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Convergence of Interlibrary Loan and Local Collections

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Interlibrary loan management is one of the more interesting areas where full text document delivery and traditional technical processes are converging. However, users continue to spin their wheels navigating through complex media choices. Not all information is “born digital”, JSTOR has “moving walls” that govern access to its online files, and many valuable resources end up in remote storage—where they may be digitized. Fortunately, despite the sweeping changes in how we deliver knowledge resources, the culture of interlibrary loan is deeply embedded in the profession. The functions of the ILL department continue to play a key role in satisfying patron needs, and the advent of digital libraries has, if anything, increased demand for materials found elsewhere.

As online ILL grows, it becomes another feature on complex Web pages many options for the patron’s consideration. That’s good for digital librarians, because Web searching brings patrons into contact with information professionals (even if the contact is made by email). More of our time goes to “quilting” together coherent and intuitive displays of our collections, to make a quality experience out of a patchwork of complex and distributed services, this is time well spent.

I see two defining moments in recent history that point to the future “look and feel” of ILL and document delivery. The first event was the development of the online “Request” feature in many OPACs, which has made it much easier for patrons to obtain collection materials. Second, the merging of loan requests for print materials with IP-authenticated links to online materials is becoming more prevalent. Users with access to catalogues with this capability can see at a glance whether an item is available in print, online, or both. This may not seem like hot news, but that merger of functionality signals some behind-the-scenes trends, like the strengthening of relationships within consortia and among service providers. It also places a new challenge in front of library trainers. Online ILL advances give us a glimpse of where digital convergence is going, so I thought I’d take a look at some of the latest generation ILL features—with the user’s experience in mind.

The “Super” Request Form

Librarians pioneered the concept of resource sharing during the print-only era, which is well within memory for many of us. Utilities like OCLC and RLIN formed a solid basis for local consortia to build ILL around. More recently, the instant gratification of the open Web has increased user interest in quick turnaround and delivery, even when they are seeking rare or print-only materials. As the Internet emerged as a principle conduit for information, libraries created online request forms, which streamlined the flow of information to staff who fulfill loan requests. Now the online “request” is becoming much more powerful, with the advent of new software for consortial lending.

Library software developers like Fretwell-Downing Informatics have targeted ILL as a function that can operate seamlessly across institutional and vendor boundaries (<http://www.fdggroup.com/fdi/company/home.html>). The new software enables networked libraries to bundle together both print and electronic requests, and determine the response strategy based on what’s available, and where. In my own network “neighborhood”, the California Digital Library (CDL) has been testing what I regard as a “super request” form. The form is branded by the popular “UC eLinks” logo for online document delivery—but the form handles ILLs *alongside and in relationship with full text sources*. The goal is to make getting an ILL filled, obtaining a digital copy of a journal, or being pointed to available full text by means of a unified search experience. The form pages look very similar, but provide vastly different services.

What’s interesting about this convergence is that it has the positive effect of reinforcing the “brand” of the host library: the form the user fills out is clearly a feature of the library they use, not someone else’s, and not a commercial database. In the case of the CDL, the “UC eLinks” logo is emblazoned all over the place. All of the stakeholders in the document delivery process can be found on Web form, if you bother to look. More likely, you’ll just fill out a form that’s branded by the California Digital Library and move on.

Not a big deal, huh? Well, consider these four characteristics of the experience that lurk below the surface.

The Media Type is Blurred. When users fill out a form for a book chapter or government document, they’re usually thinking of something in particular—a photocopied packet that will come in the mail, a courier-delivered book, etc. With Web-based consortial lending and document delivery bundled together,

users are much more likely to receive an electronic copy and print it locally. This will change their expectations dramatically over time.

“Branding” is in the hands of collection managers, not vendors. When users confront a vast array of eJournals, all of which look different and require different search strings, they often get frustrated. But when collection managers define the “look and feel” of the page that delivers the information, whether it arrives by mail or electronic transmission, the digital library that hosts the service gets the glory. So the library’s “brand” is strengthened, and carries an opportunity to associate the library with a quality experience for the user.

A single interface saves time on fulfillment. As off-site storage facilities digitize their holdings for electronic loan, the balance between print copies that are mailed and electronic copies that are emailed is changing. Any guess as to which is more popular?

Greater opportunities exist for analyzing use patterns. As users confront a similar “look and feel” for online resources and ILLs, their behavior may reveal interesting new use patterns, not only for subject selectors, but for long-term physical plant planning, too.

The Minimal Data Super-Form

Following up with the example of the CDL’s UC eLinks, there’s another time-saving feature that helps users with minimal information. Once again, it’s embedded in the form, and runs in the background. Local developers have called it “Blank Citation Linker”, as it is based on citation-linking routines that enable UC eLinks to match requests to URLs for authenticated users. UC Santa Barbara has crafted a very effective set of pages that use this feature (<http://www.library.ucsb.edu/depts/access/ill.html>).

If a patron has a bare minimum of information, like the ISSN or ISBN, or a journal title plus publication year, the system automatically takes the user to the familiar UC eLinks interface to fill in a form with what they have to work with. They can either search for an online file or fill out a request for a book, chapter, or journal article. There are two value points in this process. First, the system performs an automatic search of electronic collections, demonstrating the usefulness of the search process very concretely. Second, it reinforces the

importance of the bibliographic elements of online records—in a 100 percent Web environment.

Using Web Forms as Tutorials

Making ILL processes Web-compatible really challenges users to become familiar with the most important elements of bibliography. That may seem like a minor point, but anyone who's spent time on an information desk or ILL service point knows otherwise. It can be very time consuming to educate users about loan processing, library catalogues, and metadata. I'm extremely encouraged by the quality of the online tutorial-style of the new generation of online ILL forms, they are bound to improve search skills among users.

In my UC eLinks example, not only do the information pages for ILL link to loan forms, but also to basic "how to" pages for finding articles, formulating effective searches, etc. So over the lifespan of an interlibrary loan request, a user has several opportunities to find out more about the digital library. Public service staff and ILL staff both contribute to the design process, resulting in user-focused Web interfaces that perform better in lots of low-key ways. UC Santa Barbara's Blank Citation Linker form includes the enticing linked text of "*Show me how*" to trigger an inquisitive mind—and provides pithy answers that are well-suited to fast-paced searching.

Public Service Guides Development

Web-based software is doing a lot more of what we have traditionally done manually, behind the scenes. At the same time, relationships between vendors and libraries have grown in complexity, not only with respect to access, but also in terms of systems development. In the latter case, the contributions of line staff who are responsible for how work is performed have proven vital in the development of software. Library software and database vendors have benefited from close collaboration with systems librarians. They in turn are very aware of how vital public service staff input is. In large libraries and consortia, public service staff participate in cross-functional teams that really "bang" on software to make it better. In this respect, library skill and culture are alive and well, with a balance between technical and public service staff driving the development process—and influencing the marketplace.

The comparative success of Web-based tutorials about complex tasks like interlibrary loan has added to our training burden, particularly at the undergraduate level (or with the general public). While many patrons can handle Web forms with ease, service desk traffic remains high in lots of libraries. But considering the quilt of services and processes that make up today's digital libraries, that's good. The link between our physical and "virtual" identities must remain robust, combining effective in-person service with a compelling "branding" strategy.