

Just in time Interlending - the ODL perspective

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Abstract:

In this paper the current Interlending situation is viewed from a South African Open Distance Learning (ODL) Library perspective, first sketching the development of interlending from the 20th Century to current ILL practices. Technologies in support of just in time delivery of interlibrary loans at the ODL Library are discussed. The results of a snapshot survey sent to South African libraries in February 2014 on Sabinet's ILL listserv are considered to indicate how Library clients in South Africa view the importance of just in time interlibrary loans compared to the needs of clients in an ODL Library.

Since Interlending in South Africa has mirrored international developments right up to OCLC's Worldshare ILL, the paper will further discuss the characteristics of Worldshare ILL which has been used by some South African Libraries since August 2013. Benefits flowing from this system as experienced by the Unisa Library as an ODL Library in South Africa, will be highlighted.

Keywords: South African interlending; interlending technologies; ODL; Worldshare ILL; resource sharing

Introduction

In any discussion on the confluence for knowledge, the value of resource sharing through interlibrary loan services needs to be included since this service enhances the accessibility to all available knowledge. No other conference theme could have grasped the attention of interlibrary loan workers better than the IFLA Conference theme in 2014, i.e. *Libraries, citizens, societies: Confluence for knowledge*, since their work supports the building of strong libraries, citizens and societies which enables a confluence for knowledge.

Background information

Background information on South Africa and its interlending services as well as the University of South Africa is provided to set the context in which resource sharing and the interlibrary loan service of the country's only Open Distance Learning (ODL) institution takes place.

South Africa has nine provinces covering a vast area of 1,219,090 square kilometres (Central Statistics Service, 1995) at the southern tip of Africa. The country has densely populated areas with established infrastructure, for example, it is rated as one of the top ten internet users in Africa (Internet world stats 2012:1). It also has vast rural areas, sparsely populated with no basic technological infrastructure. There are 26 academic libraries within the country's library and information services (LIS) field (South Africa 2013:1). These libraries are well equipped with the necessary infrastructure to facilitate resource sharing and interlibrary loan services. The country's ODL Library forms part of this library category.

Interlibrary loan developments in South Africa

Interlibrary loan services provided by academic libraries contribute positively towards research in South Africa since it aims to allow access to all scholarly information resources worldwide. The National Library of South Africa serves as the backbone of the service because it is responsible for the co-ordination of the country's resource sharing activities. This Library ensures that worldwide developments in interlending are monitored. These international developments have influenced developments in the South African interlibrary loan services, particularly since the 20th Century to current ILL practices. This led to the adoption of world standards for interlibrary loans and the shift away from manual processes, and systems such as card and microfiche catalogues (Lor 1992:737).

In the course of the 20th century, academic libraries in South Africa also benefitted from CD-ROM technologies and the Internet for enhanced access to information as clients became more aware of available information resources (Lor 1992:737). Academic libraries became members of the South African Bibliographic and Information Network (SABINET). The SABINET computerized system was established in the early eighties, with a view to facilitate resource sharing through electronic transactions between South African libraries. It incorporated all location tools such as joint catalogues of the respective resources and various databases (Raubenheimer and Van Niekerk 2002:18).

Resource sharing initiatives in South Africa were further enhanced in the 1990s as academic libraries in South Africa started to work more closely due to the formation of library consortia in various provinces. These libraries invested in more sophisticated discovery tools to enhance access to own collections while using the SABINET system for the facilitation of interlibrary loans from and to member libraries of the respective consortia. A strong emphasis was placed on the rapid delivery of required items available nationally. Courier services were implemented to speed up the delivery of print material between libraries and libraries had to adhere to agreed service objectives pertaining to the filling of requests. The Unisa Library, which served libraries nationally as a net-lender within the South African LIS field, co-ordinated the delivery of requested material between consortia with the aid of courier services in order to speed up delivery.

When South Africa became a Democracy in 1994, greater resource sharing became possible for requested material not available in consortia member libraries or nationally, as libraries extended international links. Academic libraries started to lean on Document Supply centres as rapidity of transaction processing and document supply was the goal of different institutions involved in document delivery. For example, improved access to information was made possible rapidly by the British Library Document Supply Centre (BLDSC) as 60% of its requests were processed through its transmission system, ARTTel, and sent or transmitted to the requesting library within 48 hours of the receipt of the request; consortia of libraries like the Online Computer Library Centre (OCLC); the PICA online retrieval system in the Netherlands which involved a number of libraries (Raubenheimer 1995: 31). All of these contributed to the delivery of requested information rapidly. During this time it became a trend in interlibrary loan services to deliver material just in time. The digital environment offered opportunities for co-operative activities and making information resources available to clients. This meant that information services were no longer dependent on the own collection- a factor that contributed to quality services, i.e. fast and cost effective services (Shreeves 1997:373).

