



Lending 101

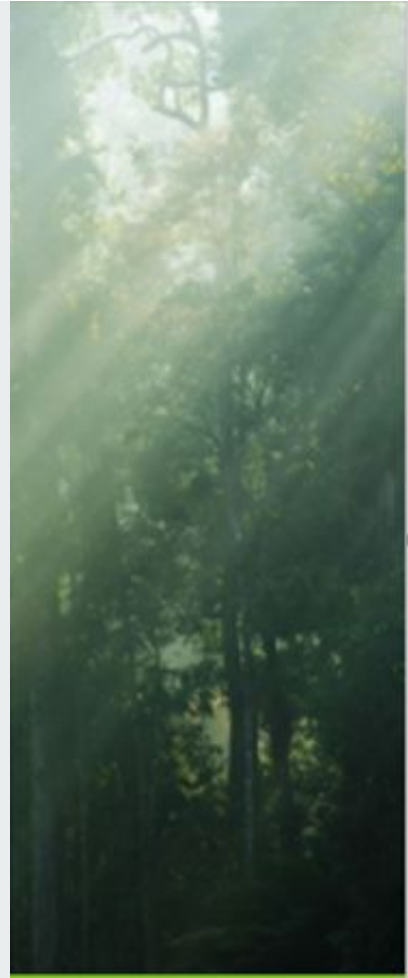
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IDS Project/Online Learning Institute



How to use Lending 101



Today's Plan:

- Back to Basics: Why lend, & some principles
- Surveying your land
- Reviewing and setting policies
- Workflows and training
- Communicate (x3)
- Troubleshooting
- Assessment/Feedback loop
- What next?



Back to Basics: Why Lend?

- No collection is self-sufficient
- Ever-increasing quantity and diversity of publications
- We get materials to users who need them, where they need them, and, (hopefully), when they need them, and (also hopefully) in the format that they need.
- But: we can borrow only because others lend (and vice versa).
- Contribute to greater equity



Back to Basics: Some Principles



As I distill it,

- Lend as broadly and conveniently as possible.
- Communicate your policies clearly (and in fact, always communicate!)
- Be as prompt as possible
- Respect user privacy

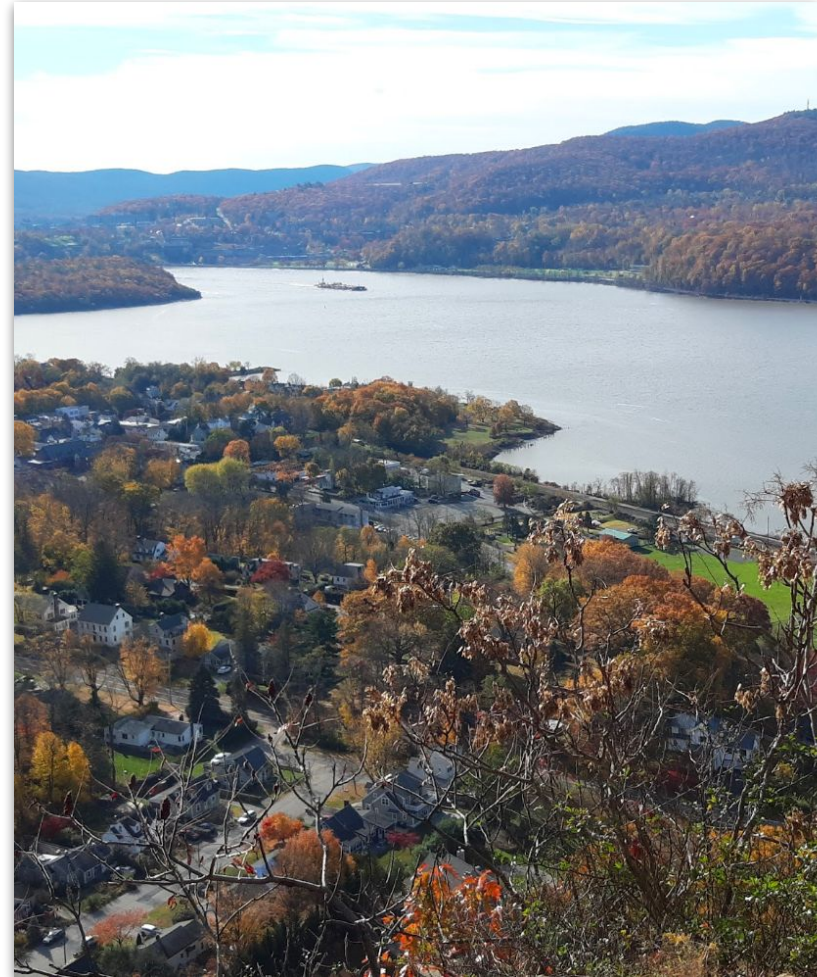
Key Document: *Interlibrary Loan Code for the United States and Explanatory Supplement: Responsibilities of the Supplying Library** Being revised!

Back to Basics: A Few Other Things

- **You are not alone:** get to know other libraries, visit, (virtually or in person) if possible, get to know colleagues, ask.
- **You can be an advocate:** To be a good lender (and borrower), you need resources and adequate support (staff, technology, supplies, mailing ability, budget...). You can help your administration see what you need and the value of what you do.

