October 2026

Memphis, TN

'All shook up:' What's new and what's next in OCLC resource sharing

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A MESSAGE FROM

Joanne Marek

Director of Resource Sharing, OCLC

Schedule a meeting with Joanne at: **oc.lc/booktime**

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Together...
we create
technology
with a
purpose.
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A global library and information organization providing

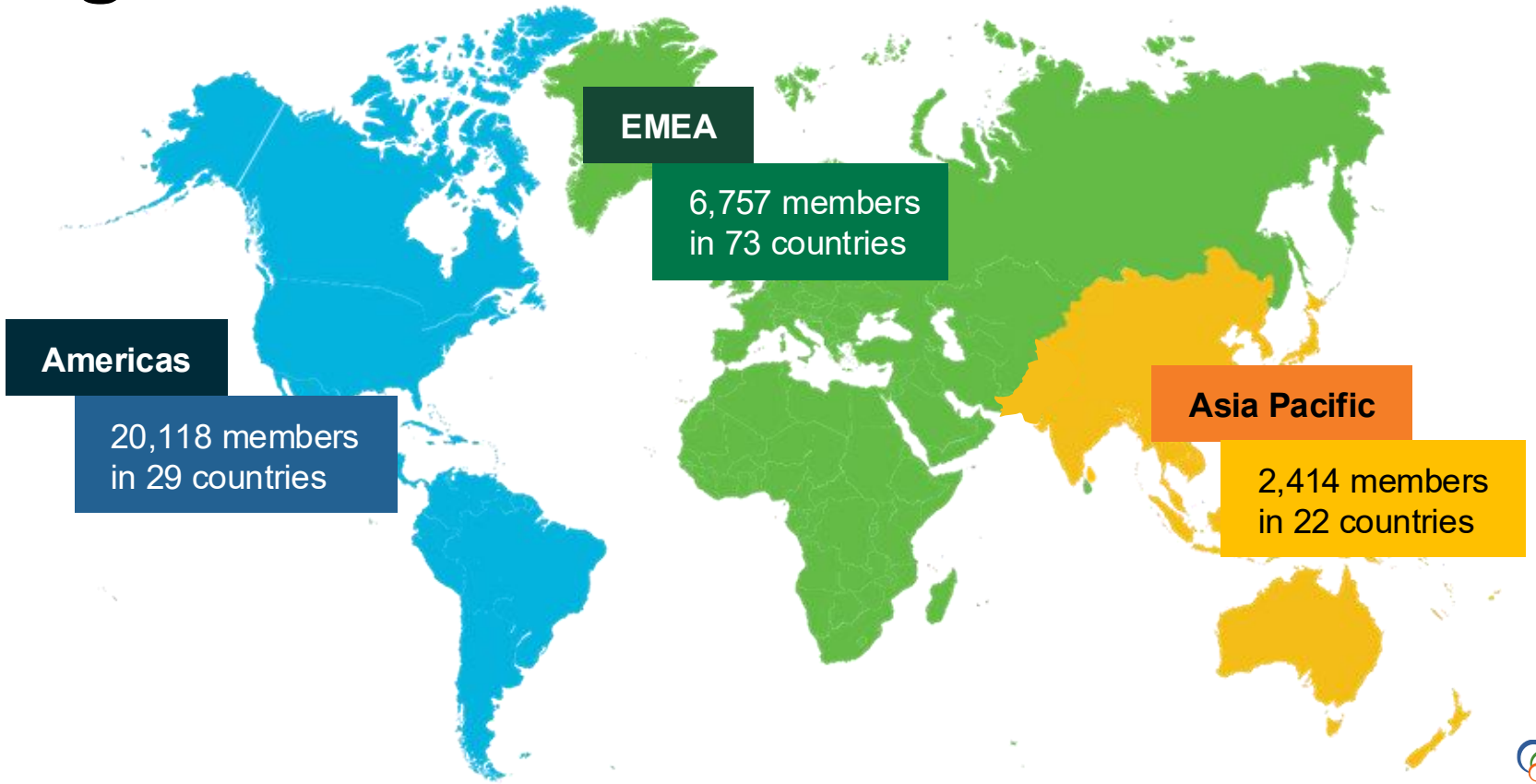
- shared technology services,
- original research, and
- community programs.

A not-for-profit company, whose leadership represents libraries around the world, not shareholders or venture capitalists.

The majority of our Board of Trustees are library leaders.

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A global network of libraries

