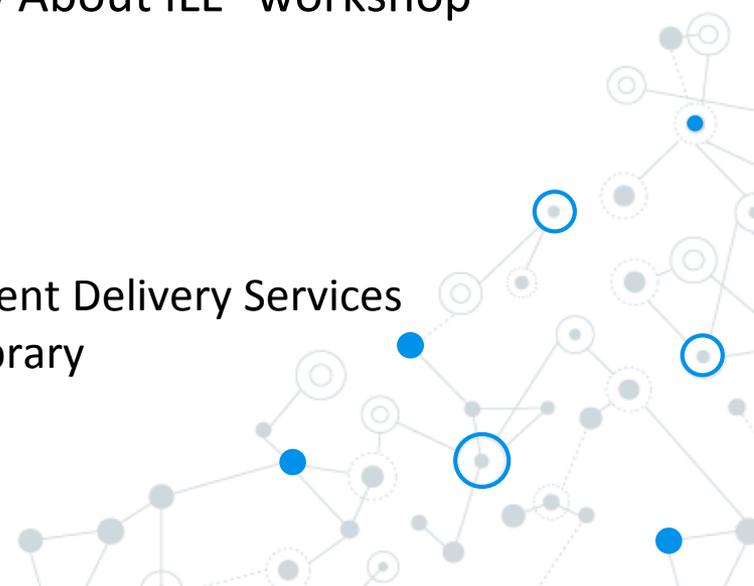


A decorative graphic in the top-left corner consisting of a network of interconnected nodes and lines. The nodes are represented by circles of varying sizes and colors, including light gray, dark gray, and blue. Some nodes are highlighted with a blue outline. The lines connecting the nodes are thin and light gray.

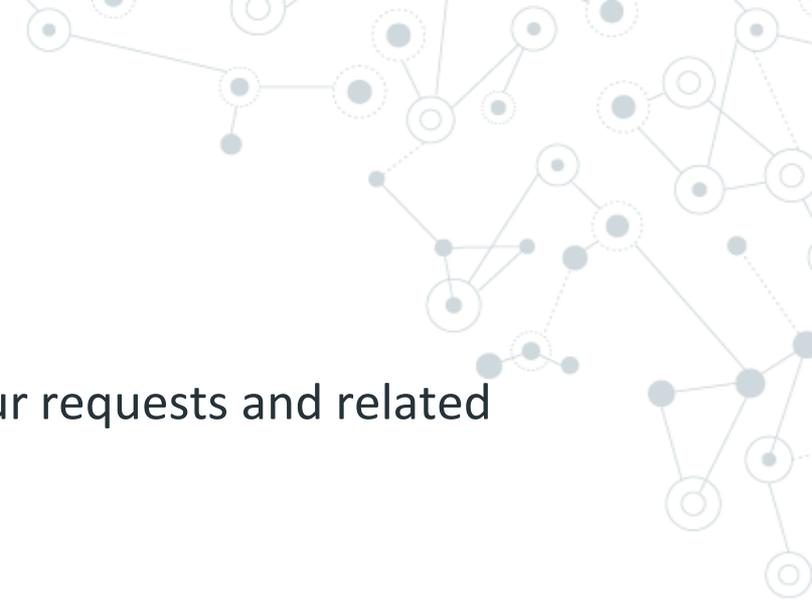
Borrowing

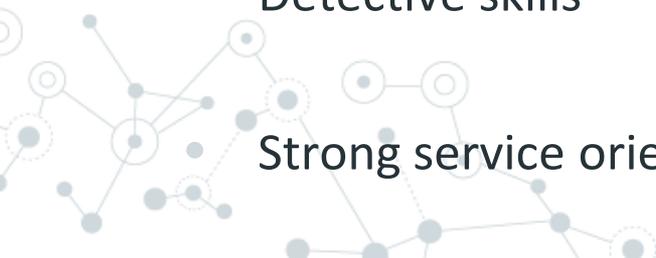
IDS Project Online Learning Institute
“Everything You Always Wanted To Know About ILL” workshop
February 9, 2018
Denver, CO

Megan Gaffney
Coordinator, Interlibrary Loan and Document Delivery Services
University of Delaware Library

A decorative graphic in the bottom-right corner, mirroring the one in the top-left. It features a network of interconnected nodes and lines, with nodes in light gray, dark gray, and blue, and some nodes highlighted with a blue outline.

