WorldShare ILL: Working Smarter Not Harder
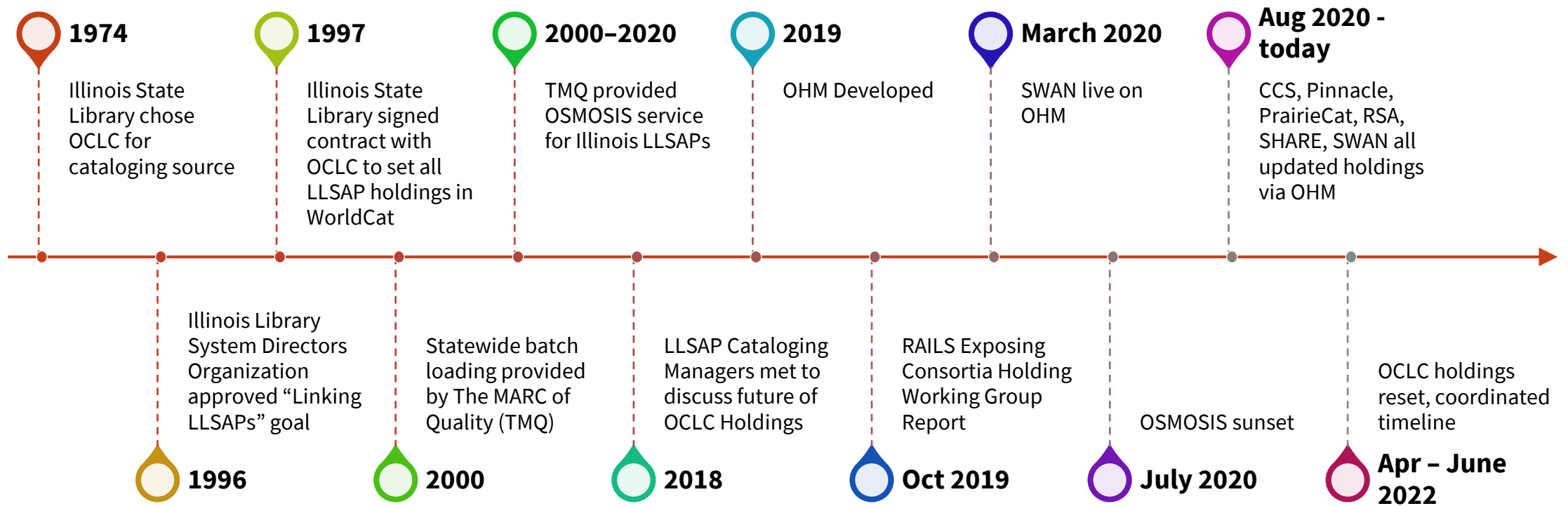
SWAN Expo 2022

Agenda

1. Maintaining Illinois holdings

2. Smart Fulfillment

3. Real-world application

Maintaining Illinois Holdings

1974
Illinois State Library chose OCLC for cataloging source

1996
Illinois Library System Directors Organization approved "Linking LLSAPs" goal

1997
Illinois State Library signed contract with OCLC to set all LLSAP holdings in WorldCat

2000
Statewide batch loading provided by The MARC of Quality (TMQ)

2000–2020
TMQ provided OSMOSIS service for Illinois LLSAPs

2018
LLSAP Cataloging Managers met to discuss future of OCLC Holdings

2019
OHM Developed

Oct 2019
RAILS Exposing Consortia Holding Working Group Report

March 2020
SWAN live on OHM

July 2020
OSMOSIS sunset

Aug 2020 - today
CCS, Pinnacle, PrairieCat, RSA, SHARE, SWAN all updated holdings via OHM

Apr – June 2022
OCLC holdings reset, coordinated timeline

OCLC Holdings Manager (OHM)

Participating consortia in Illinois

- CCS - Polaris
- Pinnacle - Polaris
- PrairieCat - Sierra
- RSA - Symphony
- SHARE - Polaris
- SWAN - Symphony

OHM prep work

- OCLC Group Symbol
  - From 10 regional library systems to 3
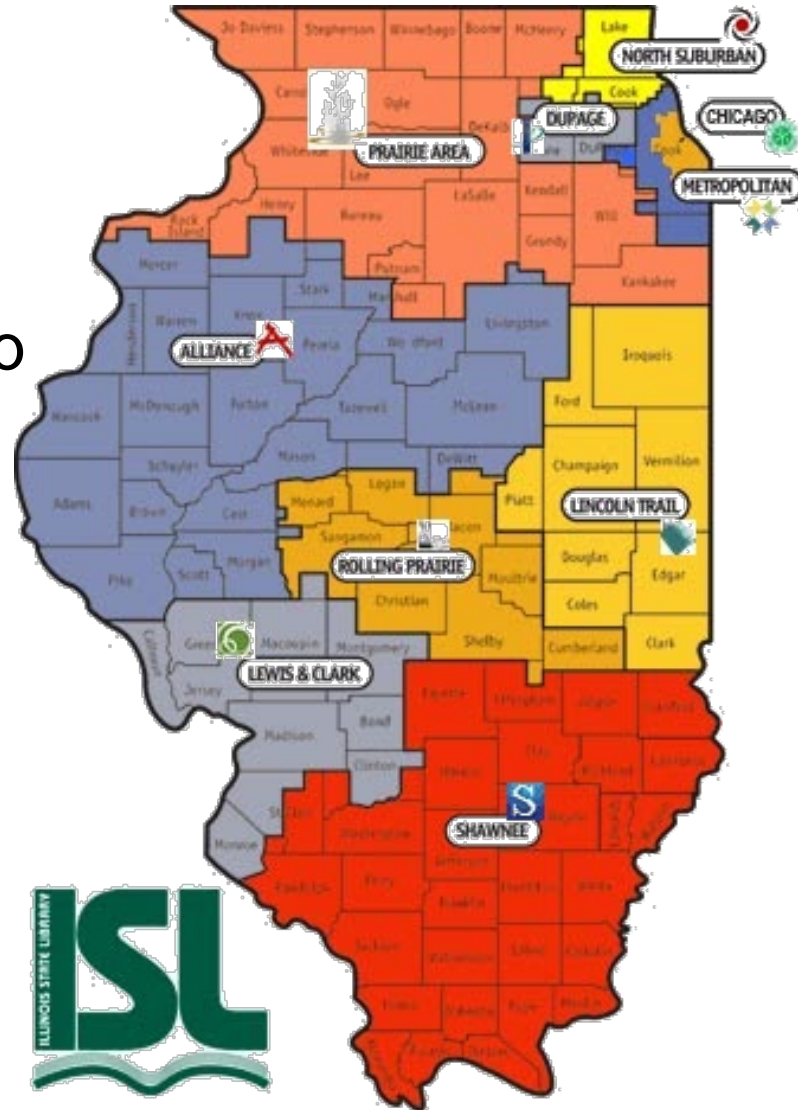
OCLC