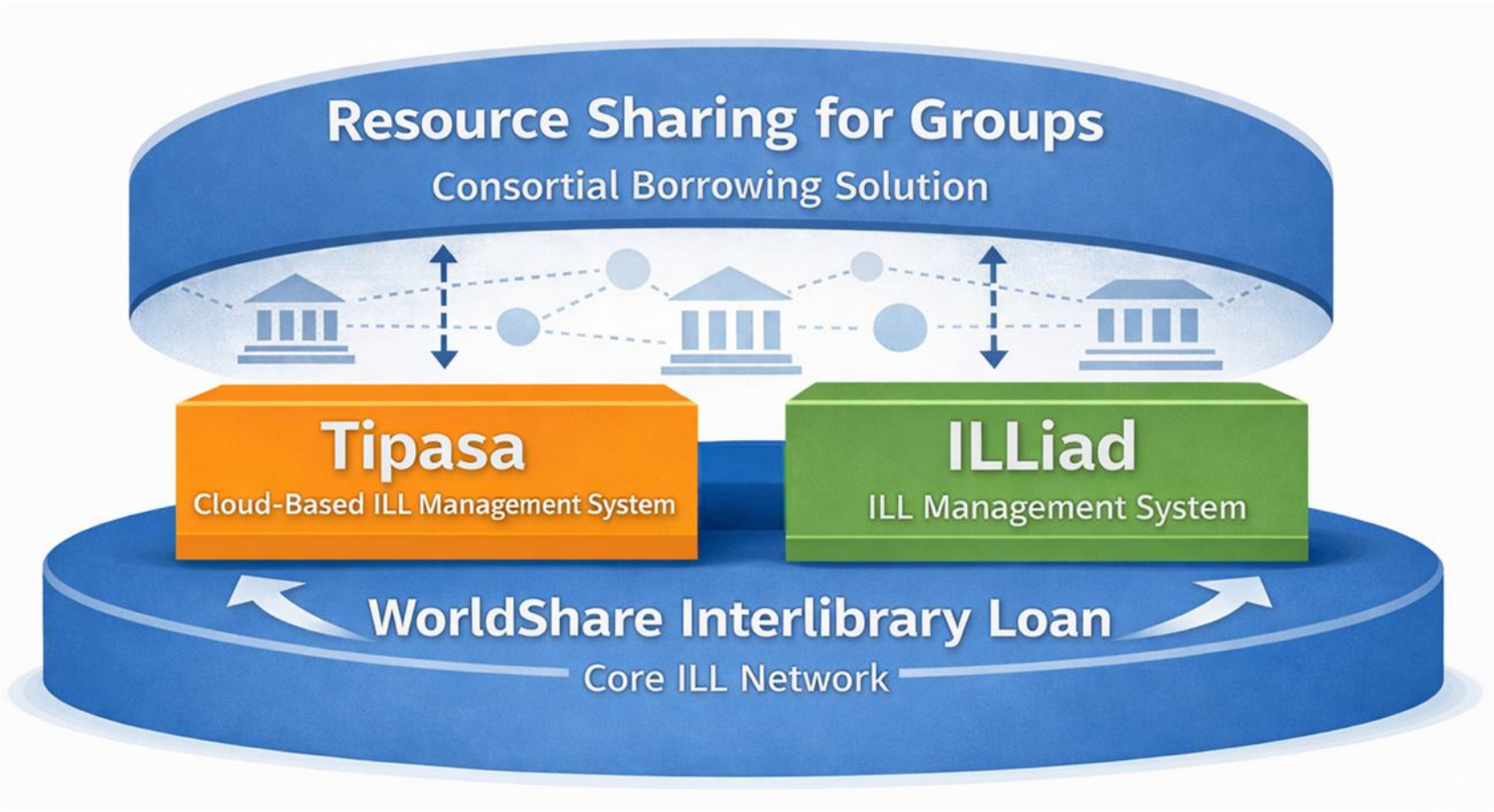


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A resource sharing update

ILLiad, Tipasa, Resource Sharing for Groups, and WorldShare ILL

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Resource Sharing for Groups
Consortial Borrowing Solution
Tipasa
Cloud-Based ILL Management System
ILLiad
ILL Management System
WorldShare Interlibrary Loan
Core ILL Network

10,000 libraries. No silos.

Libraries on the OCLC global network are filling an ILL request every second.

- Your preferred partners are already among them
- Choose your lender from any WorldShare ILL supplier, not restricted to your membership in a predefined group

One system. One queue. One place to look.

What can your library users ask for?

Other systems

- Show limited resources restricted to specific libraries

However, *research needs don't stop at your partners' shelves*

OCLC system

- Request any of the **600+ million records** in WorldCat
- Request from a network of **10,000 libraries** worldwide
- Find a supplier on your terms

Consortial borrowing without a second system



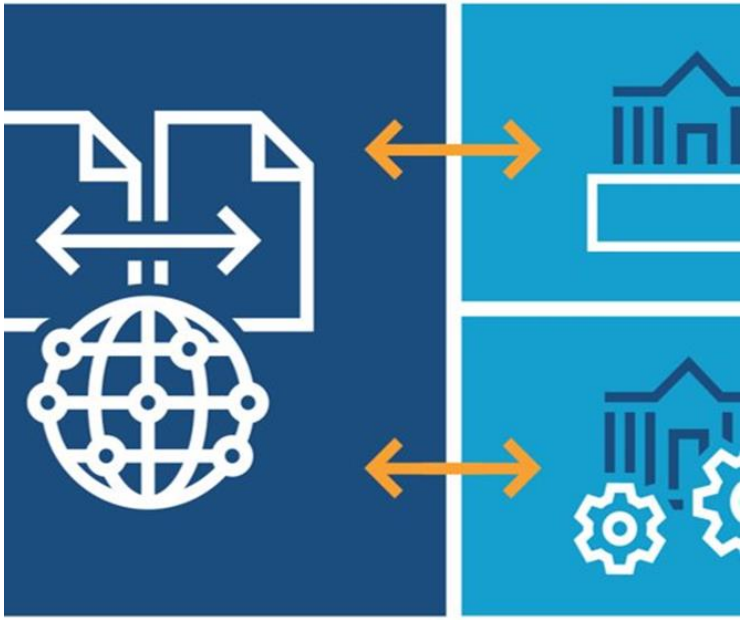
OCLC Resource Sharing for Groups

- **For library users**, faster delivery
- **For library staff**, fewer requests to touch by hand
- **For your group**, all 10,000 libraries on the network if you also have Worldshare ILL, Tipasa, or ILLiad

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OCLC Resource Sharing for Groups



Offers choice and flexibility (ILS, discovery service, and ILL service)

Standards-based: Connects with most ILSs

Builds on smart fulfillment functionality to provide automated workflows



This system has allowed us to simplify workflows and provide faster access to materials, which is critical for our academic community.

