



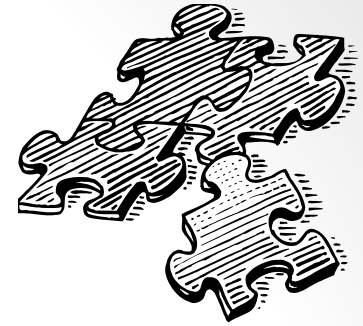
# The Right Fit

Designing article workflows using Direct Request and the OCLC Knowledge Base for institutions big or small

Alison Johnson – Assistant Library Director – Indiana Wesleyan University

Brian Miller – Head, Interlibrary Services – The Ohio State University

# In this Presentation...



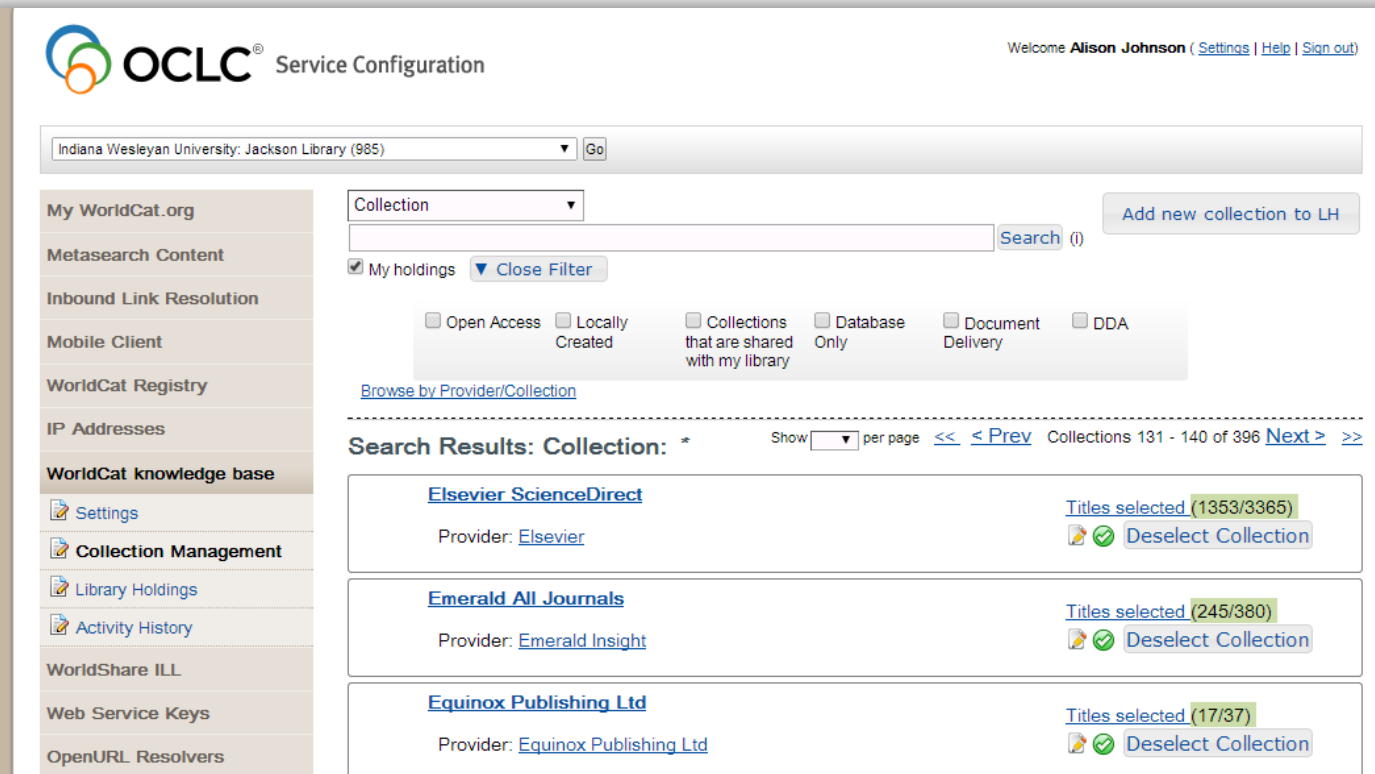
- About Our Institutions
- What is the Knowledge Base?
- Setting Up Direct Request
- Borrowing/Doc Del Article Workflows
- Lending Article Workflows
- Questions/Discussion

# About Our Institutions

Institution Name	Indiana Wesleyan University	The Ohio State University
OCLC Symbol	IMC	OSU
<b>Population served (approx.)</b>		
Students	15,000	56,000
Faculty/Staff	3,500	11,000
<b>Serial title holdings (approx.)</b>		
Print	1,500	114,000
Electronic	126,000	250,000
<b>Article requests (Borrowing + Doc Del)</b>		
Received (FY13)	7,500	25,587
Filled (FY13)	6,300	20,876
% filled via OCLC Direct Request (Feb 2014)	23%	36%
<b>ILL employees</b>		
Staff	2 FTE	5 FTE
Students	.5 FTE	2 FTE

# What is the Knowledge Base?

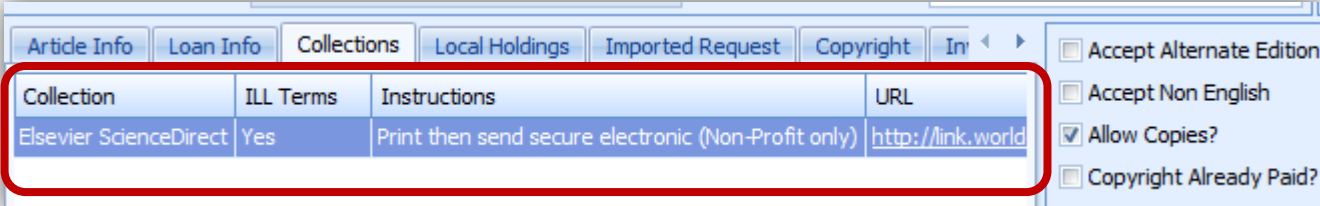
A tool for making your **e-article holdings** available for resource sharing at the **article-level** for more efficient requesting