Surveying Your Land

- People
- Systems
- Space
- Money Matters
- Mailing Support
- Library policies & resources



Reviewing and setting policies: Questions

- What can you lend?
- How fast will you be able to respond?
- What will be your loan period?
- Can you renew? For how long?
- Will you need to charge? How much?
- Can you join consortia/reciprocal agreements?
- Keep an eye on accessibility

Reviewing and setting policies: Your Current Policies



Policies Directory

Search

Institution Information

Search By

Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Days To Respond - Copies (0)

Days To Respond - Loans (0)

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Fee

Currency (0)

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

Reset

Search

CUNY The Graduate Center Library (ZGM)

Mina Rees Library

Profile

Collections

Policies (2)

Schedule

Contacts

Summary

Name (Symbol):	CUNY The Graduate Center Library (ZGM)
Also Called:	Mina Rees Library
Location:	New York, NY 10016 US
Shipping Address:	ZGM-default ILL-Mina Rees Library-CUNY Graduate Center 365 Fifth Avenue New York, NY 10016 US
Institution Type:	Academic Library
OCLC Supplier:	Yes Edit
Days To Respond:	Copies: 2 days Edit Loans: 2 days Edit
Non-Circulating:	Not Defined Edit
Periods:	Loan Period: 16 Week(s) Renew Period: 16 Week(s)
Fees:	Copies: 0.00 USD More... Loans: 0.00 USD More...

Reviewing and setting policies: Policies Directory

- OCLC's *Interlibrary Loan Policies Directory*:
<https://illpolicies.oclc.org/>
 - Also get there from: Worldshare ILL, ILLiad, Tipasa, FirstSearch).
- Update your contact & mailing info
- Update/check your URLs, Odyssey address, etc.
- Consortium/group information
- Check each tab for stated policies
- *Ask yourself*—does this still make sense? Maintain or explore further for a possible change?



Search

Institution Information

Search By

Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Days To Respond - Copies (0)

Days To Respond - Loans (0)

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Fee

Currency (0)

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

CUNY The Graduate Center Library (ZGM)

Mina Rees Library

Profile

Collections

Policies (2)

Schedule

Contacts

Summary

Name (Symbol):	CUNY The Graduate Center Library (ZGM)
Also Called:	Mina Rees Library
Location:	New York, NY 10016 US
Shipping Address:	ZGM-default ILL-Mina Rees Library-CUNY Graduate Center 365 Fifth Avenue New York, NY 10016 US
Institution Type:	Academic Library
OCLC Supplier:	Yes Edit
Days To Respond:	Copies: 2 days Edit Loans: 2 days Edit
Non-Circulating:	<i>Not Defined</i> Edit
Periods:	Loan Period: 16 Week(s) Renew Period: 16 Week(s)
Fees:	Copies: 0.00 USD More... Loans: 0.00 USD More...

Fees: Copies: 0.00 USD [More...](#)
Loans: 0.00 USD [More...](#)

Request Methods: Copies: ALA, Email, Fax, Mail, OCLC ILL
Loans: ALA, Email, ISO ILL, Mail, OCLC ILL

Delivery Methods: Copies: Odyssey

Group Affiliations: [CENTER FOR RES LIBR GROUP/LINDA HALL LI](#) , [CITY UNIV OF NEW YORK ULS](#) , [GIF-N AM COORD COUN ON JAPANESE LIBR RES](#) , [IDS PROJECT](#) , [LIBRARIES SUPPLYING ELECTRONIC DOCS DUR](#) , [LIBRARIES VERY INTERESTED IN SHARING](#) , [LIBRARIES WITH LOAN PERIODS OF 12 WEEKS](#) , [LVIS LIBRS WITH LOAN PERIODS OF 12 WEEKS](#) , [METRO REG GAC](#) , [NEW YORK CITY REG ULS](#) , [NEW YORK CONSOLIDATED ULS](#) , [NEW YORK STATEWIDE GAC](#) , [NORTHEAST GAC](#) , [NY3RS ASN INC](#) , [NYLINK INTERLIBRARY CODE GROUP](#) , [OCLC PILOT](#) , [OCLC TRAINING & ILLIAD PARTICIPANT](#) , [SHARES PROG GROUP](#) , [US NEWSP PROG](#)

International Lender: Copies: Any Country
Loans: Any Country

▸ Details

Article Exchange: *Not Defined*

Odyssey Address: [206.107.43.174](#)

Library Catalog URL: <http://libsearch.cuny.edu.ezproxy.gc.cuny.edu/F/> [More...](#)

Library Homepage URL: <http://library.gc.cuny.edu/>

Lending URL: *Not Defined*

FEIN: *Not Defined*

Note:

Loans

Add

CUNY Graduate Center - Mina Rees Library (ZGM-default)