OHM prep work

- Tie individual symbols to group Web Services key (through OCLC Developer Network)

- Evaluation of OSMOSIS
  - Needs
  - Nice-to-haves
  - Unneeded features

- Analysis of ILS output

- Conversion tables and exceptions

RSC22

Comparing catalog generations
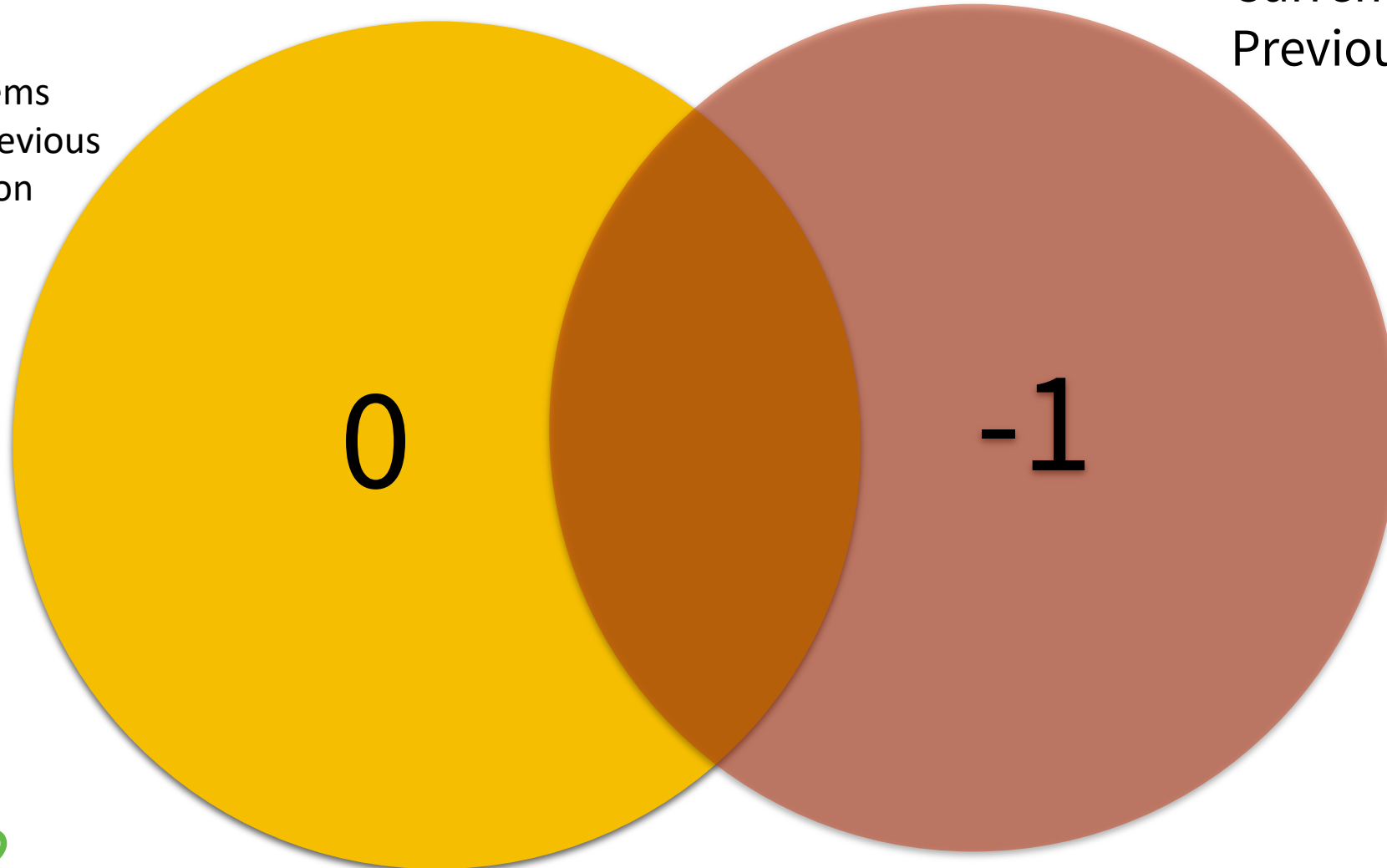
Current generation (0)
Previous generation (-1)

Titles/Items
not in previous
generation
(adds)