Emily Campbell
Document Delivery Director
University of Michigan
BTAA member

Improving accessibility

OCLC

Global commitment

Americans with Disabilities Act (ADA) Title II update

- Clearer requirements than current ADA Title II
- Platforms and content purchased with federal funds must meet WCAG 2.1 AA
- In effect April 24, 2027

Accessibility commitment

OCLC is committed to **inclusive design** and as part of that, **usable and accessible** products for all

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We build to Level A and AA of the W3C Web Content Accessibility Guidelines (WCAG) 2.2

OCLC interfaces should be:

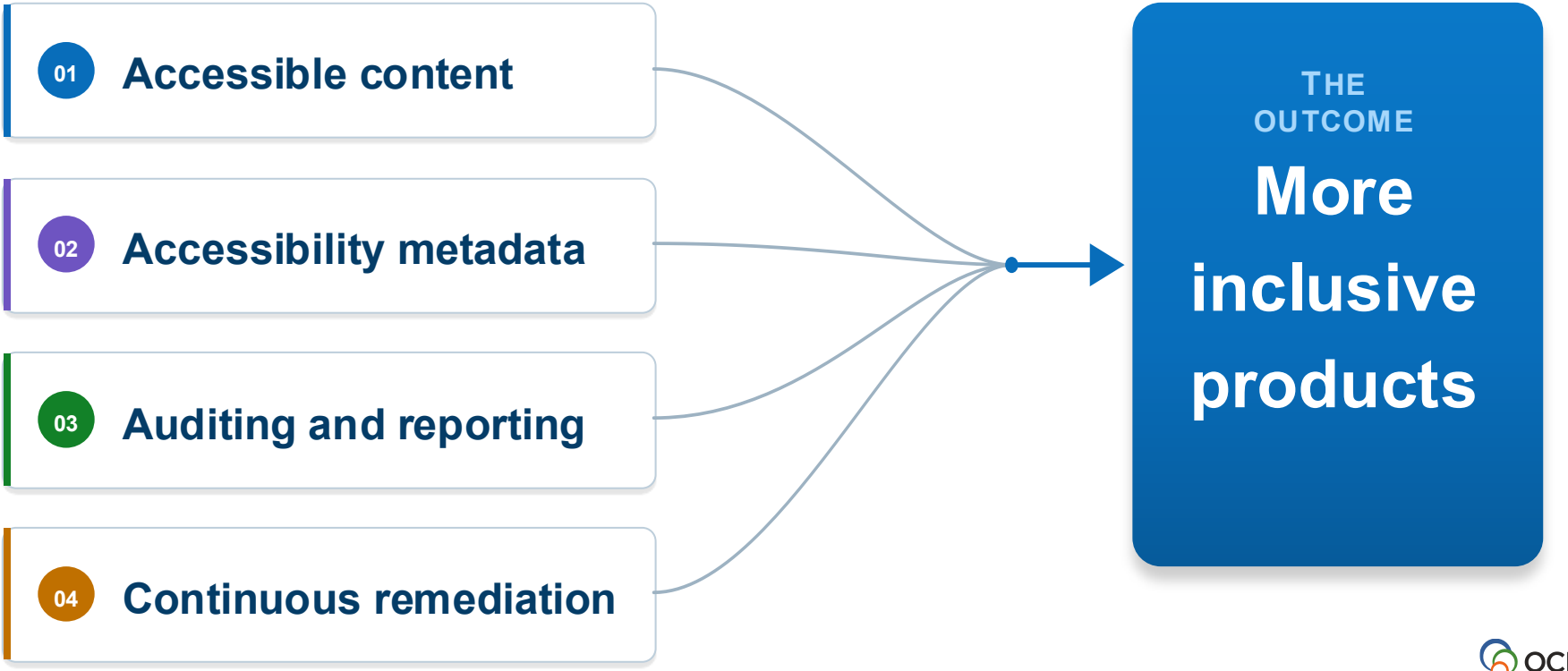
Keyboard-operable

High contrast

Clearly labeled

ACCESSIBILITY APPROACH

Four activities that together create accessible products



New! Optical character recognition (OCR) in Article Exchange

What is it?

OCR is a technology that converts images of text—such as scanned documents, photos, or PDFs—into machine-readable text.

Article text becomes searchable and selectable, with enhanced accessibility.

How does that help?

