





▶ **For Sound issues:**

- ▶ Click the purple tab in the bottom right 
- ▶ Click the My Settings gear 
- ▶ Click Audio & Video Settings to adjust volume
 - ▶ You may also use your phone for audio


▶ **To Chat:**

- ▶ Click the purple tab in the bottom right 
- ▶ Click the Chat bubble 

1

Inside Interlibrary Loan:

Lending & Borrowing
with
OCLC WMS & the KYVL Courier Service



May 2024


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Agenda

- ▶ Introduction to interlibrary loan
- ▶ OCLC WorldShare Management (WMS) – ILL module
- ▶ ILL borrowing in WMS
- ▶ ILL lending in WMS
- ▶ Wrapping Up – Bits & Pieces

3

Introduction to Interlibrary Loan



"That book is not available at this branch, this library system or this solar system, but we can order it for you."

4

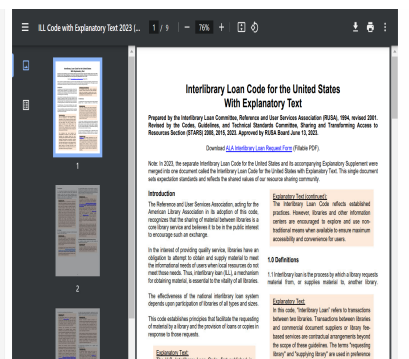
Interlibrary Loan (ILL) Definition

As defined by the *Interlibrary Loan Code for the United States with Explanatory Text*, "Interlibrary loan is the process by which a library requests material from, or supplies material to, another library. ... The purpose of interlibrary loan as defined by this code is to obtain, upon request of a library user, material not available in the user's local library."

American Library Association
ILL Resource Page
<https://libguides.ala.org/Interlibraryloans>

5

ILL Etiquette ~ The Code



<https://www.ala.org/rusa/interlibrary-loan-code-united-states-explanatory-text>

6



7

ILL Policy Development

Why Have a Policy?

- Staff can provide consistent service.
- Patrons feel confident in using ILL services when they have clear expectations.
- Other libraries will have clear guidelines on which to base their interactions with your library.

8

ILL Policy Development

Guidelines for Policy Development & Usage

- Be aligned with the library's mission and objectives
- Be clearly stated so that a reasonable person will understand what is expected
- Be reviewed regularly by the library's governing authority and potentially legal counsel
- Be enforced evenhandedly and not in a manner intended to benefit or disfavor any person or group in an arbitrary manner.

<https://www.ala.org/advocacy/intfreedom/guidelinesdevelopment>

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ILL Policy Development ~ Borrowing

- How will requests be made?
- Will you have request limits?
- Which patrons can use ILL?
- Will you pay fees to borrow?
- Will you charge patrons for lost or damaged items?
- Methods of notification?

10

ILL Policy Development ~ Lending

- Who are you and how can you be contacted?
- What types of requests will you accept?
- Which libraries will you lend materials to?
- What types of materials will you lend?
- How long will you lend materials for?
- Will you charge a fee?
- What types of materials are you willing to send photocopies of?
- Will renewal requests be accepted?
- How long will it take you to fill/answer requests?
- What questions have past borrowing libraries asked about ILL transactions?

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ILL Policy Elements ~ Pulling It All Together

➤ Mission/Goal	➤ Formats difficult
➤ Who is served	➤ Patron responsibilities
➤ How to request	➤ Library responsibilities
➤ Time to fulfill requests	➤ Delivery methods
➤ Fees and methods of payment	➤ Notification methods
➤ Limitations of Service	➤ Length of loan, renewal
➤ No. of requests allowed	➤ Lost material fees
➤ Formats off limits	➤ Contact Information

Weible, Cherie. (2011). *Interlibrary Loan Practices Handbook*. Chicago: ALA.

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Library Science Resources

Find titles in our WorldCat Discovery catalog or discover our newest titles on our Library Science Resources page. You can request items through your library's interlibrary loan department, or in the case of digital materials, access through Kentucky Libraries Unbound with your local library card. If you need more in-depth assistance, please contact me at Deborah.Hibbard@ky.gov or KDLAReferenceDesk@ky.gov or by calling 502-564-8306.



<https://kdla.ky.gov/Library-Support/Library-Staff-Development/Pages/Library-Science-Resources.aspx>

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Copyright & Libraries

Copyright covers “authors of original works of authorship, including literary, dramatic, musical, artistic, and certain other intellectual works.”

<https://www.copyright.gov/help/faq/faq-protect>

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Copyright & Libraries

1976 – 17 U. S. Code § 109 – First Sale Doctrine or “Right of First Sale”

- Allows libraries to borrow & lend “returnables” via interlibrary loan that they purchased.
 - Books
 - DVDs
 - CDs, etc.
- No copyright compliance needs to be indicated when requesting and supplying “returnables.”

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Copyright & Libraries

1976 - 17 U.S. Code § 108 –
 Limitations on exclusive rights: Reproduction by libraries and archives

- Section 108 creates provision within copyright law for interlibrary loan.
- Section 108 does not replace section 107, fair use.

