

WorldShare InterLibrary Loan- Streamlining ILL

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Abstract

OCLC's WorldShare InterLibrary Loan is the world's largest resource-sharing system and assists academic and other libraries around the world connect to one another in order to share and view each other's resources in a streamlined and more efficient way. The system allows for libraries to borrow directly from one another, supply patrons with new resources that would otherwise be unavailable in the library, automate ILL workflow for a quicker and more well-ordered process, and manage fees and payments associated with ILL. WorldShare ILL simplifies the process of resource sharing between libraries through cloud-based software. The purpose of this report is to detail how academic libraries around the world are utilizing the functions of the WorldShare ILL system to increase productivity, cost-effectiveness, and efficiency, as well as what those specific system functions are. It describes real-life accounts of this system employed in libraries throughout the world, and how those functions aid those libraries in modernizing their ILL processes.

Introduction

Academic libraries around the world are making use of a wide range of technologies in order to support and modernize their in-house operations for customers and staff. The topic that we chose for this report is OCLC's resource sharing system- WorldShare Interlibrary Loan. Academic and special libraries work with OCLC to "automate back-office activities, improve services for users and increase the impact of public libraries as a whole," (OCLC.org).

OCLC defines the WorldShare Interlibrary Loan system as "the largest resource-sharing network in the world" with over 521 bibliographic records and more than 3 billion holdings. WorldShare ILL connects libraries with over 10,000 libraries, and their collections, in over 50 countries. The system is used by academic libraries to "see the resources available from other libraries, borrow directly from them, and share your resources," (OCLC.org). The network assists academic libraries in "supplying your library users with the electronic or print resources they need, including those hard-to-find items."

WorldShare ILL also allows academic libraries to automate their ILL workflow, run statistical reports on lending, and manage invoices and payments for ILL Fees. Overall, it simplifies the sharing of resources between academic libraries. Its straightforward structure makes it easy to use and to teach to generalized librarians and staff, and the cloud-based system means that librarians do not have to wait around for the availability of IT support if a situation with the system arises.

The purpose of this report is to describe the tools and functionalities of OCLC's WorldShare ILL system, as well as outline how academic libraries are utilizing this technology to streamline their InterLibrary Loans between other libraries to increase efficiency for both staff and patrons. It helps to further demonstrate the importance of this system across libraries and the benefits of utilizing the system in new libraries.

The following report breaks down the functions and abilities of the WorldShare ILL system, as well as provides real world examples of the usefulness of this system in action in academic libraries throughout the world. It begins with a description of the technology itself before diving into the system at work. This report is structured in the following sections- Abstract, Introduction, Body of the Report, Conclusion, References, and Appendices.

What is OCLC's WorldShare Management Service?- An Introduction to Functions and Academic Library Services

The next generation of ILS systems, including WorldShare ILL, aims to solve the issues that arise from the use of multiple management points by creating integrated platforms. OCLC seeks to address this problem by integrating traditional library functions, (such as circulation, acquisitions, and descriptions), with the management of electronic resources, (Wilson, 2012).

OCLC developed and released the WorldShare Management service in 2011. The service is hosted in the cloud and the only requirement when using the software is access to a Web browser. WorldShare services utilize a subscription model that is based on an academic library's collection size and FTE, or Full-Time Equivalents. The average implementation of this service into academic libraries is 6 to 12 months, and installation and training fees are free with purchase of the subscription, (Wilson, 2012).

The necessity of using multiple management points is addressed by OCLC through the WorldShare service. Users have the ability to perform tasks from multiple points within the system, while the service automatically sets a library's WorldCat holding when a specific title is searched or activated within its knowledge base. The system also contains a license template module that allows for academic librarians to "create generic license records that can be downloaded and modified by any individual library also using the service," (Wilson, 2012).

As OCLC continues to develop this software through feedback and internal investigations, a few major development challenges must be addressed. The first is the issue of scale. Within the cloud-based environment, the software must be able to be accessed and utilized by thousands of libraries at once. A second challenge is developing a user interface that combines ILS and ERMS, or open-source electronic management, functionality. Finally, the developers must create "the License Manager system so it could integrate with Management Services or stand on its own," (Wilson, 2012).

