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# How smart fulfillment can optimize your ILL workflows



# **OCLC Presenters**

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# Agenda

- Key benefits of smart fulfillment
- Features of smart fulfillment
- Resources to get started
- Q&A





# Library on-demand Anything, anytime, anywhere.

oc.lc/library-on-demand





# Intuitive discovery

Effortless access to valuable resources when and where people need them.



## Smart fulfillment

Optimized delivery to meet library and user preferences.



# **Personalized experience**

Request, track, recommend, and return—all in one place.





### Powerful network

Unmatched potential to borrow, buy, and access resources.



# Q What is Smart fulfillment?



#### oc.lc/smartfulfillment



# **SMART FULFILLMENT FEATURES**







# **Smart fulfillment: Putting it all together**



Requester



Automated request manager

Smart lender strings

#### As a requesting library, you've optimized by:

- Configuring the Automated Request Manager to work on your requests.
- Building *smart* lender strings thru automation (avoids suppliers that are deflecting or do not hold the requested year; orders symbols by those that fill quickly).
- Building confidence in automation; configuring your automations to Send to Lender.
- Filling your patrons' requests faster!





# Automated request manager (ARM)

#### What is it? (formerly Direct Request)

• Allows you to determine how patron-generated requests are processed

#### How does it help?

- Only way to get smart lender strings!
- Ensures users get resources fast
- Helps staff focus time on more complex needs



Request Type: Loan

Request Type: Copy

Understand what is automated in a glance.

## Easily re-order, change, add new.



LOANS

COPIES

tomated Red	quest Manager			Help on this scre
want to hear your thought	ts on the new Automated Request Manage	. 🛛		
Borrowing New Reque	est			
These standard actions a	are done for all Borrowing New Requests, r	egardless of profile:		
Bibliographic record Best matching bibliograp	ohic record applied to request			
WorldCat holdings che Available when holdings	eck set in WorldCat			
Knowledge base holdi Available when OCLC ki	<b>ngs check</b> nowledge base holdings set in WorldCat			
Custom Holdings Grou Available when Custom	<b>Ip check</b> Holdings Group holdings set in WorldCat			
Main Automations				
Configure automations the	nat will be applied to new borrowing reques	ts. Only the best matching automation will be applied to a rec	uest.	+ Add New
Name	Matches	Actions	Priority 🕄	
PATRONNOTE	If any patron note exists	If Held By Your Institution, Route to Review. (else) Route Request to Review. Apply Constant Data: DEFAULT.	10	Edit Delete
		Send Request to Lenders if at least 1 lender(s) fro	m	

item

item

Custom Holdings Path ALLREQUESTS hold(s) the

Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path ALLREQUESTS hold(s) the

Apply Constant Data: DEFAULT.

Apply Constant Data: DEFAULT.



20

30

Edit

Edit

Delete

Delete

# **Smart fulfillment: Smart lender strings**

What makes a lender string built by automation better than a string I build myself?

- Strings built with automation utilize and consider:
  - Deflections
  - Turnaround time
  - Electronic licenses
  - Print serial holdings
  - Profiled groups in Custom Holdings Paths
- **GOAL**: Faster turnaround times





# Automated request manager (ARM)

#### Are Georgia libraries using it?

- 6 libraries have used ARM to send at least 1 request out unmediated to lenders since the beginning of 2020
- Valdosta State, Berry College, Georgia College and State University, Fort Valley State University, Columbus State University, Piedmont University

#### What is the impact?

• Average turnaround time (hours) for copy requests from GA libraries:

Sent via automation	Sent by staff
19.15 hours	45.06 hours



# ILLIAD SETUP FOR AUTOMATED REQUEST MANAGER



# **Customization Manager**

- Borrowing | Direct Request |DirectRequestEnabled
- Set to Yes

Borrowing	
<ul> <li></li></ul>	
🕀 🕞 Check In	Settings
🕂 🕞 Copyright	Key Value
🕂 🔁 Customer Clearance	
🕂 🔁 Defaults	
🔁 🕅 Direct Request	Description
🔦 DirectRequestEnabled	Determines if OCLC Direct Request processing is enabled. Requests are only sent if they are at Awaiting Direct Request Sending.
🔍 ISODirectRequestIPAddress	
🕂 🔁 Electronic Delivery	
🕂 🔁 EMail	
in. 🔂 Importing	