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Copyright ~ Section 108

Section 108 permits libraries and archives to:

- Make one copy of an item held by a library for interlibrary loan.
- Make up to three copies of a damaged, deteriorated, lost, or stolen work for the purpose of replacement. This only applies if a replacement copy is not available at a fair price;
- Make up to three copies of an unpublished work held by the library for the purpose of preservation. If the copy is digital, it cannot be circulated outside the library;
- Reproduce, distribute, display, or perform a published work that is in its last 20 years of copyright for the purposes of preservation, research, or scholarship *if* the work is not available at a fair price or subject to commercial exploitation;
- Make one copy of an entire work for a user or library who requests it *if* the work isn't available at a fair price.

17

Copyright ~ Section 108

The following restrictions must be observed when appealing to this exception:

- It applies only to libraries and archives open to the public, or to unaffiliated researchers in a specialized field.
- Copies cannot be made for commercial purposes.
- The copying cannot be systematic (e.g., to replace subscriptions).
- All copies made under this exception must include a notice stating that the materials may be protected under copyright.

18

108. Limitations on exclusive rights: Reproduction by libraries and archives

(a) Except as otherwise provided in this title, nothing in this title shall be construed to limit the rights of a library or archives, or any of its employees acting within the scope of their employment, to reproduce to more than one copy or phonorecord of a work, except as provided in subsections (b) and (c), or to distribute such copy or phonorecord, under the conditions specified by this section. If

(1) the reproduction or distribution is made without the express or implied consent of the copyright owner;

(2) the reproduction or distribution of the work includes a notice of copyright that appears on the copy or phonorecord that is reproduced under the provisions of this section, or includes a legend stating that the work may be protected by copyright if no such notice is so located on the copy or phonorecord that is reproduced under the provisions of this section;

(b) The rights of reproduction and distribution under this section apply to three copies or phonorecords of an unpublished work duplicated solely for purposes of preservation and security or for deposit for research use in another library or archives of the type described by clause (1) of subsection (a);

(1) the copy or phonorecord reproduced is currently in the collections of the library or archives; and

(2) any copy or phonorecord that is reproduced in digital format is not otherwise distributed in that format and is not made available to the public in that format outside the premises of the library or archives.

(c) The rights of reproduction under this section apply to three copies or phonorecords of a published work duplicated solely for the purpose of replacement of a copy or phonorecord that is damaged, deteriorating, lost, or stolen, or if the existing format in which the copy or phonorecord has, after a reasonable effort, determined that an original replacement cannot be obtained at a fair price; and

(1) the library or archives has, after a reasonable effort, determined that an original replacement cannot be obtained at a fair price; and

(2) any copy or phonorecord that is reproduced in digital format is not made available to the public in that format outside the premises of the library or archives in lawful possession of such copy.

(d) Notwithstanding the above, a library or archives may reproduce or distribute a copy or phonorecord of a work that is no longer manufactured or is no longer reasonably available in the commercial marketplace, if the reproduction or distribution is made without the express or implied consent of the copyright owner, if the copy or phonorecord is a replacement copy or phonorecord of a copy or phonorecord that is damaged, deteriorating, lost, or stolen, or if the existing format in which the copy or phonorecord has become the property of the user, and the library or archives has had no notice that the copy or phonorecord would be used for any purpose other than private study, scholarship, or research; and

(1) the library or archives displays prominently, at the place where copies are accepted, and includes on its other files, a warning of copyright in accordance with requirements that the Register of Copyrights shall prescribe by regulation.

(e) Nothing in this section

(1) shall be construed to impose liability for copyright infringement upon a library or archives or its employees for the unauthorized use of reproducing equipment located on its premises. Provided, That such equipment displays a notice that the making of a copy may be subject to copyright law;

(2) requires a person who uses such reproducing equipment or who requires a copy or phonorecord under subsection (d) from liability for copyright infringement for any such act, or for any later use of such copy or phonorecord, if it exceeds fair use as provided in section 107;

(3) in any contract between two parties, or in any contractual obligations assumed at any time by the library or archives when it obtained a copy or phonorecord of a work in its collection;

(4) in any way affects the right of fair use as provided by section 107, or any contractual obligations assumed at any time by the library or archives when it obtained a copy or phonorecord of a work in its collection.

(g) The rights of reproduction and distribution under this section extend to the scanned and unscanned reproduction or distribution of a single copy or phonorecord of the same material on separate occasions, but do not extend to cases where the library or archives, or its employee

(1) is aware or has substantial reason to believe that it is engaging in the related or concerted reproduction or distribution of multiple copies or phonorecords of the same material, whether made on one occasion or over a period of time, and whether intended to aggregate use by one or more individuals or for separate use by the individual members of a group; or

(2) engages in the systematic reproduction or distribution of single or multiple copies or phonorecords of material described in subsection (d). Provided, That nothing in this clause prevents a library or archives from participating in interlibrary arrangements that do not have, as their purpose or effect, that the library or archives receiving such copies or phonorecords for distribution files in such aggregate quantities as to substitute for a purchase of such work.

(h)(1) For purposes of this section, during the last 20 years of any term of copyright of a published work, a library or archives, including a nonprofit educational institution that functions as such, may reproduce, distribute, display, or perform in facsimile or digital form a copy or phonorecord of such work, or portions thereof, for purposes of preservation, scholarship, or research, if such library or archives has first determined, on the basis of a reasonable investigation, that none of the conditions set forth in subparagraphs (A), (B), and (C) of paragraph (2) apply.

(2) No reproduction, distribution, display, or performance is authorized under this subsection if

(A) the work is subject to normal commercial exploitation;

(B) a copy or phonorecord of the work can be obtained at a reasonable price; or

(C) the copyright owner or its agent provides notice pursuant to regulations promulgated by the Register of Copyrights that either of the conditions set forth in subparagraphs (A) and (B) apply.