OCLC academic library users have commented that they would like to see the service invest in more and better statistical tools. OCLC will address this by developing usable reports for libraries that will make use of "anonymized collective data from across the OCLC membership", (Wilson, 2012). Academic libraries have also requested better use of ease for patrons and better data quality in the centralized knowledge base. OCLC is working to fix this issue by partnering with content providers in order to "move more metadata creation upstream in the data supply chain", which will lead to academic libraries having less of a burden in constant maintenance of this metadata.

The OCLC WorldShare Management service provides public libraries with a variety of major functionalities. In terms of selection, OCLC is actively working on developing a system module that will allow for patron-driven acquisitions. They are currently participating in pilot programs with multiple content providers in order to test this technology. On the acquisition side, the specified module allows and supports academic libraries in traditional functions, such as "budget management, vendor management, ordering, invoicing, and receiving," (Wilson, 2012). The system streamlines these functions for academic libraries by employing WorldCat, as the integrated data is shared between OCLC users. The Description module supports original cataloging of academic library materials, MARC records, and inventory management. The WorldShare ILL service lets users from academic libraries around the world explore and borrow from the catalogs of other libraries through the system.

The Access module is directly linked and makes the most use out of the WorldCat knowledge base. The service allows for academic libraries to input their holdings and catalog data into a single management interface. The system also includes core-access features for a

more user/patron-friendly interface, including “an OpenURL resolver, citation linker, and A to Z list for journals and ebooks,” (Wilson, 2012).

The Electronic Resource Management functionality is broken down into three modules: Manage E-Resources, Manage Licenses, and Manage Templates (plus the additional Manage Vendors module). The Manage E-Resources module, in connection with WorldCat, allows academic libraries and their patrons to “browse or search the knowledge base and mark which titles and collections it owns,” (Wilson, 2012). Academic libraries can perform a number of functions through this module. Open-access materials are available and activated by default, with the library holding synced overnight when new resources are chosen. Libraries can also “create local collections or customize the global data provided by OCLC” and “users have the option to create a purchase order for that resource directly from the knowledge base interface,” (Wilson, 2012). The knowledge-based provider links to specific vendors within the WorldShare service, (see Figure 1).

WorldShare ILL Success Stories

WorldShare ILL is used by more than 10,000 libraries worldwide (Burke et al., 2016) to manage loan processes that are otherwise time-consuming for library staff to do manually. Both the Bavarian State Library and SUB Göttingen in Germany found WorldShare to be invaluable to their international interlibrary lending processes. European copyright restrictions, especially in Germany, prove difficult for their librarians to navigate. WorldShare allows these libraries to simplify their work by managing all of their borrowing processes through the service. Its integration with ImageWare’s MyBib eDoc and MyBib eL enables the copyright restrictions to be built directly into the program, allowing libraries to provide copies of documents to international borrowers that automatically comply with the law (Burke et al., 2016).

Other institutions such as the University of Winchester in England and the Commonwealth Scientific and Industrial Research Organization in Australia found WorldShare to be paramount in managing their requests and supply. Some institutions process thousands of document requests per month, and WorldShare has allowed them to “streamline both requesting and supplying into a single workflow” (Burke et al., 2016, p.139), as well as keep track of their loaning data and the status of their requests. On the user end, it provides easy browsing of the availability of items in any library in the network without the need to make endless phone calls and emails (Burke et al., 2016).

The trajectory of WorldShare ILL has only been increasing, as OCLC maintains regular communication with its users and aggregates feedback on how to make the user experience even better (Burke et al., 2016). Quality-of-life enhancements such as single-click request cloning, increased due date setting, and credit/debit charges being triggered at the “Shipped” status rather than “Received” are just some of the ways OCLC has taken user feedback and tweaked the WorldShare system for upgraded usability (Burke et al., 2016).

