

# Beyond the Library Collections

*Proceedings of the 2022 Erasmus Staff Training Week at ULiège Library*

François Renaville and Fabienne Prosmans (Eds.)

ULIÈGE LIBRARY  
LIÈGE





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# HERMES, an international project on free digital resource sharing

Carmen Lomba; Stefania Marzocchi; and Debora Mazza

## Abstract

In 2020, the COVID-19 situation forced academic libraries to move exclusively to the Web. Library closure led to key issues for the scientific community: the unavailability of physical collections, the lack of digitization of paper assets, the inadequacy of catalogues, the absence of information on e-book and electronic resource availability, problems in delivering digital documents to users, and a general lack of competencies in searching and retrieving digital documents. To respond to the COVID-19 emergency in the library field, in April 2020 a group of volunteer librarians under the aegis of IFLA created “Resource Sharing during COVID-19” (RSCVD): the first experiment in free digital resource sharing worldwide. After the success of the RSCVD Project in the face of the COVID emergency, the Erasmus Plus Programme, through the HERMES Project, provided the opportunity to put in place a multifaceted action which can have long-lasting impacts.

## Keywords

Free ILL; Interlibrary loan; Digital resource sharing; Document delivery software; Collaboration

## Article

### Introduction

The HERMES Project is a European project closely connected with the interlibrary loan and document delivery services. The title of the project is “HERMES: Strengthening dig-

ital resource sharing during COVID and beyond”<sup>1</sup>. This project was approved in February 2021 by the European Commission and is financed by the Erasmus Plus sub-Programme “Partnerships for Digital Education Readiness”. The duration of the project was 18 months, from May 1st 2021 to October 31st 2022, but it has been extended for six months, to April 2023. The budget is €193,320.

The leader of the project is the Italian Consiglio Nazionale delle Ricerche (CNR), and the partners are the International Federation of Library Associations (IFLA), the University of Balamand (Lebanon), the University of Cantabria (Spain) and the MEF University (Turkey). There are also associated partners in every partner country, in addition the RSCVD community, that we will mention later.

The Scientific Committee of HERMES is formed by members of the IFLA Document Delivery and Resource Sharing Section (hereafter DDRS), and by experts on librarianship, open science, copyright, and resource sharing from the partner countries and United States, United Kingdom and Qatar.

The direct beneficiaries are librarians and information professionals, researchers, and university students.

The whole objective of HERMES Project is to support effective access to knowledge for the academic community. To achieve this, HERMES plans to strengthen skills in searching and getting quality academic texts. In addition, and to provide easier access to scientific literature, librarians are the other target of HERMES’ objective: the improvement of librarians’ competencies in terms of resource sharing (RS), and the creation of a more effective international system to share electronic resources.

HERMES grew out of the RSCVD initiative, that was created precisely to facilitate the access to scientific literature during COVID.

## RSCVD

The idea of RSCVD “Received” was born during the COVID lockdown of 2020. The global pandemic resulted in the closure of most libraries and services were moved online. Therefore, resource sharing became either impossible or very difficult to perform. But at the same time, users’ information needs remained the same or even increased.

It was then that members of the IFLA DDRS Committee, led by Peter Bae and Silvana Mangiaracina, created and launched the initiative called Resource Sharing during COVID-19 (RSCVD) ([IFLA Document Delivery, n.d.](#)) to facilitate electronic document delivery during the lockdown. They prepared this initiative in record time, with the help of InstantILL: a website with a very simple form to request materials. Peter Bae invited

1. <https://www.hermes-eplus.eu>

librarians all over the world to facilitate the inter-lending of their electronic holdings. Through RSCVD, the librarians could make requests for articles and chapters that were not available through their usual networks.

The requests were visible in a spreadsheet, where the volunteering librarians found them. Then the volunteers checked request by request, one by one, their digital collections. In the event of availability, they provided the material through a safe electronic transmission mechanism, like the OCLC Article Exchange for example. Delivery was electronic, and the service was free, and of course compliant with the international standards of inter-lending and document supply. These requests were marked as “Done” in the spreadsheet.

Soon the spreadsheet was improved with important changes: for example, borrowers could add a due date, so that requests had a validity period, after which the requests disappeared from the spreadsheet.