(i) The exemption provided in this subsection does not apply to any subsequent uses by users other than such library or archives.

(j) The rights of reproduction and distribution under this section do not apply to a musical work, a pictorial, graphic or sculptural work, or motion picture or other audiovisual work other than an audiovisual work dealing with news, except that no such limitation shall apply with respect to rights granted in subsections (b), (c), and (f), or with respect to pictorial, graphic or sculptural works published as bookplates, digiprints, or similar subjects to works in three copies as reproduced or distributed in accordance with subsections (b) and (c).

(k) Pub. L. 101-554, § 101, Oct. 10, 1976; 90 Stat. 2548; Pub. L. 102-307, title 10, § 1074, July 26, 1992; 106 Stat. 272; Pub. L. 101-65, § 1010(a), Nov. 13, 1987; 101 Stat. 1334; Pub. L. 105-264, title 1, § 154, Oct. 27, 1988; 102 Stat. 2639; Pub. L. 105-304, title IV, § 404, Oct. 28, 1988; 102 Stat. 3889; Pub. L. 103-4, title IV, § 402, Apr. 27, 2000; 119 Stat. 2077.

<https://uscode.house.gov>

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SECTION 108
of the U.S. Copyright Code

Reproductions by Libraries or Archives for their Users, for Replacement, or for Preservation

Directions:

- Use your mouse to turn the wheel chart to the desired section [click and pull]
- Read the text in the box
- Clicking for details will bring up any other important qualifying criteria or explanatory notes
- Click "Create PDF" to print or save your results, including all criteria/notes and any details you'd like to add

<https://librarycopyright.net/resources/spinner/index.html>

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1978 –

National Commission on New Technological Uses of Copyrighted Works (CONTU) Guidelines –

Copyright ~ CONTU

- During one calendar year, no more than five copies may be received from any one work whose publication date is within five years of the date of the patron's request.

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Exceeding CONTU Options

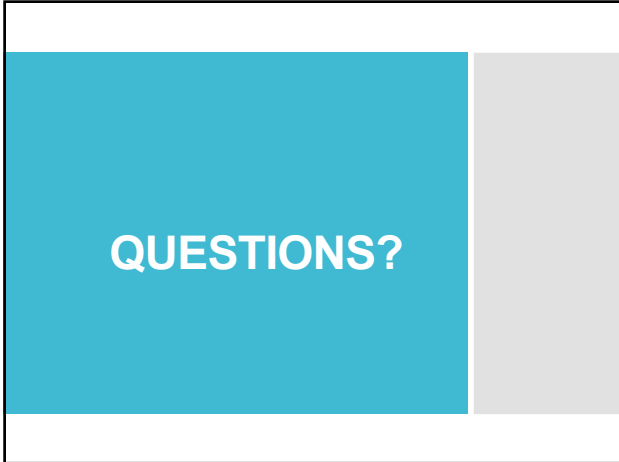
- Refuse to request the copy and cancel the request.
- Pay the royalties or get articles through an authorized delivery service.
- Attempt to borrow or purchase the journal/book or start a subscription.
- Request permission from the copyright holder.
- Refer the library user to a nearby library that has the journal/book.
- Purchase a copy of the article from the publisher's web site. Try to find it "free" online and provide patron with link.
- Evaluate for Fair Use.

23

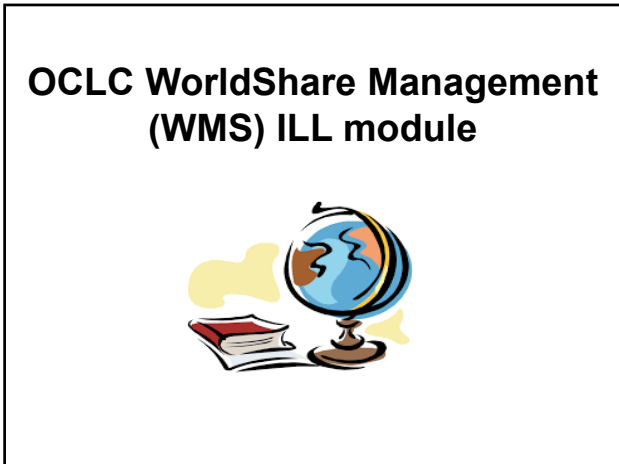
KDLA's ILL Role in Kentucky

- Agreement between OCLC and KDLA to provide WorldShare ILL services to KY public libraries.
- Lender of choice for many public libraries. We lend AV and receive courier service 5 days per week.
- We have training resources available for those new to WMS or who need a refresher.
- We are not KYVL. We are complementary but separate state agencies.

