INTERLIBRARY LOAN 101

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AGENDA

• Borrowing
• Lending
• Document Delivery
• Copyright
• Resources
BORROWING

- Borrowing: obtains material for your patrons
- Find it at other libraries, open access, purchasing, and even your own collection
Patron wants material

Patron gives request to ILL

ILL finds a bibliographic record on OCLC or other circulation system

ILL asks to borrow material

Lending library says yes

& sends in paper

& sends electronically

ILL receives the article in software or other records

ILL scans the article

ILL looks for open access options

Yes!

No

ILL verifies citation

ILL verifies your library does not have material available

Patron retrieves article

ILL posts or emails article

DOCUMENT DELIVERY

• A borrowing workflow
• Allows you to send documents from your collection to your patrons
DOCUMENT DELIVERY WORKFLOW

Patron wants material
Patron gives request to ILL
ILL looks for open access options
Yes No
Yes No
ILL verifies your library owns item
ILL posts or emails article
Send to borrowing workflow
ILL scans document

LENDING

• Lending: providing your material to other libraries/ institutions
LENDING LOAN WORKFLOW

Borrowing library wants material

Borrowing library sends the request

ILL searches for item in ILS

Library owns the item. It is available and ILL pulls it

ILL notifies borrowing library and cancels request

ILL checks out item in ILS and updates any software

Yes

No

ILL checks in item in ILS and updates any software

ILL sets any restrictions and due date

ILL packages item and sends via courier or mail

Borrowing library returns item

ILL notifies borrowing library via circulation system or other

LENDING ARTICLE WORKFLOW

Borrowing library wants material

Borrowing library sends the request

ILL searches for item in ILS

Library owns the item. It is available and ILL pulls it

ILL notifies borrowing library and cancels request

ILL notifies borrowing library via circulation system or other

ILL updates any software

Yes

No

ILL checks the article via circulation system, article exchange, email or print

ILL scans or downloads article

Once borrowing library updates software, request is finished

ILL sends the article via circulation system, article exchange, email or print

ILL sets any restrictions and due date

ILL packages item and sends via courier or mail

Borrowing library returns item

ILL notifies borrowing library via circulation system or other
COPYRIGHT

• It is called Copyright Law for a reason
• I’m not a lawyer or an expert
• Your library should make a policy and have a point person

COPYRIGHT

• Title 17 Section 107: Limitations on exclusive rights: Fair use
• Title 17 section 108: Limitations on exclusive rights: Reproduction by libraries and archives
• CONTU Guidelines on Photocopying under Interlibrary Loan Arrangements
COPYRIGHT

- Public Domain:
  - Before 1923
  - Most US Government Documents
- Copyright notices
  - Don’t need one for works published after March 1989
  - Before 1978 to 1989 with no notice is questionable
  - Before 1978 with no omission, could be public domain

COPYRIGHT

- Rule of Two
  - One article per issue, per patron: before Copyright
- Suggestion of five (within 5 years)
  - Your library may request 5 articles from a journal before royalties are paid.
    - If you own the issue, but it is unavailable- it doesn’t count towards copyright
COPYRIGHT

• How to pay:
  • Copyright Clearance Center
  • Publisher
  • CCC Get It Now
  • Reprints Desk

RESOURCES

• https://www.copyright.gov/circs/circ21.pdf
• http://www.ala.org/rusa/guidelines/interlibrary
• http://www.copyright.gov/title17/
• http://digital-law-online.info/CONTU/PDF/Chapter4.pdf
• http://idsproject.org/OLI/index.aspx
• ILL Dictionary - Made for the IDS Project classes

Holli Moseman
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# ILL Dictionary