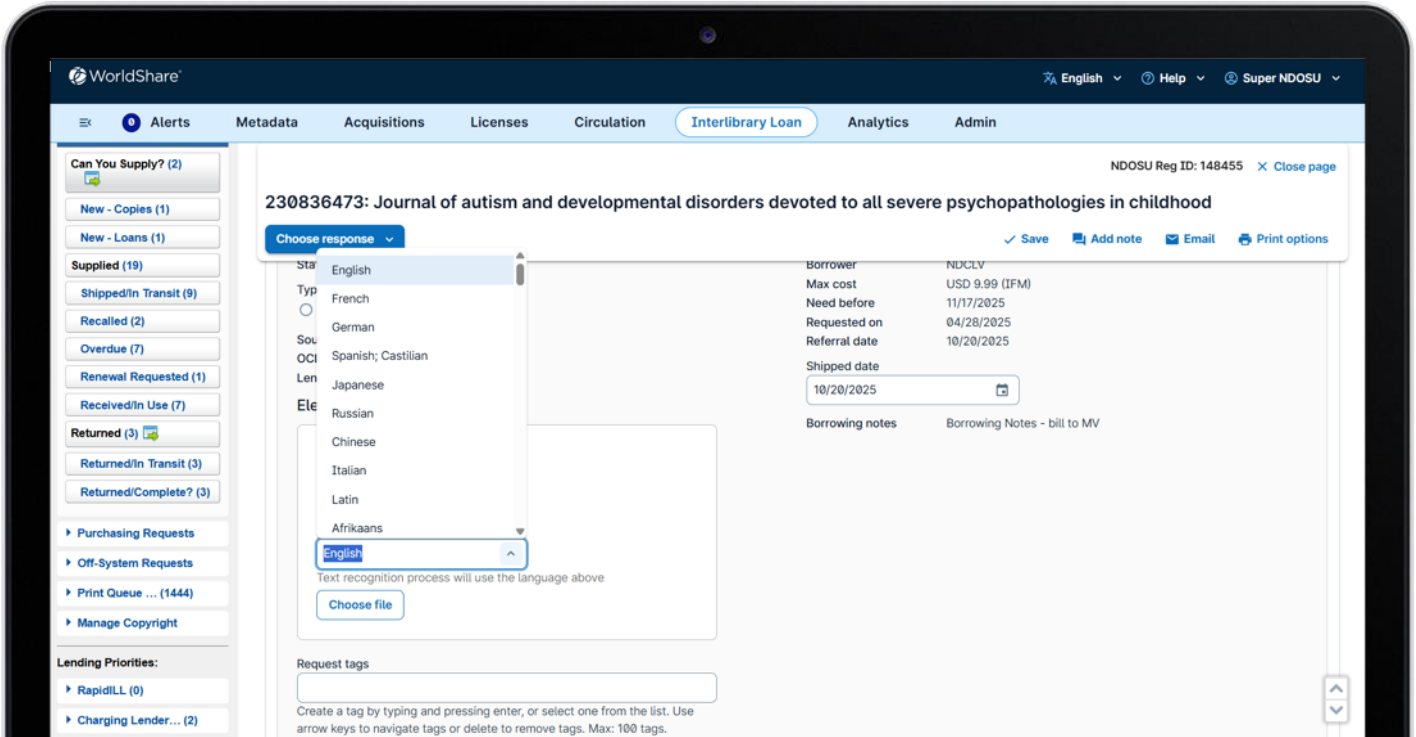
- Library users can search and find key terms, plus copy and paste text easily
- Screen readers can interpret text for improved accessibility
- ILL staff save time and money on document conversion software

OCLC

What gets OCR-ed and when?

- When the lender uploads to Article Exchange:
  - Each individual page is checked
  - If a page has any evidence of OCR or remediation, the page is not touched
  - Any pages that have not been OCR-ed yet are OCR-ed
- Tested many documents supplied by libraries and made improvements
- When document is delivered to borrowing library, it is already OCR-ed; if OCR fails, document is still delivered