0

-1

Titles/Items
not in current
generation
(deletes)

RSC22

OCLC

Reality of comparison

Latest run 1.95% of total holdings added
492,456/25,200,366

Titles/Items not in previous generation (adds)
Few as percentage of total catalog, acquisition of new titles by library
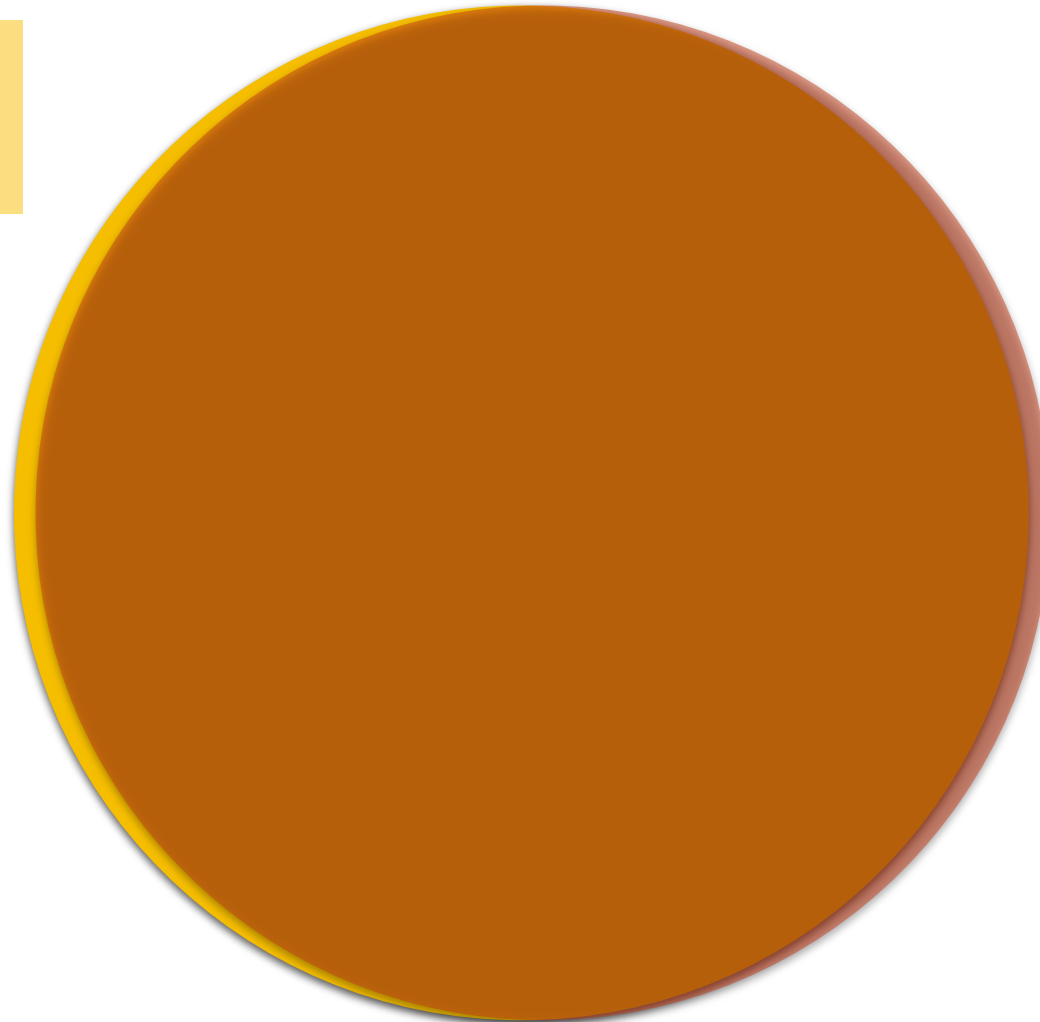
Latest run 1.47% of total holdings deleted
369,836/25,200,366

Titles/Items not in current generation (deletes)
Very few – lost items, weeding by library