The DDRS Committee members, and the librarians, also verified the affiliation of the borrowers, to make sure that the requests were coming from libraries, not from individuals.

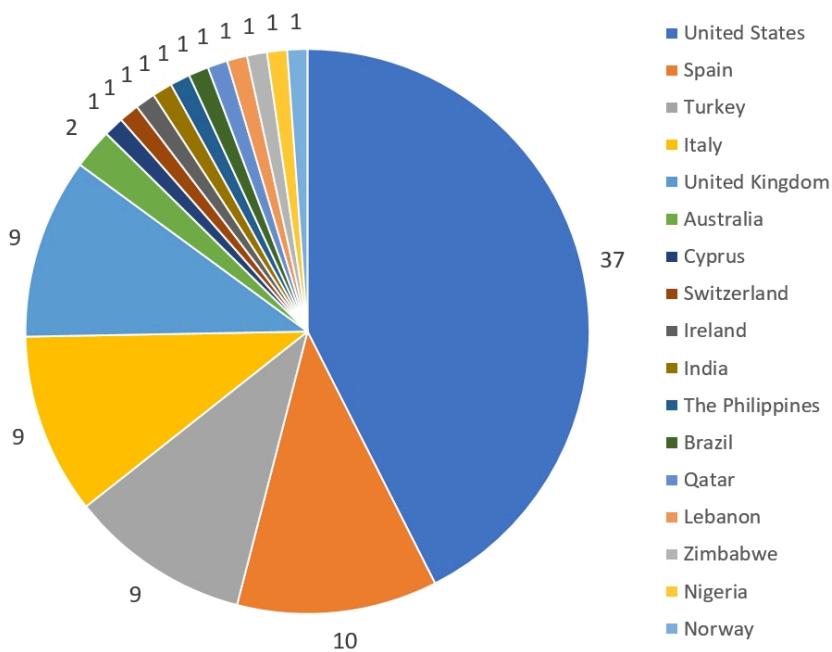


Figure 1: List of countries with volunteering libraries (as of June 2022)

The RSCVD initiative was designed very quickly during the COVID lockdown: it was put in service in almost one month. Since 21 April 2020, when the first request from an Italian library was sent, they have received 19,387 requests from libraries in 26 different



countries. And 60% of those requests were fulfilled by volunteers from over 80 libraries (Fig. 1).

And, more importantly, a community of volunteering librarians was created. Peter Bae kept things together through messages and online meetings.

On seeing how well the initiative was received, the promoters realized that there was a need for an international communication channel that could fill the gaps between well-established national resource sharing networks.

So even though RSCVD had been planned as a short-term initiative (the plan was to finish in August 2020), in fact this initiative is still running today, and one of the main HERMES Project objectives is to ensure the sustainability, and long-lasting impact of RSCVD. In fact, the old initiative is being developed now through HERMES.

## Outputs

The HERMES Project combines the goal of developing the old RSCVD initiative with the goal of making it easier for the academic community to access quality scientific documents. To achieve these goals the HERMES team works on three outputs:

- A publication that wants to be a reflection of the meaning and practices of resource sharing today.
- A piece of software that will replace the RSCVD spreadsheet. It will be a new open source software for resource sharing management, called TALARIA, Hermes' wings.
- And the third output is a number of training activities and tools, aimed at librarians and the academic community.

### *Output 1: Publication*

Partners of HERMES together with IFLA DDRS Committee members have written a manual entitled "Document Delivery and Resource Sharing: Global perspectives". This manual, in addition to reflecting on the meaning and practices of RS nowadays, wants to foster the emergence of a common European and international perspective.

The manual starts with a Manifesto, that aims to be an update of the Manifesto of the Rethinking Resource Sharing initiative of 2007 ([Rethinking Resource Sharing Initiative, 2007](#)). The new Manifesto emphasizes the idea of reducing boundaries: the libraries are gateways to the whole world's cultural heritage. Researchers from anywhere in the world are our users.

This manual also wants to explore the current state of the European and international resource sharing systems, to understand how they work, and the challenges they face, as well as to stimulate the communication of best practices and technical advances.

