



The OCLC ILLiad Users Forum

A quarterly feature highlighting innovations in the field of Interlibrary Loan

The Information Delivery Services Project: A New Model for ILL

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Introduction

New York's Information Delivery Services (IDS) Project is a mutually supportive resource sharing cooperative. The IDS Project is a grassroots solution to the rising cost of library resources during a time of shrinking library budgets. Lacking a statewide consortium such as OhioLINK, the libraries of New York's 285 academic institutions had no coordinated resource sharing system. In 2004, the library directors from 12 SUNY colleges resolved to fill this void in order to keep up with the information needs of their users. Their answer became the IDS Project, a growing cooperative of 36 academic libraries that strives for efficient resource sharing through innovation and collaboration.

Measuring turnaround time from the moment a user submits a request until the point of electronic delivery or customer contact, the IDS Project strives to deliver loans within 72 hours and articles within 48 hours. Since day one, the IDS Project has stretched ILLiad to its fullest potential in order to achieve that goal. It has organized community building and outreach efforts to help each member library meet its fullest potential as well. Moreover, the IDS Project has sought out vendor partnerships to develop innovations that streamline workflow, reduce turnaround time, and facilitate performance analysis. The result is a beneficial collection of tools and best practices that you can put to work at your library.

Mentor Program & the Workflow Toolkit

The IDS Project is nothing if not a community, so it places a great deal of emphasis upon support and collaboration. Central to this is the mentor program, which assigns volunteer applications and systems specialists from current member libraries to each new member. Through both onsite visits and regular communications, the mentors help the staff at the joining library to configure ILLiad, optimize their workflows, and implement the technical requirements of the IDS Project. This also helps build personal relationships that form the foundation of a strong community, which gathers every year for the IDS Project Conference. The IDS Project's listserv provides another forum for members to stay connected throughout the year, further strengthening the IDS Project's community.

While visiting newly joining libraries, mentors take with them a valuable resource called the Workflow Toolkit. A collection of best practices, ILLiad customizations, and links to free software, the Toolkit is available as a free download from the IDS Project's website at <http://idsproject.org/toolkit.aspx>. With tips ranging from Direct Request and Trusted Sender to email routing and batch Odyssey processing, the Workflow Toolkit can really help improve borrowing and lending turnaround times.

Transaction Performance Analysis Module (TPAM)

With turnaround time such a critical component of user satisfaction, interlibrary loan departments rely heavily upon statistical reports. ILLiad's Web Reports are a fantastic resource for analyzing the performance of your interlibrary loan department; but for the goals of the Project, as with any consortium, a higher level of analysis is needed to analyze performance at a group level. That led the IDS Project to develop the Transaction Performance Analysis Module (TPAM). The TPAM is a web-based service that pulls the ILLiad transaction data from each member's SQL server into real time reports (with each report limited by date range and request type). Two particularly useful reports are the:

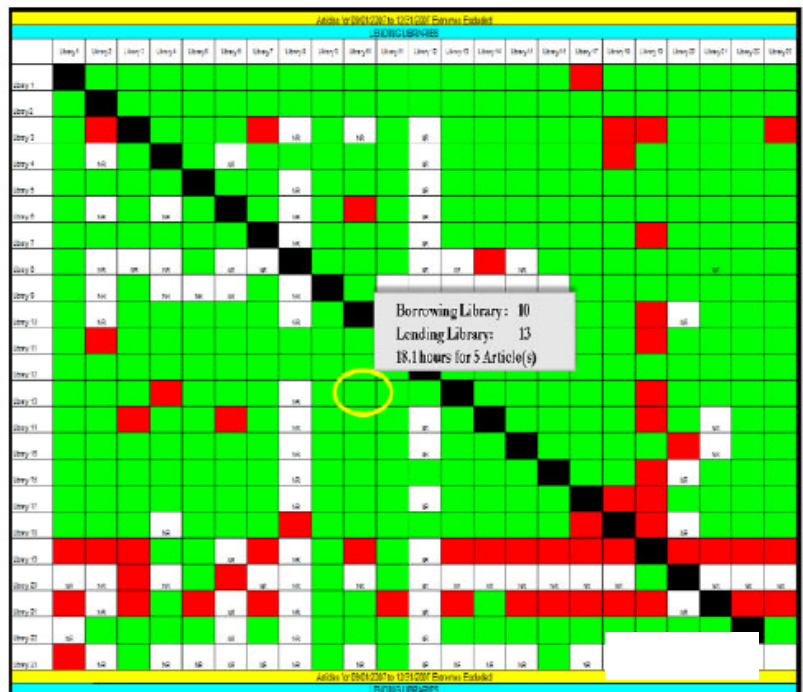


Figure 1. Project Overview

- **Project Overview Chart** – a matrix of all member libraries, this report indicates how well members are meeting the turnaround goals of 48 hours for articles and 72 hours for loans (Figure 1). The matrix is color coded for easier analysis, with green indicating that two libraries have met the goal and red indicating they have not. On mouse-over, a tooltip appears displaying the number of requests between the two libraries and their turnaround time.
- **Transaction Analysis Chart** – a bar graph of processing times, this report displays the average amount of time that requests between two libraries spend in the following five phases:
 - Borrowing request processing
 - OCLC request handling
 - Lending request processing
 - Shipping and receiving
 - Customer contact and electronic delivery

