

Capturing the Benefits of Open Access in Interlibrary Loan

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Brick & Click

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What is open access literature?



digital

online

free of charge

free of most copyright
and

licensing restrictions

Peter Suber

What are the benefits of open access to ILL?

Ability to Fill

access traditionally hard to borrow materials

Speed

eliminate lending staff and shipping time

Cost

reduce to minimum staff time

What factors impact your pre-searching parameters?

Volume

more volume = less pre-searching

Time

less time = less pre-searching

Staff

less staff = less pre-searching

ILL System

less automation = less pre-searching

The key is to be strategic.

Where should your pre-searching begin?

Public Domain

pre-1923 publications

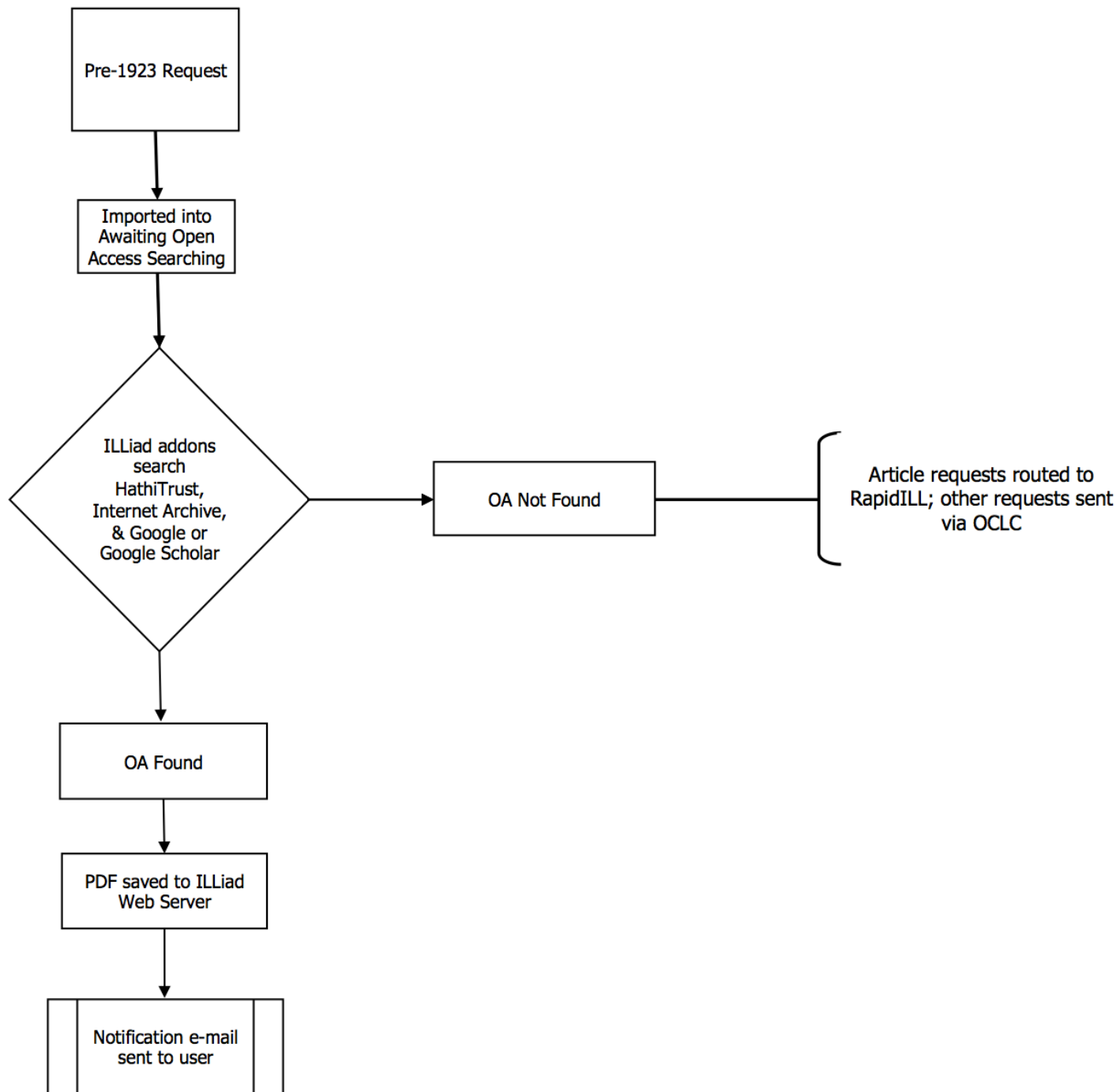
ETDs

Electronic Theses & Dissertations

Establish parameters for pre-searching in ILLiad

RuleNo	1
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	((t.LoanDate < '1923') or (t.PhotoJournalYear < '1923'))
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Public Domain Searching
RuleDescription	This rule moves all requests with a pre-1923 publication date into an Awaiting Public Domain Searching queue.

QueueName	Awaiting Public Domain Searching
ProcessType	Borrowing
NVTGC	ILL



Choose search techniques and strategies

The screenshot shows the 'Manage Addons' window in ILLiad. It features a toolbar with 'Reset Cache Options', 'Save Settings', 'Reset Settings', and 'Create Connection File Addon Settings'. Below this is a table listing various search add-ons. The 'Hathi Trust Catalog' add-on is selected, and its configuration details are shown in a form below the table. The configuration form includes fields for Name, Author, Version, Active status, and Description. To the right of the form is a table of settings for the selected add-on.

Name	Author	Version	Active	Description
Google Scholar Search	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs a Google Scholar search for the PhotoArticleTitle for articles.
Google Search	Atlas Systems, Inc.	1.1	<input checked="" type="checkbox"/>	Performs a generic Google search for the LoanTitle for loans and the PhotoArticleTitle for articles.
Hathi Trust Catalog	IDS Project	1.2	<input checked="" type="checkbox"/>	Searches HathiTrust Catalog for ISBN or Title for loans.
Internet Archive Search	Simmons College Li...	1.1	<input checked="" type="checkbox"/>	Performs a search of internet archive for a loans' LoanTitle.