# **Customization Manager Keys**

System | Custom Queues |CustomQueues

Add record for Awaiting Direct Request Sending

용· 문 Borrowing 용· 문 Contact Information 용· 문 Doc Del		Cu	stom	Queues
🕀 💭 Lending	QueueName	ProcessType	NVTGC	
H- Cutors	Acquisitions Review	Doc Del	ILL	
🕞 🤤 Avticle Exchange	Additional Fee Inquiry	Borrowing	ILL	
	Awaiting Conditional Processing	Borrowing	ILL	
- Custom Oueues	Awaiting Conditional Request Processing	Lending	Lending	
- EustomQueues	Awaiting Direct Request Sending	Borrowing	ILL	
🔲 QueueSort	Awaking Doc Frovider Processing	borrowing	1	-
🕂 🕂 Database Manager	Awaiting EJournal Processing	Lending	ILL	
🕀 👧 Docline	Awaiting Faculty Processing	Borrowing	ILL	≡
EMail	Awaiting ISO ILL Request Processing	Lending	Lending	
	Awaiting Lending Request Processing	Lending	Lending	
	Awaiting OCLC Sending	Borrowing	ILL	
	Awaiting Patron Response	Borrowing	ILL	
	Awaiting Renewal Request Processing	Lending	Lending	
🛨 🔚 Printing	Awaiting RUSH Request Processing	Lending	Lending	
🕂 💻 Rapid	Awaiting Unfilled Processing	Borrowing	ILL	
🕂 💽 Routing	Awaiting User Verification	Borrowing	ILL	
E Versions	Blocked Returns	Borrowing	ILL	
📑 💮 🚛 Web Platform	Borrowing	Faculty Overdues	ILL	



# **Routing Rules**

Not required

• Recommended for **most** automated workflow

Send only those items with ISSN, ISBN or OCLC Number in request

Rule number should be low

• Prioritize the rule to run before all others



# **ROUTING RULE EXAMPLES**



# **Basic Ioan**

Field Name	Entry
RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.ISSN > " and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL)
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
Rule Description	Default Direct Request—Automation rule for loans with ISBN



# **Basic loan with ISSN or OCLC Number**

Field Name	Entry
RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	(t.ISSN > " or t.ESPNumber > ") and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL)
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
Rule Description	Direct Request—Automation Rule with OCLC Number Match in addition to ISBN



# **Basic article with ISSN or OCLC Number**

Field Name	Entry
RuleNo	0
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	(t.ISSN > " or t.ESPNumber > ") and t.RequestType = 'Article' and (t.LendingString = " or t.LendingString is NULL)
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
Rule Description	Direct Request Rule with OCLC Number Match in addition to ISSN



# **Smart lender strings: A tale of two libraries**

## • Borrowing Library 1

- Automations apply constant data and send requests to lenders in a Custom Holdings Path.
- Requests submitted by patrons have bibliographic matching performed by automation and are sent to lenders immediately.
- By using ILLiad with Trusted Senders, requests are automatically received and documents are sent directly to patrons.
- Borrowing staff do not need to touch these requests.



# **Smart lender strings: A tale of two libraries**

## • Borrowing Library 2

- No automations are in place.
- Staff manually type in requests and/or review all requests submitted by users.
- Staff manually construct the lender string.
- Staff manually apply constant data.



# **Smart lender strings: Two requests for the same title**



Copy request for articles from Developmental Psychology journal

How was lender string built?	Patron placed request	Request sent to lenders	Request shipped by lender	Position in lender string	Request received at borrowing library	Borrower's turnaround time
Automation (Library 1)	Friday, 1:53 PM	Friday, 1:53 PM	Friday, 2:07 PM	1	Friday, 2:08 PM	15 minutes
Manually by staff (Library 2)	Unknown	Tuesday, 2:28 PM	Thursday, 11:44 AM	7	Thursday, 11:56 AM	45 hours, 28 minutes



# What happened to these two requests?

#### Automated (Library 1)

Patron placed request

Automation sent request to lenders in the specified Custom Holdings Path

Automation removed 3 potential lenders that would have deflected request

First assigned lender shipped electronically

Lender was a Trusted Sender; system automatically received request

System automatically notified patron request was filled

#### Total elapsed time

- Automated request: 15 minutes
- Manual request: 45 hours, 28 minutes

#### Manual (Library 2)

Patron placed request

Staff manually entered request info into a blank request

Staff manually chose a lender string and sent request

First selected lender deflected

Second selected lender said No – Lacking

Third selected lender said No - Other

Fourth selected lender said No – Non-Circulating

Fifth selected lender said No - Other

Sixth selected lender deflected

Seventh selected lender shipped electronically

Borrowing staff manually marked request received

Borrowing staff contacted patron



# **Smart lender strings: two requests for the same title**



Loan request for the DVD, A Godwink Christmas: Meant for Love

How was lender string built?	Patron placed request	Request sent to lenders	Request shipped by lender	Position in lender string	Request received at borrowing library	Borrower's turnaround time
Automation (Library 1)	Thursday, March 4, 1:30 AM	Thursday, March 4, 1:31 AM	Thursday, March 4, 2:27 PM	3	Monday, March 8, 9:09 AM	4 days, 7 hours, 39 minutes
Manually by staff (Library 2)	Sunday, Dec 27, 11:12 PM	Tuesday, January 12, 8:44 PM	Saturday, January 23, 10:30 AM	5	Monday, February 8, 10:16 AM	42 days, 11 hours, 4 minutes



# What happened to these two requests?



#### Fifth selected lender shipped the item

Lender was not geographically nearby; shipping took 16 days



#### Total elapsed time

- Automated request: 4 days, 7 hours
- Manual request: 42 days, 11 hours

# **Smart fulfillment: Putting it all together**

### As a supplying library, you've optimized by:

- Having OCLC configure real-time availability. The system responds "auto-no" to requests you are unable to fill.
- Viewing mostly requests that you can fill in the Can You Supply queue.
- Using Time to Respond to determine the priority to give to requests – improving your lending turnaround time.

