

7-26-2024

## Advancing resource sharing: Enhancements and best practices for optimizing your ILL service

Sara Juel

Tony Melvyn

Follow this and additional works at: <https://knightscholar.geneseo.edu/ipp-conference-presentations>

---

### Recommended Citation

Juel, Sara and Melvyn, Tony, "Advancing resource sharing: Enhancements and best practices for optimizing your ILL service" (2024). *Conference Presentations*. 57.  
<https://knightscholar.geneseo.edu/ipp-conference-presentations/57>

This Presentation is brought to you for free and open access by the IDS Project Proceedings Collection at KnightScholar. It has been accepted for inclusion in Conference Presentations by an authorized administrator of KnightScholar. For more information, please contact [KnightScholar@geneseo.edu](mailto:KnightScholar@geneseo.edu).

July 26, 2024

---

# **Advancing resource sharing:** Enhancements and best practices for optimizing your ILL service

# Today's presenters



**Sara Juel**  
Access Services Product Manager  
Atlas Systems, Inc



**Tony Melvyn**  
Senior Product Manager  
OCLC



# Together...

we create  
technology  
with a  
purpose.

# Atlas Systems and OCLC are partners

## ILLiad

An ILL management system to help manage higher ILL volume

---

Owned by Atlas Systems, based in VA

---

Leverages the OCLC resource sharing network

# 10,000+



libraries in OCLC's resource sharing network, **the largest in the world.**

*Expand your collection with AI-driven access to materials from thousands of libraries worldwide.*

# The Atlas-OCLC partnership



## BTAA dev partnership

Implemented and extended OCLC  
Resource Sharing for Groups



## OCLC ILLiad hosting services

## LVIS advisory committee

Included representatives of ILLiad,  
Tipasa, and WorldShare ILL

Into the future...

# Resource sharing: Libraries worldwide working together

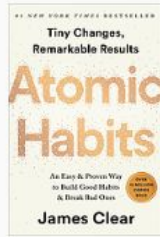


# Top 10 titles requested via the OCLC ILL network in 2024 (Jan – Jun)



[Remarkably bright creatures...](#)

Print Book, 2022



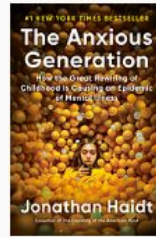
[Atomic habits : tiny changes,](#)

Print Book, 2018



[Fourth wing](#)

Print Book, 2023



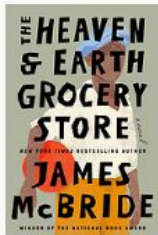
[The anxious generation : ho...](#)

Print Book, 2024



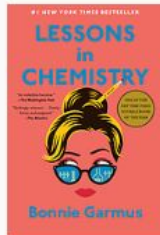
[The women](#)

Print Book, 2024



[The Heaven & Earth Grocery...](#)

Print Book, 2023



[Lessons in chemistry](#)

Print Book, 2022



[Ace the data science interview...](#)

Print Book, 2022



[Yellowface : a novel](#)

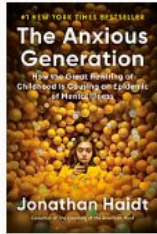
Print Book, 2023



[The keeper of stars : a novel](#)

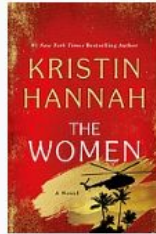
Print Book, 2023

# Top 10 titles requested via the OCLC ILL network in June



[The anxious generation : ho...](#)

Print Book, 2024



[The women](#)

Print Book, 2024



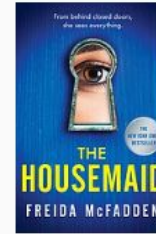
[All fours](#)

Print Book, 2024



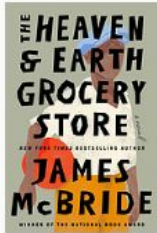
[Funny story](#)

Print Book, 2024



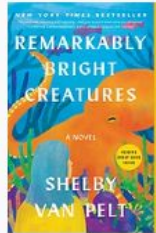
[The housemaid](#)

Print Book, 2022



[The Heaven & Earth Grocery...](#)

Print Book, 2023



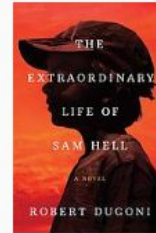
[Remarkably bright creatures...](#)

Print Book, 2022



[The lost book of herbal remedies...](#)

Print Book, 2019



[The extraordinary lif...](#)

Print Book, 2018



[The keeper of stars : a novel](#)

Print Book, 2023

# Ability to serve a diverse community



Your library can  
borrow resources in  
**250+ languages**

# Provide resources in many formats

Your library can  
borrow resources  
in **25+ formats**



A word cloud of various library resource formats. The words are arranged in a roughly rectangular shape, with 'Sound Recording' being the largest and most central. Other prominent words include 'Serial Map CD', 'Newspaper', 'Musical Score', 'Book', 'DVD', and 'LP'. Smaller words include 'Microform', 'Manuscript', 'Dissertation', 'VHS Kit', 'Internet', 'Audio Cassette', 'Government document', 'Computer File', and 'Archival'. The colors used are primarily shades of blue and green.