Edit Delete

SERVICE	FEEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None Loan Period: 16 Week(s) Renewal Max: None Renewal Period: 16 Week(s)	Per Request: <ul style="list-style-type: none">No Charge Currency: United States Dollar Tax Included: No	Groups: ✓ Any Libraries: ✓ Any Locations: ✓ Any	Collections: ✓ Any Formats: ✓ Archival/Mixed Material ✓ Book ✓ Dissertation ✓ E-Text ✓ Government Document ✓ Internet Resource ✓ Manuscript ✓ Map ✓ Microform ✓ Musical Score ✓ Newspaper ✓ Other ✓ Proceedings ✓ Serial ✓ Serial - Bound ✓ Serial - Unbound ✓ Sound Recording ✓ Sound Recording - Cassette ✓ Sound Recording - CD ✓ Sound Recording - LP ✓ Thesis ✓ Visual Material ✓ Visual Material - DVD ✓ Visual Material - VHS	Requests: 1. OCLC ILL 2. ALA 3. Mail 4. ISO ILL 5. Email Billing: 1. OCLC IFM

Note:

Policies, Cont'd: ILLiad Customization Manager

The screenshot displays the ILLiad Customization Manager interface. The top navigation bar includes a 'Home' button, a search bar for tables and keys (containing 'overdue'), and various action buttons like Favorites, New Record, Copy Record, Reset Filter, Save, Delete, Cancel, and Setup Wizards. Below the navigation bar, there are tabs for 'Customization', 'Z39.50', 'Notification Templates', 'Server Addons', and 'DSP Business Rules'. The main content area is divided into a left-hand tree view and a right-hand settings panel.

The tree view on the left shows a hierarchy of customization options. The 'LendingOverdueNoticesActive' policy is selected and highlighted. Other visible options include OverdueNoticesRunNow, OverdueNoticesRuntime, PrintDocumentsPath, SharedCustomSearchesPath, SharedServerSupport, SSSLenderAddressesALL, StaffPasswordComplexity, StaffProxyWebURL, SystemIDDOCSymbol, SystemIDISOSymbol, SystemIDOCLCSymbol, SystemManagerAddonInterval, IDS, Integration, ISOILLDefaults, LOCL, OCLC, Password Expiration, Printing, Rapid, and RLIN.

The settings panel for 'LendingOverdueNoticesActive' is titled 'Settings' and contains the following information:

- Key Value:** A radio button group with 'Yes' selected and 'No' unselected.
- Description:** Enables or disables the processing of lending overdue notification e-mails via System Manager.

At the bottom of the settings panel, there is a table showing the value changes:

Value Changed From	Value Changed To	NVTGC
No	Yes	ILL
Yes	No	ILL
No	Yes	ILL

Home

Show Change History ▾

Maintenance

Search All Tables and Keys

overdues

Search

Favorites ▾

New Record Copy Record Reset Filter

Table Options

Save Delete Cancel

Editing Options

Setup Wizards ▾

Setup

- Customization
- Z39.50
- Notification Templates
- Server Addons
- DSP Business Rules

- Lending
 - Billing
 - Cancellations
 - Conditionals
 - EFTS
 - General
 - Import Queues
 - Importing
 - Overdues
 - LendingOverdue1Docs
 - LendingOverdue2Docs
 - LendingOverdue3Docs
 - LendingOverdueGraceDays
 - LendingOverdueNoticeOneDays
 - LendingOverdueNoticeTwoDays
 - LendingOverdueReminderDocs
 - LendingReminderDaysBeforeDue...
 - Printing
 - Searching
- Odyssey
- System
- System Billing

LendingReminderDaysBeforeDueDate

Settings

Key Value

0

Description

The number of days before the due date when an overdue reminder should be sent. A value of 0 will disable lending reminders.

Value Changed From

Value Changed To

NVTGC

Customization - ILLiad Customization Manager (scho)

Home

Show Change History ▾

Maintenance

Search All Tables and Keys

Search

Favorites

New Record Copy Record Reset Filter

Table Options

Save Delete Cancel

Editing Options

Setup Wizards ▾

Setup

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

- ▶ Borrowing
- ▶ Contact Information
- ▶ Doc Del
- ▶ Lending
 - ▶ Billing
 - ▶ Cancellations
 - ▶ Conditionals
 - ▶ EFTS
 - ▶ General
 - ▶ Import Queues
 - ▶ Importing
 - ▶ Overdues
 - 🔑 LendingOverdue1Docs
 - 🔑 LendingOverdue2Docs

LendingOverdue1Docs

Settings

Key Value

Lending Overdue 1

Description

Lending overdue letter Word document to auto-open.

Value Changed From	Value Changed To	NVTGC	Changed Time
--------------------	------------------	-------	--------------

Notification Templates

Home Notification Templates

New Edit Copy Save Delete Cancel

Templates Editing

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

Notification Templates

Notification Templates - [Library Customization](#)

Home Notification Templates

New Edit Copy Save Delete Cancel

Server Admins DSP Business Rules

- Lending Cancellation Article
- Lending Cancellation Loan
- Lending Overdue 1
- Lending Overdue 2
- Lending Overdue 3
- Lending Overdue Reminder
- Lending Password Reset
- Lending Cancellation
- lendover.txt
- lendrecall**
- library_use_only.txt
- Manual Overdue-No Renewals
- manual_article_notify
- manual_overdue.txt
- manual_paper_notify.txt
- ManualLoanNotify
- Merged User
- MixingBook
- NotReceivedArticle
- NotReceivedLoan
- NYPL_Ebook
- online_article_delivered.txt