The screenshot displays the OCLC Service Configuration interface. At the top left is the OCLC logo and the text "Service Configuration". At the top right, it says "Welcome Alison Johnson" with links for "Settings", "Help", and "Sign out". Below this is a search bar containing "Indiana Wesleyan University: Jackson Library (985)" and a "Go" button. A left-hand navigation menu includes items like "My WorldCat.org", "Metasearch Content", "Inbound Link Resolution", "Mobile Client", "WorldCat Registry", "IP Addresses", "WorldCat knowledge base" (with sub-links for Settings, Collection Management, Library Holdings, and Activity History), "WorldShare ILL", "Web Service Keys", and "OpenURL Resolvers". The main content area features a "Collection" dropdown menu, a "Search" button, and a "Close Filter" button. Below these are several filter checkboxes: "My holdings" (checked), "Open Access", "Locally Created", "Collections that are shared with my library", "Database Only", "Document Delivery", and "DDA". A "Browse by Provider/Collection" link is also present. The search results section shows "Search Results: Collection: \*" with a "Show" dropdown and pagination controls. Three collection results are listed: "Elsevier ScienceDirect" (1353/3365 titles selected), "Emerald All Journals" (245/380 titles selected), and "Equinox Publishing Ltd" (17/37 titles selected). Each result includes a "Deselect Collection" button.

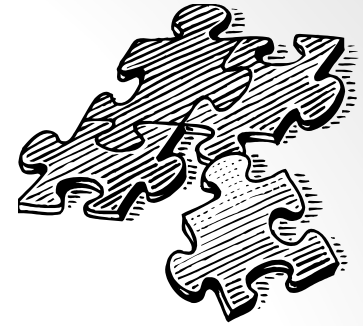
# Benefits of the KB

- Faster **Borrowing** of e-Journal Articles
  - Direct Request for Articles
  - Lenders chosen based on article-level holdings
  - 635 libraries now participate in the KB (Group symbol: KBIL)
- Faster **Doc Del** of e-Journal Articles
  - Requests you own contain link directly to full-text
  - Links for Open Access collections can be activated
- Faster **Lending** of e-Journal Articles
  - Requests contain links to full-text
  - Licensing permission instructions displayed



Collection	ILL Terms	Instructions	URL
Elsevier ScienceDirect	Yes	Print then send secure electronic (Non-Profit only)	<a href="http://link.world">http://link.world</a>

# Implementing the KB



**How do I get started?**

# Implementing the KB

- Initiate process by contacting OCLC  
<http://oclc.org/support/services/knowledge-base.en.html>
- Populate e-Journal Holdings into the KB
  - PubGet (IWU)
  - Manual entry through Service Configuration module (OSU)
  - Other options: upload spreadsheet... or a combination

pubget LIBRARIAN PORTAL oclc Welcome, Indiana Wesleyan University!

Logins Holdings IP ranges Usage Summary Usage Reports Cost Reports Preferences Support

Logins Proxy details Platform Alerts

### Platform Logins

Enter your logins here to collect holdings data and stats.

WorldCat knowledge base status:  
Holdings were last uploaded to WorldCat knowledge base on 03/01/2014. The report is available [here](#).  
The best place to review ultimate output is [WorldCat knowledge base](#).

[Add login](#) [Download this table](#)

Platform	Services	Status	Username	Password	Actions
American Chemical Society	Holdings JR1 Stats	Imported 6 days ago TBA	██████████	██████████	<a href="#">edit</a> <a href="#">refresh</a> <a href="#">delete</a>
EBSCO	Holdings JR1 Stats	Imported 6 days ago TBA	██████████	██████████	<a href="#">edit</a> <a href="#">refresh</a> <a href="#">delete</a>

OCLC Service Configuration Welcome Brian Miller | Settings | Help | Logout

Ohio State University Libraries (2315) [Go]

### Collection Management for Ohio State University Libraries

Collection [dropdown] Search [i]

[Add new collection to LH](#)

My holdings [Close Filter](#)

Open Access  Locally Created  Collections that are shared with my library  Database Only  Document Delivery  DDA

[Browse by Provider/Collection](#)

My WorldCat.org  
Metasearch Content  
Inbound Link Resolution  
Mobile Client  
WorldCat Registry  
IP Addresses  
WorldCat knowledge base  
Settings  
Collection Management  
Library Holdings  
Activity History  
WorkShare 3.1  
Web Service Keys  
OpenURL Resolvers

Need Help? [Help and Tutorials](#) [E-mail Support Page](#) [+1-614-764-0000, ext. 3510 INTL 1-800-848-5800 USA](#)

# Setting up Direct Request

## Step 1: Create a Direct Request Profile (OSU's Profile)

The screenshot shows the OCLC Resource Sharing Settings interface for creating a Direct Request Profile. The profile name is 'DRA' and the description is 'Direct Request for Articles'. The 'Request Types' section has 'Copy' and 'Loan' checked. The 'Bibliographic Formats' list includes 'Books', 'E-Serials', and 'Serials' checked. The 'Route To Review File Options' section has 'If Held By Your Institution' and 'If Held By Custom Holdings Group' checked, with 'LOCAL2' selected in the dropdown. The 'Additional Profile Options' section has 'Minimum Number in Lender String' set to 1, 'Custom Holdings Path' set to 'DRA', 'Prefers E Article Processing' set to 'E within group', and 'Produce The Request' set to 'Yes'. Red boxes and arrows highlight these specific settings.

Serial, E-Serial, and Book formats allow unmediated requesting of journal articles and book chapters.

We want to manually review requests held by our institution (OSU) or any symbol under the Ohio State umbrella in our custom holdings group LOCAL2 (i.e. OS2, OHL, OAG).

The electronic or print OCLC record must have at least one eligible symbol for Direct Request.

With free and then charging libraries in our DRA Path, Direct Request checks for lenders with electronic and then print holdings within the free custom holdings groups first before moving to the charging libraries.