OCR for Article Exchange supports 153 languages and scripts



OCR in action

71 languages
processed

Top six: English, French, German, Italian, Spanish, and Chinese

Also included: Yiddish, Ancient Greek, Esperanto, and Sanskrit

20,600,000+
pages

Averaging 110,000+ pages per day

Average processing time per document: <60 seconds

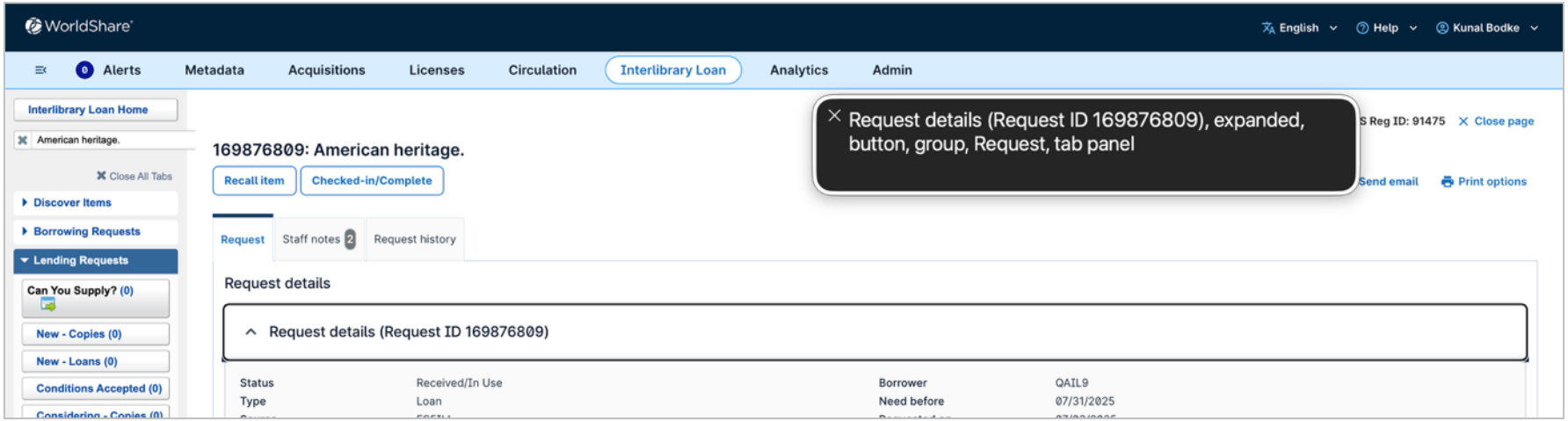
New! Updating the staff interface for accessibility

WorldShare® Interlibrary Loan | Tipasa® | Resource Sharing for Groups

- **Goal:** Provide a solution that enables efficient ILL staff workflows while improving accessibility.
- **ADA Title II:** many interface updates were made to prepare for compliance with ADA Title II and accessibility requirements by April 2027

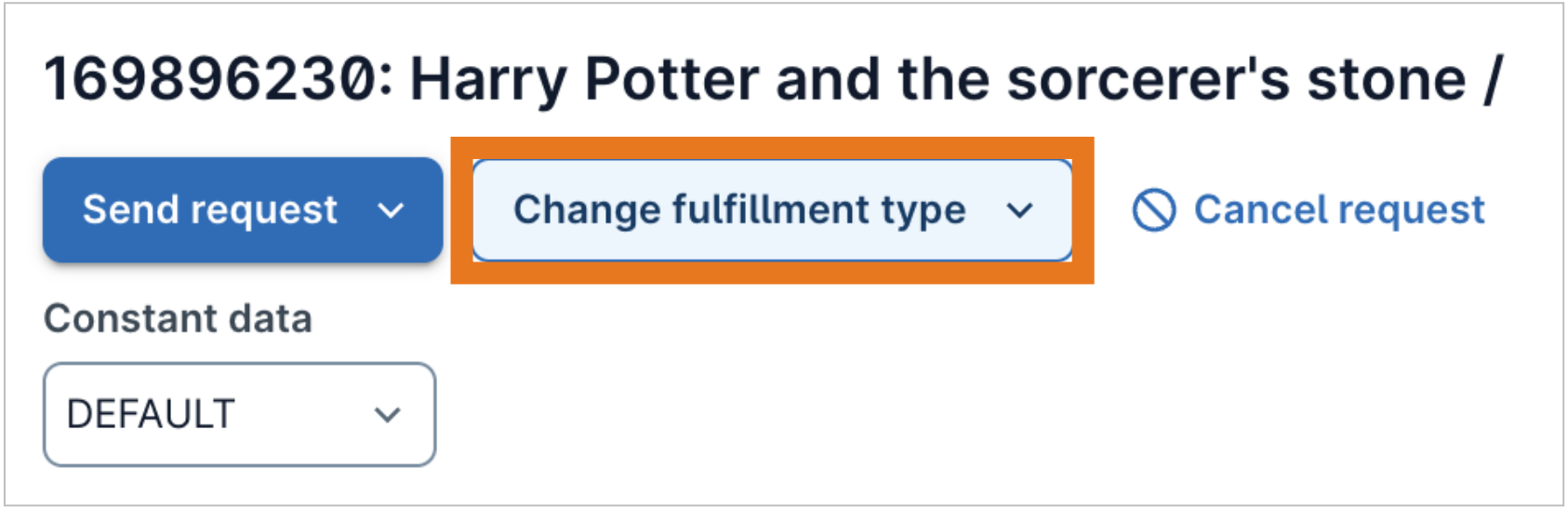
Example of an accessibility update

Improved navigation: Consistent headings, uniform data grids and tables, and keyboard-navigable components ensure structured, predictable navigation for users, including those using assistive technologies



Example of an accessibility update

Better focus tracking: To help keyboard users easily track location on the page



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2026 release calendar



Sep/Oct:
Staff interface

November:
Service Configuration

January:
Policies
Directory

Other key improvements (available now)



Automate your processes with Automated request manager (ARM)

What is it?

You decide how patron requests are handled

Checks deflection and license terms up front

Smart lender strings sorted by turnaround time

For both borrowing and lending

HOW DOES IT HELP?