What do you need?



- A way to collect, manage, and store your requests and related records
 - Communication with users and other libraries
 - Materials to check in loans then check them out to users; delivery mechanism for articles
 - Relationships with other departments in your library
 - Detective skills
 - Strong service orientation
- 



Your Policies and Users

What are your policies?

- Answer this question now to avoid headaches later and **make the policies available to your users.**
- Consider:
 - Who is eligible for ILL?
 - How will you deliver materials to them? Consider patrons at a distance as well as those who are local to your library.
 - How will you handle materials available at your library?
 - What will you borrow?
 - Are there limits?
 - How much will you pay?
 - How will you get the items back if they're overdue?

Can I borrow...

- Something my library owns?
- Something my faculty member wants to put on reserve?
- Textbooks?
- “Popular” works in research libraries, and how will I determine what fits that category?
- Formats that I won’t lend?

Please describe the item being requested.

*** Author/Editors**

Not required for newspapers or other serials.

*** Title**

Please avoid abbreviations.

Publisher

Place of Publication

Date of Publication

Edition

ISBN (International Standard Book Number)

Providing an ISBN or ISSN will speed request processing.

OCLC Number

*** Not Wanted After Date**

(MM/DD/YYYY)

02/14/2014

Will you accept the item in a language other than English?

If yes, specify acceptable languages in the notes field.

Yes

Will you accept an alternate edition of this item?