Worldshare Management Systems and Academic Cataloging

OCLC offers its ILL software both individually and as an add-on to the WorldShare Management Services LMS, and the OCLC master record is at the heart of both. The global capacity of the WMS master record is vast, but librarians Claire-Lise Bénaud and Sever Bordeianu at the University of New Mexico noted positives and negatives when applied to their local academic setting. Not only were there necessary shifts in “mentality and practice” while moving from legacy ILS to WMS (Bénaud & Bordeianu, 2015), but specific issues for special collections and archival materials came to light with the removal of the local record and

implementation of the OCLC master record. This master record does not allow for manual changes to the authority record without authorization, and though globally this is helpful for ILL purposes, issues arise when scaled down to the local level for special collections acquisition (Bénaud & Bordeianu, 2015). The change to the WMS LMS from the legacy ILS also brought about the unmasking of records for special collections materials that are not publicly available but used for duplication purposes (Bénaud & Bordeianu, 2015). The change also meant the unmasking of records used by technical staff that kept track of local information and non-bibliographic items. Bringing processes like decisions records to the forefront of the catalog where patrons can access it is not something before dealt with, and thus libraries switching to WMS need to come up with new strategies for their catalog records.

As mentioned previously for academic libraries in England and Australia, request and supply are “streamlined” into a single workflow on WMS (Burke et al., 2016). This means both acquisitions and cataloging are now treated as one process. While this gave rise to quick cataloging done from the moment of purchase, for the University of New Mexico, these two departments merging in the LMS was the cause of some internal structural changes. Cross-training staff members is only part of the changes, as Bénaud and Bordeianu note the differences in clearance for staff work is often much different between departments, thus creating the need for a different approach to the internal structure of the library (Bénaud & Bordeianu, 2015). When related back to the issues of local special collections processing, this is problematic for delegating input to the correct staff. The use of smaller vendors, gifted items, and works separated from other archival collections leads to direct cataloging of special collection items, eliminating the need for the acquisitions department to be involved at all, opening up still more need for restructuring (Bénaud & Bordeianu, 2015). While not mentioned as a detriment to the WMS software itself, the streamlined workflow of the merged functions comes with the price of redefining staff responsibilities and clearances and should be considered.

WorldShare ILL in Action- South Africa

WorldShare ILL has seen continued success and growth in South Africa. Since being introduced in 2013, the system quickly rose the rank and became a popular system choice amongst academic and special libraries (Raubenheimer & van Niekerk, 2015). In an annual report done by the OCLC in 2014, one library in South Africa is quoted as stating “the appeal of the WorldShare Management system is evident in its seamless design, worldwide discovery of resources and ease of interlibrary loans for patrons” (as cited in Raubenheimer & van Niekerk, 2015, p. 79). The system’s accessibility and ease-of-access user interface made WorldShare ILL a popular commodity in South Africa.

At the time of Raubenheimer, & van Niekerk’s 2015 article, “An overview of the current state of interlibrary loans in South Africa”, the network behind WorldShare ILL was made up of around 10,000 libraries with the World Cat database at its core. This allowed WorldShare ILL to generate almost 9,000,000 ILL requests (Raubenheimer & van Niekerk, 2015, p. 79). Its appeal is evident with the knowledge that six months after the launch of WorldShare ILL, 41 percent of libraries had subscribed to the system (Raubenheimer & van Niekerk, 2015, p. 79). South African libraries had mostly positive comments for WorldShare ILL. Typical comments hailed the system for having improved security and being able to receive larger files than previous system iterations. Favorably, users noted their experience using WorldShare ILL “... so far we have not experienced any problems [...] Our library uses those programmes and finds it effective and easy to use so far” (Raubenheimer & van Niekerk, 2015, p. 80). Other comments praised the system’s flexibility, and probably most importantly, its affordability (Raubenheimer & van

Niekerk, 2015, p. 80). At the time of the article, WorldShare ILL was deemed as less expensive than its competitors (Raubenheimer & van Niekerk, 2015).

With its increasing popularity amongst South African libraries, WorldShare ILL has opened new doors for system users. Allowing users to gain more access to different works while remaining user-friendly has given WorldShare ILL a competitive edge amongst its competitors in the ILL system market.