Select an email template from the list

Reviewing and setting policies: Resources

- Other sources for understanding your policies:
 - Public web pages, FAQs, Libguides, statements.
 - Internal documentation, manuals, task lists, &c.
 - Staff, library administration
- Other sources for data-based decision-making:
 - Statistics
 - Your platform (ILLiad, etc.) + OCLC Usage Statistics:
<http://stats.oclc.org> (or through FirstSearch)

Reviewing and setting policies: Resources

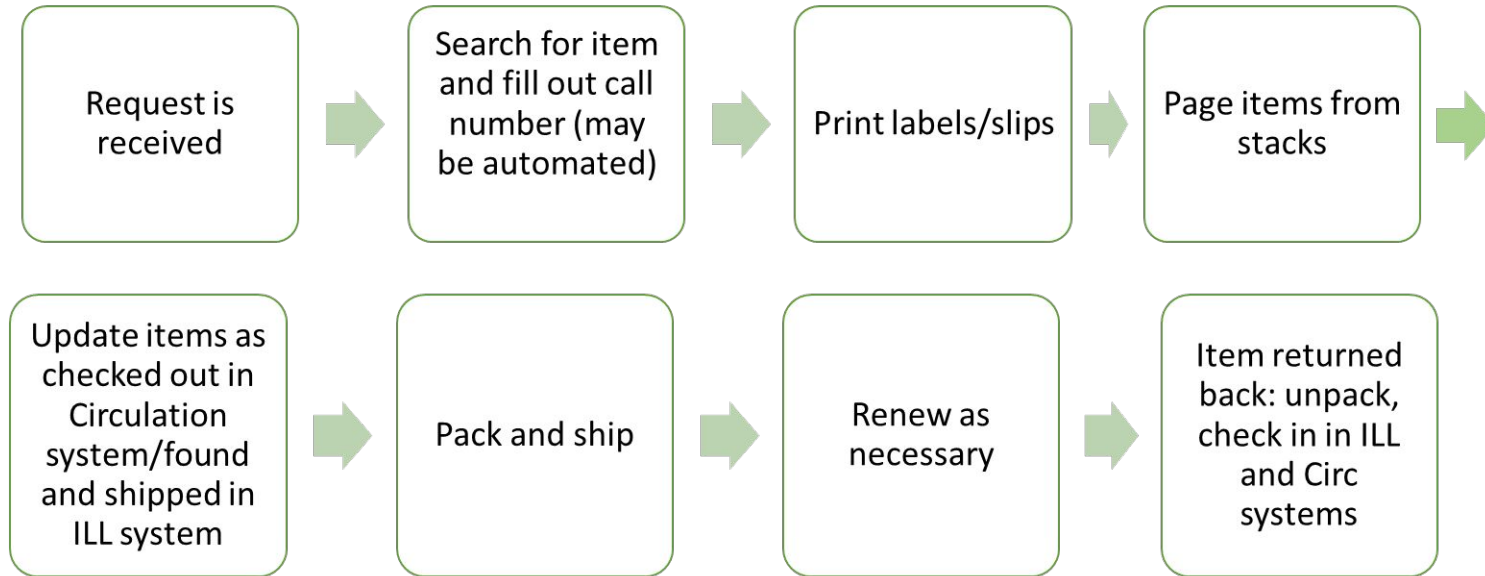
- Other sources for evaluating policies/ideas:
 - Best Practices
 - STAR Checklist: <https://rethinkingresourcesharing.org/star-checklist-2/>
 - IDS Workflow Toolkit: <https://www.idsproject.org/press/WorkflowToolkit.aspx> and [IDS Answers](#)
 - Community
 - Listservs: [ILL-L](#), [ILLIAD-L](#), [DOCLINE-L](#), [Workflow Toolkit](#), [SHARES-L](#), etc.
 - Facebook group: [ILLers](#)
 - Local resource sharing groups and meetups
 - Resource sharing conferences: OCLC, IDS, regional conferences, etc. (Check out RSC 2022!)

Workflows and Training



- Try everything out, test everything
- Listen to & incorporate feedback from staff
- Develop training documentation (work together with your team!)

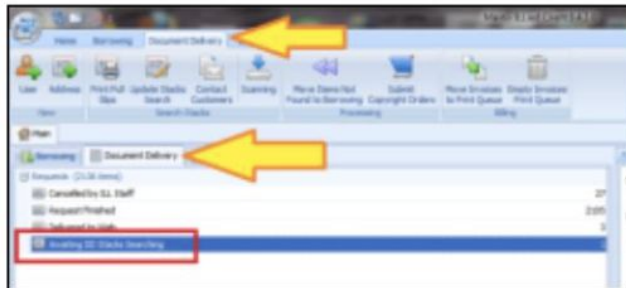
Workflows and Training



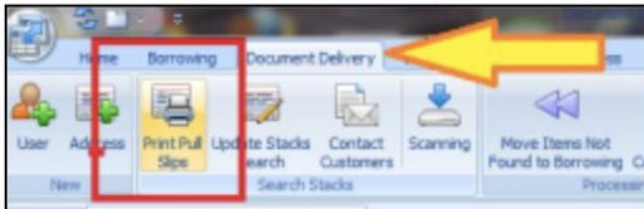
Workflows and Training

- Images (or video) speak louder

1. In ILLiad, open the “Document Delivery” tab. If you see any requests in the “Awaiting DD Stacks Searching” queue, it means that we have work to do!