Netflix Search	Atlas Systems, Inc.	1.1	<input type="checkbox"/>	Searches Netflix for a request's Loan Title if the request is a Loan and has a process type of Borrowing or Doc Del.
NLM Form	California Polytech...	1.2	<input checked="" type="checkbox"/>	Populates the NLM web form for an Inter-library loan request when you select "Import Fields" from the ribbon inside the Add-on.
OCLC Article Exchange	Atlas Systems, Inc.	1.6	<input checked="" type="checkbox"/>	Opens OCLC Article Exchange
PDF Viewer	R. A. Manning, Mid...	1.0	<input checked="" type="checkbox"/>	PDF Viewer
Proquest Dissertation S...	University of Cinci...	1.2	<input checked="" type="checkbox"/>	Performs an Advanced title search for the LoanTitle for loans on Proquest Dissertation Abstracts.

Setting Name	Value	Type	Description
AutoSearch	<input checked="" type="checkbox"/>	boolean	Determines whether or not the search should be done automatically when the request is opened.
StartwithISBN	<input type="checkbox"/>	boolean	Determines whether or not the Addon should start the search with item ISBN.

ILLiad Addons

Choose search techniques and strategies

The screenshot displays the OCLC WorldShare interface. At the top, the OCLC WorldShare logo is on the left, and 'Need Help?' with a dropdown arrow and 'Tina Baich' with a dropdown arrow are on the right. Below the logo is a navigation bar with 'Metadata', 'Interlibrary Loan', and 'Admin' tabs. The 'Collection Manager' section is active, showing a search bar with the text 'Search Collections with "", Open Access with "1"'. A filter list on the left includes options like 'Collections I created', 'Collections I shared to others', 'Collections shared with me', 'Contains Open Access content' (checked), 'Databases (contains no titles)', 'Demand Driven Acquisitions collections', 'Discontinued', 'Document delivery collections', 'Maintain WorldCat Holdings disabled', 'Maintain WorldCat Holdings enabled', 'MARC Record Delivery disabled', 'MARC Record Delivery enabled', and 'WorldCat query collections'. Below the filter list, a table shows search results. The first result is 'Atlanta Historic Newspapers Archive', which is 'Customizable : Open Access'. The table has columns for 'Collection', 'Provider', 'Created', 'In My Holdings', 'Shared', and 'Shared by'. The 'In My Holdings' column for the first result shows a green checkmark and the text 'Held by my library (27 / 27) Titles', with links for 'Deselect' and 'Collection'. The table also includes pagination controls at the bottom: 'Refresh', 'Results 1-10 of 102', 'Show 10 rows per page', and a series of numbered links from 1 to 10, with 'Next >' and 'Last >>'.