Another objective is understanding the impact of copyright laws and regulations on our service, along with the impact of the terms of the licences. The publication also presents practical issues relating to management and content access to help librarians and other stakeholders improve skills to locate and obtain documents, with a particular focus on Open Access.

So, the expected impacts of the publication would be:

- wider knowledge of resource sharing
- better understanding of existing systems
- guidelines for legal issues that affect ILL including copyright and licensing
- development of a shared vision for cooperation between national systems

This manual is now under peer-review at IFLA. It will be published as an IFLA professional report in IFLA series, under Creative Commons licence.

### *Output 2: TALARIA software*

Due to the COVID pandemic, it has become impossible for many libraries to complete their activities. However, users' information needs have increased as a consequence of this situation. With the help of IFLA's DDRS Committee members and volunteer librarians from all over the world, it was possible to create the initiative "Resource Sharing during COVID-19" – RSCVD (or "Received"), a service that enables libraries around the world to request materials needed by their users from other libraries that can provide them.

Currently, the website RSCVD.org has an interface based on a web form powered by Open Access Button (built by OA.Works) where users can submit their requests, and the back-end is managed by volunteers through a Google Sheet to manage requests and delivered through OAB's InstantILL.

The service is efficient, but the handling of requests is done manually. In this context, HERMES comes into play. In Greek mythology, Hermes is the messenger of the gods. He wears a pair of sandals that allow him to fly as fast as the wind to deliver messages that were assigned to him. Output Two of the HERMES Project aim is to build, or deliver, a new resource sharing platform called TALARIA, open-source software that will enhance the existing RSCVD system, improve the document-sharing tools already used worldwide and ensure independence from commercial platforms ([Mangiaracina et al., 2022](#)). Just like Hermes' sandals, TALARIA will deliver resources reliably and quickly between libraries, and the RSCVD international community will be the first to use this new software.

## TALARIA's technical features

TALARIA development is led by CNR Dario Nobili Library Bologna, which is also the developer of the Italian NILDE software for document delivery (Guerra, 2023). The software will be released as open source software, it will use only free open source third-party software solutions, such as plugins, API and external services. TALARIA is also designed to support library communities (or consortia) in their RS management, for instance: the RSCVD international community, the NILDE community (Italy), and any other national, regional, consortium community willing to use it for their RS management needs since it is designed to be a flexible platform. For this reason, TALARIA offers the possibility to customize configurations. Most of the pillars of the TALARIA software that are already been implemented have customizable features, first of all, the visual identity (logo, TALARIA colour scheme), in order to respect the graphic identity of each RS community. The library communities can customize their Community policies on retrieving the ILL costs: document exchange among libraries can be set up to be free of charge, free of charge with an imbalance threshold or with a fixed unit cost. Another customization regards the Library RS profiles, depending on the community to which the library belongs, they can choose between a “Basic profile” to request only and “Full profile”, where every library is borrower and lender and can request and provide resources.

The user registration and authentication systems available include traditional access with e-mail and a password; Federated Access, a simplified way to access online services, made possible by agreements between content providers and federations of research institutions and organizations based on SAML (Security Assertion Markup Language) and through Social login, which enables users to authenticate themselves through their accounts on social networks such as Facebook and Google.

TALARIA introduces the user roles: the Library Operators are responsible for managing the RS workflow. The role of the Library Manager is acquired when a user registers a new library or when their account is associated to a library with that role. The Library Manager has complete control over all operations (borrowing, lending) and is the one managing their library, or multiple libraries, inside the system. The permitted actions are to invite, add, remove and delete the other Library Operators of their own library. The other user roles are the Borrowing Operator and the Lending Operator, which only handle respectively the submissions and the fulfilment of requests.

TALARIA also has an environment dedicated to end-user management, where patrons can collect their bibliographic references and make a request from a library they are associated with. This feature enables user requests that each library can decide to set up or not.

In order to use TALARIA, libraries have to be registered and the system asks them to provide the GPS coordinates (latitude and longitude) of the library's location. They can

be set manually, if known, or they can be automatically detected if the librarian is inside the building.