2. Navigate to the big “Document Delivery” tab and click “Print Pull Slips.”



Workflows and Training

- Lending Best Practices:
 - Fill only as requested:
 - Do not exceed Max Cost;
 - Editions, formats;
 - Check special Instructions
- Physical Loan Best Practices:
 - Efficiency, environmental impact
 - Book labels? Book bands? Return slips?
 - Packaging
 - Reduce, reuse (to a reasonable point!), recycle
 - Avoid “jiffy” envelopes
 - Handling issues: tracking, damage, losses (& reducing billing)

Workflows and Training

- Scanning Best Practices:
 - Complete (endnotes, illustrations; consider book title & copyright pages for chapters),
 - Legible (300dpi+, right side up)
 - Minimize black margins
 - Accessibility: can you provide OCR'd copies by default?
 - Odyssey, Article Exchange, Electronic Delivery Utility

Communicate, Communicate, Communicate

- Clearly state policies:
 - Policies directory
 - Lending info in your website
 - Promptly respond to items you can't fill
 - Use specific cancellation reasons

Communicating Cont'd



Conditionals (a quick review)

- Use when you have a question with intention/possibility to fill, or, a message with helpful information
 - Good examples:
 - Maxcost \$15IFM, OK?
 - In-library use only, OK?
 - This might be in another publication, OCLC# 1234567. We don't own it, please delete this request. (Should it be 'please make a new request to other libraries', or similar?)
 - There is an OA copy here: <https://aaa.aaaaa>. Please reply "No" to this conditional.
 - Not so good:
 - "We don't own". Best to just cancel.

Communicating Cont'd



Conditionals (a quick review)

- Requests that are still wanted will come back, and show in the *Awaiting Conditional Request Processing* queue. Check the Notes section (or OCLC request form) for any additional info.
- If you don't get the request back, it's not wanted.

TROUBLESHOOTING, ETC.

Alerts and Messages

- In ILLiad:

The screenshot displays the ILLiad system interface. On the left, there is a list of items categorized by frequency: Daily (8 items), Weekly (70 items), and Finished (242099 items). On the right, there is a 'Barometer' chart showing three bars of varying heights. Below the chart, a table titled 'Alert' is highlighted with a red border. The table has columns for 'Alert', 'B', 'D', and 'L'.

Alert	B	D	L
Connection Manager	0	0	0
Odyssey Manager	0	0	0
Outgoing Notifications	0	0	0
System Error Flags	0	0	0
Users To Clear	0	0	0

Great resource: Galvan, Angela. [System Alerts](#). (In IDS Project > Workflow Toolkit/IDS Answers)

Main - ILLiad Client

Home Borrowing Document Delivery Lending System

Number ALL
User Information ALL
Citation Information ALL

Search Requests

Username
Name
ID

Main

Borrowing Document Delivery Lending

Daily (2 items)

Recalled	1
Awaiting Lending Request Processing	1

Weekly (65 items)

OCLC Special Message: Not Received	1
OCLC Special Message: Complete?	5
Sent Invoice and Awaiting Payment	5
COVID Lost	30
Very Overdue	24

Finished (242147 items)

Cancelled by ILL Staff	120203
Item Shipped	434
Request Finished	119541
Request Conditionalized	1969

TIP: Organize your queues into convenient groups.

- Or in Worldshare:

WorldShare

Interlibrary Loan | Analytics | Admin

Interlibrary Loan Home

Interlibrary Loan Home

Search for requests

Request ID Go

Active Requests Closed Requests

Quick Links

Borrowing:

- [AE Alert \(2\)](#)
- [New For Review \(6\)](#)
- [Not Reviewed \(6\)](#)
- [Produced \(160\)](#)
- [Awaiting Response \(78\)](#)
- [In Transit \(77\)](#)
- [Not Received \(4\)](#)
- [Unfilled \(1\)](#)
- [Received? \(9\)](#)
- [Received \(720\)](#)
- [Received/In Use \(716\)](#)

Lending:

- [Can You Supply? \(15\)](#)
- [New - Copies \(4\)](#)
- [New - Loans \(2\)](#)
- [Considering - Copies \(5\)](#)
- [Considering - Loans \(4\)](#)

Supplied

- [Not Received \(1\)](#)
- [Overdue \(11\)](#)

Returned

- [Returned/In Transit \(46\)](#)
- [Returned/Complete? \(5\)](#)

Other:

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)
- [WS ILL Training Resources](#)
- [OCLC Community Center](#)

What's Next?



Evidence-based decisions (and making life easier)

- Check out: Assessment 101 by Emily Aylward @ [IDS Project > Online Learning Institute](#).
- Lending:
 - Number of requests; number filled, unfilled by type (loans vs. articles)
 - Turnaround time by request type (loans, articles, e-books).
 - Reasons for cancellation
- What types of things do you find yourself doing repeatedly?
 - Example:
 - Are they necessary (can your policies be updated)?
 - Can they be automated?

