

Digital Interlibrary Loan and Article Delivery Services at University of Calgary and Concordia Libraries

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I. What are these services?

University of Calgary's Post to Web service started in March 2008, and consists of digitally sending patrons copies of journal articles and book chapters ordered from other libraries using the Interlibrary Loans (ILL) service. Users receive a link to the PDF via email and the documents are posted to a secure server for two weeks. Users may fill out a request form at: <http://library1.ucalgary.ca/dds.php>

Concordia's Article Delivery Service started in September 2007, and allows students, faculty and staff at Concordia to request articles from the library's print/microform journal collection to be scanned and sent to them as PDFs. Users may \ fill out a request form on the Library website at: <https://library.concordia.ca/services/lcd/deliveryreq.php> A valid Library login is required to submit a request.

II. Copyright Issues

The services at both University of Calgary and Concordia Libraries adhere to Canada's Copyright Law and take into account the 2004 CCH Supreme Court Judgment. Paragraph 49 of the Judgment allows libraries to act on behalf of users directly under fair dealing (section 29) rather than using section 30.2 of the Copyright Act. There are no format restrictions in section 29 of the Copyright Act. Section 30.2 (5), which allows libraries to act on behalf of their users in fair dealing, does not allow the user to receive a digital copy.

III. Staffing Considerations

At both libraries, no new staff were hired for the implementation of these digital delivery services, however, responsibilities of staff did change.

At University of Calgary, a staff member monitors the Receive FTP function in Relais to match incoming Ariel or Odyssey transmissions with the appropriate request for post to web. For ILL requests that are sent by lending libraries as email attachments, mailed photocopies or faxes, the workload increases because the article needs to be rescanned for digital delivery to our user.

At Concordia, two different libraries receive Article Delivery requests and staff in each library can "triage" all requests but only end up scanning the requests for titles held in that library. Library Assistants "triage" the requests and prepare them for scanning while clerical staff retrieve the items, make the scans, and send them to patrons.

IV. Service Considerations

Turnaround Time
The University of Calgary's Post to Web service is part of the ILL operation and as such, turnaround time is dependent upon the library that provides the article/chapter and how they send it to the library.

Concordia staff aim for a two working days; the majority of our requests are filled within this time and many are filled within 24 hours.

Ordering Limits
At the University of Calgary, there is no limit on the number of requests users can make, however, during peak periods staff will sometimes limit processing to five requests per person per day.

At Concordia, there is also no limit on the number of requests users can make. Once or twice a term, we have a user who will submit many (e.g. 50) requests within a few hours, and this can cause a backlog in processing; in these cases, we may contact the patron to tell them that there may be a longer than normal turnaround time to fulfill all their requests.

Cost
The University of Calgary and Concordia services are both offered at no cost to users.

V. Workflow

At the University of Calgary, most requests arrive via the Relais ILL web form (used for all ILL requests). Currently, requests for material in the University's own library collection are not processed, and users receive an email informing them that the material they have requested is in the library's collection, and the request is cancelled. Requests are occasionally received from more than one user asking for more than one article from an issue of a journal or more than one chapter from a book. These requests are refused because of concerns that filling them would require the Library to go beyond fair dealing.

For Concordia's Article Delivery Service, requests arrive as emails an a Microsoft Outlook email account that is checked frequently by staff at both of the University's libraries. Staff at either library "triage" the request, which consists of the following:

- Checking to see if the article is available online (if so, patrons are informed and given instructions for how to find the e-version)
- If the article is not online, check to see if we have it in print or microform, which library has it and, if needed, passing the request to that library using folders in Outlook. Requests to be scanned are printed and clerical staff retrieve the volume, scan it on a flatbed or micorform scanner, save it as a PDF and email the file to the patron as an attachment
- If the article is not available at Concordia, the patron is sent a message with a link to our Interlibrary Loan service
- If the patron requests several articles from the same volume/issue, the first request is filled and, because of fair dealing concerns, we cancel the remaining requests and offer to put the entire bound volume/issue on the holdshelf for them to come consult
- Patron requests often contain citation errors, but staff are usually able to troubleshoot and correct them

Scripts of email text for use in all potential situations are copied and pasted by staff members when responding to users so as to maintain consistency in all responses. There is also a policy which governs the service.

If Interlibrary Loan requests are received for journal articles that we have in our print or microfilm collection, the request is cancelled in our Interlibrary Loan system (VDX) and users are sent an email telling them their request has been forwarded to the Article Delivery Service, and that their article will be scanned and sent to them in 2-3 working days.

VI. Use of the Service

The University of Calgary's Post to Web service has generated the following statistics:

Month/Year	Number of Requests filled with Post to Web
April 2009	1142
May 2008	1417
June 2008	1469
July 2008	1751
August 2008	1099
September 2008	1503
October 2008	1723
November 2008	1502
December 2008	1020
January 2009	1267
February 2009	1530
March 2009	1852
April 2009	1229
May 2009	124
June 2009	953
July 2009	1203
August 2009	1176
September 2009	1173
October 2009	1555
November 2009	2004
December 2009	667
January 2010	1367
February 2010	1227
March 2010	1392
April 2010	1168
Average	1340

At Concordia, feedback from users about the service (via comments received in response to us sending patrons their requests, as well as LibQUAL) has been very positive. An average of 364 requests are processed per month (this is a total for our two libraries). The breakdown for filled and denied requests is as follows:

	Monthly Average (Sept 07-Dec 09)	Average Percentage of Monthly Requests
Filled Requests		
Scanned and Emailed	253	71%
Material available online in Concordia's collection	34	10%
Filled with bound volume	5	1%
Total Requests Filled	292	82%
Denied Requests		
No Concordia holdings	38	10%
Copyright issue	12	3%
Not a periodical	9	2%
Citation is incorrect	5	1%
Missing/Volume at Binding	4	1%
Patron is blocked	2	1%
Total Requests Denied	70	18%

VII. Future Directions

University of Calgary would like to begin filling requests from their own library's collection, especially once their offsite High Density Library is open, which will store lesser used materials

With Concordia's upgrade to its VDX Interlibrary Loan software this summer, it may be possible to use VDX to manage our Article Delivery requests, so that users do not have to know to fill out a separate web form as opposed to VDX. Concordia may also, in future, consider allowing non-periodicals in its collection to be requested.

VIII. Summary

Beginning on March 18, 2008, the University of Calgary Library began delivering interlibrary loan requests for copies of journal articles and chapters of books via post to web. A PDF copy is posted to a secure web server. The user receives a link via email and has 14 days to retrieve the article. We would like to expand post to web to include delivery of articles from our own collection. This will be especially important after the High Density Library, our offsite storage facility, opens in the late Summer of 2010.

In August of 2007, Concordia Libraries launched an Article Delivery Service, where students, faculty and staff can request that articles the library has in its print and microform collections be scanned and sent to them by email. Turnaround time for requests to be filled is 2 working days. There is no limit on the number of requests patrons can make (as long as they are not from the same issue), and requests are free of charge. The service has been well used by patrons; the monthly average number of requests filled is 292. Feedback from users has been positive. Possible developments to the service include better integrating the service with our ILL management software, and expanding the service to include non-periodical materials.

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