In the new millennium, academic libraries started to work more independently as some South African library consortia closed down and the general interlibrary loan service within the South African interlending network continued. This did not impact much on service delivery since many requests could be filled from the vast number of databases subscribed to by academic libraries due to joint subscriptions facilitated by the South African National Library and Information Consortium (SANLIC). Resources available in libraries worldwide became more accessible as SABINET included OCLC Worldcat in the product range. Library clients could subsequently access materials directly on WorldCat, ascertain availability in the own library or place a pre-request for an interlibrary loan through WorldCat Resource Sharing. In 2010 WorldCat was integrated with the OCLC knowledge base and in 2012, OCLC introduced Article Exchange in production (Birch 2014:1). Both these developments had a positive impact on just in time deliveries. The latest development in 2013, indicates a general movement to using ILL alongside other fulfillment options e.g. Open access or a range of ILL or document providers as well as purchasing materials on a just in time basis was noted. This led to a new resource sharing initiative, known as OCLC WorldShare ILL. Prior to this new WorldShare platform, WorldCat Resource sharing did not allow the flexibility to introduce these features. The new system, however, allows this flexibility. It enables integration with other OCLC services as well as external service providers. In this regard, OCLC currently works with the British Library on integrating WorldShare ILL and their web based ordering service.

This integrated service will thus not only provide improved access, but also improved delivery of information, particularly with regard to requests for journal articles.

The delivery of information is equally important to the provision of access to information. Swain (1992:169-170) alluded to the fact that access to information should be balanced with effective delivery services. Developments in delivery tools to speed up the request process were subsequently noted for many years. Photocopying machines, fax machines and an electronic delivery system of the Research Libraries Group in the United States, named Ariel, were introduced for the supply of journal articles (Raubenheimer 1996:194). The latter became the norm for electronic document delivery in South African academic libraries between 1996 -2013.

University of South Africa as an ODL institution

While academic libraries in South Africa focused much on enhancing access to information and the delivery thereof, the library of the University of South Africa (Unisa) as an academic library also had to consider the effect of developments in South Africa's higher education environment on its service delivery. Unisa was established as the only ODL institution in South Africa in 2004 and during the last decade, it has transformed itself from the correspondence model of distant education into a truly ODL institution. It is acknowledged as a leader in this field and celebrated its 140th year of existence in 2013 (University of South Africa 2014:1). It has approximately 400 000 students of which 86744, the largest percentage, resides in Africa (HEDA 2013). It has 3196 students living with disabilities (HEDA 2013). This means that Library clients are spread worldwide and diverse in terms of library needs.

The Unisa ODL policy defines ODL as a 'multi-dimensional concept that, in practice, seeks to bridge the time, geographical, economic, social, educational and communication distances between students and the institution, between students and academics, between students and between course ware and students and peers' (University of South Africa, 2008).

The Unisa Library in an ODL environment

The Unisa Library, endeavors to bridge the distance between students and the library through nine branch libraries and mobile libraries at regional offices from where a high concentration of students are served in the respective regions; and through its centralised Request service, which includes interlibrary loan services, situated in the Muckleneuk Library. All of these are using information technologies in support of service delivery. Service objectives set for the delivery of information resources to the Library's own clients also apply to clients of all libraries who request material from the Unisa collections. The Library aims to deliver all requested items which are available upon request within one working day.

The Library aligns its services with the Standards for Distance Education libraries. Flowing from this, the Library's planning and service activities further align with the three pillar concept developed by Mbambo-Thata (2014). The three pillars inform ODL librarianship with regard to access to information, broadcasting of information, and excellence in ODL service delivery.