OCLC

OHM Process
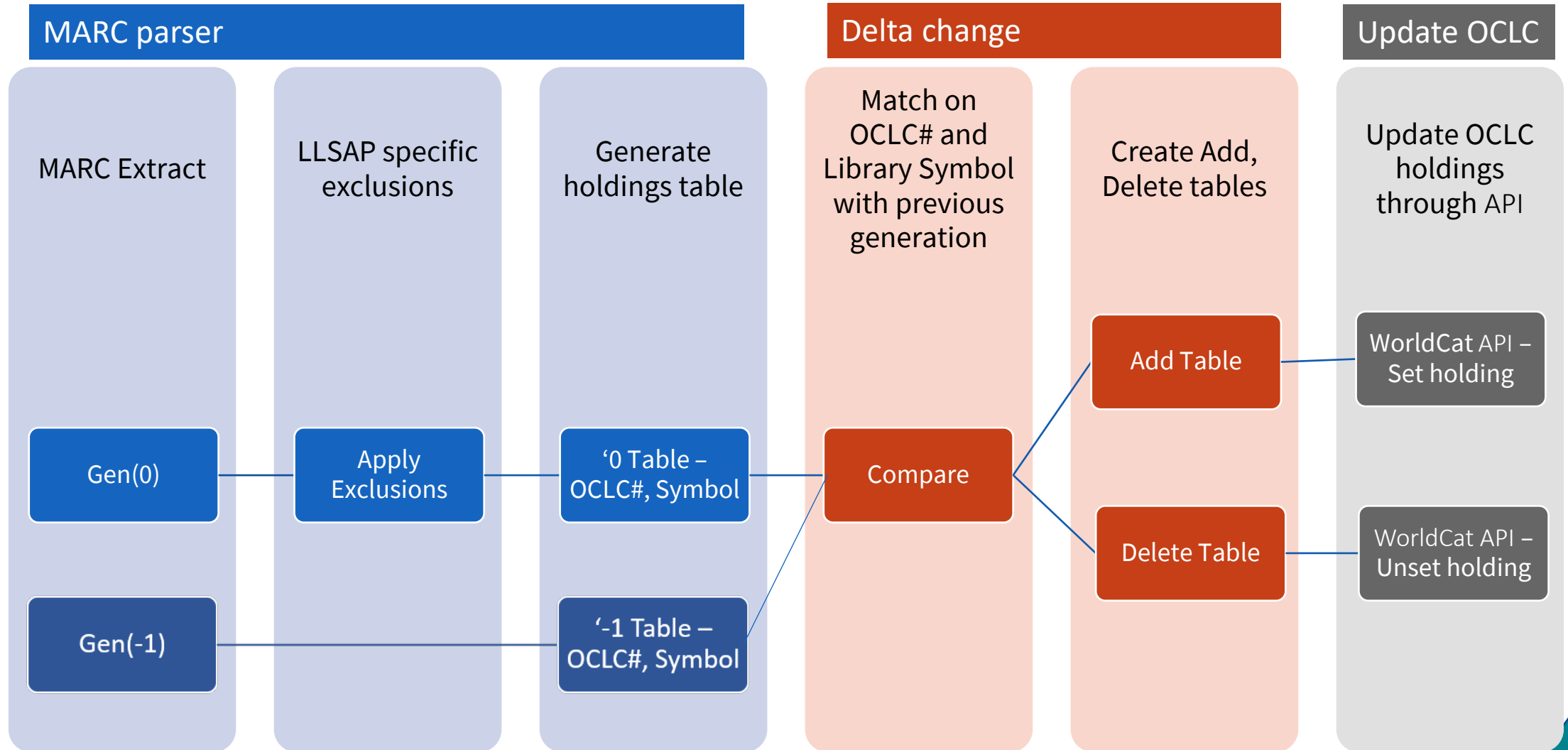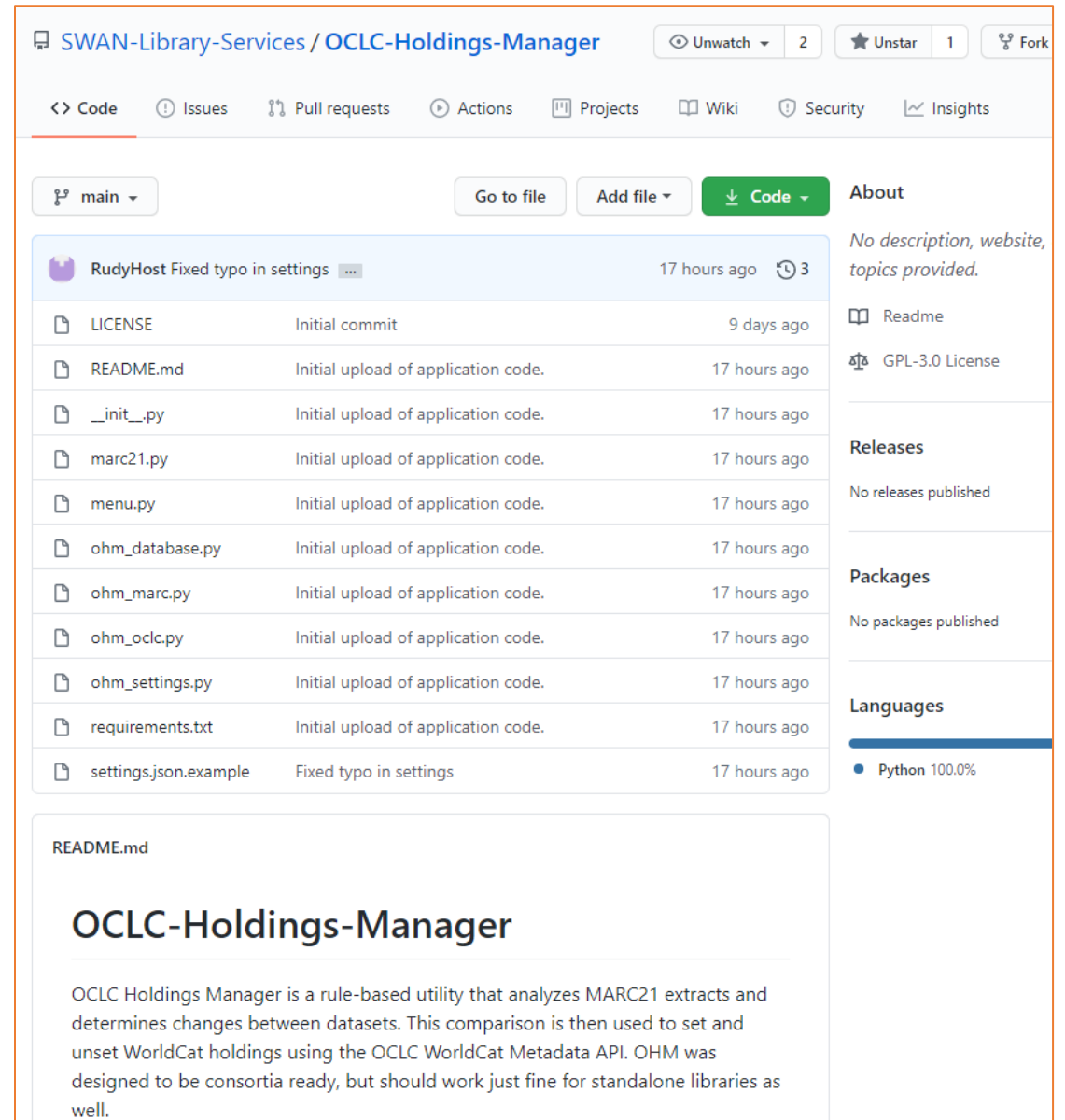
OHM future development

- Working with OCLC to increase speed and parallel processing of web services calls

- Web interface

- Reporting tools
  - Invalid identifiers
  - OCLC number cross-references

- Statistics portal

OCLC

Want more info on OHM?