# Setting up Direct Request

## 'Prefers E Article Processing' setting

### E within group

#### Free consortial group

ABC

XYZ

PQR

1<sup>st</sup>  KB/Electronic record

2<sup>nd</sup>  Print record

#### Free elsewhere group

GHI

MNO

UVW

3<sup>rd</sup>  KB/Electronic record

4<sup>th</sup>  Print record

#### \$10 or less group

DEF

JKL

STU

5<sup>th</sup>  KB/Electronic record

6<sup>th</sup>  Print record

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### E across groups

#### Free consortial group

ABC

XYZ

PQR

1<sup>st</sup>  KB/Electronic record

4<sup>th</sup>  Print record

#### Free Odyssey/AE group

UTS

LKJ

FED

2<sup>nd</sup>  KB/Electronic record

5<sup>th</sup>  Print record

#### Free Email Delivery group

WVU

ONM

IHG

3<sup>rd</sup>  KB/Electronic record

6<sup>th</sup>  Print record

# Setting up Direct Request

## Step 2: Create a Custom Holdings Path



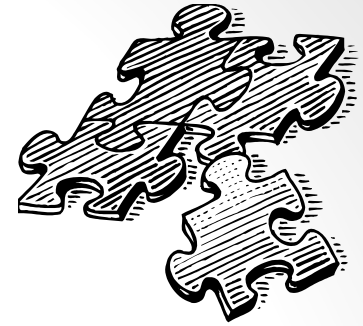
## Step 3: Decide what custom holdings group or groups should be selected in your Direct Request for articles Path.

- You can choose to use only free custom holdings groups or also include those for libraries that charge.
- Search for group symbol **KBIL** in the OCLC Policies Directory to find OCLC Knowledge Base libraries that fill from electronic content. Then make sure those symbols are in your appropriate local custom holdings groups.

## Step 4: Create routing rules to move requests to 'Awaiting Direct Request Sending' . . . .

Additional info at: <https://prometheus.atlas-sys.com/display/illiad/Unmediated+ILL+-+Direct+Request>

# Borrowing/Doc Del Article Workflows



**Where does the article go  
when a patron clicks Submit?**

# Pre-Copyright Clearance

## Options:

- 1) No routing rules before Copyright Clearance
- 2) One routing rule before Copyright Clearance (IWU)

RuleNo	8
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType = 'Article' and len(t.PhotoJournalYear) = 4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate()) - 5))
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Rule to bypass copyright clearance for articles exempt from the Rule of 5 (older than five years).

- 3) Multiple routing rules before Copyright Clearance (OSU)

Demonstrated on the following slides

# Pre-Copyright Clearance: OSU

## Routing Rule

If article request from *Dissertation Abstracts International* . . .

- Routes these requests to **Dissertation Abstracts** custom queue for staff to locate in ProQuest Dissertations and Theses database.
- Request is cancelled with instructions for access provided to patron.
- These are caught before going out through Direct Request.

RuleNo	8
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	u.NVTGC in ('OSU') and t.PhotoJournalTitle like '%Dissertation Abstracts%'
NewProcessType	Borrowing
NewTransactionStatus	Dissertation Abstracts
RuleDescription	Routes dissertation requests to own queue for staff review in ProQuest Dissertations and Theses database

# Pre-Copyright Clearance: OSU

## Routing Rule

### If article from pre-1923 . . .

- Routes these requests to **Awaiting Open Access Searching** custom queue for staff to locate in Hathi, Internet Archive, Google.
- Request is cancelled with URL provided to patron.
- Requests caught before going out through Direct Request.

RuleNo	22
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.PhotoJournalYear < '1923' and u.nvtgc ='OSU'
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Open Access Searching
RuleDescription	Routes pre-1923 requests out of copyright to their own queue to be searched online for free access before sending to other libraries through Borrowing

# Pre-Copyright Clearance: OSU

## Routing Rule

If article from expensive copyright title . . .

- Routes these requests to specific staff person's custom queue (**Give to xxxxx**) for review and decision how to proceed.
- Requests caught before going out through Direct Request.
- Request may be filled or cancelled.

RuleNo	34
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType = 'Article' and t.PhotoJournalTitle like '%Journal of xxxxxx xxxxxxxxxxxxxx%' and u.nvtgc = 'OSU'
NewProcessType	Borrowing
NewTransactionStatus	Give to xxxxx
RuleDescription	Moves expensive articles to staff queue for review

# Pre-Copyright Clearance: OSU

## Routing Rule

If older than 5 years and has an ISSN . . .

* Pages If given will speed processing. Enter NA only if unknown.	<input type="text"/>
<b>ISSN/ISBN</b> If given will speed processing.	<input type="text"/>
OCLC Number	<input type="text"/>

- Request is auto-routed to **Awaiting Direct Request Sending** to go out through Direct Request.

RuleNo	35
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType='Article' and len(t.PhotoJournalYear)=4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate()-4)) and t.ISSN > " and u.nvtgc ='OSU'
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Automatically send Borrowing article requests with ISSN and older than 5 years on to Direct Request



# Pre-Copyright Clearance: OSU

## Routing Rule

If no ISSN is present . . .

- Request is routed to **To be searched** custom queue in Document Delivery.

RuleNo	37
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType='Article' and (t.ISSN = " or t.ISSN is NULL) and u.nvtgc = 'OSU'
NewProcessType	Doc Del
NewTransactionStatus	To be searched
RuleDescription	Any age article transaction WITHOUT ISSN route from Awaiting Copyright Clearance TO Document Delivery To Be Searched

- Requests in Document Delivery are processed 18 hours a day by ILL or Circ staff who:
  - fill from OSU print collection;
  - cancel if in OSU electronic collections and give patron instructions for access; or
  - manually route request back to Borrowing's **Awaiting Copyright Clearance** queue if not at OSU.

# Pre-Copyright Clearance: OSU

## Routing Rule

When DocDel staff move requests not available at OSU over to 'Awaiting Copyright Clearance' . . .

- **If no ISSN added . . .**
  - Request stops in **Awaiting Copyright Clearance** if from last 5 years; or
  - Auto-routes to **Awaiting Request Processing** if older than 5 years.

RuleNo	36
RuleActive	Yes
ProcessType	Doc Del
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType='Article' and len(t.PhotoJournalYear)=4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate())-4)) and (t.ISSN = " or t.ISSN is NULL) and u.nvtgc ='OSU'
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Request Processing
RuleDescription	Catch items that have been previously searched with no ISSN and route on to Awaiting Request Processing if older than 5 years

- **If ISSN was added and request is for article older than five years . . .**
  - It auto-routes to **Awaiting Direct Request Sending** to go out on Direct Request.

