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## **SHAREit<sup>®</sup> Upgrades ACCESS Pennsylvania's Resource Sharing, Saving the State Time and Money**

*New Statewide Catalog/Interlibrary Loan System from Auto-Graphics Saves Pennsylvania \$1.8 Million Dollars After Implementation*

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### **CHALLENGE**

When it's time to upgrade a union catalog and interlibrary loan system that serves diverse libraries across an entire state, the challenges are great. Add funding shortfalls and staff cuts to the mix and the stakes rise even higher. Created in 1985, the Access PA catalog includes the holdings of all different types of libraries across Pennsylvania. A single search will reveal materials held by public, school, academic, and special libraries throughout the state. It was the first, and remains one of the largest, statewide union catalogs in North America. Keeping the historic catalog and interlibrary loan system on track for a promising future would require the very best, most flexible solution available.



Access PA is supported with state funds, and in 2009 the state's nonprofit library technology partner, Hosting Solutions and Library Consulting (HSLC), saw a 50% reduction of its grant to maintain the service. As a result, the system in place at that time was frozen. The loss in funding for the deprecated systems (INN-Reach/VDX) led to the inability to deploy software and hardware upgrades. Degraded server performance and a suspension of MARC record loads followed, culminating in an outdated catalog.

As the need for an upgrade became critical, HSLC sent teams out to libraries across the state to identify the most desired features in the next resource sharing system. The new system needed to be cost-effective and versatile without sacrificing service to the libraries and their patrons who needed access to the best technology available. HSLC compiled a statewide list of features to consider as they sent out a proposal request for the upgrade.

#### **TOP TEN RESOURCE SHARING CONSIDERATIONS:**

1. Recreate vs. de-duplicate database
2. Increase frequency of holdings updates
3. Retain search scoping (ability to sort by library type)
4. Offer authority control
5. Provide kids' interface to Access PA database
6. Offer efficient user account management
7. Provide stand-alone system for State Correctional Institution (SCI) libraries
8. Enable social networking integration
9. Link to other Interlibrary Loan (ILL) systems, i.e., ILLiad, OCLC
10. Continue email alerts for ILL requests

## SOLUTION

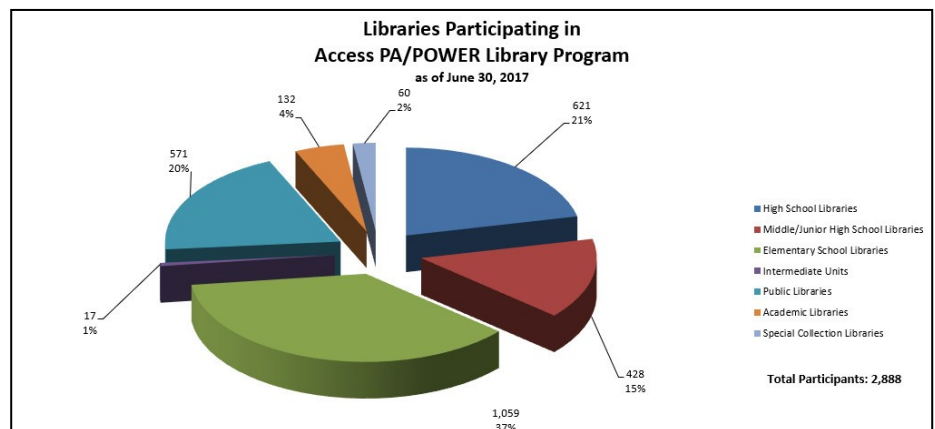
Access PA required an intuitive, affordable resource sharing solution that also offers the latest features librarians expect from a typical ILL system. After a competitive Request for Proposal process including resource sharing and interlibrary loan vendors throughout the nation, Auto-Graphics was selected by HSLC to provide the next interlibrary loan platform for Access PA. Auto-Graphics' SHAREit® product was selected for its close match to the desired features requested by Pennsylvania librarians. Switching to the SHAREit ILL platform offered Access PA an upgrade to a more modern and feature-rich interface for end users with greater search functionality, a more flexible and efficient ILL system, and an increasingly accurate and authoritative union database—significantly enhancing statewide ILL services. Auto-Graphics has adapted the latest software, database, and industry standards to provide a leading-edge platform capable of serving the needs of the diverse libraries participating in the system. A unique feature of the system is the stand-alone OPAC and ILL that Auto-Graphics developed for Pennsylvania's correctional institutions. SHAREit provides the Access PA union catalog seamless integration with one of the most evolved and long-standing statewide ILLs in the nation.