Contact: ohm_admin@swanlibraries.net

Repository:
https://github.com/SWAN-Library-Services/OCLC-Holdings-Manager

Smart fulfillment

SWAN Library Services

All the puzzle pieces

- Accurate holdings
- World, State, Group, Library scoping
- Real-time availability
- Deflection
- Custom holdings groups/paths
- Patron requests/remote authentication
- Added convenience
  - Article Exchange
  - IFM

RSC22

OCLC
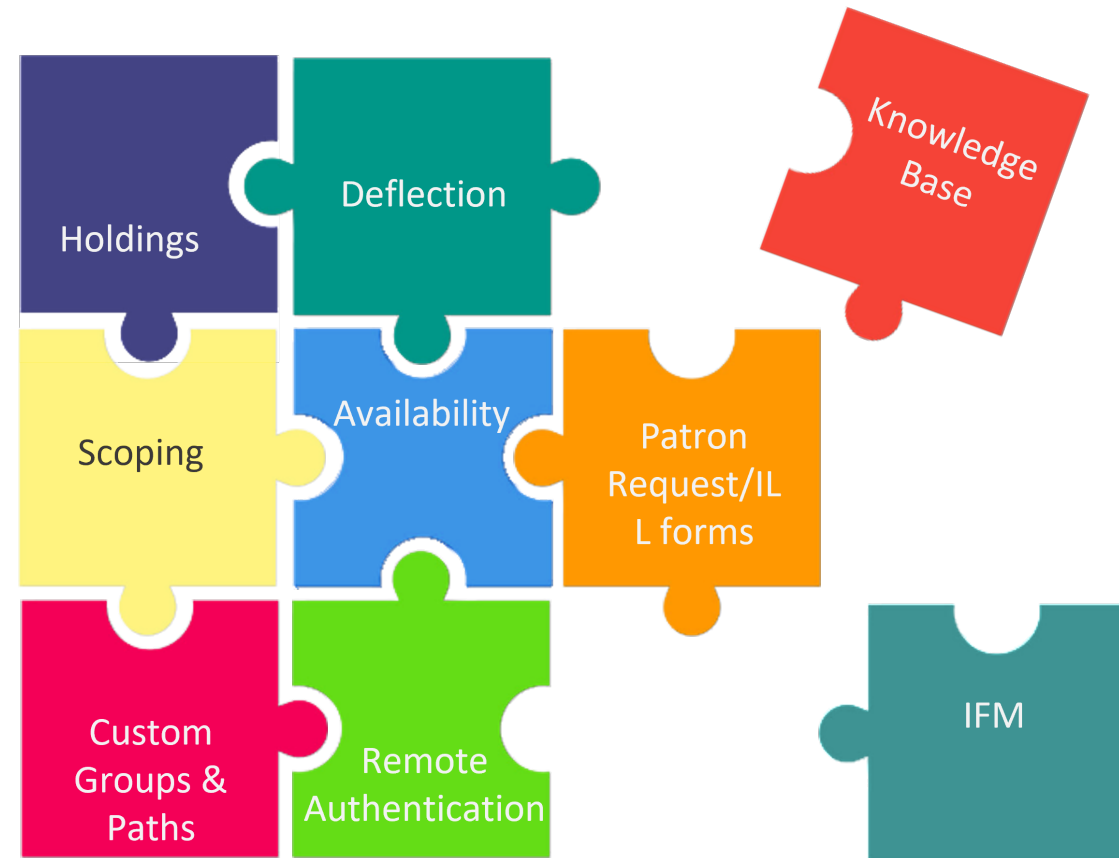
Holdings drive scope display

Holdings determine patron-initiated ILL

Held My Library
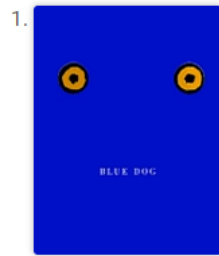
Blue dog

by George Rodrigue, Lawrence S Freundlich

Print Book 1994

Held by Glen Ellyn Public Library

▶ View Description

▶ Explore Editions and Formats

◆ Check Availability

ⓘ We are unable to get availability information for this item at yo

◆ Libraries Worldwide

Search location: 400 Duane St, Glen Ellyn, US-IL

Institution

Elmhurst Public Library

Glen Ellyn Public Library

Held By Consortium

Blue dog man

by George Rodrigue

Print Book 1999

Held by Libraries in SWAN

▶ View Description

▶ Explore Editions and Formats

◆ Check Availability

◆ Libraries Worldwide

Search location: 400 Duane St, Glen Ellyn, US-IL

Institution

Riverside Public Library

Held in Illinois

Blue dog love

by George Rodrigue, Wendy Wolfe Rodri

Print Book 2001

Held by Libraries in Illinois

▶ View Description

▶ Explore Editions and Formats

◆ Check Availability

◆ Libraries Worldwide

Request Item through Interlibrary Loan ⧉

Search location: 400 Duane St, Glen Ellyn, US-IL

Institution

Naperville Public Library

Held Worldwide

A blue dog Christmas

by George Rodrigue, David McAninch

Print Book 2000

Held by other libraries worldwide

▶ View Description

▶ Explore Editions and Formats

◆ Check Availability

◆ Libraries Worldwide

Request Item through Interlibrary Loan ⧉

Search location: 400 Duane St, Glen Ellyn, US-IL

Institution

University of North Texas Library

Challenges and side notes

Changes in core OCLC discovery ecosystem make constant testing and reconfiguration necessary