RuleNo	40
RuleActive	Yes
ProcessType	Doc Del
TransactionStatus	Awaiting Copyright Clearance
MatchString	t.RequestType='Article' and len(t.PhotoJournalYear)=4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate())-4)) and t.ISSN > " and u.nvtgc ='OSU'
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Automatically sends articles from Doc Del with ISSN and older than 5 years on to Direct Request

- **If ISSN was added and request is for article from last 5 years . . .**
  - Request stops in **Awaiting Copyright Clearance** for Borrowing staff to clear.

# In Copyright Clearance: OSU & IWU

For requests from last 5 years in **Awaiting Copyright Clearance . . .**

- If on Copyright List, ILL staff double-click entry to open request and check to see if article can be obtained through Get It Now.

Copyright - ILLiad Client 8.4.3.0

Home Borrowing Document Delivery Lending System Copyright

Select All Doc Provider Auto Search

Title: Journal of Organizational Computing ...  
ISSN: 1091-9392  
Publisher: Copyright Clearance Center

TN	Journal	Article	Volume	Issue	Inclusive Pages	Pa...	Year
1121429	Journal of Organizational Computing ...	Analyzing...	24	1	94-112	19	2013

Journal of Ho Hum Studies  
Journal of La Di Da  
**Journal of Organizational Computing**

Back Forward Stop Refresh

Initiate IFM Payment Approve IFM Payment Retry IFM Payment

Browser Get It Now Search Manual Action

Detail History OCLC Z39.50 PubMed/Dodine Get It Now Search NLM Web Form OHIOLINK Title

IFM Billing

- If not using Get It Now, click “Save CCC Information” and request will move to **Awaiting Request Processing**.

# Post-Copyright Clearance: OSU & IWU

## If not on Copyright List . . .

- Borrowing staff click 'No Problem' causing requests to move to **Awaiting Request Processing**.
- If these cleared requests have an ISSN or OCLC#, they are auto-routed to **Awaiting Direct Request Sending**.

**A routing rule like one of the following is required:**

RuleNo	23
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	(t.ISSN > " or t.ESPNumber > ") and u.Cleared = 'Yes' and t.RequestType = 'Article' and (t.LendingString = " or t.LendingString is NULL) and u.NVTGC in ('OSU')
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Default Direct Request for articles rule

**OSU**

RuleNo	3
RuleActive	Yes
ProcessType	Borrowing
TransactionStatus	Awaiting Request Processing
MatchString	t.ISSN > " and t.RequestType = 'Article' and (t.LendingString = " or t.LendingString is NULL)
NewProcessType	Borrowing
NewTransactionStatus	Awaiting Direct Request Sending
RuleDescription	Default Direct Request Article rule

**IWU**

# Post-Copyright Clearance: OSU

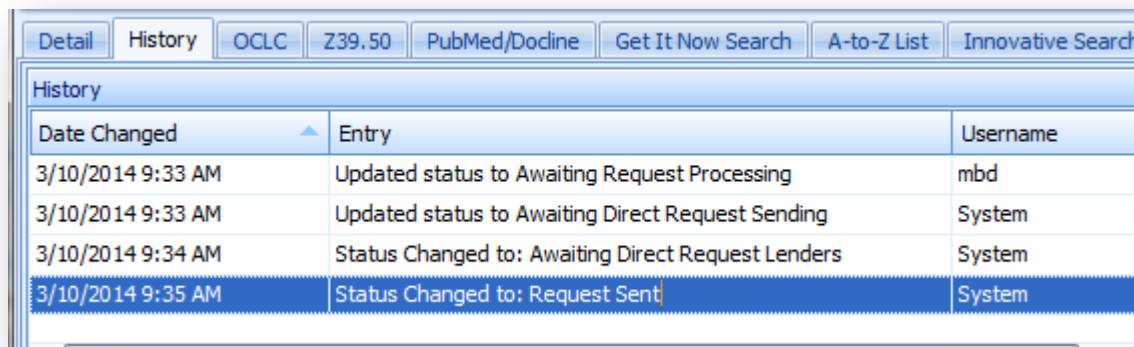
So at OSU there are **three routing rules** that send articles to Direct Request . . .

- Requests for articles older than 5 years that patron submitted already containing an ISSN
- Requests for articles older than 5 years that DocDel staff added an ISSN
- Requests for articles from within the last 5 years that cleared Copyright coming from Awaiting Request Processing.

# Direct Request Sending

Once requests enter **Awaiting Direct Request Sending**, a lending string is auto-chosen based on:

- Holdings that lenders have set in the OCLC Knowledge Base as well as the WorldCat database.
- Your Direct Request custom holdings group(s) in the Direct Request custom holdings path.



The screenshot shows a web interface with a navigation bar at the top containing tabs: Detail, History, OCLC, Z39.50, PubMed/Dodine, Get It Now Search, A-to-Z List, and Innovative Search. Below the navigation bar is a 'History' section containing a table with the following data:

Date Changed	Entry	Username
3/10/2014 9:33 AM	Updated status to Awaiting Request Processing	mbd
3/10/2014 9:33 AM	Updated status to Awaiting Direct Request Sending	System
3/10/2014 9:34 AM	Status Changed to: Awaiting Direct Request Lenders	System
3/10/2014 9:35 AM	Status Changed to: Request Sent	System

# Direct Request Fulfillment

## Trusted Sender

To have articles auto-mounted to your ILLiad server and an email notification automatically sent to your patron with no staff intervention, set the Key Value of the following two settings in the Customization Manager to 'Always':

**OdysseyAutoElecDel** OSU

**Settings**

Key Value  
Always

Description  
Possible values are Always, Never, or Trusted. Always means all articles go directly to the customer without staff review. Never means all articles must be reviewed by staff. Trusted means only articles received from Trusted senders bypass staff review.

**ArticleExchangeTrusted** OSU

**Settings**

Key Value  
Always

Description  
Possible values are Always, Never, or Trusted. Always means all articles go directly to the customer without staff review. Never means all articles must be reviewed by staff. Trusted means only articles received from Trusted senders bypass staff review.