## RESULTS

Maryam Phillips, Executive Director of HSLC, met with Auto-Graphics to discuss some of the ways in which SHAREit has contributed to the continued success of Access PA. To begin, Phillips shared the contents of her October 15, 2017 report to the Pennsylvania governor's advisory council, where she detailed the most impressive improvements: "The Access PA statewide catalog was replaced in 2015 with new software called SHAREit. Participation is approaching 1,500 libraries with 8.6 million bibliographic records and 43 million items available for resource sharing across Pennsylvania. Over 100,000 titles were loaned in fiscal year 2016. Using the lowest *Library Journal* 2016 average hardcover book cost (\$18.01), this represents a savings of \$1,800,000 in purchase costs for Pennsylvania libraries."

**"...interlibrary loan fulfillment rate has increased from 67% to 81% in a year's time..."**

Since deploying SHAREit, Access PA has seen dramatic results that have significantly freed up staff time and provided more cost savings to the library. The interlibrary loan fulfillment rate has increased from 67% to 81% in a year's time due to having started over with new record loads, offering current holdings, and the ability for libraries to export their own records to the statewide catalog on their schedule. In her interview with Auto-Graphics, Maryam Phillips discussed in further detail the ways in which SHAREit has addressed some of the state's Top Ten List of desired features for libraries.



## Recreate or De-duplicate?

In implementing the new system, the decision was made to recreate the catalog database rather than attempt to carry over and deduplicate the existing contents. "We decided not to carry our old system over into SHAREit," Phillips explained. "We decided to clear the decks and start from scratch because we had so many issues. The original database had 2500 libraries participating, but with the landscape for school library staffing on a downward spiral that number didn't feel accurate to me anymore. I felt perfectly fine with starting over. So what we've managed to do is to build participation back up to close to 1500 libraries which is still pretty amazing I think, especially since we are a multi-type kind of catalog."

As the Access PA union catalog was recreated, SHAREit also facilitated the deduplication process that was needed to establish accurate bibliographic records. Records coming in from school libraries without professional cataloguing staff needed attention. "It was really important for us to be able to identify their MARC records and replace them with enhanced records that came in from other places," Phillips said. Due to lack of funds for updating, the old system which SHAREit replaced had become badly deprecated and its deduplication capabilities seriously reduced. "That was really high on our list to improve in our next system," said Phillips. "The old system had 22 million bibs and 44 million items. SHAREit has 8.5 million bibs and 44 million items." With the clean new catalog database, interlibrary loan fulfillment reached new levels of performance, up to the present 81-83%, which Phillips calls, "pretty darn good".

## ***“I look at a statewide catalog as having multiple uses besides just interlibrary loans”***

### **Authority Control Helps Everyone**

Improved authority control of bibliographic records ranked “very high” on Access PA’s Top Ten wish list, as Maryam Phillips explained, calling the old system’s “22 million bibs totally out of control.” “Not that anyone was doing anything wrong,” she said. “A librarian who only has two hours a week to catalog is not going to be able to catalog at the same level as an academic library that has five full-time catalogers. We find that the ranking system that SHAREit uses has eliminated what we thought was going to be the need to send our database out once a year for authority control. We really like the way the system can determine the levels of cataloging expertise. With SHAREit, the institutions that are doing the cataloging and submitting the collections basically get a rating and then the system knows how to overlay and merge and has resulted in us knocking those 22 million bibs down to 8.5 million.”

“I look at a statewide catalog as having multiple uses besides just interlibrary loans,” Phillips said. “For example, I want our libraries to turn to SHAREit for cataloging records. I want the catalog to be good enough that, if a library continually updates their collection there, if something happens locally to their ILS, maybe they are doing an upgrade and they’re going to be down for a couple of days or something else happens, they could turn to the statewide catalog to look for their holdings there and see what they own even though they wouldn’t necessarily be able to see what’s on the shelf.”

### **Improved User Account Management**

Another system feature of importance to Access PA’s participating libraries was ease of user account management. Phillips discussed several of the ways that SHAREit has streamlined communication between participating libraries and system administration. These range from the updating of local contact information to the uploading of collection records. “HSLC used to get a lot of emails,” said Phillips, “telling us the librarian’s name changed or the librarian’s email changed and asking us to update their contact information. Now, if they’ve got five minutes, it is easier for them to just make the change themselves.”

With SHAREit, holdings updates can be made more frequently and easily. “Now, too, the libraries are able to export to the Auto-Graphics file server for processing their collection. Previously there was a big long, drawn-out procedure, but the idea with SHAREit was to put more and more control in the hands of the librarians,” Phillips said. She also cited Auto-Graphics’ move to the Cloud as making the work of participating libraries easier. “It’s much more convenient for the library to decide when they have the time and can copy their collections over. Libraries might be involved in weeding and finish a big weeding project and really want to replace their collection. They can schedule it whenever they want.”