Better turnaround time will move your symbol ahead in smart lender strings!



Real-time availability

Decision

optimization





#### What is it?

- · Connects to a lender's local catalog to see if an item is on the shelf
- Responds "no" automatically if item is checked out or unavailable

#### How does it help?

- Gets requests to lenders that can supply more quickly
- Speeds borrower turnaround time systemwide
- Reduces time as a lender spent looking up item availability





# **Real-time availability in action**

#### Which lenders have it now?

- All WMS, all Discovery Premium
- Additional libraries who have asked to be configured
- ~ 615 libraries and growing
- Available to all. Request to be configured!

#### How can you see it working?

- Check your Resource Sharing Lender Reasons For No Report once configured
- These requests display as No System
   Checked Availability

Supplier History		
Date	Supplier	Response
2020-08-18 11:02:07	BXM	No - System Checked Availability
2020-08-18 11:02:07	AMH	No - Auto-Deflection: format type
2020-08-18 11:02:07	GC0	No - System Checked Availability
2020-08-18 11:02:13	FBR	Supplied



# **Real-time availability and Georgia**

#### 12 libraries are currently configured:

Atlanta University Center, Agnes Scott College, Berry College, Brenau University, Columbus State, Life University, Wesleyan College, Thomas University, Covenant College, Forsyth County Public Library, Toccoa Falls College, Young Harris College

But we can get everyone configured!

Among all Georgia libraries:

5,136 requests from Jan-May with "In Use/On Loan" could have been auto-no

Get set up: oc.lc/realtimeill or email oclcresourcesharing@oclc.org



# **Smart fulfillment: Putting it all together!**





Real-time availability



Decision optimization



# Now available: New turnaround time data for lending

	Mar 2021	Feb 2021	Jan 2021
Requests Received	4799	5196	5440
Requests From WorldCat	4579	4978	4909
Requests Cancelled	56	44	52
Requests Filled	3067	3481	3334
Loan	759	771	821
Сору	2308	2710	2513
Requests Unfilled	1732	1739	2002
Average Turnaround Time For Filled Requests (dd:hh:mm)	0:22:34	0:22:19	1:02:38
Average Turnaround Time For Copy Filled Requests (dd:hh:mm)	0:14:24	0:14:24	0:17:02
Average Turnaround Time For Loan Filled Requests (dd:hh:mm)	1:23:17	2:02:24	2:08:10

#### www.stats.oclc.org



# Now available: New turnaround time data for borrowing

		History	
	Mar 2021	Feb 2021	Jan 2021
Requests Initiated	1331	1114	1430
Requests From WorldCat	1311	1096	1412
Requests Cancelled	277	273	382
Requests Filled	1068	908	1006
Loan	192	184	141
Сору	876	724	865
Requests Unfilled	0	0	0
Average Turnaround Time For Filled Requests (dd:hh:mm)	4:10:19	5:03:50	4:19:12
Average Turnaround Time For Copy Filled Requests (dd:hh:mm)	1:21:36	2:04:19	2:14:53
Average Turnaround Time For Loan Filled Requests (dd:hh:mm)	15:23:31	16:21:22	18:05:02

#### www.stats.oclc.org





#### What is it?

- An exclusive group of libraries that...
- Has the fastest turnaround times (**18 hours or less**)
- Provides digital resources in an average of 10 hours
- Uses the WorldShare ILL network

#### How does it help?

 Enables digital resource borrowing and lending among an exclusive group of libraries 26 Georgia libraries currently qualified for Express



# **Smart fulfillment: More about Express**



#### Become an Express library!

Your improved performance as a supplier will give you access to other libraries that can fill copy requests just as quickly.

Month	Copy requests filled	Average lender turnaround lime
Feb 2021	34,724	10.65 hours
Mar 2021	39,423	9.79 hours
Apr 2021	32,567	10.22 hours
May 2021	20,671	10.19 hours



# **RESOURCES TO GET STARTED**



# **Getting started with Smart Fulfillment**

**Checklist: oc.lc/sf-get-started** 

- 1. Submit info to OCLC for real-time availability setup
- 2. Configure at least one automation each for copies, loans
- 3. Speed lending processing of copy requests to earn an invitation to Express