# Success! 54 minutes to delivery. No staff intervention.

Tracking		
Date Changed	Changed To	Changed By
2/24/2014 5:04 PM	Submitted by Customer	Username
2/24/2014 5:04 PM	Awaiting Copyright Clearance	Username
2/24/2014 5:04 PM	Awaiting Direct Request Sending	System
2/24/2014 5:04 PM	Awaiting Direct Request Lenders	System
2/24/2014 5:05 PM	Request Sent	System
2/24/2014 5:58 PM	Odyssey Document Received	Odyssey
2/24/2014 5:58 PM	Delivered to Web	Odyssey

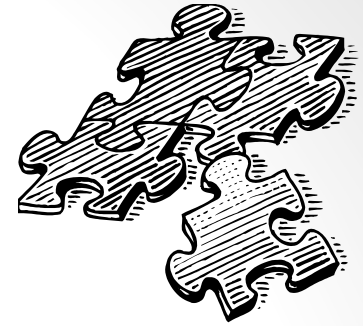
Auto-routed through Copyright Clearance due to publication date greater than 5 years

OCLC record and lenders automatically selected by KB and request sent

Received via Odyssey (trusted sender) and patron notified automatically



# Borrowing/Doc Del Article Workflows



**What happens when  
Direct Request fails?**

# Reasons Direct Request Fails



- No ISSN or OCLC#

Date	Note	Type	Added By
3/1/2014 7:16 AM	1. No Matching Bib/2. No ISBN, ISSN, or OCLCNo in request.	System	System

- Not Enough Lenders

Date	Note	Type	Added By
2/28/2014 4:41 PM	1. Request matched profile ARTICLES./2. No lenders or not enough lenders	System	System

- ISSN Search with too many hits

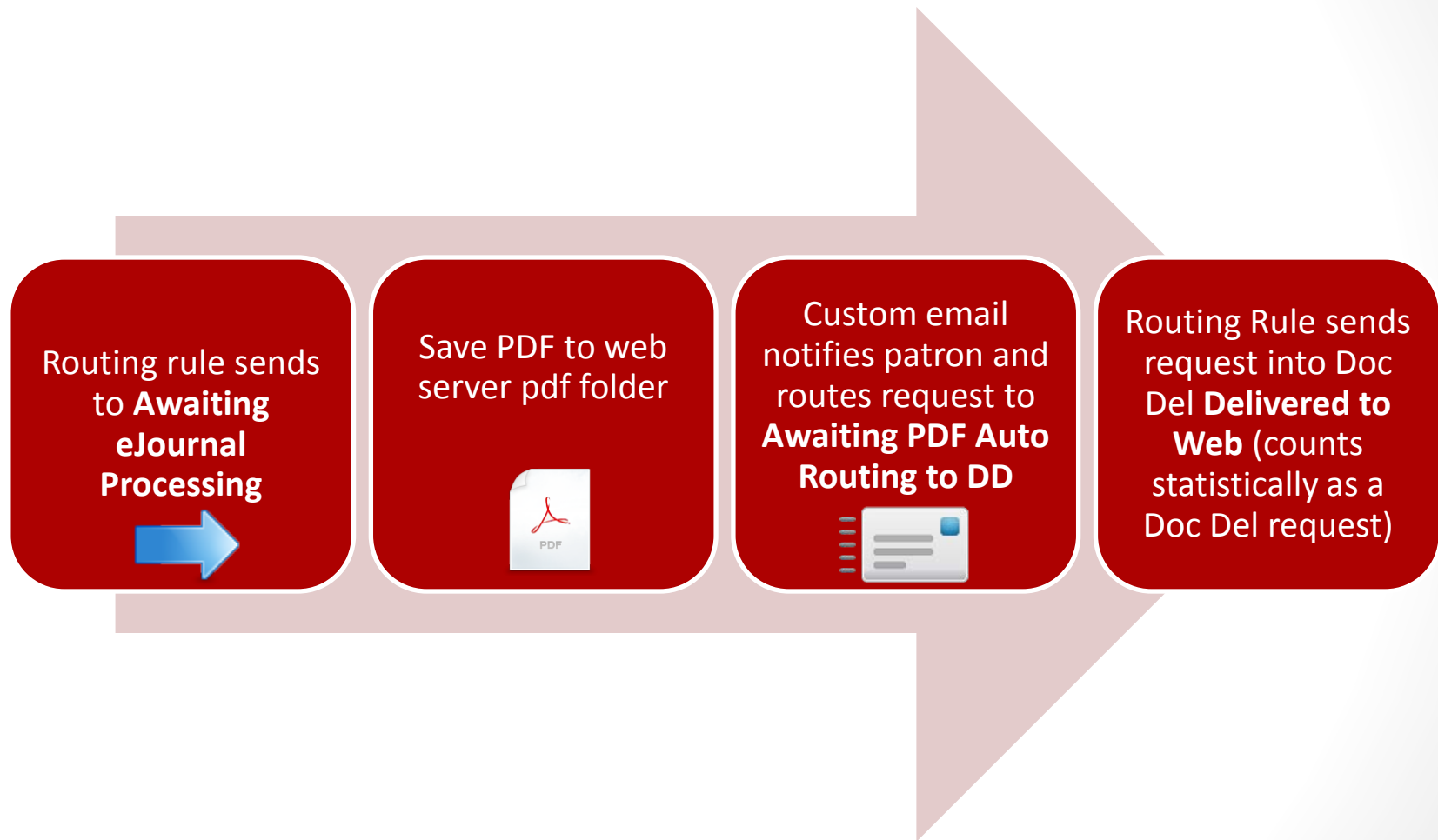
*D.R. can only process up to 25 OCLC records associated with a single ISSN*

Date	Note	Type	Added By
3/1/2014 10:43 AM	1. No Matching Bib/2. ISSN Search With Too Many Hits.	System	System

- Locally owned / Open Access

Date	Note	Type	Added By
1/8/2014 11:49 AM	1. Request matched profile ARTICLES./2. Held by your library	System	System
2/20/2014 10:32 AM	1. Request matched profile DRA./2. Held by group LOCAL2	System	System

# We Own **Electronically** (IWU)



*Requests for Undergrads are not filled if we own. Requests are routed to Doc Del for cancellation. Patrons emailed instructions on how to find.*

# We Own **Electronically** (OSU)

From **Awaiting Request Processing**, staff first verify that electronic article is accessible.