Microform  
Manuscript  
Serial Map CD  
Dissertation  
VHS Kit  
Newspaper  
Internet Audio Cassette  
Sound Recording  
Government document  
Book  
Musical Score  
Archival  
Book  
Computer File  
DVD  
LP

# Provide fast digital delivery with the Express program



A select group of **1,000+ libraries**

---

**10-hour** average turnaround time

---

Additional cost = **\$0**

[oclc/express](https://oclc.org/express)

# Tune-ups: Optimizing your ILL service

# Tune-ups

## What is a tune-up?

- A one-hour consultation with your ILL staff and Atlas and OCLC staff.
- We review your library's ILL configurations with you and make recommendations. We can offer guidance in setting up automations, custom holdings groups, smart lender strings, real-time availability, and more.

## What is its purpose?

- To help your library get the most value out of your ILLiad, Tipasa, or WorldShare ILL service.

# Collaborative tune-ups

## ILLiad-OCLC tune-up recommendations


**Each meeting includes...** an interview with Sara and Tony to look at both ILLiad and OCLC configuration and workflows.

**You'll receive the following recommendations (if applicable):**

- New routing rules for Automated request manager processes
- Rules for duplicate request detection
- An analysis of workflows and any quick recommendations
- A follow-up email with recommendations and documentation

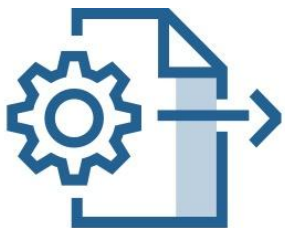


# Recommended automations

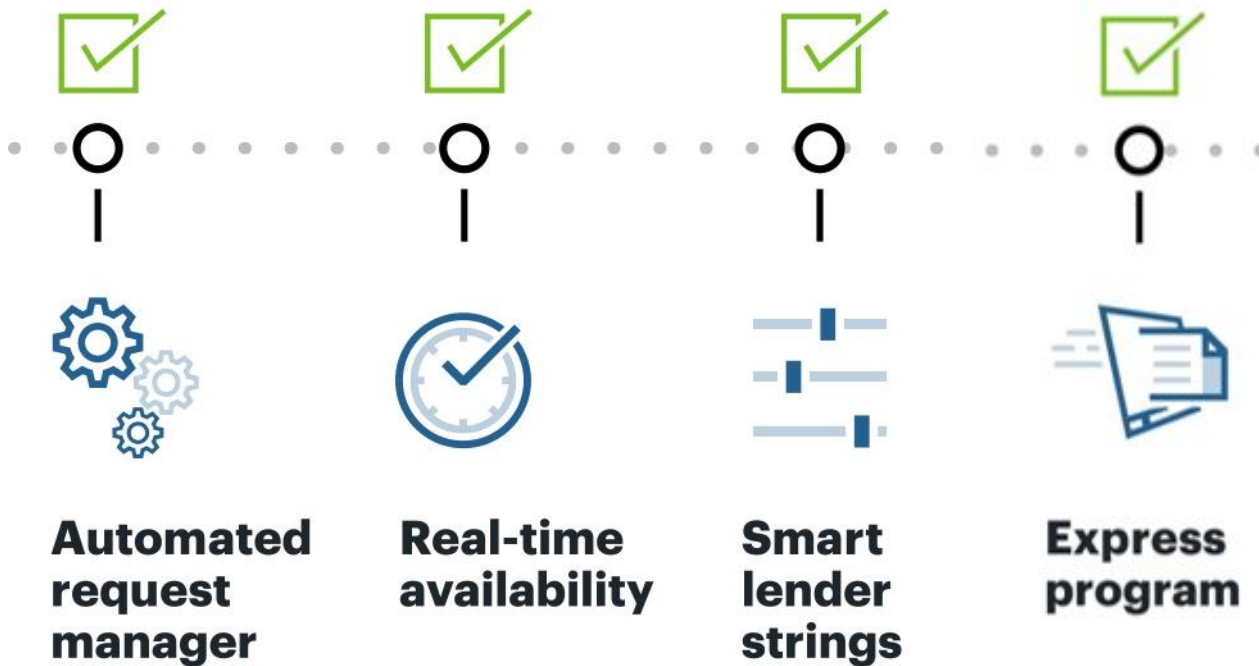
Name	Matches	Actions	Priority 
LOAN	Request Type: Loan	If Duplicate Request, Route to Review. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path LOANS hold(s) the item. Apply Constant Data: LOAN.	1  <a href="#">Edit</a> <a href="#">Delete</a>
COPY	Request Type: Copy	If Duplicate Request, Route to Review. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path COPIES hold(s) the item. Apply Constant Data: COPY.	2  <a href="#">Edit</a> <a href="#">Delete</a>