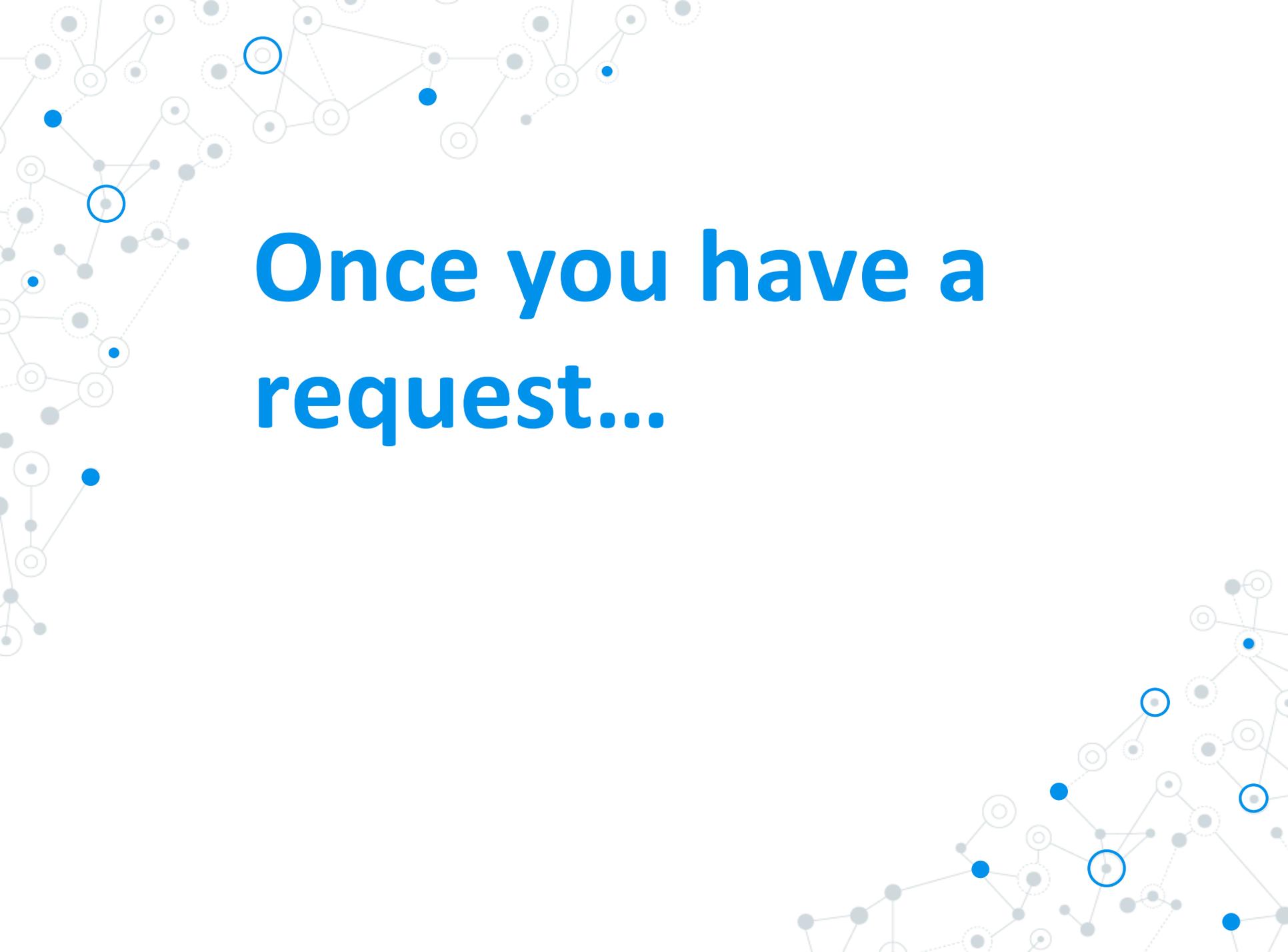
Yes

Notes

Please provide any additional information here.



Where did you learn about this item?

A background network diagram consisting of various nodes and connecting lines. Some nodes are solid blue circles, while others are hollow circles with blue outlines. The nodes are interconnected by thin grey lines, forming a complex web-like structure. The text is centered in the middle of the image.

**Once you have a
request...**

How can I get from my patron's citation to fulfillment?

- WorldCat.org is free!
- Union catalogs help with international requests
- Check other libraries' catalogs
- Ask your friends and neighbors
- Remember that catalog records and database citations always are subject to error!

MARC is just for catalogers, right?

- 020 – ISBN
- 022 – ISSN
- 490 – series statement
- 500 – general notes
- 780 – previous serial title
- 785 – succeeding serial title
- 856 – links to online resources

Detective skills at work:

- Request for *Atlanta Journal-Constitution* 1990?

043		#a n-us-ga
050	00	#a Newspaper
130	0	#a Atlanta journal-constitution (Atlanta, Ga. : 2001)
210	0	#a Atlanta j.-const. #b (2001)
222	4	#a The Atlanta journal-constitution #b (2001)
245	04	#a The Atlanta journal-constitution.
246	30	#a Atlanta journal constitution
260		#a Atlanta, Ga. : #b Atlanta Newspapers, #c 2001-
300		#a v.
310		#a Daily
362	0	#a Vol. 53, no. 48 (Nov. 5, 2001)-
500		#a Continues the numbering of the Atlanta journal (Atlanta, Ga. : 1889). of the latter.
530		#a Also available on microfilm and online via the World Wide Web.
580		#a Formed by the union of: Atlanta constitution (Atlanta, Ga. : 1881), and: Atlanta journal (Atlanta, Ga. : 1889), and continues the numbering of the latter.
651	0	#a Atlanta (Ga.) #v Newspapers.
651	0	#a Fulton County (Ga.) #v Newspapers.
651	7	#a Georgia #z Atlanta. #2 fast
651	7	#a Georgia #z Fulton County. #2 fast
655	7	#a Newspapers. #2 fast
752		#a United States #b Georgia #c Fulton #d Atlanta.
780	14	#t Atlanta constitution (Atlanta, Ga. : 1881) #x 2473-1609 #w (DLC)sn 82015857 #w (OCoLC)8821030
780	14	#t Atlanta journal (Atlanta, Ga. : 1889) #x 2473-1625 #w (DLC)sn 82015426 #w (OCoLC)8807964