Mbambo-Thata (2014:2) alludes to the importance of technologies to promote these three aspects while reducing the transactional distance between the client and the ODL Library. In practice, this means that the transaction between a remote client and the library should be such that the experience of remote clients becomes similar to that of a client who visits one of the Unisa branch Libraries. The Library has therefore implemented services, accessible 24/7 and endeavours to establish access through a single sign on. An online catalogue and bibliographic databases provide instant access to information and its electronic reference material, e-books, full text articles available in various databases, the Library's electronic Reserve which contains recommended material for students, and scholarly information in the Institutional Repository ensure the availability of information resources. Conversion of print to electronic contributes positively to serving the Library's own clients instantly as requested materials from the Library's own collection can be downloaded or delivered without delay to an e-mail address.

Online requests can be placed from the catalogue for material only available in print.

Since clients have become used to electronic resources, this contributes positively to client satisfaction. Temme (2009) alludes to the fact that e-books have become the third most popular category of downloads after games and entertainment. This can be done via computers or the mobile application on mobile phones.

The use of mobile applications on phones has shifted the Library's focus on enhanced access to information further towards the use of mobile access to the Unisa Library catalogue and its collections. As part of the Library's collection development strategy, mobile friendly content is therefore considered.

Raubenheimer (2012:26) explains how mobile access is made possible through the use of the Innovative Interfaces AirPAC product. Mobile phones not only allow access and the viewing of information, but also the downloading thereof should it be allowed in terms of licence agreements. Mobile phones contributed positively towards the broadcasting of information.

This supports the view of Mbambo-Thata (2014:4) who states that technologies which enable geographical reach should be implemented. This is of particular importance in an institution with as many as 400 000 students where the broadcasting of information is often essential. In practice, this means that the Library should endeavor to reach all clients simultaneously to ensure that all clients are equally informed and ultimately equally equipped to use the library's services. Mbambo-Thata (2014:4) alludes in this regard to the fact that effective training services, such as online training manuals, should be implemented in order to enhance its training service particularly with regard to information and digital literacy. The Library's training service should be further promoted through the use of podcasts and LibGuides. The sharing of knowledge can typically be done through Twitter, Moblogs, Glogs, Wiki's and social networking tools such as LinkedIn, Academia.edu, and Facebook. Archived information can be broadcast through You Tube, Flickr and Slide share.

Mbambo-Thata (2014:5) states that with regard to effective service delivery in an ODL Library environment, ODL librarianship should be reflected with service objectives which relate to a rapid response to requests and short turnaround time for the delivery of the request. In addition to e-content and digitization which contributes positively in this regard, operational efficiency is enhanced by making self-services available to clients through the use of Radio Frequency Identification (RFID) technologies which speed up the lending procedures and which ensure effective stock management.

Based on the direction provided through the three ODL pillars, the Unisa Library was faced with a situation whereby its interlibrary loan practice had to be reviewed in order to determine how it aligns with ODL librarianship. Consequently it was decided to investigate the following:

- What are the needs of ODL library clients with regard to interlibrary loan services?
- What technologies, relevant to resource sharing, promote access to information?
- What technologies, relevant to resource sharing, ensure the broadcasting of related information?
- What new systems contribute to effective interlibrary loan services in an ODL institution?

Methodology

It was the intention to obtain insight into the needs of ODL Library clients and the trends pertaining to technologies used by the ODL Library in South Africa as a "new" phenomenon rather than using only written documents on available technologies which can be applied. The

methodology used in this investigation encompassed both a literature study and an empirical study. The literature study pertained to information on the development of interlibrary loan services and the speeding up of requests to improve on access to information and the delivery thereof as well and the use of technologies in the development of ODL Library services. This was done to foster an understanding of how ODL library services have developed against the background of developments in the South African LIS environment and how it can be further promoted. An ODL service model developed for this purpose by Mbambo-Thata (2014) was studied and used as basis to consider how the ODL Library's interlibrary loan service aligns with the model, particularly with regard to technologies.

Information on the current needs of South African libraries, with regard to turn around time of interlibrary loans, were captured through a snapshot survey conducted in February 2014. The survey was placed on the SABINET Listserve with the request that it be completed by all heads of interlibrary loan departments in South Africa with a view to determine, inter alia, the current needs of clients of an ODL Library in South Africa. The question was included to also determine whether there was a difference between the response to the question by the Head of the ODL library's interlibrary loan section compared to the response by other South African libraries (Raubenheimer and Van Niekerk 2014: 2).

Findings

The needs of ODL Library clients are illustrated from the results from the survey. A total of 37 South African libraries responded to the survey. Of these, 19 were university libraries. Information from the literature study is reported in terms of the problem statement in three categories pertaining to improved access; broadcasting of information and efficient service delivery.