# Routing rules

Field Name	Entry
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	(ISNULL(t.ISSN,') !=' OR ISNULL(t.ESPNumber,') !=') AND ISNULL(t.LendingString,') !=' AND t.RequestType = 'Loan'
New Process Type	Borrowing
New Transaction Status	Configure this setting according to the version of the ILLiad Connection Manager that is installed: <ul style="list-style-type: none"><li>• Awaiting ARM Sending (<i>Connection Manager v9.2.4 or later</i>)</li><li>• Awaiting Direct Request Sending (<i>Connection Manager v9.2.2 or earlier</i>)</li></ul>
Rule Description	Default ARM/Direct Request rule modified to also use OCLC Number.



# Smart fulfillment capabilities



# IDS Project libraries & smart fulfillment

**78 libraries** participate in Express digital delivery

---

**59 libraries** have Real-time availability set up

---

**52 libraries** use Automated request manager

---

**Get started with smart fulfillment:** [oc.lc/sf-get-started](https://oc.lc/sf-get-started)

**Coming soon  
to automations**

# Smarter lender strings for copies



**Copy auto-no** – Similar to real-time availability for loans, the system will automatically say no for copy requests outside your *WorldCat knowledge base coverage range*.



**Find lenders globally who can fill soon** – Makes use of *actual times* when libraries fill copy requests. For example, if your library user places a request at 10:00 pm, it'll be routed to a UK library that can fill the request during their afternoon.

# Machine learning: Supplier available

Generated Lender String at Different Times: Patron in EST

**6 AM**

suppliersymbol	new_value	supplier_timezone
ESHAB	1.0	Europe/Madrid
Z8Q	1.0	Africa/Johannesburg
OG\$	2.0	Africa/Johannesburg
NEHVU	2.0	Europe/Amsterdam
QHU	2.0	Europe/Amsterdam
FRBCB	3.0	Europe/Paris
U@M	3.0	Europe/London
BECOE	3.0	Europe/Brussels
NLCVW	3.0	Europe/Amsterdam
NLMVD	3.0	Europe/Amsterdam
IDL	3.0	America/Chicago
IBH	3.0	Asia/Jerusalem
Z#U	4.0	Africa/Johannesburg
PGU	4.0	America/New_York
ITS	4.0	America/Indiana/Indianapolis



**2 PM**

suppliersymbol	new_value	supplier_timezone
NH0	-1.0	America/New_York
JXY	0.0	America/Chicago
VND	0.0	America/New_York
NUZ	0.0	America/Los_Angeles
PQA	0.0	America/New_York
CQL	0.0	America/Chicago
SJR	0.0	America/Chicago
PSF	1.0	America/New_York
JAM	1.0	America/Chicago
JAA	1.0	America/Chicago
WOP	1.0	America/Chicago
VVM	1.0	America/New_York
UPTPR	1.0	America/Puerto_Rico
OUH	1.0	America/Chicago
SCK	1.0	America/Denver



**11 PM**

suppliersymbol	new_value	supplier_timezone
NZCXR	1.0	Pacific/Auckland
NZROM	2.0	Pacific/Auckland
BYU	2.0	Pacific/Honolulu
CDT	2.0	America/Los_Angeles
NWMAO	2.0	Pacific/Auckland
A2J	3.0	Pacific/Auckland
AZC	3.0	America/Phoenix
COW	3.0	America/Denver
HTM	3.0	America/Los_Angeles
C7F	4.0	Australia/Melbourne
NUZ	4.0	America/Los_Angeles
CDU	4.0	America/Los_Angeles
OIN	4.0	None
OUP	4.0	America/Los_Angeles
NZWJK	4.0	Pacific/Auckland

# Automation: Smart lender strings

## Strings built with automation utilize and consider:

- Deflections
- Electronic licenses
- WorldCat knowledge base holdings and coverage ranges
- Print serial holdings
- Custom holdings groups and profiled groups in custom holdings paths
- Turnaround time
- Load leveling

**GOAL:** Faster turnaround times

[oc.lc/sf-get-started](https://oc.lc/sf-get-started)




# New workflow evaluation for ILLiad's Connection Manager v9.2.4

Review Connection Manager version to determine if you can leverage new ILLiad workflows.