The item isn't in WorldCat. Is that possible?!

- Check spelling, transliteration, diacritics, etc.
- Consider:
 - Age
 - Publisher
 - Place of publication
 - Material type
- There are just some materials that no library has purchased.

If it isn't in WorldCat, can I get it?

- Consider commercial suppliers such as ProQuest Dissertations and Theses (for dissertations), Alibris, Amazon
- Check for open access/public domain materials.
- Consider the place of publication: is it unlikely to be in WorldCat? (Latin American publications, highly-specialized standards, etc).
- Consider referral to a subject specialist; think about information literacy.

It's OK to send a speculative request.



*“Google is the BFF of ILL.”
- Jennifer Kuehn*

I found it in WorldCat. Now what?

- Communicate with the lender. Do you have restrictions or special requests?
- Provide a complete citation (or as complete as you can get).
 - Google can help: lots of bad citations can be fixed after a quick search.
 - Google can complicate: users are getting their request citations by Googling.
 - Collaboration with other departments/staff at your library can be a huge help.

Best practice:

Put yourself in the
lender's shoes.



System

Lending Processing OCLC

Cancel Request Conditionalize Request Mark Found Mark Found Scan Now Route Policies Directory Resend Request Billing View Send E-Mail Print Request Add to Print Queue Print and Empty Queue Pending Updates

Process Routing OCLC Odyssey Billing Lender Printing System

Detail OCLC History 239.50 PubMed/Docline DELCAT GOBI BNCollege Search

General Request Information

Transaction Number: 307947 Article Loan

Username: Lending Service Type:

Transaction Date: 12/13/2013 8:14 AM Not Wanted After: 01/11/2014

Delivery Method: Site:

Service Level: Regular Shipping Options: Mail

Billing Account: Doc Type:

OCLC Information

ILL Number:

OCLC Number: 29875689

Lending String: *DLM,EYW,TXH,AUM,IQU

Borrower: 1 ...

System ID: OCLC

OCLC Status: Record not found

Loan Info Collections Local Holdings Imported Request Copyright Invoice Additional

Title: Mind, culture, and activity.

Author:

Publisher: La Jolla, CA ; Laboratory of Comparative Human Cog

Place:

Date:

Edition:

Original Loan Author:

Original Loan Title:

Accept Alternate Edition

Accept Non English

Allow Copies?

Copyright Already Paid?

Allow Renewals?

Library Use Only?

Replacement Pages?

Priority Shipping

Ariel

Odyssey (PDF Enabled)

Item Information

Call Number:

Location:

Due Date: 2/21/2014

Reason For Cancellation: Serial

Item Num/Ref Num:

ISxN: 1074-9039

Special Instructions:

Max Cost/Pieces: 0.00

Date	Note	Type	Added By
12/12/2013 4:48 PM	Borrowing Notes; LVIS; Prefer not to charge (reciprocal).	System	System

Citation Information

Cited In:

Title:

Date:

Volume/Pages:

Item Info 2:

What would I need to fill the request?

What about the unfilled requests?