- WorldCat Discovery v2

- WorldCat.org work underway

- Keep up with release notes

- Office hours are helpful (taking advantage of OCLC office hours, offering internal for members)

RSC22

OCLC

Deflection policies

- Universal deflection policy for SWAN member-to-member requests

- Some libraries deflect out-of-state due to cost

- Some libraries deflect based on format

RSC22

OCLC

Real-time Availability

- Configured Z39.50 access to catalog (configured by OCLC)

- Saves staff time

- Helps requesting libraries – more quickly routes to a library that can fill request

RSC22

Refining OPAC status

- Use OPAC Statuses to further automate "no"

- Deflection based on publication date is often not precise for indicating "new" material

RSC22

Impact of Smart Fulfillment

Deflection & Availability – Auto No accounted for 35% of requests received

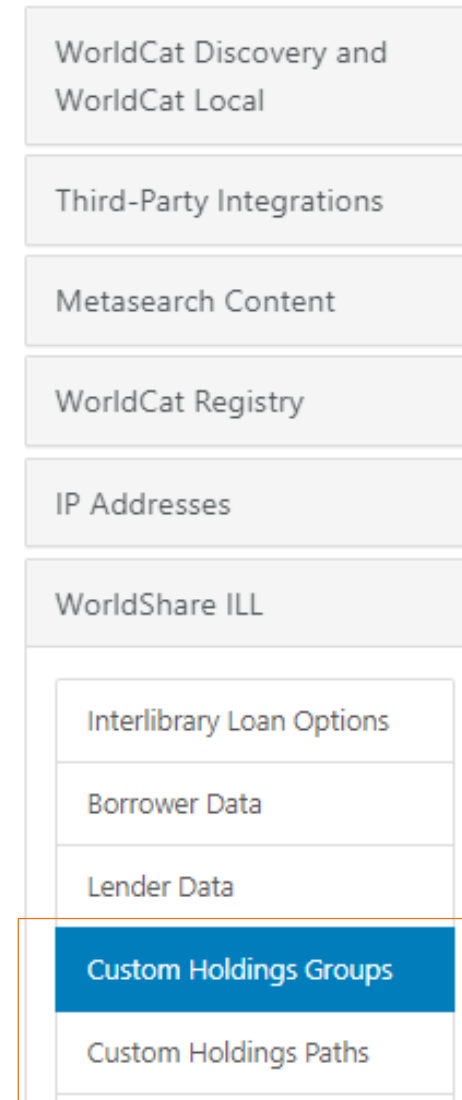Source: OCLC Statistics, St. Charles Public Library, Feb. 2022

Example: SWAN Library 02-2022

8   8

98

160

18

Automated No 35%

131

- Lacking Info
- Not on Shelf/Owned
- Manual Check
- Deflection
- Availability -Auto No
- Filled
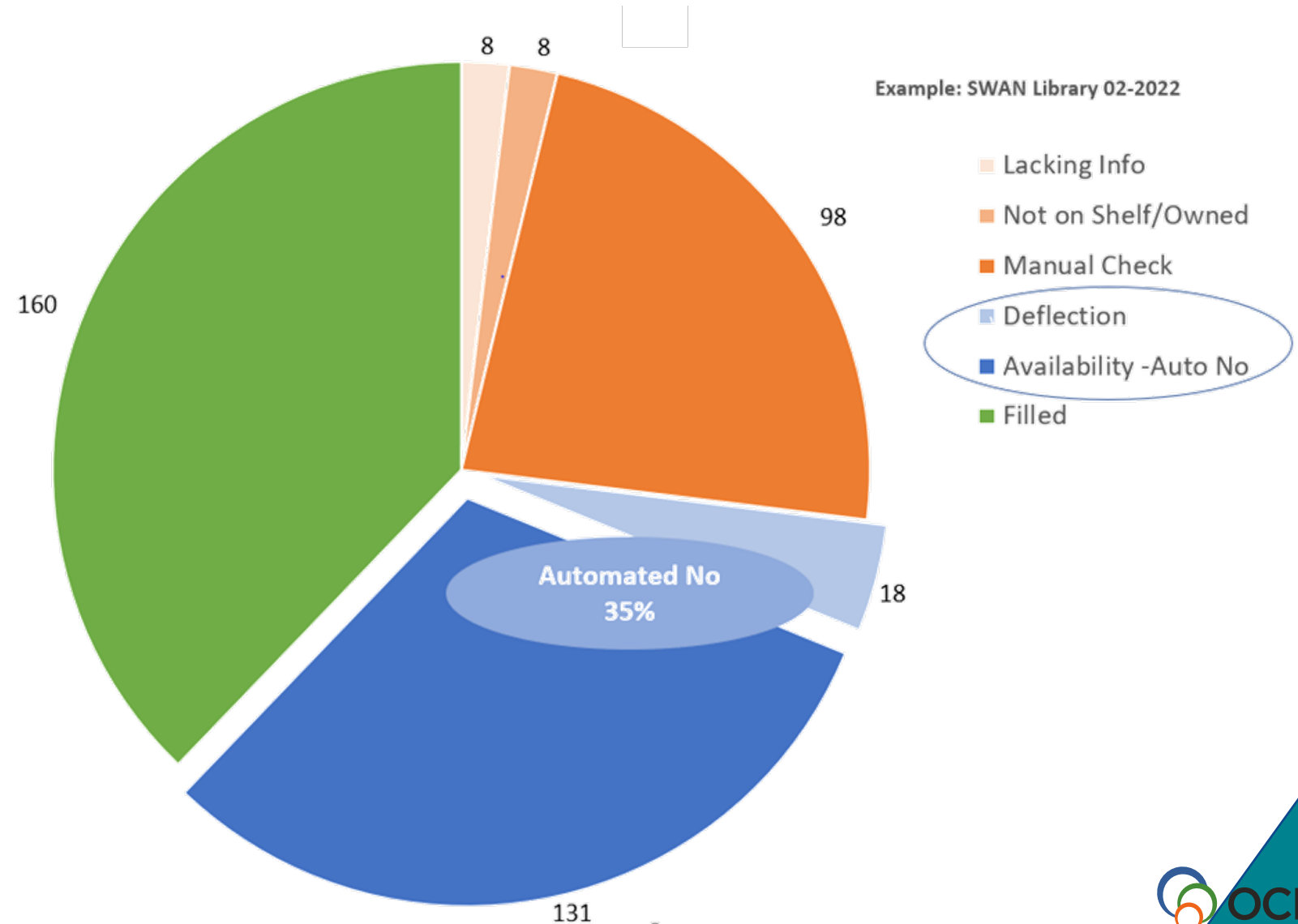
OCLC