<table>
<thead>
<tr>
<th><strong>Academic Institution</strong></th>
<th>An educational institution dedicated to education and research, which grants academic degrees</th>
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</thead>
<tbody>
<tr>
<td><strong>ALA</strong></td>
<td>American Library Association</td>
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<tr>
<td><strong>ALI</strong></td>
<td>Academic Libraries of Indiana</td>
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<tr>
<td><strong>Article Exchange</strong></td>
<td>A document-sharing site provides a single, secure location where lending libraries worldwide can place requested documents and library users can retrieve articles or book chapters obtained for them via interlibrary loan</td>
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<tr>
<td><strong>Bibliographic record</strong></td>
<td>An entry in a bibliographic database (or a library catalog) which represents and describes a specific resource.</td>
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<tr>
<td><strong>BOD</strong></td>
<td>Buying on Demand</td>
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<tr>
<td><strong>Borrower</strong></td>
<td>1. The institution borrowing material from another library. 2. Common alternate term for patron</td>
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<tr>
<td><strong>BRI</strong></td>
<td>British Library</td>
</tr>
<tr>
<td><strong>CCC</strong></td>
<td>Copyright Clearance Center. A global clearing house for obtaining licensing clearance for photocopies.</td>
</tr>
<tr>
<td><strong>CCG</strong></td>
<td>Copyright Clearance Guidelines. Indicates compliance with the CONTU Guideline. Typically this indicates that the article being copied is less than 5 years old, and that your library does not own a copy of this title and your library has not borrowed more than 5 articles from the same journal in the past year.</td>
</tr>
<tr>
<td><strong>CCL</strong></td>
<td>Copyright Clearance Law. CCL applies when the item being copied is older than five years, or if your library owns a copy of the title, or if your library has already requested five other articles from the same journal title and your library is paying a copyright fee to the Copyright Clearance Center or other vendor.</td>
</tr>
<tr>
<td><strong>Citation</strong></td>
<td>Description of a document that includes titles, volume, and pages.</td>
</tr>
<tr>
<td><strong>Clio</strong></td>
<td>Interlibrary Loan software <a href="http://cliosoftware.com/">http://cliosoftware.com/</a></td>
</tr>
<tr>
<td><strong>Connection manager</strong></td>
<td>A system used to communicate between OCLC and your local system/software</td>
</tr>
<tr>
<td><strong>CONTU</strong></td>
<td>Stands for <em>Commission on New Technological Uses of Copyright Works</em>. The purpose of the guidelines is to discourage the use of ILL as a substitute for magazine subscriptions [Butler, 2004]. The guidelines can be found at <a href="http://www.copyright.com/Services/copyrightoncampus/content/ill_contu.html">www.copyright.com/Services/copyrightoncampus/content/ill_contu.html</a>.</td>
</tr>
<tr>
<td><strong>Copyright</strong></td>
<td>The Copyright Act (Title 17 United State Code) contains specific exceptions for the use of copyright-protected materials. These provisions include:</td>
</tr>
<tr>
<td><strong>Custom Holdings</strong></td>
<td>System that allow you to organize and customize holdings displays to improve access to the OCLC symbols of your preferred lenders</td>
</tr>
<tr>
<td><strong>DDA</strong></td>
<td>Demand Driven Acquisitions - a model of library collection development in which a library purchases content when it is clear that a patron wants them</td>
</tr>
<tr>
<td><strong>Distance Education</strong></td>
<td>Distance education, or distance learning, is a means of providing instruction to students who are not physically present in a traditional classroom.</td>
</tr>
<tr>
<td><strong>Distance Learners</strong></td>
<td>Students who participate in distance education or distance learning.</td>
</tr>
<tr>
<td><strong>Document Delivery</strong></td>
<td>1. A service whereby a user of one library can borrow material or receive copies of documents that are owned by another library 2. A service where a user may request copies of documents that are owned by their library</td>
</tr>
</tbody>
</table>
**Document Supply**

1. A service which allows a user of one library to borrow material or receive copies of documents that are owned by another library
2. A service where a user may request copies of documents that are owned by their library

**Evergreen**

Evergreen is open-source library management software that helps libraries manage, catalog, and circulate materials.

**Evergreen Indiana**

Evergreen Indiana is a consortium of 107+ public, school and institutional libraries throughout Indiana using the Evergreen ILS software catalog materials and to allow patron initiated borrowing from the other member libraries.