Another helpful feature of SHAREit is the ability of participating libraries to take themselves out of the ILL system when they have a planned closure or service interruption. “The SHAREit holiday scheduling feature is fantastic,” said Phillips. “We go in and literally set a holiday for every K-12 school starting about mid-May to mid-September. So all summer they are suspended from receiving any interlibrary loan requests. That was something we did have in the old system but HSLC had to do it. Now every participant has the ability to adjust their own holiday schedule or times when they are not able to deal with interlibrary loan.”

### **Custom Kids’ Catalog**

Another important component of the Access PA system update was the addition of a kids’ catalog. Maryam Phillips explains, “We want this catalog not just to serve librarians but also to serve the public. It was important to us that younger kids have a catalog that they could access that would pull just their audience in the results. Our last system did have a kids’ catalog so to speak, but it did not restrict on the audience level in the MARC records. A third grader could look in the statewide catalog under the Civil War and get back all these dissertations and treatises and college level materials. We wanted a true kids’ interface for Access PA.”



“If you go to [kids.powerlibrary.org](http://kids.powerlibrary.org),” says Phillips, “you’ll see a page we created just for pre-K to grade 4. On that page is your kids’ catalog which did not exist when we signed the contract with A-G, but it was in development. I think we may have done a couple of focus groups with your developers and it was released to us not too long after we signed on for SHAREit.”

***“We find Auto-Graphics enhancements and attention to system issues to be very responsive to customer needs.”***

### **Training Database Empowers Staff**

Phillips discussed one request that she found extremely valuable for staff development. “We did not have a training database when I arrived at HSLC, but I’ve always had one in previous lives. It was really important to us to have a training database because we only go on the road to do training twice a year and library turnover happens in between. We can’t say, ‘we’re sorry, you have to wait until fall to be trained in how to use this statewide catalog.’ We asked Auto-Graphics to come up with a separate database that could be used for training, and then we supplement that with little video intros to SHAREit. Now we can tell library staff to go in there and start playing around. The training database is a “safe sandbox”—it lets employees go at their own pace, when new staff arrives.

### **Service for Correctional Institutions**

Access PA also needed a special system component for the 24 State Correctional Institution (SCI) libraries in Pennsylvania. These libraries need a stand-alone system because they are not on the Internet and print out their loan requests to receive service. Auto-Graphics developed this unique module for HSLC which creates and ships an updated library database on a quarterly basis for use by the SCI libraries.

### **A Bright Future for Access PA**

Auto-Graphics already had a successful history working with the Pennsylvania library community providing authentication and access control via on-demand E-card registration for the POWER Library e-resources, a service within Pennsylvania’s Electronic Library. The company was pleased to further extend the relationship with Access PA with the implementation of SHAREit. Auto-Graphics is proud to know that one of the country’s largest ILL systems has selected SHAREit because of Auto-Graphics’ ability to grow with them in the future. As Maryam Phillips confirmed, “We find Auto-Graphics enhancements and attention to system issues to be very responsive to customer needs.”

### **About SHAREit®**

SHAREit, a component of the Auto-Graphic Library Management Platform, is a patron-initiated, library-managed and consortium-administered resource sharing interlibrary loan (ILL) and consortial borrowing solution. SHAREit’s open platform provides a tremendous advancement in the development of next generation resource sharing systems for libraries by facilitating interconnectivity of disparate systems, providing consortia the ability to simultaneously interface with multiple ILL and resource sharing systems.

SHAREit helps libraries significantly reduce the amount of time spent on managing borrowing and lending activities, greatly improving staff workflow and patron satisfaction. It supports and manages mediated ILL transactions, and mediated or unmediated patron-initiated ILL transactions. Libraries with different local automation systems can share resources with one another, regardless of their collection size or automation system. SHAREit seamlessly accommodates these disparate systems – creating a level playing field for all consortium members due to the solution being fully compliant with all library standards—including NCIP, ISO ILL and IPIG profile support—SHAREit interoperates with all major resource sharing systems, including OCLC WorldCat Resource Sharing, ILLiad, Relais, VDX and the Library and Archives Canada’s ILL system (generic script).

### **About Hosting Solutions and Library Consulting (HSLC)**

Hosting Solutions and Library Consulting, dba HSLC, furthers the missions of libraries by delivering technical solutions and consulting services. HSLC’s technical advice, products and services help libraries connect with each other and their communities.



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