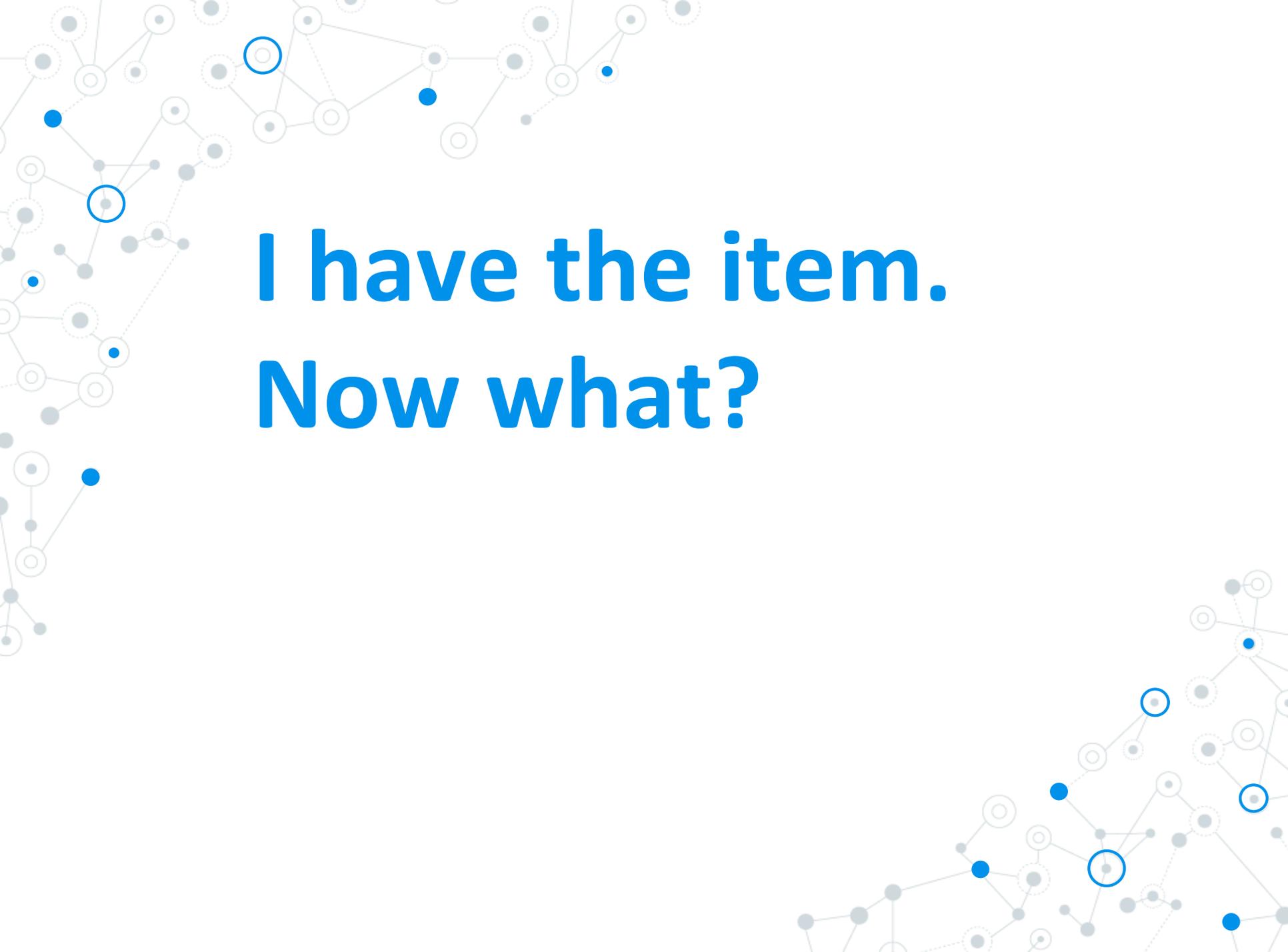
- More lender strings; read your “reasons for no”
- Switch your request mover, investigate other fulfillment sources
- Check your MARC record
- Resume detective work