Assessment/Feedback Loop



Evidence-based decisions (and making life easier)

- Consider qualitative as well as quantitative feedback
- Can use to improve services, but also to advocate and communicate with administrators



Example: Updating policies-Loan Periods, Renewals, Overdues

- How generously can you lend, given your institution's Circ and other policies?
- Can you give long loan periods? (& save time/labor in renewals)
- Can you renew as much as needed?
- Can you lessen recalls (e.g. if another user needs the material, can you borrow it from another library instead of recalling your copy?)
- Can you accept replacement copies instead of payment?
- Can you accept payment with IFLA vouchers, or IFMs?

Process Routing Cloning OCLC Billing User System

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number: 502659

Article Article Loan

Username: [Redacted] > Wanted By: []

Transaction Date: 2/13/2018 2:46 PM Not Wanted After: []

Delivery Method: Hold for Pickup Site: []

Service Level: Regular Shipping Options: []

Billing Account: [] Doc Type: Article

OCLC Information

ILL Number: 185476540

OCLC Number: 0

Lending String: [Redacted]

Lender: [Redacted]

System ID: OCLC

External Request Status: Record not found

Article Info Loan Info Collections Local Holdings Imported Request User Copyright Invoice Additional Library Shipping Information OC

Journal Title: DUMMY REQUEST TO PAY BILL #SR000979 (\$15) ATTN: [Redacted]

Volume/Issue: []

Month/Year/Pages: []

Article Author: DUMMY REQUEST TO PAY BILL #SR000979 (\$15)

Article Title: DUMMY REQUEST TO PAY BILL #SR000979 (\$15)

Original Journal Title: DUMMY REQUEST TO PAY BILL #SR000979 (\$15) ATTN: [Redacted]

Item Author/Publisher: []

Item Place/Edition: []

Accept Alternate Edition

Accept Non English

Allow Copies?

Copyright Already Paid?

Allow Renewals?

Library Use Only?

Replacement Pages?

Priority Shipping

Ariel

Item Information

Call Number: []

Location: []

Due Date: []

Reason For Cancellation: []

Item Num/Ref Num: []

ISxN: []

Special Instructions: []

Max Cost/Pieces: []

Citation Information

Cited In: []

Title: []

Date: []

Date	Note	Type	Added By
2/5/2018 10:52 AM	IDS Logic::LogicRule::c7ac::Processed	System	System
2/5/2018 10:52 AM	BA_YearFixer::UnableToFix[UNABLE_TO_FIX_YEAR]	System	System
2/5/2018 10:52 AM	BA_YearFilter: Route to Awaiting Year Identification	System	System

Further info: Juel, S. (2022). [Adding Billing Charges in Lending](#). Atlas Documentation.



Setting up deflections and automations

- Deflections:
 - Allows requests to be automatically deflected based on Format Type, Age of Material Request Type, Max Cost, OCLC Group, etc.
 - See: OCLC. (2022). [Deflections](#). Worldshare Interlibrary Loan Documentation.
- Automations: does your system/consortium offer automations you can use?
 - IDS Logic
 - ILLiad: e-mail routing and routing rules
 - Send any frequent messages? Set up e-mail routing.

Email Routing

System Notification

Lending Processing Printing Odyssey OCLC Request Notification

Send Change Status on Send

Process

Detail History OCLC Z39.50 PubMed/Dodline Edit Notification Form x

E-mail

To: [REDACTED]

CC:

BCC:

Subject: ILL # [REDACTED] dissertation available in OA repository

Dear colleague,

The Graduate Center dissertation you requested is currently available at our open access institutional repository, Academic Works: [LINK]

Title: [REDACTED]
 Author: [REDACTED]
 Our Tn: 655082
 ILL: 214112862

We hope this serves your user's needs. If we can help in any other way, please don't hesitate to contact us.

Thank you,

Interlibrary Loan Department
 The Graduate Center, CUNY (ZGM)
 212-817-7049
 ill@gc.cuny.edu

Customization - ILLiad Customization Manager (scho)

Home

Search All Tables and Keys

Search

Maintenance

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

Show Change History
 Favorites
 New Record
 Copy Record
 Reset Filter
 Save
 Delete
 Cancel
 Setup Wizards Setup

E-Mail Routing

Process...	Name	DefaultToAddress	DefaultToName
Lending	Article Exchange		
Lending	EJournal Access Issue	[REDACTED]	[REDACTED]
Lending	Embargoed Digital Dissertation	[REDACTED]	[REDACTED]
Lending	Lending Recall		
Lending	lendover.bit		
Lending	Missing Book	[REDACTED]	[REDACTED]
Lending	Open Access Dissertation at Academic Works		

- LendingOverdueReminderDocs
- LendingReminderDaysBeforeDue...
- Printing
- Searching
- Odyssey
 - Article Exchange
 - Billing
 - Custom Flags
 - Custom Queues
 - Database Manager
 - Email
 - DocDelEMailFromAddress
 - DocDelEMailFromName
 - EMailAuthMechanism
 - EMailFromAddress
 - EMailFromName
 - EMailImport
 - EMailImportActive
 - EMailImportInterval
 - EMailNoAccountAddress
 - EMailRouting
 - EMailSecure
 - EMailSMTPPort

Routing Rules

Customization - ILLiad Customization Manager (scho)

Home

Show Change History Maintenance

Search All Tables and Keys

Search

Favorites

New Record Copy Record Reset Filter

Table Options

Save Delete Cancel

Editing Options

Setup Wizards Setup

Customization Z39.50 Notification Templates Server Addons DSP Business Rules

LendingReminderDaysBeforeDue...