Request is then cancelled and specific instructions for access are emailed to patron.



Dear John,

Regarding the ILLiad request you've made . . .

Transaction Number: 1125106

Title: Journal of Dental Research

Year: 1943

Author: Klatsky, Meyer

Publisher:

Article Title: Anthropological Studies in Dental Caries

Volume: 22

Issue: 4

Pages: 267-274

We've found the article for you through the OSU Online Journals List at <https://osu.illiad.oclc.org/illiad/osu/OnlineJournals.html>.

Enter the journal title in the box next to 'Title Begins With' and click Search. Then use the link: Dentistry & Oral Sciences Source

If you have a question about this item, please contact us at [osuill@osu.edu](mailto:osuill@osu.edu) with the Transaction Number 1125106 so we can assist you.

Thank you for using Interlibrary Services.

# We Own **Print** (IWU)

Routing rule  
sends to **Awaiting  
eJournal  
Processing**



Run **Z39.50**  
search and save  
location info



Route to  
**Awaiting DD  
Stacks Searching**



Fill request in  
Doc Del



# We Own **Print** (OSU)

Borrowing staff check local catalog and add Location and Call Number to transaction



Request is manually routed to Doc Del module. . .



**Awaiting DD Stacks Searching** main library;  
**OR Awaiting Document Delivery Processing** to be email routed to dept libraries/depository



Request is scanned and filled



# We Do Not Own



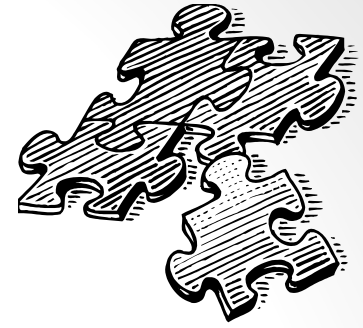
Traditional mediated OCLC request (OSU & IWU)

Purchase through Get It Now or publisher site  
(OSU & IWU)

Local Routed to ILLiad shared server site (OSU)

Rapid for LHL/CRL (OSU)

# Lending Article Workflows



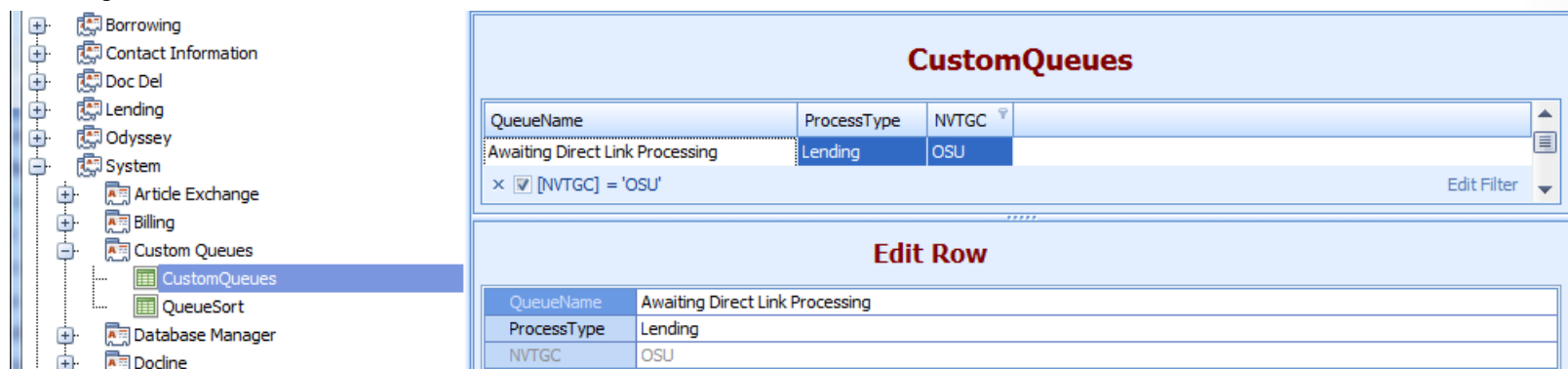
**What about Lending?**



# Lending Article Workflow

To have incoming lending article requests with links from KB go into their own queue . . .

- **Step #1: Create a Custom Queue**



The screenshot shows the 'CustomQueues' interface. On the left is a tree view with 'Custom Queues' selected. The main area displays a table with the following data:

QueueName	ProcessType	NVTGC
Awaiting Direct Link Processing	Lending	OSU

Below the table is an 'Edit Row' section with the following details:

QueueName	Awaiting Direct Link Processing
ProcessType	Lending
NVTGC	OSU

- **Step #2: Create a Routing Rule**

RuleNo	24
RuleActive	Yes
ProcessType	Lending
TransactionStatus	Awaiting Lending Request Processing
MatchString	t.username = 'OSU' and t.TransactionNumber in (select distinct TransactionNumber from OCLCCollectionData)
NewProcessType	Lending
NewTransactionStatus	Awaiting Direct Link Processing
RuleDescription	Moves all items with Collection data to Awaiting Direct Link Processing

# Lending Article Workflow (IWU)

When processing requests from that queue, the Collections tab will contain the Knowledge Base information.

General Request Information

Transaction Number: 63277    Article    Loan

Username: Lending    Service Type:    Not Wanted After: 04/17/2013

Transaction Date: 3/18/2013 9:39 AM    Site:    Shipping Options: Mail

Delivery Method:    Billing Account:    Doc Type:

Service Level: Regular

Article Info    Loan Info    **Collections**    Local Holdings    Imported Request    Copyright    In

Collection	ILL Terms	Instructions	URL
Elsevier ScienceDirect	Yes	Print then send secure electronic (Non-Profit only)	http://link.world

Accept Alternate Edition  
Accept Non English  
 Allow Copies?  
Copyright Already Paid?

Is it okay to lend?

*This is a collection setting from the KB.*

What type of lending is permissible?