Conclusion

OCLC's WorldShare ILL has drastically changed the environment of libraries the world over and expanded resource sharing exponentially. From South Africa to New Mexico to England and Australia, the global capacity of WorldShare Management Services and its added service of ILL are clearly shown. The streamlining of various processes and use of the WorldCat database as a core to the master record have led to the expansion of OCLC to the LMS world and have given many global libraries the chance to become a part of this robust collective.

The merging of local data with that of the global is one of the most important changes that the OCLC WMS brought into play, and the InterLibrary Loan addition then gives rise to these global libraries to share use of resources and not just catalog data. OCLC's communication with its users to continually make updates and changes is then greatly appreciated by academic libraries attempting to navigate the master record of such a robust global community. The automation of the WorldShare LMS and easy resource sharing through ILL are all simplified with cloud-based software, showing the cloud as a strong candidate for the management of an LMS and indicating possible further advances in automation as updates are made.

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Appendices

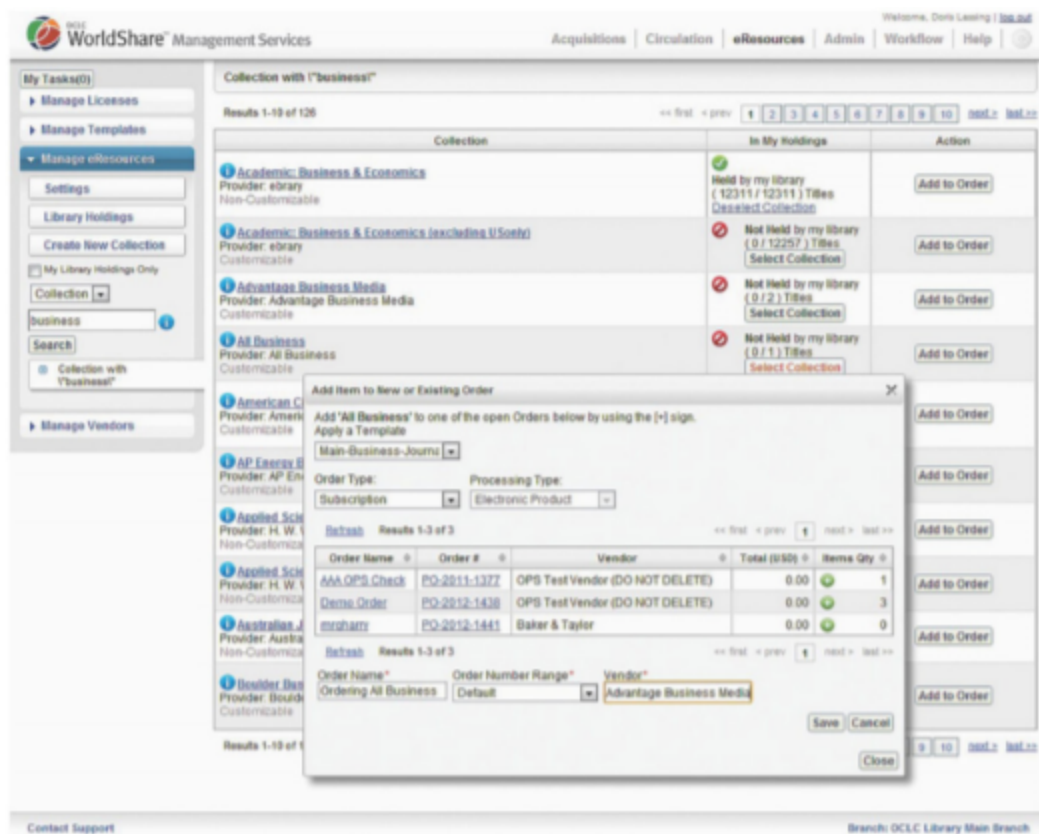


Figure 1: Adding an order from knowledge-base display of OCLC WorldShare Management Services (Wilson, 2012)