Needs of ODL Library clients

Effective interlibrary loan services in the ODL Library should be viewed in accordance with client needs. The results of the 2014 snapshot survey revealed the need of libraries in South Africa with regard to the importance of just in time interlibrary loans compared to the needs of clients in an ODL Library. A question on the expected turn-around time for requested library material via interlibrary loan was included in the survey in order to determine how Library clients in South Africa view the importance of just in time interlibrary loans. Interlibrary loan librarians from all library types had to respond to the following question:

In days, how fast does your client expect you to deliver the requested item?

The findings of the survey indicated that 27% of the total number of libraries indicated that the clients of the library expects to receive an interlibrary loan within 1-2 days; 59% indicated that it is expected to receive the loan within 3-7 days and 14% indicated that clients do not mind waiting more than 7 days to receive the material. The expectation of the clients of the ODL library was included in the 1-2 days category. There is thus a strong awareness for rapid interlibrary loans by ODL library clients, compared to the need by clients of most of the other types of libraries (Raubenheimer and Van Niekerk 2014: 5).

Technologies to enhance access to information through resource sharing

The ODL Library uses the technological infrastructure provided by SABINET which enhances resource sharing in South Africa and the rest of the world. The ODL Library benefits from access to information, not available in the Library's own online catalogue, by using WorldCat through SABINET. This enables clients to locate required information resources in libraries worldwide. In order to speed up the filling of a request for books not available in own collections, library clients are requested to submit a pre-request for an interlibrary loan through the online Library catalogue from home or via their mobile phones. Unisa clients, who do not have access to these tools, can visit the Unisa branch libraries, Unisa mobile libraries or an Internet Café as these are equipped with computers. They can either access the Unisa catalogue or OCLC WorldCat Mobile (OCLC 2011) to place a pre-request to register the request for an interlibrary loan with the Library's interlibrary loan service. Since the pre-request is submitted online it contributes positively to the speeding up of the process as it is received instantly and possible interpretation mistakes previously made by interlibrary loan workers who had to manually capture information written on cards, are eliminated due to, for example, faint handwriting or incorrect capturing of bibliographic details. The verification of membership is done without delay upon receipt of the pre-request and the request is immediately forwarded on the SABINET interlibrary loan system for processing. This contributes positively to speeding up the processing of requests for interlibrary loans received by the Unisa Library clients and the requesting procedure from another library.

Requested material is delivered to Unisa clients in accordance with the client's preferred mode of delivery. It can be delivered to academics to a pick up point on the Muckleneuk Campus or to all clients by the Library's online delivery service, courier service or by the South African Post Office Safe mail service.

Upon receipt of requested material, such as journal articles, the item is typically delivered in one day via the library's online service or courier service.

Technologies relevant to broadcasting resource sharing related information

Clients are trained in the use of the Library's interlending service through an online training manual. The use of the service is further communicated through LibGuides (University of South Africa 2014). This ensures that all clients have access to required information which fosters an awareness of the Library's interlibrary loan services and how it should be used to speed up the delivery of requested information resources. The manuals and Libguides are accessible from the Unisa web page and via the University's *myUnisa* (University of South Africa:2014) portal where students have access to all teaching and learning services through the use of podcasts (University of South Africa 2013).

Online training services, Libguides and podcasts are available on computers and mobile phones. Camtashia software (TechSmith 2011) is used to create podcasts in the appropriate formats required by mobile phones and other mobile devices.

Twitter (Twitter 2014) and Face Book (Face Book 2014) is used for the communication of interlibrary loan related information which affects all clients simultaneously. This is done to ensure that broadcasting of information to all clients worldwide is done so that all clients can be equally informed at the same time.

Effective ODL Interlibrary loan services

Interlibrary loan services should be rapid and requests should be delivered just in time to be effective. The response of the Unisa Library to effective interlibrary loan service delivery, pertains to the provision of adequate human capacity to provide an interlibrary loan service. In this regard the Unisa Library illustrates the need for this essential service through the appointment of a dedicated team responsible for the processing of requests and the delivery thereof. The team consists of more than 100 staff members responsible for the processing of requests for information and information resources, including interlibrary loans. Staff should be equipped to perform their role through adequate training in the use of the established sophisticated interlibrary loan networks. The request processing staff is trained by SABINET staff, responsible for the South African Interlending network and related systems in order to foster an understanding of interlibrary loan practices globally. It is believed that there is a connotation between well trained staff and effective service delivery.