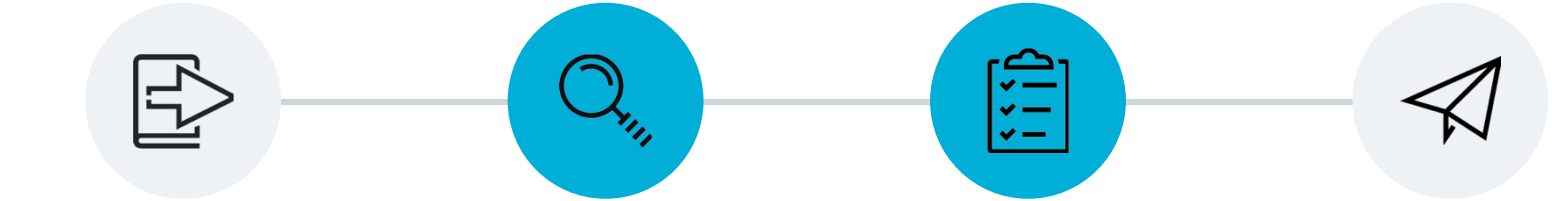
You stay in control: review the lender string, or send it straight out

Patrons wait less

Load leveled on queue depth, so a swamped lender isn't asked first

Two enhancements you already have

If you're using borrowing automation that builds a lender string or sends requests to lenders, there's nothing to configure. Both are already working for you.



Now finds multiple acceptable records

Now built even when you hold the item

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Use automation to find more lenders with multiple bibliographic matches

BEFORE

One best-matched WorldCat record (the most widely held)

NOW

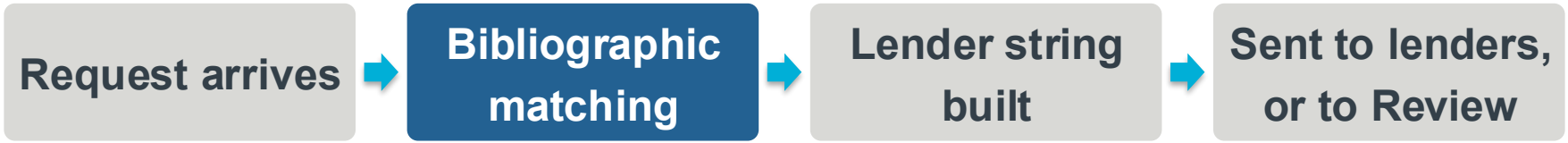
Every acceptable match, narrowed to your custom holdings path

Why it matters

- Libraries set holdings on different records for what is functionally the same item.
- More of your preferred lenders make it into the string, and from earlier groups in your path.
- Better fill rates, less staff review, and nothing to configure.

Edition preference now guides bibliographic matching

New in October - Specify edition preference in Staff Interface or via Patron Request forms



This edition + OCLC number

Matches only that OCLC number. No ISBN or ISSN broadening.

“Large print” in edition text

Matches only large-print print-book records in WorldCat.

Any edition and Most recent edition work the same as before.

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Lender string for locally held items

BEFORE

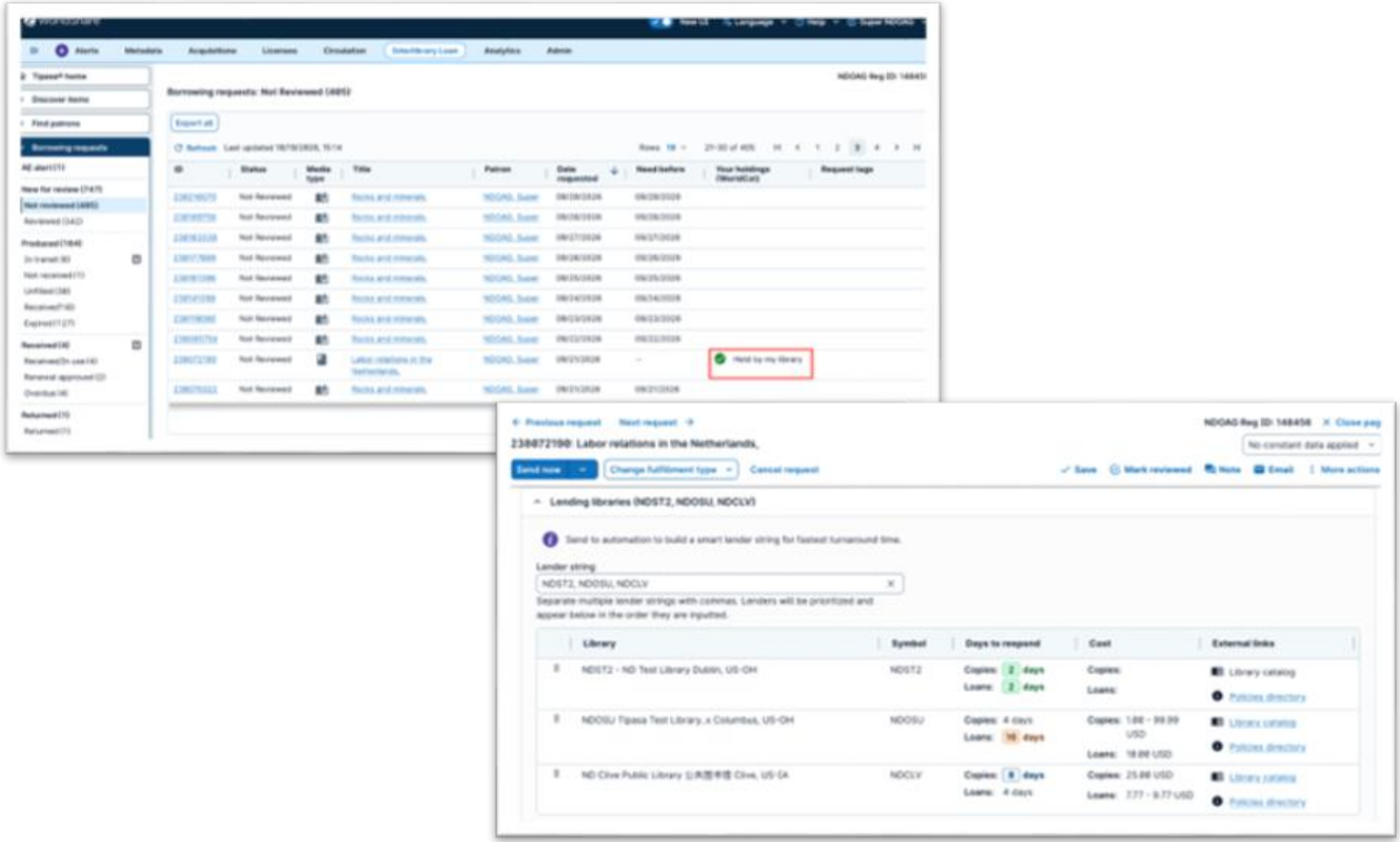
No lender strings were built if an item was locally held by the borrowing library