Examples:

- Send directly to a particular automation

Name	Matches	Actions	Priority 	
TESTINGBTAA	If a patron note contains: Send to LVIS	Route Request to Review. Build Lender String if at least 1 lender(s) from Custom Holdings Path LVIS hold(s) the item. Apply Constant Data: BOOK.	1	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

- Option to review lending string and determine if request should be sent via those lenders
- Requests can be resubmitted into Automated request manager

# What's new and what's next?

# OCLC Resource Sharing for Groups



A modern consortial borrowing solution

**For library users**, an exceptional experience with fast delivery times

**For library staff**, improved workflow efficiencies and time-savings

**Works with ILLiad, Tipasa, and WorldShare ILL**

[oclc.org/rsgroups](https://oclc.org/rsgroups)

**With OCLC's  
solution**



**Each member  
library**

# API Translations

If the submitted value for the field specified in the **ILLiadFieldName** column exactly matches the value specified in the **RemoteFieldValue** column, the new transaction's field value will be set to the static value specified in the **ILLiadFieldValue** column.

The submitted value must match the **RemoteFieldValue** exactly and is case-sensitive.

# API Translation Examples

```
error_mod.use_y = False
error_mod.use_z = True

#selection at the end -add
obj_ob.select= 1
modifier_ob.select=1
context.scene.objects.active
obj("Selected" + str(modifier_ob.name))
error_ob.select = 0
bpy.context.selected_objects
data.objects[one.name].select
```

## Example 1: Map an Incoming Repository Code to the Repository's Full Name

ILLiad FieldName	Remote FieldValue	ILLiad FieldValue	Action Replace Value
Location	3214321423214	ABC Pickup Location	Substitute

## Example 2: Capture an Incoming Value and Add a Text Prefix

ILLiad FieldName	Remote FieldValue	ILLiad FieldValue	Action Replace Value
ItemInfo2	(.+)	User submitted value: (\$1)	Replace