Printing

Searching

Odyssey

System

Article Exchange

Billing

Custom Flags

Custom Queues

Database Manager

Email

General

IDS

Integration

ISOILLDefaults

LOCL

OCLC

Password Expiration

Printing

Rapid

RLIN

Routing

Routing

RoutingOn

System

User Expiration

Routing

RuleNo	RuleActive	ProcessT...	TransactionStatus	MatchString	NewProcess...	NewTransactionStatus	RuleDescription
3	yes	Lending	Awaiting Shipping Label Printing	t.RequestType = 'Loan'	Lending	Item Shipped	Move loans directly to
4	yes	Lending	Awaiting Shipping Label Printing	t.RequestType = 'Article'	Lending	Request Finished	eliminate shipping label
8	Yes	Lending	Awaiting Lending Request Processing	t.TransactionNumber in (select distinct Tra...	Lending	Awaiting EJournal Processing	Moves incoming lendr
9	Yes	Lending	Awaiting Ejournal Processing	t.lendinglibrary in (select lenderstring from...	Lending	Awaiting IDS Lending Request ...	rule to give IDS librari

EXPANDING ACCESS



Accessibility

- Start with: good quality scans. Good quality, resolution, and imaging size help further processing.
- Provide OCR'd articles whenever possible (check if your scanner allows this by default)
- There are provisions in copyright law that allow copying for accessibility purposes. Learn more about the Chafee Amendment in the U.S. Law, and the Marrakesh Treaty for International Lending (resources below).
- If you are not able to provide OCR'd articles, send back a Conditional and offer to send a good quality scan instead (OCR may be able to be done at the other end).
- Make good workflows and train your staff.

Adapted from: Figueroa, R. & Goode, T. (2020). Slide 47. [Making ILL Materials Accessible: Examining the Law, Current Practices, and the Future](#). OCLC Conference Presentation.

See also: Figueroa, R., Massie, D. & Goode, T. (2022). [Making Library Materials Available in Accessible Formats via Interlibrary Loan](#). SHARES Executive Committee Accessibility Subgroup Report.



Lending to folks outside of your system (e.g. non-OCLC)

- Good practice to lend as widely as possible
- If you charge, let them know upfront how they can pay you before you work on it.
- You can still keep records for statistics, etc.:
 - In ILLiad, you can add them manually.



Can you expand lending even more? OA and International Lending

- OA: Have a great OA search workflow incorporated into your Borrowing? Consider using it also for Lending. And referring libraries to it using Conditionals.
 - Example: There is an OA copy here: <https://aaa.aaaaa>. Please reply “No” to this conditional.
- International lending:
 - Can you ship internationally?
 - Working with mailroom
 - Filling out custom forms
 - If not, can you lend articles/scans only?
 - Can you accept payment via IFLA vouchers?
 - Put out information on how to contact you to make requests outside of the system.
 - Consider participating in projects like RCVD
 - Resource: International ILL toolkit

Expanding Digital Lending



- Electronic article lending:
 - Maintaining good holdings records: advocacy
 - Licensing agreements: advocacy
 - Do your discovery tools find an OA copy? Forward the info!
 - Find any glitches/errors? Communicate with your Electronic Resources librarian to fix the issue



Lending whole e-books

- Groups, consortia and libraries have negotiated licenses to allow whole e-book lending.
- What are licenses?
 - Licenses are contracts, in which the owners of copyright can permit the use of their work by others (in exchange for a consideration, like subscription fees).
- Advocate & negotiate–new acquisitions, publishers.
- Goal: minimize DRM, or chapter by chapter downloads; whole book lending via single PDF.
- Examples & Resources:
 - VIVA consortium - VIVA. (n.d.) VIVA Whole Ebook Interlibrary Loan Recommendations. <https://vivalib.org/va/e-book-recommendations>
 - University of Connecticut - Huzarewicz, S., McNeil, E. & Rodriguez, M. (2020). Interlibrary Lending of Whole Ebooks. https://opencommons.uconn.edu/libr_pres/53/
 - SUNY Libraries - SUNY Library Services. (2022) EBC eBook Lending Project. https://slcny.libguides.com/sls/ebc_lending
 - PALCI -Higham, Krista. (2022). [E-book lending/borrowing demystified](#). OCLC RSC2022 Presentation.
 - [Occam's reader](#)



Controlled Digital Lending

- What is Controlled Digital Lending?
 - CDL “enables a library to circulate a digitized title in place of a physical one in a controlled manner.” (Hansen and Courtney, Par III, White Paper).
- Consider:
 - HathiTrust Emergency Temporary Access Service (ETAS),
 - Open Library (IA’s version of CDL),
 - The National Emergency Library (NEL-temporary, now closed);
 - CDLI (CDL Implementers), CDL Reserves (see Bae, Hurlburt & Bae), and other local implementations. Open Library: IA’s Version of CDL
- CDL litigation: Hachette Book Group, Inc. v. Internet Archive, ongoing.