*This is a collection setting from the KB.*

Link to full-text

# Lending Article Workflow (OSU)

System 1125807 - Lending Request

Lending Processing OCLC

Cancel Request Conditionalize Request Finished Searching Mark Found Mark Found Scan Now Yes Yes With Due Date No Renewals Route Routing Policies Directory Resend Request Odyssey Billing View Send E-Mail Print Request Add to Print Queue Print and Empty Queue Pending Updates System

Detail History OCLC Z39.50 PubMed/Docline NLM Web Form OHIOLINK Title Connexion

General Request Information

Transaction Number: 1125807 Article Loan

Username: OSU

Transaction Date: 3/7/2014 2:02 PM

Service Level: Regular

Status: Awaiting Direct Link Processing

OCLC Information

ILL Number: 114453185

OCLC Number: 2242805

Lending String: \*OSU

System ID: OCLC 102641

OCLC Status: IN\_PROCESS

Due Date:

Article Info Loan Info Imported Request Copyright Invoice Additional Library Item Information

Journal Title: Archaeology of Eastern North America.

Volume/Issue: 21

Month/Year/Pages: 1993 179-192

Article Author:

Article Title: Crock et al.; Scalloping for artifacts

ISxN: 0360-1021

Original Journal Title:

Item Author/Publisher:

Item Place/Edition:

Item Info 2: Item Info 3:

Lending Policy: Unknown

Lending Repo Policy: Will reproduce

LHR Summary: v.1(1973)-

OCLC Number: 2242805

Orig Bib:

Collection: JSTOR Arts & Sciences IX Collec...

ILL Terms: Yes

Instructions: Send electronic copy

URL: [http://link.worldcat.org/?rft.institution\\_id=2315&spage=179&pkqName=asix&rft.ocnum=2242805&issn=0360-1021&linkclass=to\\_article&jKey=archeastnortham&provider=jstor&date=1993](http://link.worldcat.org/?rft.institution_id=2315&spage=179&pkqName=asix&rft.ocnum=2242805&issn=0360-1021&linkclass=to_article&jKey=archeastnortham&provider=jstor&date=1993)

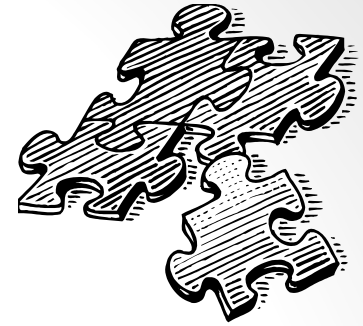
Date: 3/7/2014 2:02 PM

Note: Borrowing Notes; We loan for free to those who loan to us for free. (maxCost; FREE)

Type: System

Added By: System

# Questions / Discussion



Alison Johnson – Indiana Wesleyan University

**[alison.johnson@indwes.edu](mailto:alison.johnson@indwes.edu)**

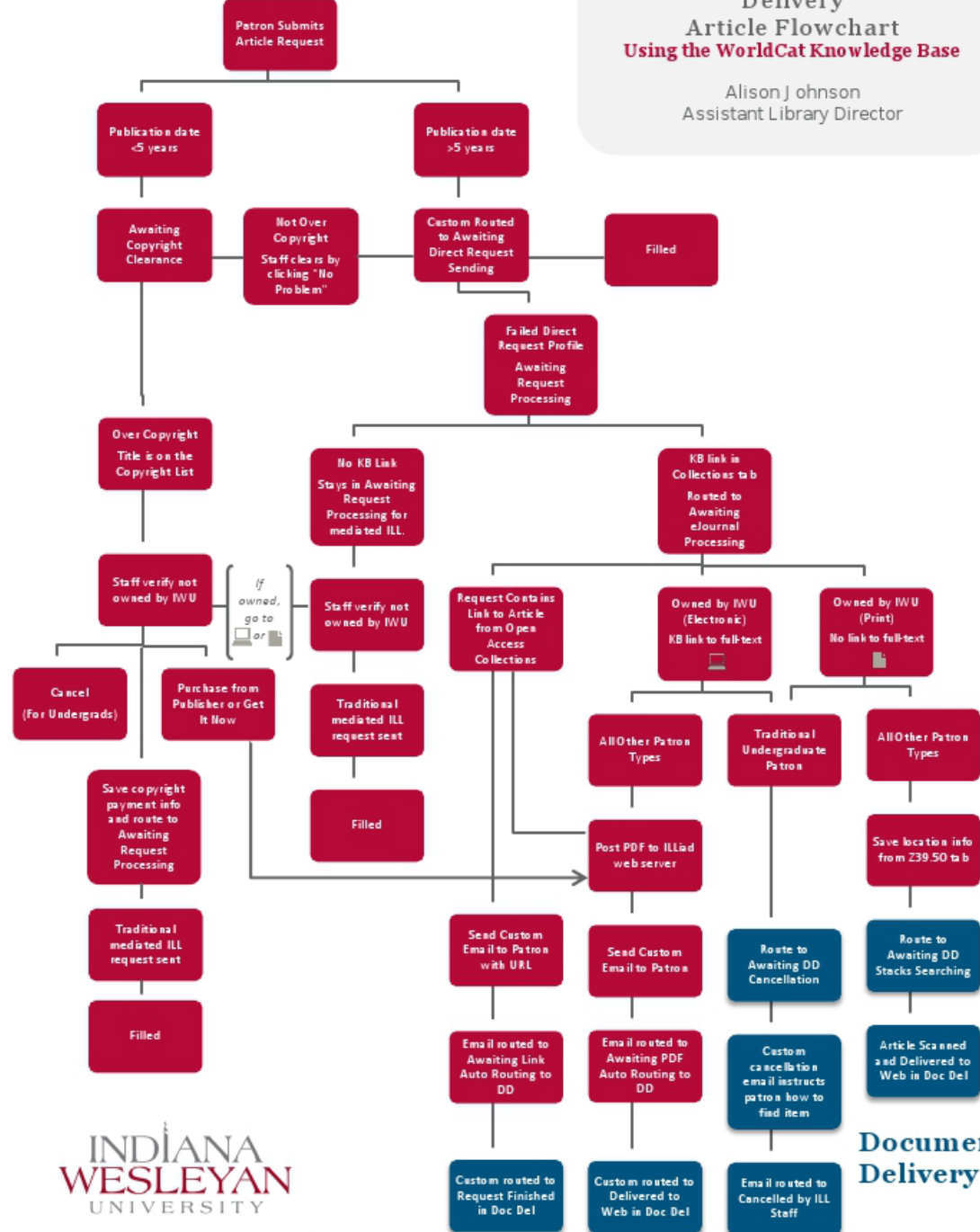
Brian Miller – The Ohio State University