Staff should, however, be committed to provide this essential service. This is possible if they have internalized the vision and mission of the Library and therefore respond to interlibrary loan requests in accordance with their understanding of the need for just in time ILL services in an ODL environment. The aim is to provide a rapid service with a same day response to the client to communicate the status of the request. Although the requested material may not be available for delivery in one day, Library clients should be kept informed of the status of the request.

Availability of material has recently been complimented by a new development which was initiated by a role player in the ILL and document supply field. This development which was considered by the Unisa Library to ensure just in time deliveries of interlibrary loans, pertains to the OCLC World share ILL system. This system was first implemented by some South African libraries, including the Unisa Library, in August 2013. World share interlibrary loan is an integrated discovery and delivery of electronic, digital and print materials in a single interface. The service is said to be integrated because it centralizes workflows previously managed in multiple systems, such as the display of lender costs from the Policies Directory and display of item availability from your library's integrated library system. It also supports evolving workflow changes, such as the option to purchase needed items rather than borrow them (OCLC 2014). The growth of the system in South Africa since August 2013 has increased from less than 20% of the libraries to 80% of the libraries and the transactions for both books and journals have increased from 1% to 61% (OCLC 2014).

The Unisa Library response to the benefits of the system pertain particularly to the facts that clients can see holdings worldwide, see the cost of the article, policy details on use, and receive larger files. Turnaround time measured indicates that on average, 80% of the requested journal articles were delivered in one day. These were then delivered further to the requestor through the person's preferred mode of delivery, mostly as an attachment to an e-mail.

In the case of requests for books, the turn-around time was much slower if the book was requested from an international library. It was therefore decided to rather purchase books on demand available in electronic format, should the client indicate that the waiting period cannot exceed the turn-around time of 1-2 days. This ensures a just in time delivery in terms of client needs and expectations.

Technologies or systems which enhance the delivery process to the Library's own clients when the item is received from another Library, pertain to delivery vehicles that can speed up the delivery process such as online deliveries or courier services. The Interlending service to the Library's own clients is further enhanced by communication technologies to keep the client informed rapidly of the status of the request. This is done via sms upon receipt of the request for a book. The sms is sent by the Library's automated workflow system and another sms is sent upon delivery of the item by the Library. In the case where print material must be delivered via the South African Post Office Safe mail service, in addition to an Sms send by the Library to communicate the delivery of the requested item, a third sms is sent by the Post Office to inform the client that the requested item is ready for collection. This contributes further to the rapid delivery of requested information resources as the item can be collected as soon as the sms is received. Other communication vehicles in use to communicate matters pertaining to the request are e-mail, or Skype (2014). The latter is used should this networking tool be required for a visual explanation, for example, the table of contents (TOC) can be displayed to show what chapters in a book are available. The client then indicates what information in the book is relevant to the project and copies of the book can be sent in terms of the South African copyright act. This ensure just in time delivery whereas a service delivered via courier or the South African Post Office, may take days.

Effective interlibrary loan service delivery to libraries requesting items from the Unisa Library collections depends much on the availability of the requested item at the time that the request is received and the internal transportation of the requested material. The Library therefore addresses matters which seem to hamper the supply of requested items to other libraries. For this purpose an RFID stock management system is currently being investigated to ensure that missing items can be recorded timeously and that this can be communicated promptly should an interlibrary loan for an item be requested. The speed of delivery of available books should be improved by an internal transportation procedure which eliminates the pushing of requested material on trolleys in a large size library. In this regard, the Unisa library identified the Paternoster system as viable for implementation as part of the Library's Renovation project (Raubenheimer 2013) which will commence in the near future.

License agreements sometimes do not allow the filling of requests received from other libraries. This was a significant impact on interlibrary loan services, particularly in South Africa where the Unisa Library serves other libraries as a net-lender. This matter should be considered upon subscribing requests for items which are only available in electronic format.

Conclusion

The Unisa Library cannot deliver relevant interlibrary loan services without the use of appropriate technologies. As in the past, the ODL library's interlibrary loan services are developing in accordance with the needs of clients and the availability of new technologies. This essential service is continually assessed and developed in order to be relevant to ODL library clients.

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