# Features in the next release

ILLiad Staff Web  
Client

Enhanced  
renewals

MSI Installer  
Updates

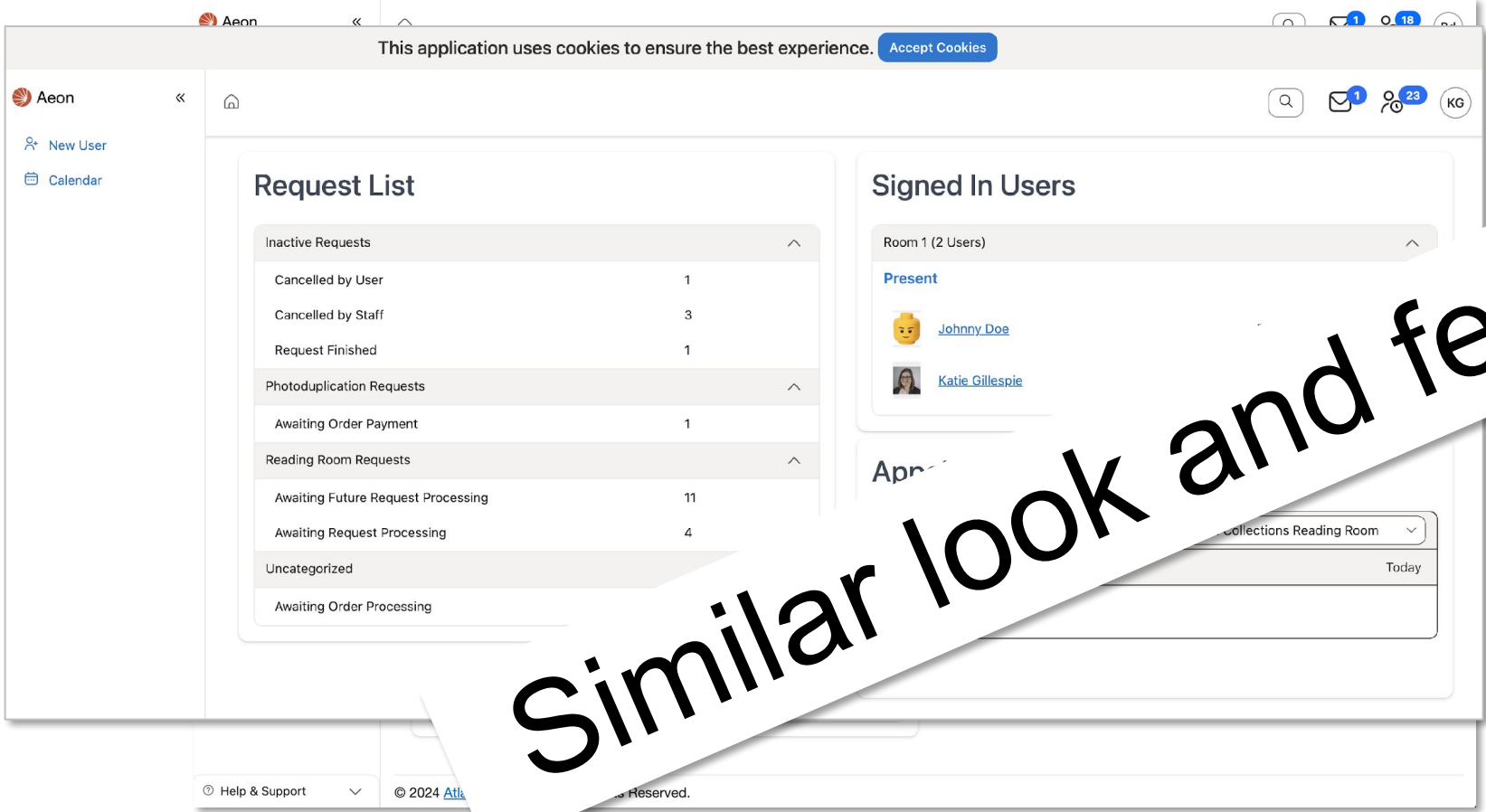
Implementation of  
the DOCLINE API

Support for default  
FOLIO and ALMA  
Z39.50  
configurations

Several Bug Fixes

# ILLiad Web Client





This application uses cookies to ensure the best experience. [Accept Cookies](#)

### Request List

Inactive Requests	^
Cancelled by User	1
Cancelled by Staff	3
Request Finished	1
Photoduplication Requests	^
Awaiting Order Payment	1
Reading Room Requests	^
Awaiting Future Request Processing	11
Awaiting Request Processing	4
Uncategorized	
Awaiting Order Processing	

### Signed In Users

Room 1 (2 Users) ^

**Present**

- [Johnny Doe](#)
- [Katie Gillespie](#)

Similar look and feel

Circulation

# Circulation

Check In

Check Out

Renew

Mark in Transit Received

Mark in Transit Returned

Note (will be added to all processed transactions).

## Circulation Log

Clear

TN	Action	Successful	Message
No records to display			

First look at the new Web Circ

# What's new

Date	Feature/Enhancement	WSILL	Tipasa	Groups
Ongoing	Staff interface being modernized for improved accessibility, usability, and navigation	✓	✓	✓
Feb	Take advantage of improved bibliographic matching to fill requests more quickly and save staff time	✓	✓	✓
Feb	Utilize License Manager enhancements to specify and view more accurate ILL license terms	✓	✓	✓
Apr	Centrally define pickup location codes for improved coordination and communication within your library	✓	✓	✓
Apr	Customize the Profile tab in My Account to meet your library users' needs		✓	

[Release notes: oc.lc/help](https://oclc.org/help)

# What's new and coming next

Date	Feature/Enhancement	WSILL	Tipasa	Groups
May	Limit the number of active requests allowed per library user		<i>Existing</i>	✓
June	Configure and send email notifications for library user		<i>Existing</i>	✓
August	My Account for Resource Sharing for Groups		<i>Existing</i>	✓
August	Fulfillment integration with Alma		✓	✓
August	Additional lending integration with Sirsi Dynix to automatically place hold on requested items		✓	✓

**Roadmap: [oc.lc/community](https://oc.lc/community)**



# Together...

we build  
stronger  
communities.

# Q&A

---

OCLC Update

---

# Thank you!

**Name**

Title

# Unlimited assistance

- **Training:** Live, instructor-led sessions, plus recorded sessions and video tutorials ([oc.lc/training](https://oc.lc/training))

---

- **Customer support:** Telephone and email ([oc.lc/support](https://oc.lc/support))

---

- **Documentation:** Help pages and release notes ([oc.lc/help](https://oc.lc/help))

---

- **Access to the OCLC Community Center:** Connect online, stay updated ([oc.lc/community](https://oc.lc/community))