The Open Access Search and bibliographic citation import are the major features. Through the TALARIA homepage it is possible to immediately search and import bibliographic references in the search box in different ways, by unique identifiers such as DOI, PMID, ISBN or by the title of the resource and automatically import the bibliographic metadata. A new reference can also be imported via the OpenURL protocol. Alternatively, it is always possible to fill in the form manually by “Go to form” option. The search activates the Open Access button API, which can check whether a resource is freely available and whether an archived version exists in an institutional repository (Fig. 2). If the resource is available, the URL to the resource or the resource itself is immediately available through the TALARIA user interface, as in the current RSCVD software version.

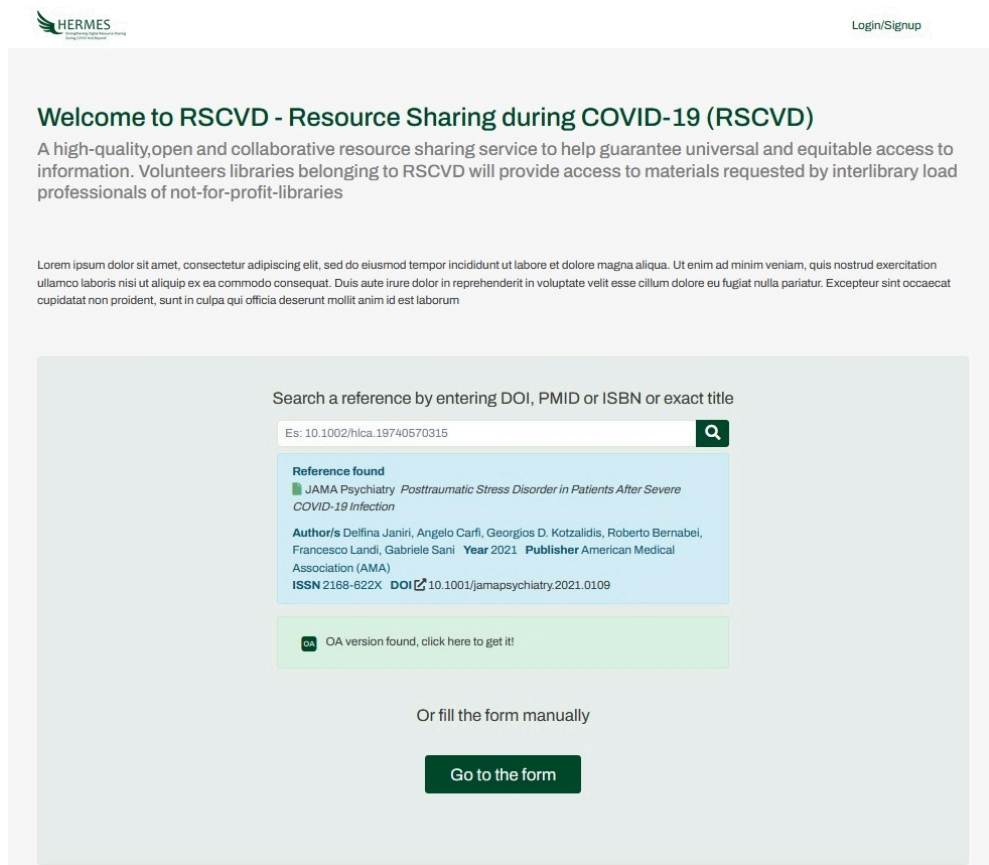


Figure 2: TALARIA homepage showing an Open Access reference that has been found

In TALARIA, librarians can manage requests in two environments: Borrowing and Lending. Each request has an ID, the status of the request, the name of the operator creating

the request and the date of entry. The bibliographic reference is provided in a short form. Since TALARIA is a very articulate piece of software, icons have been used for the interface: each icon corresponds to an action that the librarian is permitted to do.

The Borrowing environment for the request submission is composed in “New request”, “Pending requests” and “Archive”. A new request can be opened to view the detail and the full bibliographic reference, it can be sent to a library or it can be cancelled. It is possible to modify the bibliographic reference, search for the OA version (this action will be possible until the request is sent to a Lender library) or retrieve the OA version of the resource and check own holdings if a link resolver has been set up. In the event of unfulfilment, the actions permitted are the reiteration of the request to another Library or archiving it as unfulfilled. Furthermore, creating one or more tags for each request is possible. A request can be sent to a single library or to “All libraries” in the system. This second option is suggested when the search in the catalogues does not generate any results or the request has been unfulfilled several times. The Archive panel allows the storage of the concluded borrowing requests.