NOW

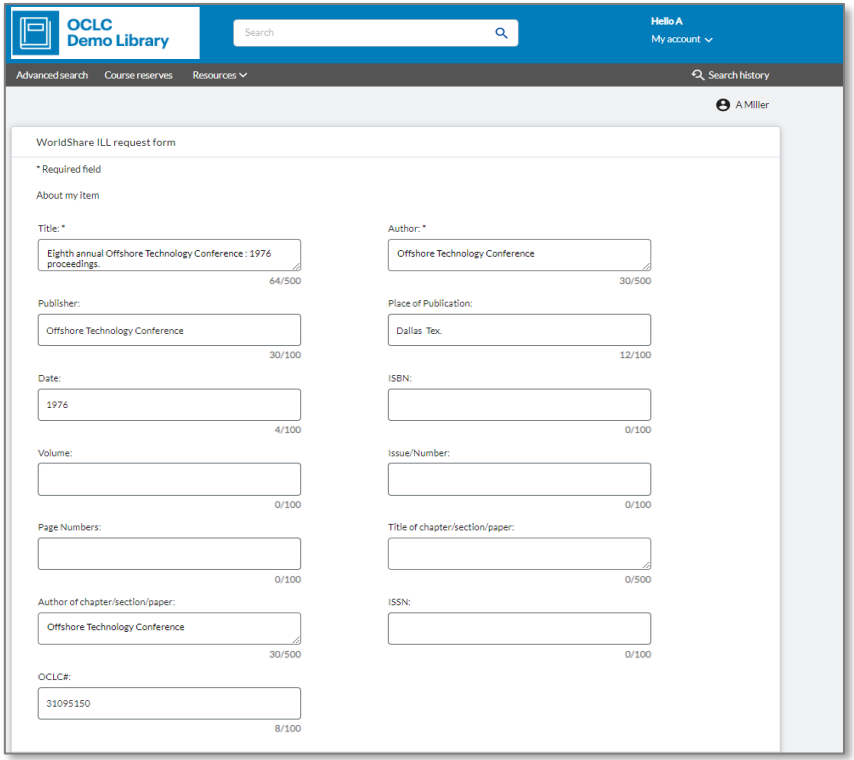
The lender string is built, then the request routes to Review

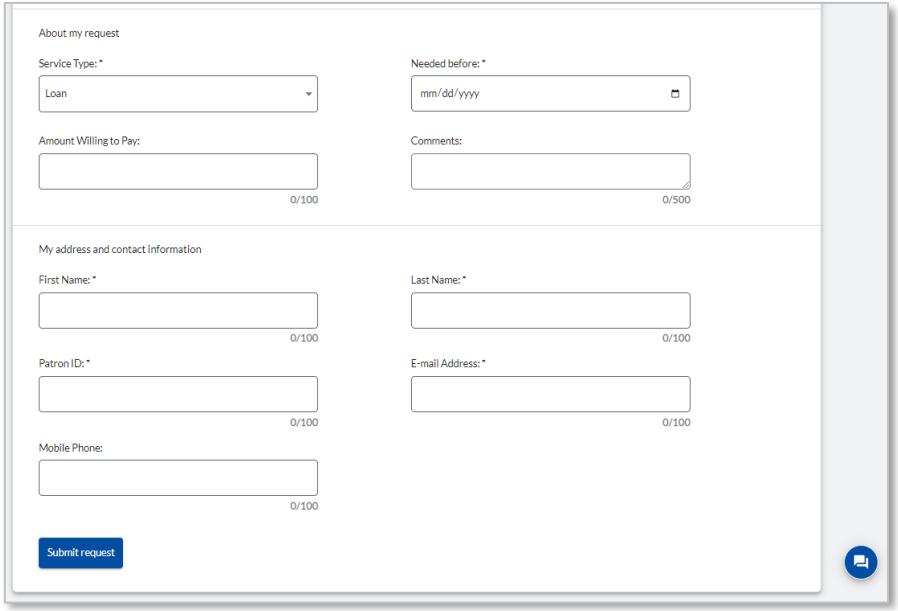
Why it matters

- Local copy checked out, at another branch, or not right for the patron? The lenders are already there.
- No rebuilding a lender string from scratch, and no manual lender research.
- Nothing to reconfigure. If your borrowing automation already builds a lender string or sends to lenders, you have it now.