Configuration considerations

Request via OCLC?	SWAN Libraries NO (DEFLECT)	Non-SWAN Illinois Libraries YES (PREFERRED)
Group or Path Name	Group - SWANPARTNERS	Path – NONSWAN Include: CCS, PCAT, RSA, PLC, ISHARE
Use to:	DEFLECT Requests We do not want to accept requests from SWAN Partners since we can directly place holds in the shared catalog.	Desired lenders - share delivery and free in Illinois. When making OCLC requests, start with lenders on same delivery hub
Configuration Tool:	Create Group in: OCLC Service Configuration Create Deflection rule in: OCLC Policies Directory (from WorldShare ILL Home Page)	OCLC Service Configuration (from WorldShare ILL Home Page)

RSC22

OCLC

Custom Holdings Groups/Paths

- Custom Holdings Group for:
  - Illinois consortium partners
  - Academic network in Illinois
  - All Illinois libraries
  - Preferred/reciprocal lenders
- Custom Holdings Path for:
  - Public libraries, based on closest delivery
  - Academic & Special libraries
  - Preferred

WorldCat Discovery and WorldCat Local

Third-Party Integrations

Metasearch Content

WorldCat Registry

IP Addresses

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

OCLC

Resource Sharing Buttons

Default settings:

- Owned by library - no
- Owned by SWAN - no
- Owned in Illinois - yes
- Owned Worldwide – yes

WorldCat Discovery – ILL Request Button

Some expand display of ILL button for local holdings and mediate request locally.
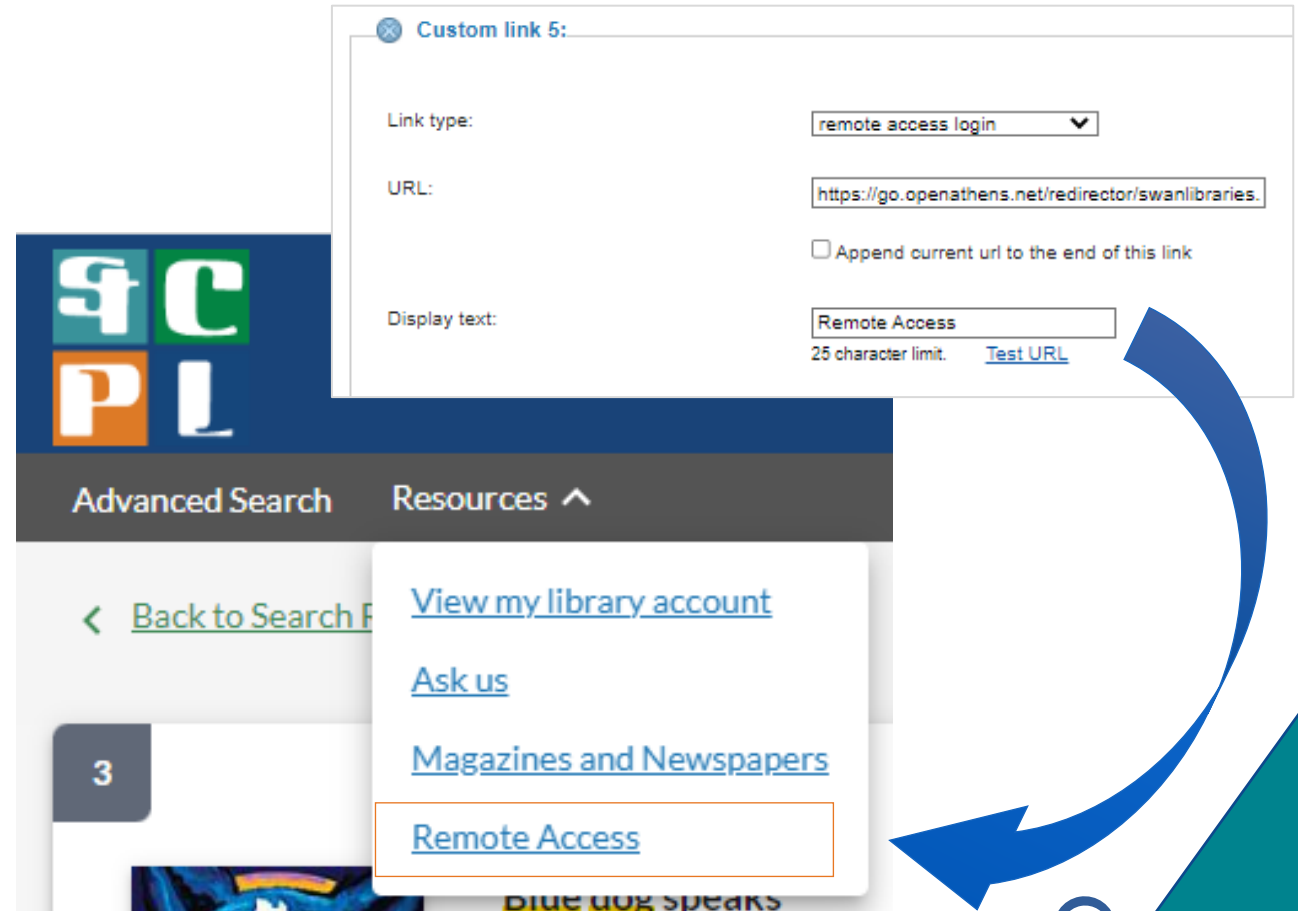
Others further restrict patron-initiated requests.