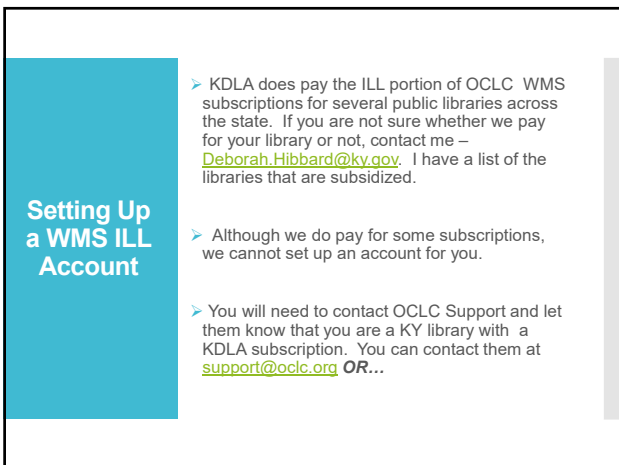
24



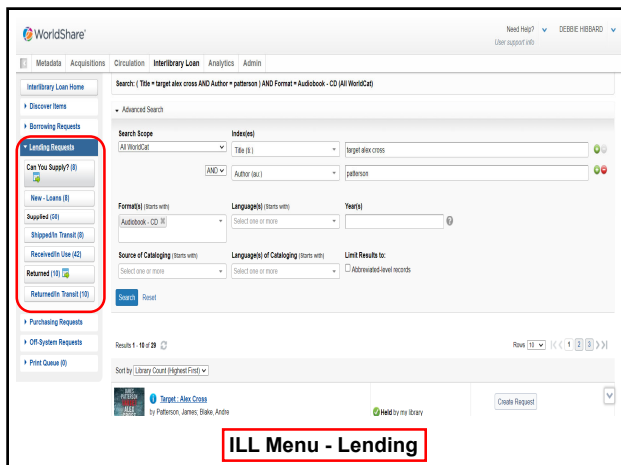
25



26

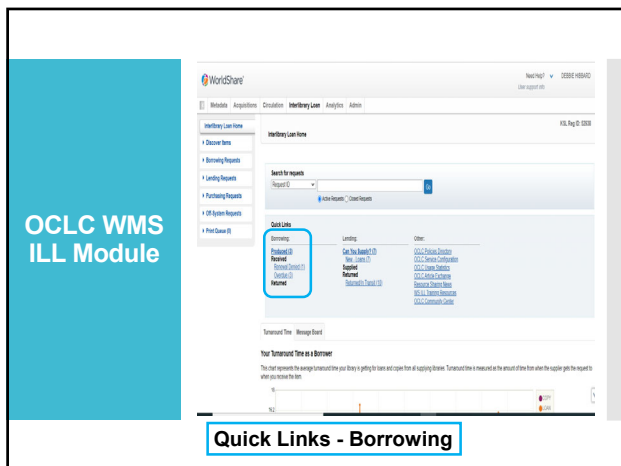


27



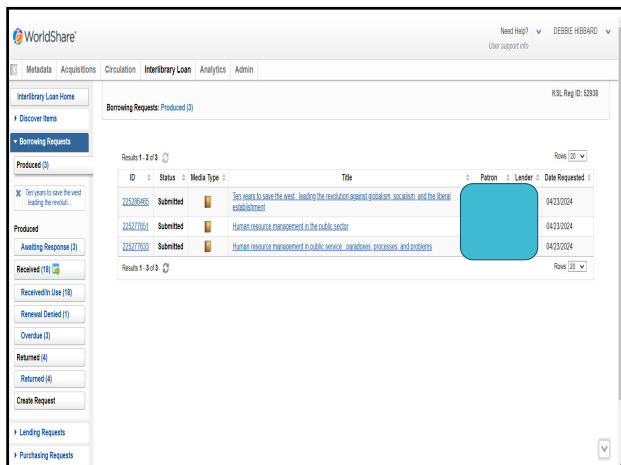
ILL Menu - Lending

34



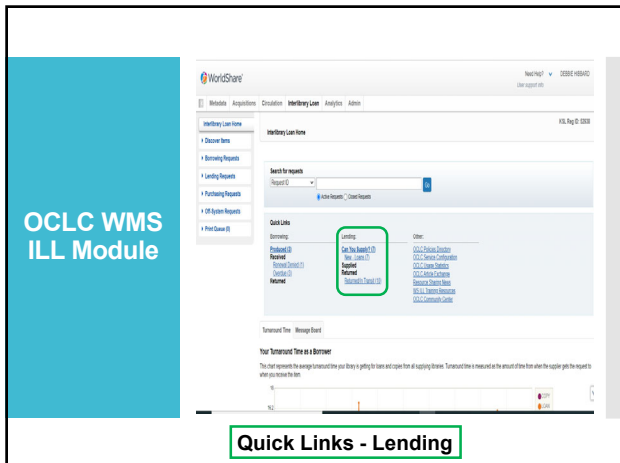
Quick Links - Borrowing

35



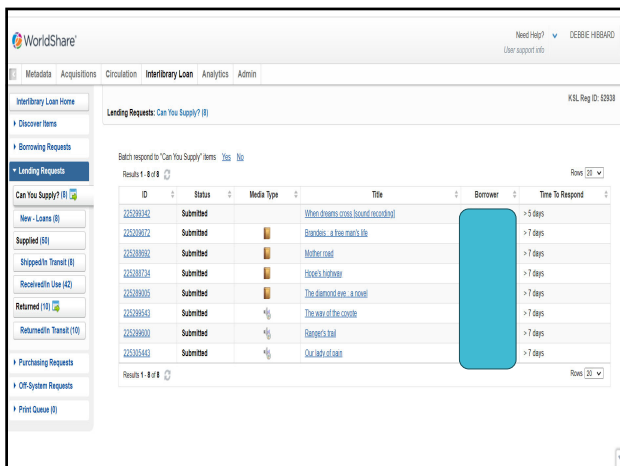
36



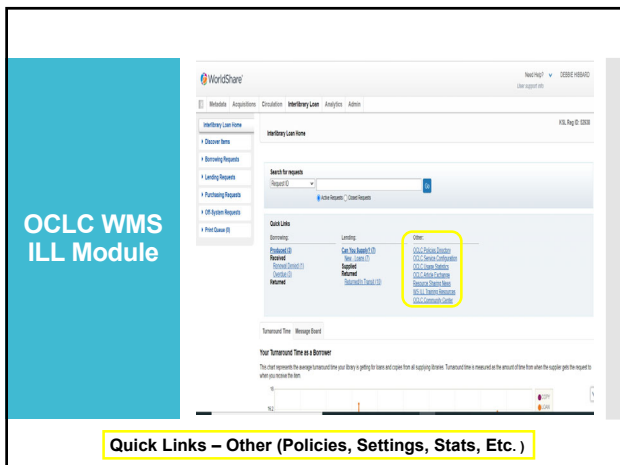


Quick Links - Lending

37



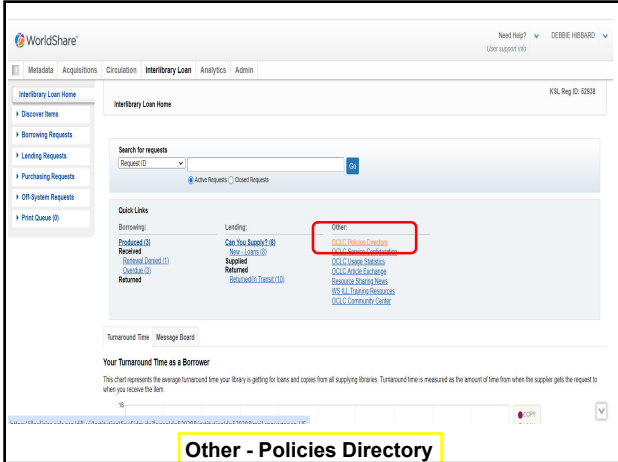
38



Quick Links - Other (Policies, Settings, Stats, Etc.)

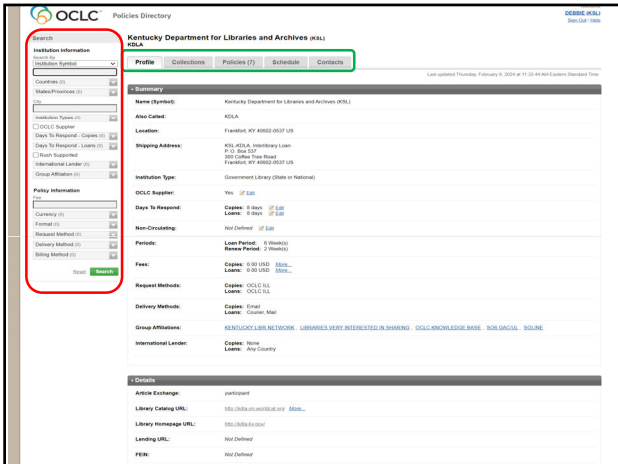