Borrowing requests: Not Reviewed (485)
Held by my library
238072100: Labor relations in the Netherlands,
Send now
Change fulfillment type
Cancel request
Lending libraries (NDST2, NDOSU, NDCLV)
Send to automation to build a smart lender string for fastest turnaround time.
Lender string
NDST2, NDOSU, NDCLV
Separate multiple lender strings with commas. Lenders will be prioritized and appear below in the order they are inputted.
Library
Symbol
Days to respond
Cost
External links
NDST2 - ND Test Library Dublin, US-OH
NDOSU
NDCLV

OpenURL request forms





oc.lc/ill-form

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ILL request transfer

- Enables ILL requests to be transferred from your library system to Tipasa or WorldShare ILL for fulfillment
- Saves time by eliminating the need to rekey ILL requests
- Ability to manage *all ILL requests* via Tipasa or WorldShare ILL interfaces

Available for these library systems:

- **Ex Libris** (Alma)
- **Innovative** (Polaris and Sierra)

oc.lc/ill-transfer

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Integrate with your circulation

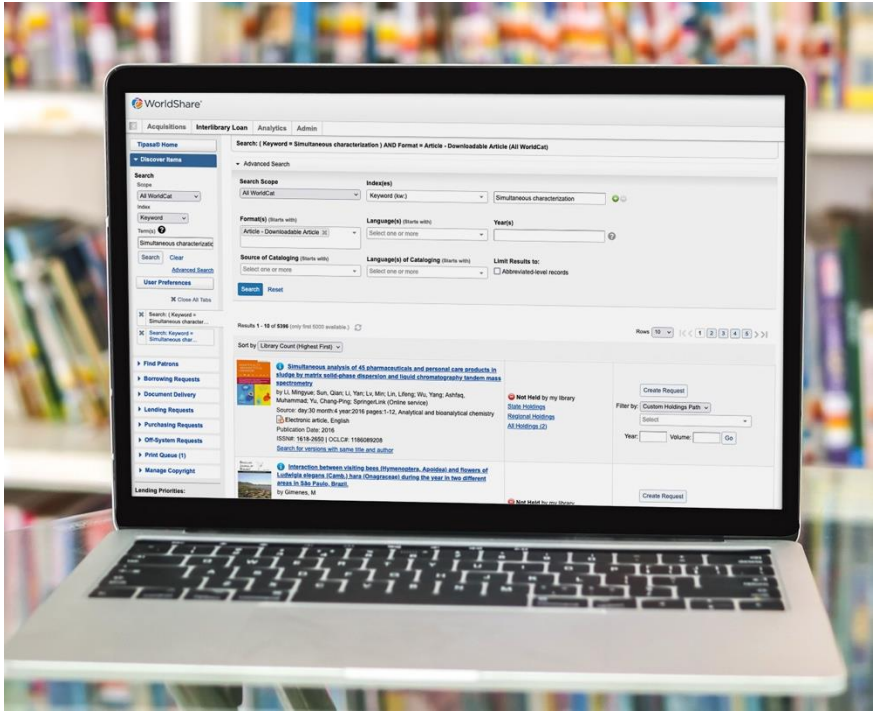
With NCIP circulation integration, Tipasa and Resource Sharing for Groups can...

- Keep ILL and circulation systems in sync, save staff time.
  - Automatically create temporary circulation records and place holds for items borrowed.
  - Automatically mark items lent to other libraries as unavailable, then move them back to available when they’re returned.
  - Currently available for Sirsi (Symphony and Horizon), Sierra, Millennium, Alma, WMS

Additional option for Tipasa and Resource Sharing for Groups libraries using Alma

Fulfillment integration:

It enables loan borrowing requests started in Ex Libris Alma or Primo to be fulfilled in Tipasa.



Benefits of Tipasa's Alma fulfillment integration



Patron: Views ILL requests and circulation information in same interface



ILL Staff: Save time by not manually entering requests from the local system



IT Staff: No patron data in Tipasa, no need to setup authentication

Coming next

Dynamic groups

Rebuild themselves from live network data, using machine learning

- **Your requirements.** Turnaround, loan period, cost, geography, IFM
- **All or nothing.** A lender qualifies only if it meets every one
- **Real behavior.** How lenders actually perform, not what they reported
- **Your pool.** The whole network, or a subgroup you define

What that means for you...

- You write the requirements. We go find who meets them.
- Different request, different requirements.
- Chosen at the moment of the request, not at signup.

The group isn't something you join. It's something you describe.

Unlimited assistance

- **Training**: Live, instructor-led sessions, plus recorded sessions and video tutorials (oc.lc/training)
- **Customer support**: Telephone and email (oc.lc/support)
- **Documentation**: Help pages and release notes (oc.lc/help)
- **Access to the OCLC Community Center**: Connect online, stay updated (oc.lc/community)


Together...
we build
stronger
communities.
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Q&A

Thank you!

Schedule a meeting with Joanne at: **oc.lc/booktime**

OCLC Support
support@oclc.org