Need Help? Tina Baich

User support info

Metadata Interlibrary Loan Admin

Collection Manager

Collection

?

☐ My Selected Collections

Search

Search Collections with ""

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

My Apps

Search Collections with "", Open Access with "1"

Filter

- ☐ Collections I created
- ☐ Collections I shared to others
- ☐ Collections shared with me
- ☒ Contains Open Access content
- ☐ Databases (contains no titles)
- ☐ Demand Driven Acquisitions collections
- ☐ Discontinued
- ☐ Document delivery collections
- ☐ Maintain WorldCat Holdings disabled
- ☐ Maintain WorldCat Holdings enabled
- ☐ MARC Record Delivery disabled
- ☐ MARC Record Delivery enabled
- ☐ WorldCat query collections

[Refresh](#) Results 1-10 of 102 Show 10 rows per page.

<< First < Previous 1 2 3 4 5 6 7 8 9 10 Next > Last >>

Collection	Provider	Created	In My Holdings	Shared	Shared by
Atlanta Historic Newspapers Archive Customizable : Open Access		6/17/2015, 3:41:16 PM	Held by my library (27 / 27) Titles Deselect Collection		

WorldCat Knowledgebase

Choose search techniques and strategies

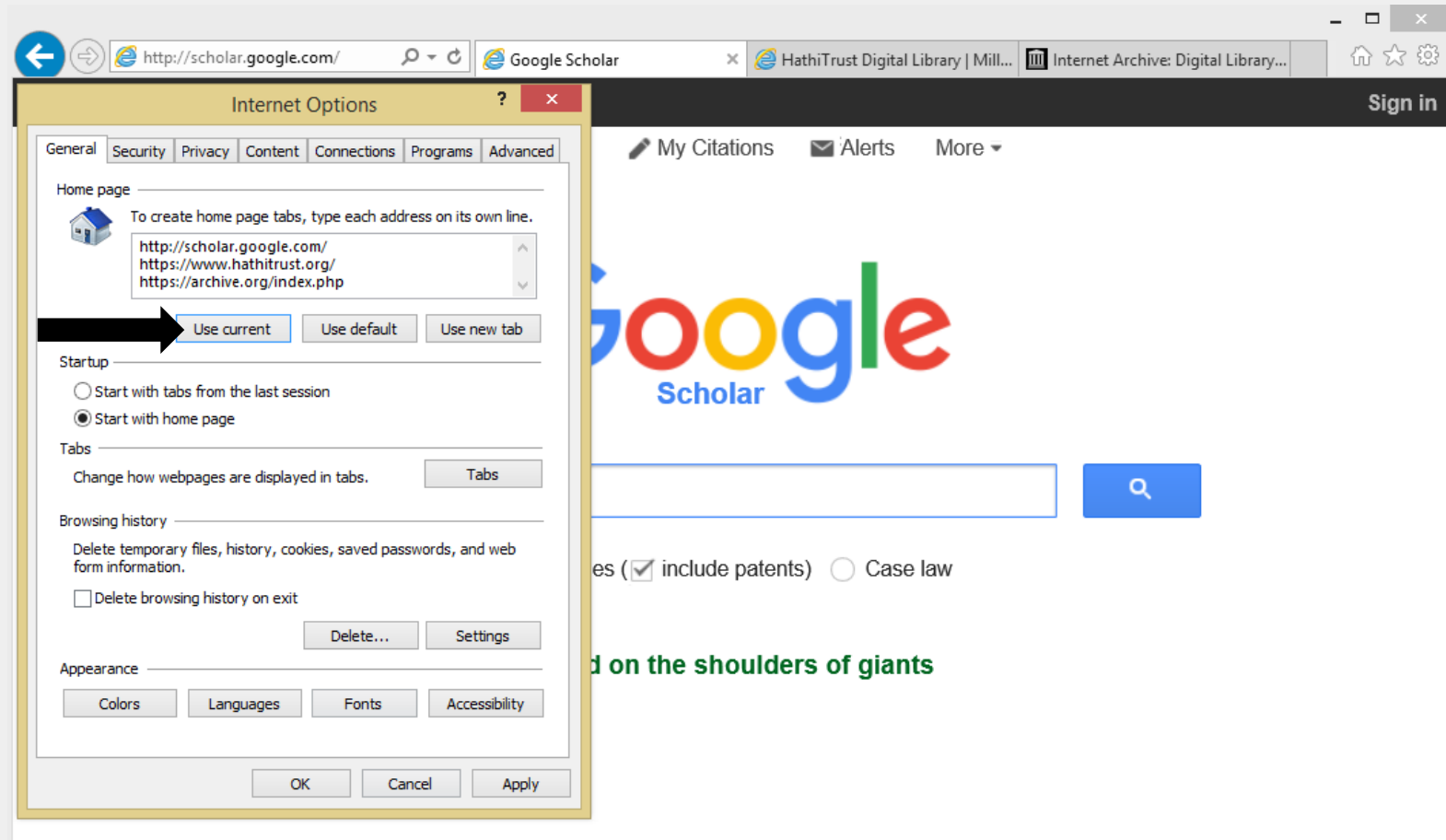
The screenshot displays the WorldShare Interlibrary Loan (ILL) search interface. The top navigation bar includes 'Metadata', 'Interlibrary Loan', and 'Admin'. The left sidebar contains links for 'Interlibrary Loan Home', 'Discover Items', 'Borrowing Requests', 'Lending Requests', 'Purchasing Requests', and 'Print Queue (0)'. The main search area shows a search for 'plos' with 8961 results. The results are sorted by 'Library Count (Highest first)'. Two results are visible:

Item	Library	Availability
PloS one by Public Library of Science ePeriodical (digital), English Publisher: San Francisco, CA : Public Library of Science ISSN#: 1932-6203 OCLC#: 70662135 View Now free View Now free Search for versions with same title and author	Public Library of Science	Held by my library State Holdings Regional Holdings All Holdings (1113)
PLOS clinical trials by Public Library of Science ePeriodical (digital), English Publisher: Cambridge, UK : Public Library of Science, 2006- ISSN#: 1555-5887 OCLC#: 58994937 View Now free	Public Library of Science	Held by my library State Holdings Regional Holdings All Holdings (957)

On the right side of the interface, there are filters for 'Filter by: Custom Holdings Path' and 'Year: Volume: Go'.

WorldShare ILL

Choose search techniques and strategies



Pre-Set Browser Tabs

What will you communicate?



Educational opportunity?
instruct or give

What to deliver?
PDF or link

How will you communicate?



Specialized?

multiple email templates

General?

single email template

Create email template(s)

The screenshot displays the Gmail 'Compose' screen with a pre-filled email template. On the left, the 'Settings' sidebar is visible, showing the 'General' tab. The main composition area has a title bar 'ILL Request Available Online' and a 'To' field. The email body contains a greeting 'Dear Library User,' followed by a paragraph about an open access version of a requested item. It lists placeholders for 'ARTICLE AUTHOR', 'ARTICLE TITLE', 'JOURNAL TITLE', and 'ARTICLE YEAR'. A link to 'ILL@library.edu' is provided for questions. The email concludes with 'Thank you for using XYZ Library's Interlibrary Loan service.' and 'Sincerely, ILL Staff'. A 'Save' button is visible above the signature. At the bottom, there is a rich text editor with various formatting options (font, bold, italic, underline, link, list, indent, link, unlink, image, link, unlink, emoji) and a 'Send' button. A context menu is open over the 'Send' button, offering options: 'Default to full-screen', 'Canned responses', 'Label', 'Plain text mode', 'Print', and 'Check spelling'. The right sidebar shows 'Offline' and 'Themes' tabs.