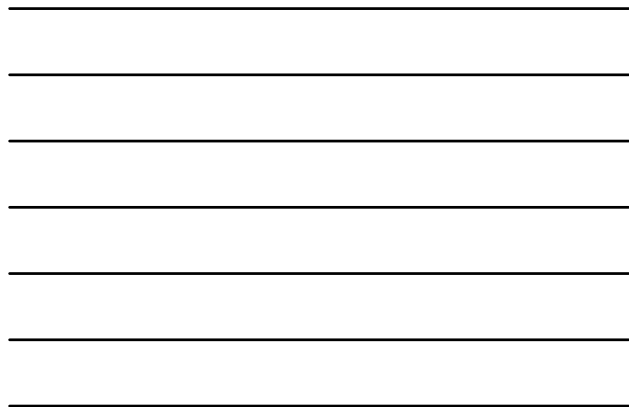
39



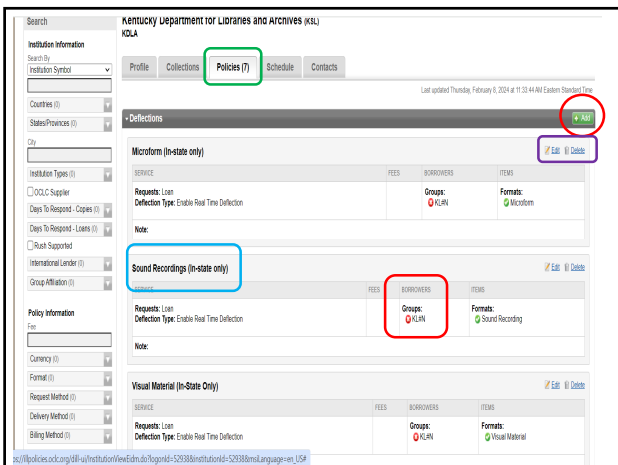


Other - Policies Directory

40



41



42



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).
Buttons: Read, Search, + Add, Edit, Delete.

43



Dialog Box: Edit Closure. Fields: Name (Memorial Day), Type (Holiday), Start Date (05/27/2024), End Date (05/27/2024), OCLC Supplier (Yes/No).
Background: Closures section showing Memorial Day and Independence Day entries.

44



Search By: 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).
Buttons: Read, Search, + Add, Edit, Delete.