Request processing and fulfilment are managed in the Lending environment. Besides the Archive, there are two relevant panels: Pending requests and Orphaned requests.

Pending requests displays all the requests that are made to the user’s own library. In order to manage the request, it is always necessary to accept to fulfil it. The fulfilment supports a set of delivery methods: Secure E-Delivery (SED) embedded into the system, Article Exchange and via URL. The idea behind the URL came from RSCVD: volunteer librarians noted that some of the requested resources were available in public digital archives in the form of digitized documents. This makes it possible to send the resource directly through a direct URL. Otherwise, a library cannot fulfil for a variety of reasons. Reasons for non-fulfilment are:

1. not available for ILL
2. not held
3. not on shelf
4. wrong reference
5. ILL not permitted by licence or copyright law
6. order exceeding the maximum number of requests

A borrowing library may ask for the cancellation of a request once the request has already been forwarded to the lending library. In this case, the lender library can accept or not the cancellation request.

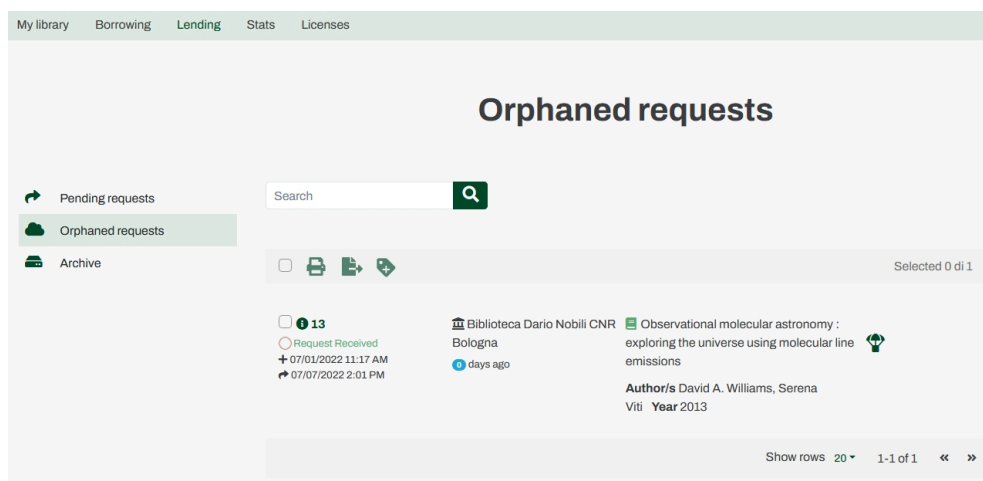


Figure 3: Lending environment in “Orphaned requests” panel

The requests sent to “All libraries” are displayed in the “Orphaned requests” panel (Fig. 3), a secondary mode of requests. Orphan requests must be accepted to be managed. At this point, the request disappears from the panel “Orphaned requests” for all libraries and the request will be only in the accepting library’s “Pending requests” panel.

## TALARIA state of development

The RSCVD community will start using TALARIA in 2023, after the release of TALARIA 1.0, but the development is not complete.

Discussion with RSCVD volunteers and librarians is fundamental to the development process in order to gather feedback, detect bugs and make improvements. They have been involved in software testing several times since the beginning of the project. The TALARIA demo of the first prototype was presented in December 2021 by the software team to the CBN (NILDE Libraries Committee), which is the guarantor of the functioning of the NILDE community, and involved 20 librarians. In February 2022, the software was presented to a group of 30 RSCVD librarians. In summer 2022 TALARIA vers.Alpha was tested by 12 partner librarians and HERMES Scientific Committee. The users were assigned tasks for checking the proper functioning of the software with the support of the draft software user manual. At the end of the tests, a meeting of the whole group was arranged with the developers to discuss the results of the feedback.