Settings

General Labels

Gmail Labs: Son

Gmail Labs is a testir
primetime. They may
If (when) a Labs featu
escape hatch. Use ht

Search for a lab:

Save Changes

Enabled Labs

Insert
Refer to documentati
Status report templai
FAQ

ILL Request Available Online

To

Cc Bcc

ILL Request Available Online

Dear Library User,

We located an open access version of the following item you requested at URL.

This version of the article is the author's manuscript and may vary slightly from the final, published version. If you require the final, published version, please resubmit your request including a note indicating that need.

ARTICLE AUTHOR
ARTICLE TITLE
JOURNAL TITLE
ARTICLE YEAR

If you have questions about this request, please contact us at ILL@library.edu.

Thank you for using XYZ Library's Interlibrary Loan service.

Sincerely,
ILL Staff

Save

New canned response...

Sans Serif | T | B | I | U | A | | | | | | | | | |

Send

Default to full-screen

Canned responses

Label

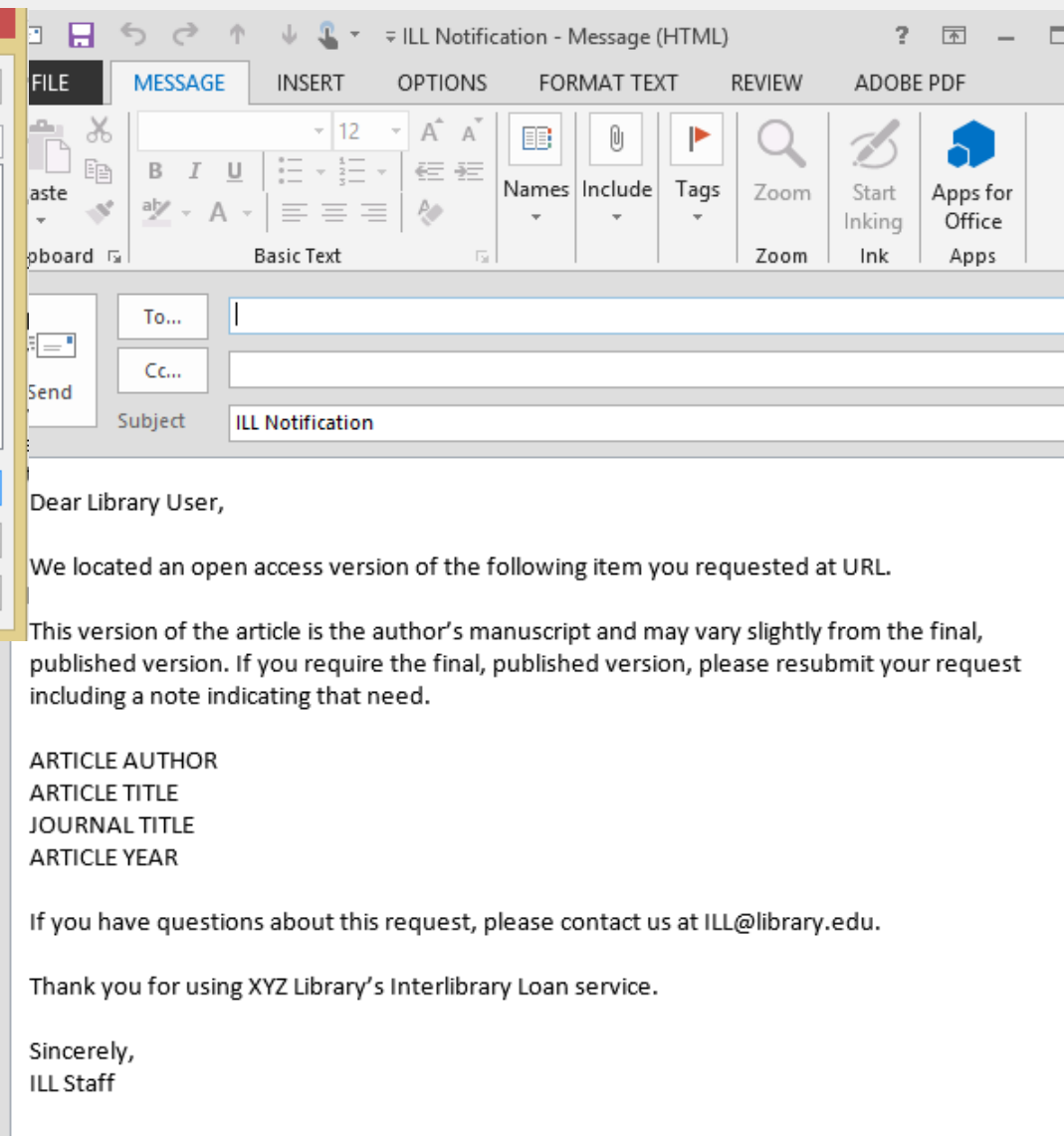
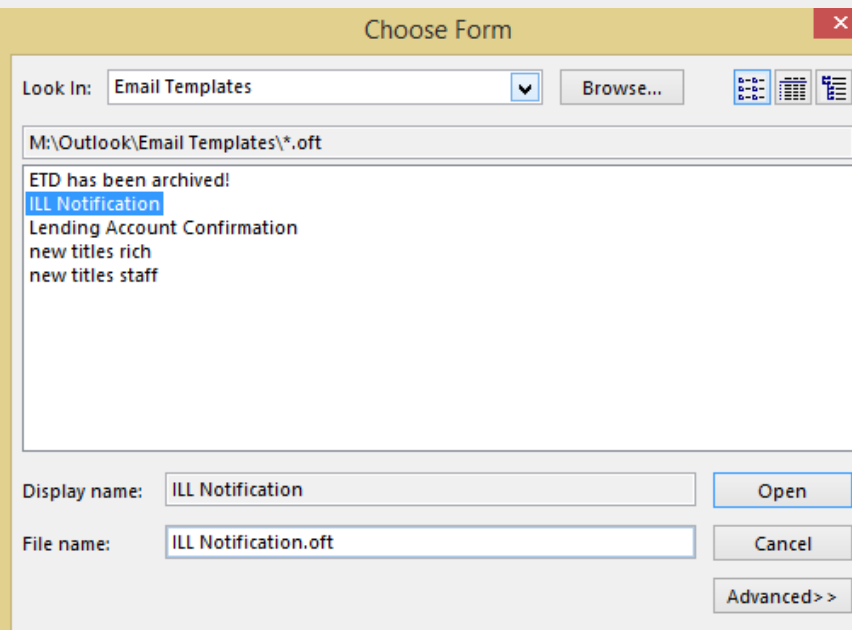
Plain text mode