45



Service Configuration
~
Create Efficiencies

- Constant Data
- Custom Holdings Groups

49

Efficiencies
~
Constant Data

- Minimize possibilities for errors
- Saves time!
 - Can select any of your saved records and instantly populate your borrowing or lending fields with this information

50

Interlibrary Loan Options

Kentucky Department for Libraries and Archives (52938) [Change](#)

Configure Borrower Constant Data [Help on this screen](#)

Required fields are marked with an asterisk *

Constant Data Record

DEFAULT

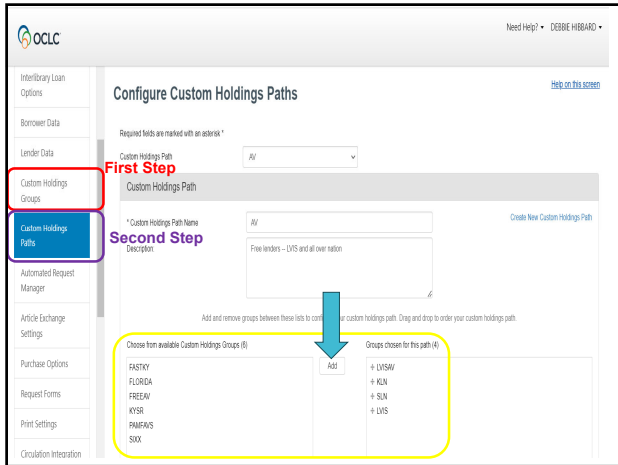
Borrowing Library Information

* Constant Data Record Name: [Create New CD record](#)

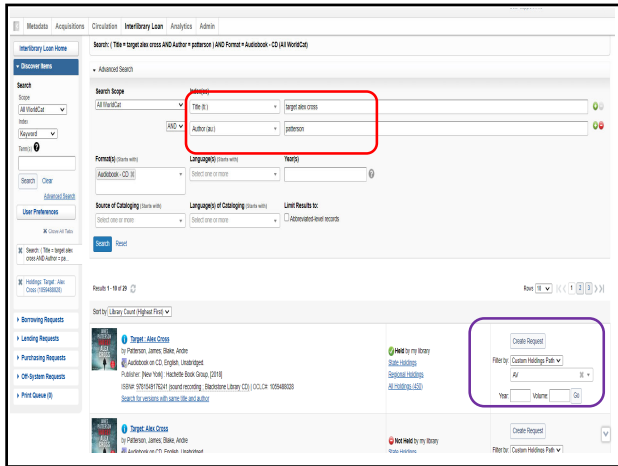
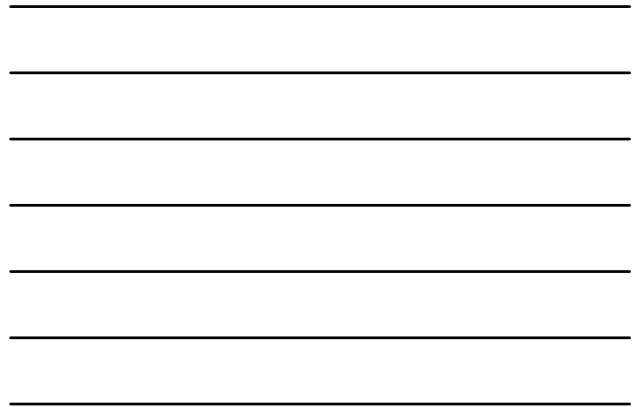
DEFAULT

Description:

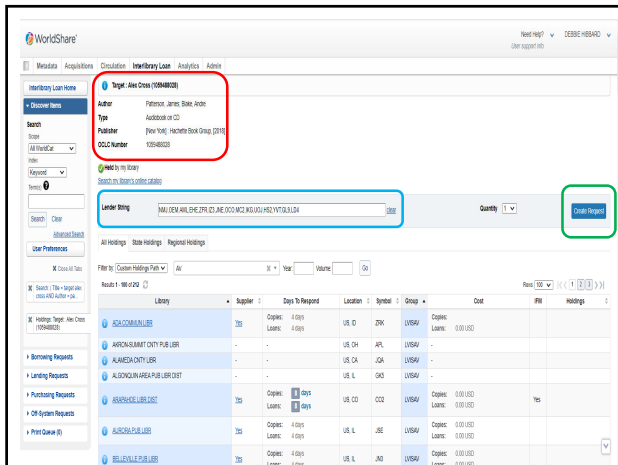
51



55

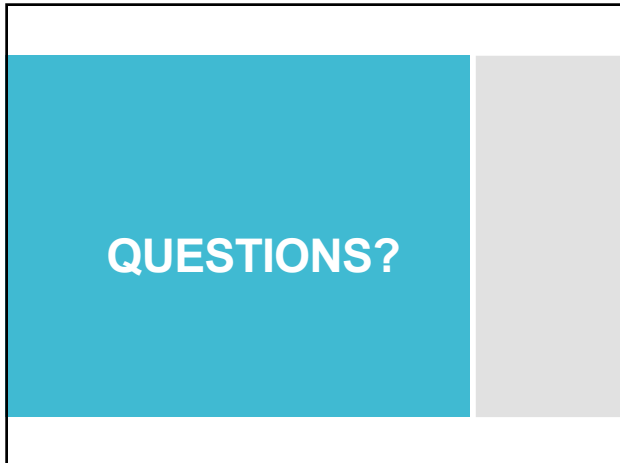


56

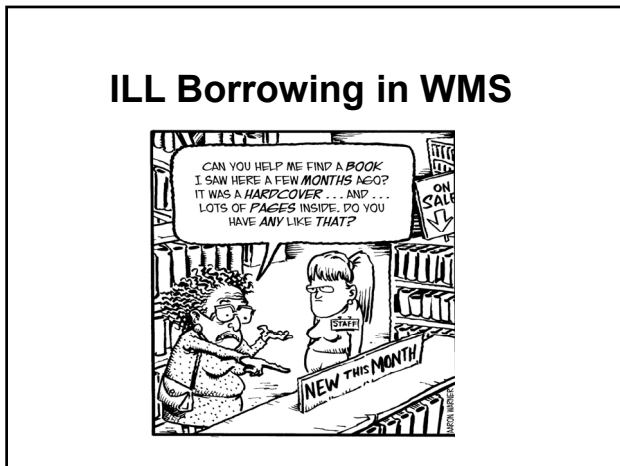


57

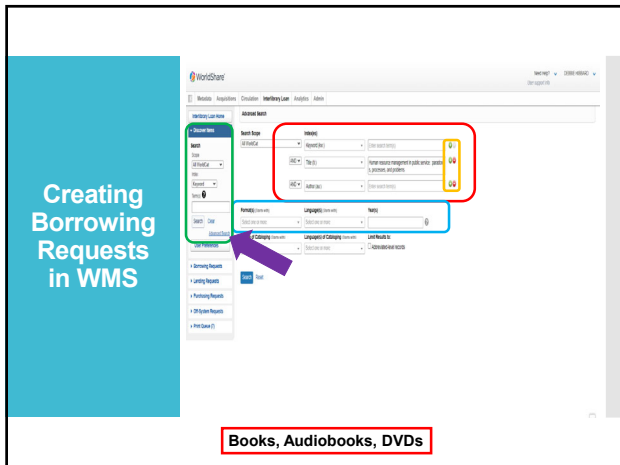




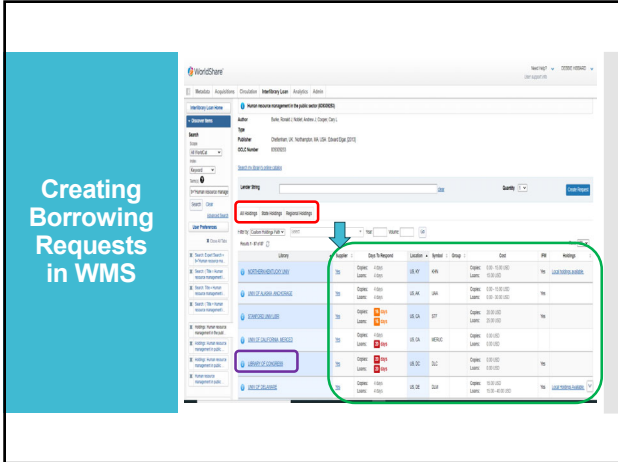
58



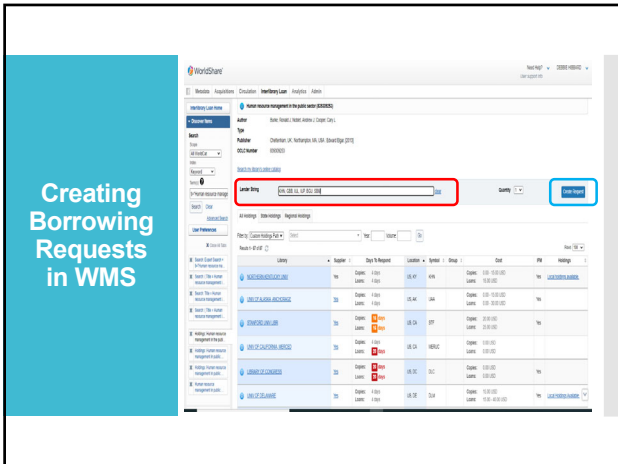
59



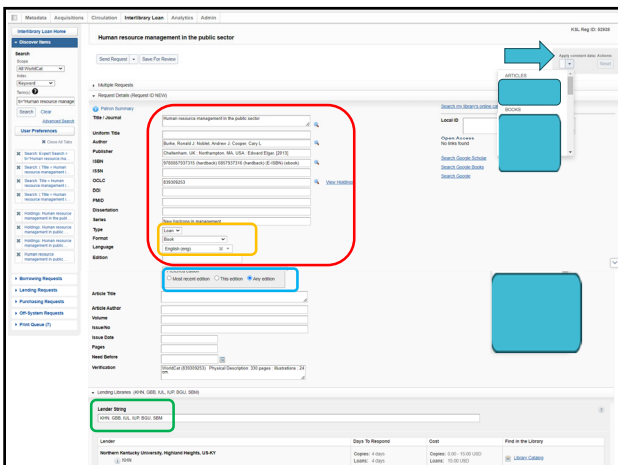
60



64



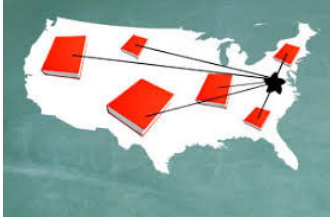
65



66



ILL Lending in WMS



82

Setting Up Deflections

- Why?
 - Non-circulating collections
 - Limits on Lending (in-state only?)
 - Age of Material? (< 1 year?)
- How?
 - Via Policies Directory
 - Quick and Easy!