AUTO-DEFLECTION: MULTIPLE REASONS	12/4/2014
AUTO-DEFLECTION: AGE OF MATERIAL	12/4/2014
AUTO-DEFLECTION: FORMAT TYPE	12/4/2014
NOT LICENSED TO FILL	12/5/2014

Lender Position	ILL Record Number	Illiad TH	Title	OCLC #	Article(Citation)	Date(Citation)	Imprint Date	Lender Symbol	Lender Full Name	Reason For Ilo	Lender Unfilled Date
2	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			NOT ON SHELF	12/3/2014
3	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			NON CIRCULATING	12/4/2014
4	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/4/2014
5	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			UNSPECIFIED	12/4/2014
6	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: MULTIPLE REASONS	12/4/2014
7	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: AGE OF MATERIAL	12/4/2014
8	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/4/2014
9	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			NOT LICENSED TO FILL	12/5/2014
10	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/5/2014
11	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: MULTIPLE REASONS	12/5/2014
12	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/5/2014
13	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			NON CIRCULATING	12/5/2014
14	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/5/2014
15	136683755	TN:360495	DELIVER US FROM EVIL /	890535210			2014			AUTO-DEFLECTION: FORMAT TYPE	12/5/2014

From stats.oclc.org.
Deliver us from evil, 2014 DVD



A network diagram background consisting of a complex web of nodes and edges. The nodes are represented by circles of varying sizes and colors, including light gray, dark gray, and blue. Some nodes are highlighted with a blue outline. The edges are thin lines connecting the nodes, creating a dense, interconnected structure. The diagram is positioned in the corners of the slide, with the top-left and bottom-right corners showing more detail than the other corners.

**I have the item.
Now what?**

How can I pay?

- OCLC IFM
- DOCLINE EFTS
- IFLA Vouchers
- Invoices – payable by check, credit card

Investigate consortia and partnerships that might alleviate costs.

You're not responsible for charges above your maxcost.



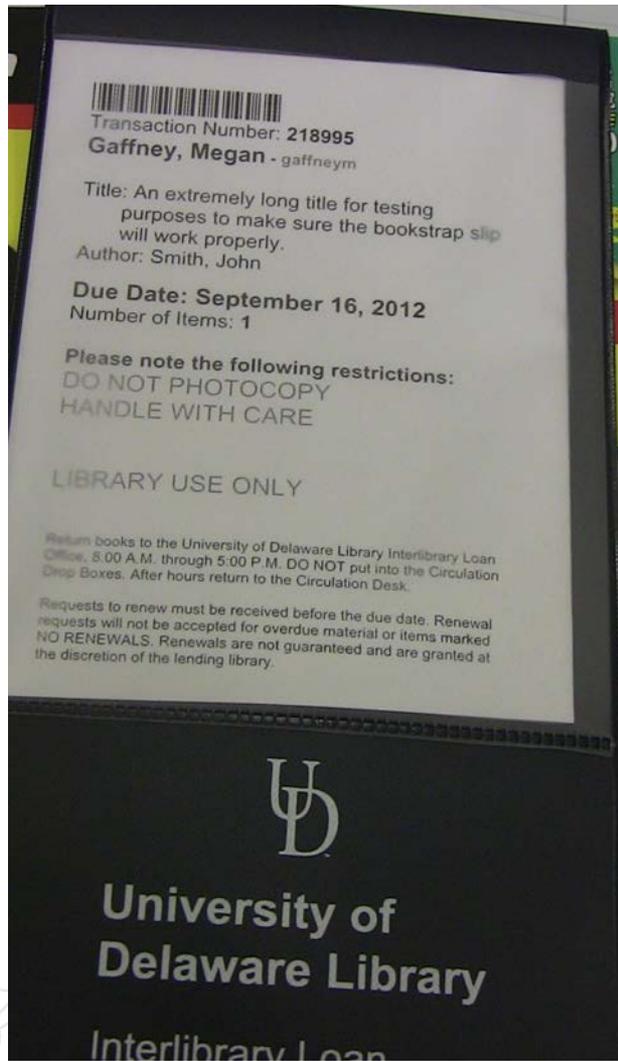
How should I handle returnables?