For the TALARIA 2.0 release, work is planned on the supporting the connection with other RS systems, based on ISO-18626 protocol, licence management, catalogue search, payment management and statistic reports. Connecting to other RS systems is in fact one of the most difficult challenges. The ISO 18626 Interlibrary Loan Transactions stan-

dard is the protocol that will be used to ensure interoperability among the different ILL systems. ISO 18626 is based on XML and Web services. The aim is to make uniform/standardize management communication between the different ILL software used by libraries all over the world and thus fill the gaps when documents cannot be found in national RS communities. In addition, the first version of the software user manual will be released in 2023.

### *Output 3: Training activities*

Another output of HERMES are the training activities and tools. These activities are designed by a HERMES Project team led by the MEF University, and they are directed at the two target groups that the project is intended for: the librarians, especially the staff of interlibrary loan and document delivery services, and the academic community in general: students, teachers, and researches.

For the librarians, the HERMES team has planned to do webinars and tests about the TALARIA software, in order to present it to the librarian community, and to evaluate it with the librarians' feedback. These webinars will be launched when the beta version of the software is ready. Along with this presentation, some other webinars about topics covered by the publication will also be launched. Topics include resource sharing, and practical knowledge and instruments for a more effective service. The goal is to share professional knowledge between librarians and to learn about the new "Received" software and service.

The intention is to launch these live webinars to volunteer librarians pertaining to the HERMES associated partners, and to the RSCVD community. Eventually a final version of the webinars will be recorded and kept on the IFLA website, subtitled, open and free.

The planned training activities and tools for the academic community consist of a set of six live webinars. The webinars are about:

- Introduction to Open Access
- Open Access ethic matters. Legal, national, and EU mandates. Initiatives. Trends
- Copyright and licences
- Resource discovery. Use cases in the academic field
- How to get the information. Sources and Tools
- Future directions

A training activity has already been undertaken with the students in Librarianship at the University of Hacettepe (Turkey) in March 2022. Despite the difficulty stemming from the fact that the webinars were in English, the sessions were highly valued by the students.

Another training activity was held during the IFLA DDRS 2022 Meeting in Qatar,<sup>2</sup> where the professionals who attended it had the opportunity to attend training sessions about HERMES and TALARIA, resource discovery, Open Access and copyright and licences.

## Conclusion

The HERMES Project will end on 30 April 2023, with the 5th Transnational Project Meeting held in The Hague (The Netherlands), the headquarters of IFLA.

The new training activities will be focused on TALARIA software. In January 2023, a training session was held in Istanbul for RSCVD volunteers in Turkey. HERMES' YouTube channel has been updated with the new webinars for librarians and the academic community.<sup>3</sup>

The project is ambitious and challenging, as are the expected results. HERMES Project and RSCVD initiative want to build a community of libraries willing to share their resources internationally, crossing national and cultural borders and solving problems related to the connection between the different ILL systems. To educate librarians and academics about the principles and practices of resource sharing, especially with the support of online free training resources.

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Carmen Lomba (1964) has a degree in History of Art (University of Valladolid). She has been working as librarian at the Library of Cantabria University since 1989 and has been responsible for the Interlibrary Loan–Document Delivery Service (ILL-DD) since 1995. She is currently part of the Working Group on ILL-DD for REBIUN (Network of Spanish University Libraries) and has been a member of the NILDE Internationalization Working Group since 2019. She participates as a volunteer in RSCVD initiatives and works in the European project “HERMES –Strengthening digital resource sharing during COVID and beyond” ERASMUS PLUS PROGRAMME, led by the Italian CNR (*Consiglio Nazionale delle Ricerche*) 2021-2023. She is a member of the IFLA Document Delivery and Resource Sharing (DDRS) Standing Committee (2021-2025).

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Stefania Marzocchi (1969) is a librarian and project manager. Her collaboration with the Italian CNR (*Consiglio Nazionale delle Ricerche*) started in 2018 and is related to the implementation of CARONTE, BRAIN@WORK, and HERMES project activities, all funded by the European Commission. She is experienced in the design, management, and evaluation of international technical assistance projects with specific reference to the field of methodological approaches to research activity.

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Debora Mazza (1996) graduated in History and Oriental Studies from the University of Bologna. She has been collaborating with Dario Nobili CNR Library in Bologna since 2019.

She is in charge of the library's communication activities (graphic design, social media, website management) and she is involved in front-office, reference services, and document delivery with NILDE. She also develops the TALARIA software as part of the European HERMES Project.