Resources:

- Hansen, D. R. and Courtney, K. K. (2018). [A White Paper on Controlled Digital Lending of Library Books.](#)
- Hansen, D. R. and Courtney, K. K. (2022). [Controlled Digital Lending for resource sharing: Law and policy developments.](#) OCLC RSC 2022 Presentation.
- [IFLA’s statement on international CDL:](#)
- CDL Co-Op. (2021). [Statement on Using Controlled Digital Lending as a Mechanism for Interlibrary Loan.](#)
- CDL Implementers: [Documents and Resources.](#)



Following updates

- Listservs: ILL-L, ILLIAD-L, DOCLINE-L, Workflow Toolkit, SHARES-L, etc.
- Facebook group: ILLers
- Local resource sharing groups and meetups
- Resource sharing conferences: OCLC, IDS, regional conferences, etc.
(Check out IDS Conference 2022! July 25, 27,
29-<https://idsproject.org/conferences.aspx>)



Resources & References

- General
 - *Interlibrary Loan Code for the United States and Explanatory Supplement: Responsibilities of the Supplying Library*
 - OCLC's *Interlibrary Loan Policies Directory*:
<https://illpolicies.oclc.org/>
- Statistics
 - ILLiad Web Reports
 - OCLC Usage Statistics: <http://www.stats.oclc.org/>



- Best Practices

- STAR Checklist: <https://rethinkingresourcesharing.org/star-checklist-2/>
- IDS Workflow Toolkit: <https://www.idsproject.org/press/WorkflowToolkit.aspx>

- Community

- Listservs: [ILL-L](#), [ILLIAD-L](#), [DOCLINE-L](#), [Workflow Toolkit](#), [SHARES-L](#), etc.
- Facebook group: [ILLers](#)
- Local resource sharing groups and meetups
- Resource sharing conferences: OCLC, IDS, regional conferences, etc. (Check out RSC 2022!)
- Journal: JILLDER



- Further Reading

Aylward, E. (2022). Assessment 101. https://idsproject.org/OLI/Recordings/ILL101_Assessment_2022.pdf

CDL Co-Op. (2021). Statement on Using Controlled Digital Lending as a Mechanism for Interlibrary Loan. <https://controlleddigitallending.org/illstatement>

CDL Implementers: Documents and Resources. <https://sites.google.com/view/cdl-implementers/documents-resources>

Cho, J. S. (2022). Lending 101. https://idsproject.org/OLI/Recordings/ILL101_Lending_2022.pdf

Figuroa, R. & Goode, T. (2020). Slide 47. *Making ILL Materials Accessible: Examining the Law, Current Practices, and the Future*. OCLC Conference Presentation. https://www.oclc.org/content/dam/community/InterlibraryLoan/RSC20webseries/Making-ILL-Materials-Accessible-RSC20_13August2020.pdf

Figuroa, R., Massie, D. & Goode, T. (2022). Making Library Materials Available in Accessible Formats via Interlibrary Loan. SHARES Executive Committee Accessibility Subgroup Report. <https://www.oclc.org/content/dam/research/documents/shares/SHARES-ILL-accessibility-resources.pdf>


Galvan, Angela. System Alerts: <https://idsproject.libanswers.com/faq/142541>.

Hansen, D. R. and Courtney, K. K. (2018). A White Paper on Controlled Digital Lending of Library Books. <https://controlleddigitallending.org/whitepaper>

Hansen, D. R. and Courtney, K. K. (2022). Controlled Digital Lending for resource sharing: Law and policy developments. OCLC RSC 2022 Presentation. https://www.oclc.org/content/dam/community/InterlibraryLoan/RSC22_CDLC-policy-law_6April2022.pdf

Higham, Krista. 2022. E-book lending/borrowing demystified. OCLC RSC2022 Presentation. <https://www.oclc.org/content/dam/community/InterlibraryLoan/RSC22-E-book-borrowing-lending-demystified-10May2022.pdf>

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Huzarewicz, S., McNeil, E. & Rodriguez, M. (2020). Interlibrary Lending of Whole Ebooks. https://opencommons.uconn.edu/libr_pres/53/

IFLA's statement on international CDL: <https://www.ifla.org/news/ifla-releases-a-statement-on-controlled-digital-lending/> • Controlled Digital Lending Implementers home page: <https://sites.google.com/view/cdlimplementers> • Canadian paper on CDL: https://papers.ssrn.com/sol3/papers.cfm?abstract_id=4031054

Juel, S. (2022). Adding Billing Charges in Lending. <https://support.atlas-sys.com/hc/en-us/articles/360011811954-Adding-Billing-Charges-in-Lending>

Occam's reader: <https://occamsreader.lib.ttu.edu/about/index.php>

OCLC. (2022). Deflections. https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Lending_Requests/Deflections?sl=en

Posner, B. (2016). *Library information and resource sharing : Transforming services and collections*. Santa Barbara, CA: Libraries Unlimited.

SUNY Library Services. (2022) EBC eBook Lending Project. https://slcnv.libguides.com/sls/ebc_lending

VIVA. (n.d.) VIVA Whole Ebook Interlibrary Loan Recommendations. <https://vivalib.org/va/e-book-recommendations>



Thank You

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