RSC22

Remote Authentication

ILL request form requires:

- IP range verification
  – or –

- Remote authentication

Open Athens links are configured as custom link

ILL Request Form

Request forms customized to support local practice (e.g., drive-up window pick-up)

Use IFM

- More of our libraries are setting IFM preferences

- Using IFM as a "bank" – to store funds to support requests from patrons that may incur a cost.

- Greater ease in processing lost material and damages through IFM with other libraries.
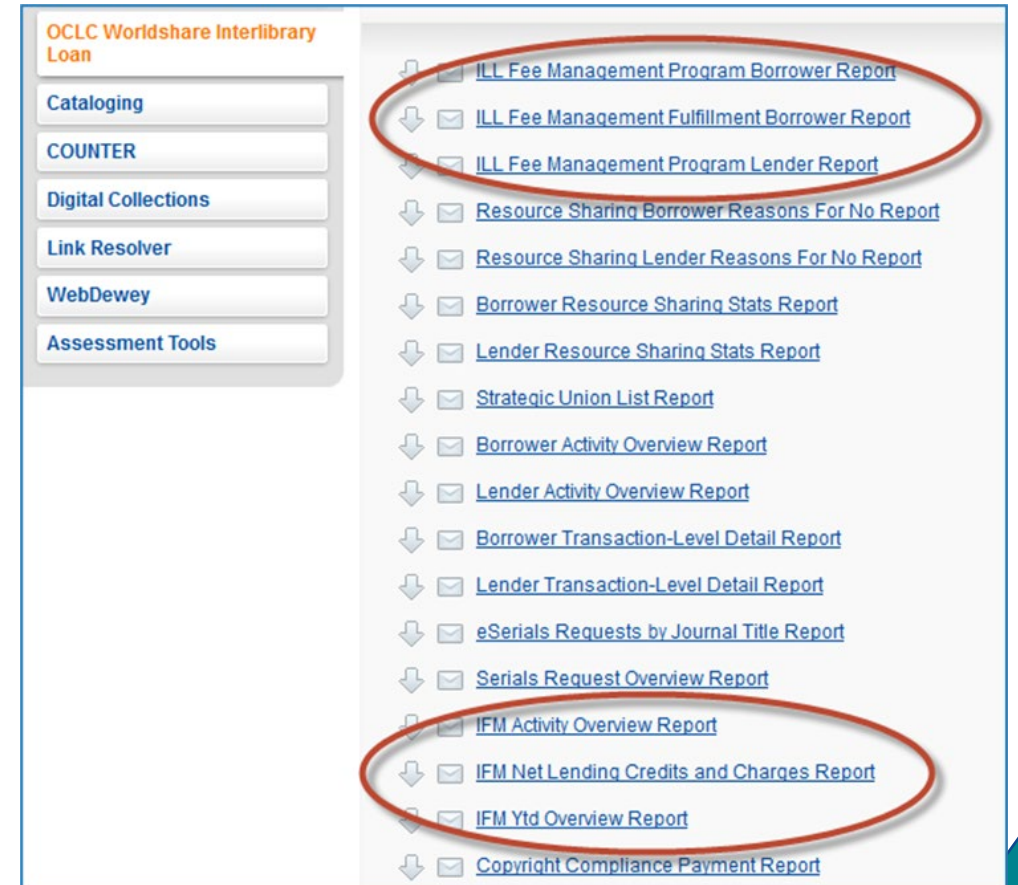
Internal workflow consistency

- All items being sent out (lending) are checked out to in-house accounts (either OCLC-In-State or OCLC-Out-State)
  - This allows us to consistently report activity across the consortium
- Incoming items (borrowing) from OCLC libraries
  - Create temporary/brief bibliographic record
  - Place hold on patron's record
  - Check in item when received, hold is trapped, patron notified

OCLC

Helpful Resources

- SWAN-specific ILL Training
  - https://support.swanlibraries.net/training/86650

- SWAN ILL Users Group
  - https://support.swanlibraries.net/meetings-trainings/meeting-documents?title=SWAN%20ILL

- SWAN Community Forums
  - https://forums.swanlibraries.net/c/interlibrary-loan-ill/54

- OCLC Learning tools, release notes, and more
  - https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan

RSC22

OCLC

Real World Application

Questions?