Print

Check spelling

Gmail

Create email template(s)



Microsoft Outlook

Create email template(s)

ILLiad

Template Details

Name: NVTGC:

Description:

E-mail ☒ SMS

From Name: From Address:

To Name: To Address:

CC Address: BCC Address:

Subject:

Dear <#User.FirstName> <#User.LastName>,

The following item that you requested through Interlibrary Loan was found freely available on the internet:

<#Transaction.PhotoJournalTitle>
Vol. <#Transaction.PhotoJournalVolume>, no. <#Transaction.PhotoJournalIssue>: (<#Transaction.PhotoJournalYear>), pp.
<#Transaction.PhotoJournalInclusivePages>

Title: <#Transaction.PhotoArticleTitle><#Transaction.LoanTitle>
Author: <#Transaction.PhotoArticleAuthor><#Transaction.LoanAuthor>

We have made it conveniently available for download from your ILLiad account. You can access it by clicking here:
<https://ill.ulib.iupui.edu/ILLiad/IUP/pdf/<#Transaction.TransactionNumber>.pdf>
or by logging into your ILLiad account:
<https://ill.ulib.iupui.edu/ILLiad/IUP/login.html>

You can also view the item at the following URL: <#Transaction.CallNumber>

If you have any questions about this service, please contact us and refer to the Transaction Number TN:
<#Transaction.TransactionNumber>.