This level of analysis can help interlibrary loan staff determine where things are working well, but more importantly what can be improved. For example, in Figure 2, the average time that 33 articles spent in the delivery process was 11.22 hours. This indicates that either Odyssey or Ariel was not being utilized. Had it been, it is likely that 10 to 11 hours could have been saved.

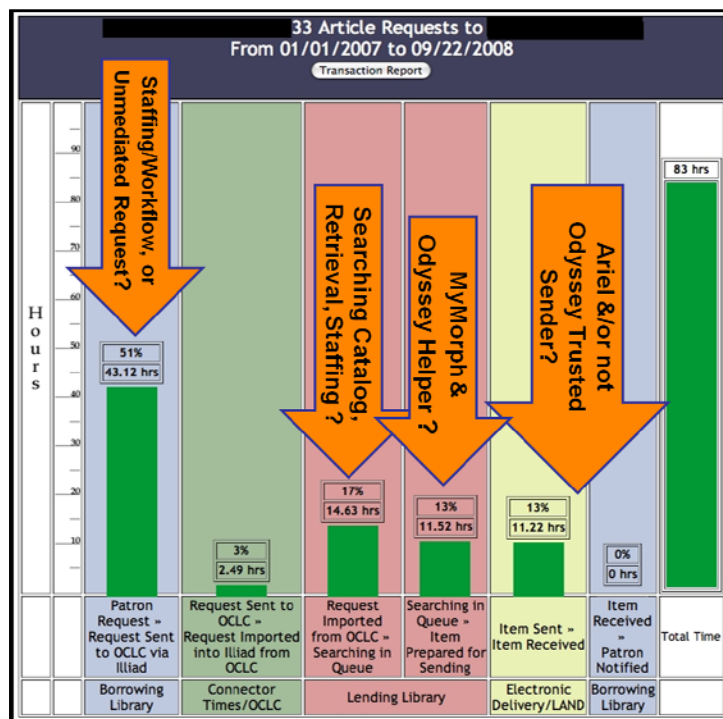


Figure 2. Transaction Analysis Chart

eJournal Availability Server

Another tool developed by the IDS Project is the eJournal Availability Server. The inability to determine accurate holdings and licensing information for electronic journals is a serious obstacle to effective resource sharing—especially as more libraries replace their print subscriptions with electronic subscriptions. In the case of the IDS Project, it was determined that 66% of article requests could be filled within the Project if such licensing and holdings information were available. This spurred the creation of the eJournal Availability Server.

The electronic journal holdings data for each member library is gathered biweekly from Serials Solutions. This is combined with licensing information that is kept up to date by a team of librarians. The result is a union catalog of holdings and licensing information that can be searched using ILLiad's Z39.50 Search (Z Search) function. Borrowing staff can use that information to prioritize libraries that can lend a journal electronically, and lending staff can use it to speed up delivery by identifying from which electronic journals they are allowed to lend.

Future Developments: Unmediated Article Requests & Enhanced Toolkit

Expanding upon the success of the eJournal Availability Server, the IDS Project is currently testing the Article Licensing Information Availability Server (ALIAS). Working with Atlas Systems, the IDS Project has developed a service that allows ILLiad to perform unmediated article request processing using the eJournal Availability Server. ALIAS is able to construct a lender string and send article requests straight to OCLC. Like Direct Request, this can free up an average of 10 to 20 hours of staff time (in Figure 2, this would be reflected in the first column) and decreases the turnaround time for article requests—especially since ALIAS promotes electronic over print holdings. Unlike OCLC's Direct Request, ALIAS also performs load leveling.

The IDS Project is also working with Atlas Systems to create the next version of the Workflow Toolkit. It will include basic ILLiad tutorials and videos to help illustrate the Toolkit's content. More importantly, it will be incorporated into Atlas' Community Portal so that the entire ILLiad community can contribute to its future development. The goal of the new Workflow Toolkit is to serve as an expanding resource for ILLiad training and best practices.

As libraries continue to face tightening budgets, resource sharing becomes an increasingly important service. A 2008 recipient of the Rethinking Resource Sharing Innovation Award, the IDS Project offers a resource sharing model that can help libraries maintain efficient and effective information delivery services for their users. The IDS Project is committed to providing improvements to the entire resource sharing community through the ongoing development of innovative tools and promotion of best practices. To learn more about the IDS Project, visit its website at <http://idsproject.org>.