**Holdings**

Indication that a library owns a specific item or document

**IDS**

Information Delivery Services

**IFLA**

International Federation of Library Associations

**IFM**

ILL Fee Management

**ILL**

[See Interlibrary Loan]

**ILLiad**


**ILS**

Integrated Library System, also known as a Library Management System. A software system used to catalog and circulate library materials

**InfoExpress**

Indiana’s library courier system, transporting materials between nearly 400 Indiana Libraries.

**Interlending**

A service which allows a user of one library to borrow material or receive copies of documents that are owned by another library. Originally the British term for ILL.

**Interlibrary Loan**

A service which allows a user of one library to borrow material or receive copies of documents that are owned by another library

**Interlibrary Loan Code for the United States**

Code libraries in the United States should support and try to follow. [http://www.ala.org/rusa/resources/guidelines/interlibrary](http://www.ala.org/rusa/resources/guidelines/interlibrary)

**Interloan**

A service which allows a user of one library to borrow material or receive copies of documents that are owned by another library. Originally the British term for ILL.

**Lender**

The institution lending material to another library

**Lending string**

A list of libraries that the borrower is sending a particular request

**Library Courier System**

A usually regional system of shipping items between libraries

**Library use only**

An item lent with the restriction that the item may not leave the library and must be tracked by the borrowing library

**LOC**

Library of Congress

**Mediated Request**

An interlibrary loan request that is reviewed and process by library staff

**NLM**

National Library of Medicine

**No Copying**

An item lent with the restriction that may not be scanned or photocopied, usually because of condition issues.
OCLC
Online Computer Library Center. Founded in 1967, OCLC and its 72,000 worldwide member libraries cooperatively produce and maintain WorldCat, the largest online public access catalog (OPAC) in the world. The online catalog that houses item records and the institutional holdings of member libraries for cataloging and searching purposes.

OCLC holding(s)
The OCLC Holdings screen indicates which libraries have cataloged a particular item, indicating that they own (hold) a copy.

OCLC Symbol
A 3, 4, or 5 character code representing the holdings of a particular library when displayed in the OCLC Holdings screen.

Odyssey
Software which allow sites to send and receive electronic documents to other Odyssey sites, OCLC ILLiad sites, and other vendor’s software that supports the Odyssey protocol.

OPAC
Online Public Access Catalog.

Open access
Publication that provides immediately free online access to all users worldwide.

PALNI
The Private Academic Library Network of Indiana.

Patron
A library user, also referred to as the Borrower.

Patron Initiated Request
The ability for an end user or patron to request materials from another library, usually electronically.

PDA
Purchase Driven Acquisition or Patron Driven Acquisitions - A model of library collection development in which a library purchases content when it is clear that a patron wants them.

Public Institution
An organization that is open to the public.

Public Library
A library that is open to the public. Use may be limited to patrons who live within a specific district.

Reciprocal contract
Mutual agreement between libraries to lend for no or at a set cost.

Reciprocal Library
A lending library that will not charge if the borrowing library would not charge them.

Resource Sharing
A service which allows a user of one library to borrow material or receive copies of documents that are owned by another library.

RUSA
Reference & User Services Association.

Section 107
Section 107 of the copyright law deals with the fair use copied excerpts for illustration, commentary and the spontaneous reproduction of materials for classroom use.

Section 108
Section 108 of the copyright law deals with reproduction of materials by libraries and archives, including archiving; replacing lost, damaged or obsolete materials; patron requests and interlibrary loans.

Section 109
Section 109 of the copyright law deals with the right of first sale, which provides libraries the right to lend materials.

Section 110
Section 110 of the copyright law focuses on the use of certain types of materials in an educational setting, whether in a face-to-face classroom and via distance education.

Special Library
A library serving a specialized clientele, such as a medical library, or focused on a narrow topic, i.e.--Chemistry Library.

SRCS

Unmediated Request
An interlibrary loan request that is automatically transmitted to a potential supplier.