- All loans are subject to recall.
- All restrictions, like “library use only,” “no photocopying.” or “no renewals” need to be followed.
- Lenders may specify return shipping methods and additional instructions, such as an insurance amount.
- Adhesive material (tape, labels) should not be put on borrowed items.
- The item is due back **at your library** on the due date.
- All this and more in the Interlibrary Loan Code for the United States.

Who's responsible for borrowed materials?

- The **borrowing library** is always responsible from start to finish.
- [A requesting library will] “assume responsibility for borrowed material from the time it leaves the supplying library until it has been returned to and received by the supplying library. This includes all material shipped directly to and/or returned by the user. If damage or loss occurs, provide compensation or replacement, in accordance with the preference of the supplying library.” (ALA Interlibrary Loan Code for the United States, 2016)
- Borrowers pay for lost or damaged material; if not for that request, the material would be safe and sound in the lender's library.
- Replacement copies may be acceptable. Ask the lender.
- Refunds are at the discretion of the lending library.

What about the paperwork?



- Pay close attention to instructions/
- Note the “return to” address: many lenders have more than one library/ILL office associated with one OCLC symbol.
- Some libraries do want paperwork back.

Odyssey/Post to ILL account

Article Exchange

Dropbox

How can I deliver non-returns?

Average retention of PDFs: 30 days

What records should I keep?

- Request information should be retained for copyright compliance.
- Records need to reflect **what was requested, not who requested it.**
- Check your own institution's policies on retaining records of library, financial, and other categories of transactions.



Fulfillment beyond traditional ILL

How do I borrow outside the U.S.?

- Several national libraries list materials in OCLC, but do not supply that way...
- And many international libraries/consortia do not list their holdings in OCLC at all.
- First sale & other U.S. practices related to interlibrary lending don't apply in every other country.
- Resource sharing looks different in other countries: take the time to think about how to word your request.



What's the deal with e-books?

- Licensing and lending capability is limited
- “Reasons for No” from lenders may be inconsistent
- Alternatives to traditional ILL include purchasing access, Occam’s Reader, Kindles, and more!

What about purchasing?

- **Purchasing returnables for patron's use**
 - Online bookstores sell used, new copies that might be cheaper than borrowing
 - Give to the patron, add to the collection, resell
- **Purchasing access to a document**
 - Vendors like Copyright Clearance Center and Reprints Desk
 - Document suppliers such as the British Library
 - Direct from the publisher's or journal association's website
 - Typically one-time use; not added to the collection
- **Patron-Driven Acquisitions / Purchase on Demand through ILL**
 - Purchase items that patrons request instead of borrowing them, then add them to your collection. Many different models: talk with your Acquisitions/Collection Development librarians to develop one that works for you.

What's open access?

- **“Open access (OA) literature is digital, online, free or charge, and free of most copyright and licensing restrictions. What makes it possible is the internet and the consent of the author or copyright-holder.”** – Peter Suber, [A Very Brief Introduction to Open Access](#)
- **Accessible online does not mean Open Access.**
- OA sources include:
 - Open access journals
 - Institutional repositories
 - Public Domain resources (like Google Books, HathiTrust)



How does OA affect borrowing?

- Establish a set workflow for dealing with materials available free online.
- Do you always search Google before OCLC?
- Will you send a link or a file to the user?
- Will you count it as a filled request or cancel it?



Words of Wisdom

- Patience
- Attention to detail
- Multi-tasking
- Come back to a problem later
- Focus on what your users want and need
- Get to know OCLC really well

Thank you!

Questions?

Megan Gaffney

Coordinator, Interlibrary Loan and Document Delivery Services

University of Delaware Library

gaffneym@udel.edu