**[miller.2507@osu.edu](mailto:miller.2507@osu.edu)**

# Borrowing

## ILLiad Borrowing & Document Delivery Article Flowchart Using the WorldCat Knowledge Base

Alison Johnson  
Assistant Library Director



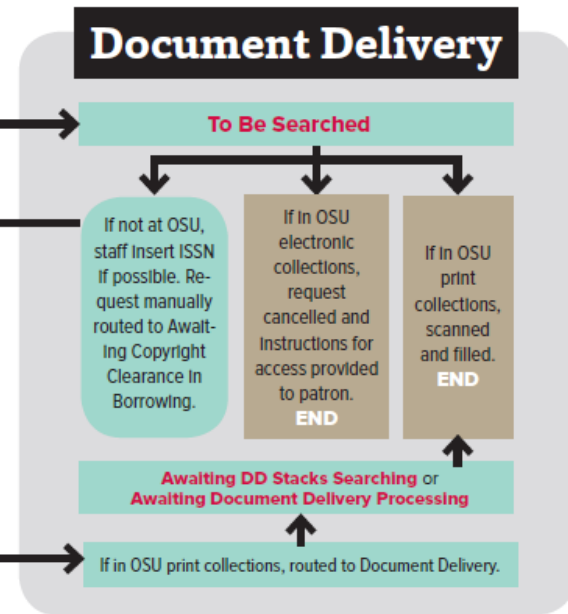
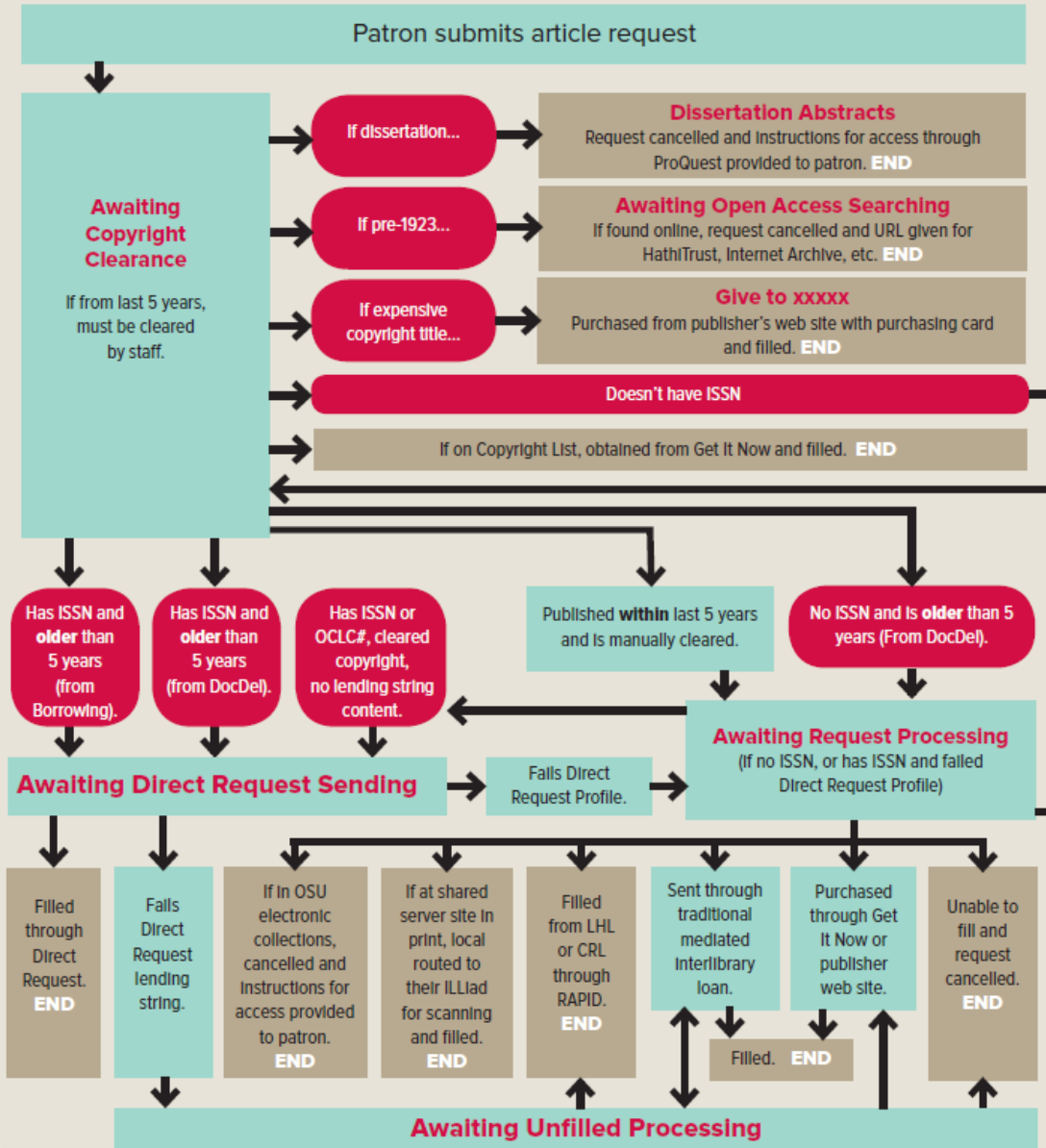
# Borrowing

Patron submits article request

## ILLiad Borrowing / Doc Del Article Flowchart

**Brian Miller**  
Head, Interlibrary Services

### Document Delivery



**Key**

- Red Text** ILLiad queue name
- Black Box** ILLiad module
- Red Rounded Rectangle** Routing rule used
- Light Blue Box** Temporary condition
- Grey Box** End status (Delivered to Web, Request Finished, or Cancelled by ILL Staff)