Thank you for using Interlibrary Loan, please let us know how we are doing, we appreciate your feedback.

Sincerely,
<#LocalInfo.GeneralContactName> Staff

Please email us at: <#LocalInfo.GeneralEmailAddress> or Tel: <#LocalInfo.GeneralPhone>

Create email routing rule in ILLiad

ProcessType	Borrowing
Name	Open Access
DefaultToAddress	
DefaultToName	
DefaultCCAddress	
DefaultSubject	
DefaultFromAddress	
DefaultFromName	
DefaultStatus	Request Finished
LoanTemplate	openaccess.txt
ArticleTemplate	openaccess.txt
NVTGC	ILL

How do you keep statistics on open access requests?

Cancelled or Filled?

What do you do with open access statistics?



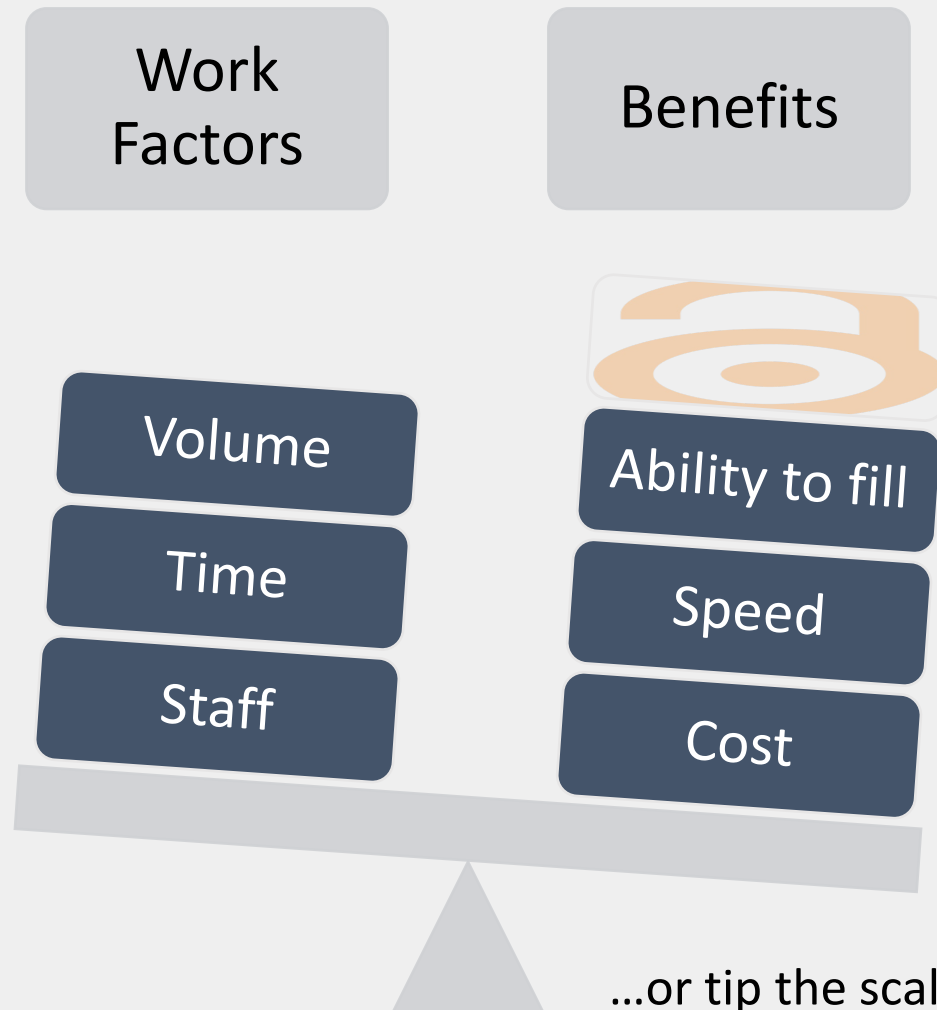
You may find opportunities to expand or redirect pre-searching.

Conference papers

Reports

Articles published the previous year

The goal is to create a balance





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