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Search

Kentucky Department for Libraries and Archives (KDLA)

Profile Collections **Policies (7)** Schedule Contacts

Collection: [dropdown]

Country: [dropdown]

State/Province: [dropdown]

Collection Name: [input]

Microform (In-state only)

REQUEST	GROUP	FORMAT
Request Loan	Groups	Format
Deflection Type: Create New Time Deflector	Groups	Format

Note:

Sound Recordings (In-state only)

REQUEST	GROUP	FORMAT
Request Loan	Groups	Format
Deflection Type: Create New Time Deflector	Groups	Format

Note:

Visual Material (In-State Only)

REQUEST	GROUP	FORMAT
Request Loan	Groups	Format
Deflection Type: Create New Time Deflector	Groups	Format

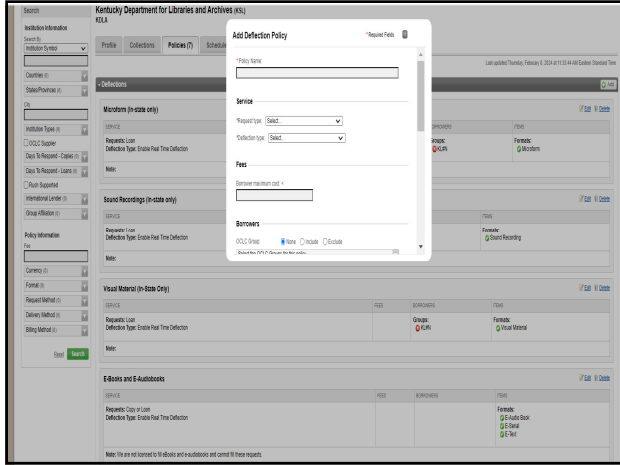
Note:

E-Books and E-Audiobooks

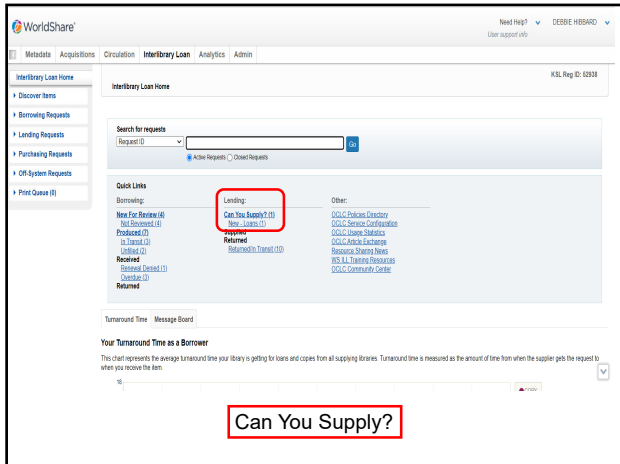
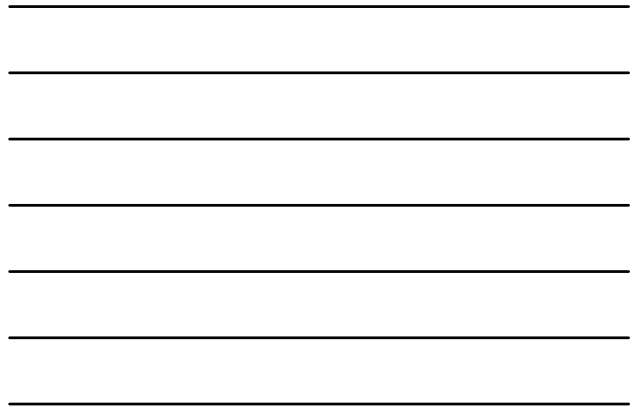
REQUEST	GROUP	FORMAT
Request Copy to Loan	Groups	Format
Deflection Type: Create New Time Deflector	Groups	Format

Note: You are not permitted to allocate and/or cancel these requests.

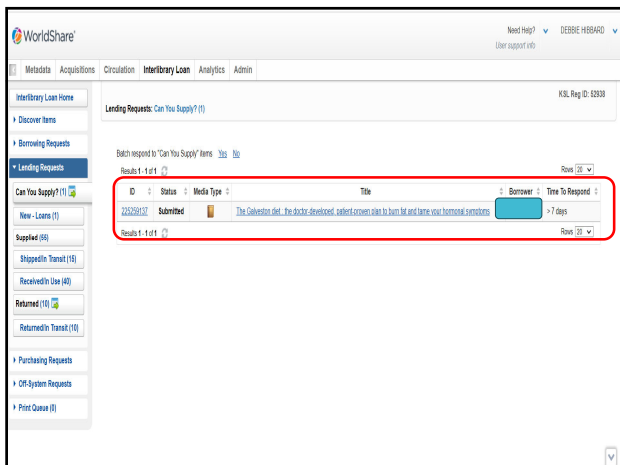
84



85



86



87



22529137: The Gellveston diet: the doctor-developed, patient-proven plan to burn fat and tame your hormonal symptoms

Can you supply? Print Shipping Labels Print Book Shipping Labels

Group Affiliations: SL, KJ, KJPL, LVS

Apply content date actions: DEFAULT, Note, Mark as Considering, Save, Email, Print Item

Request Staff Notes

Type: Loan

Barcode: 157637030

ISBN: 9781602861000

Request: 05/01/2024 (PM)

New Dates: 05/02/2024

Requested on: 04/22/2024

Due Date: 05/11/2024

Shipped On: 04/30/2024

Title: The Gellveston diet: the doctor-developed, patient-proven plan to burn fat and tame your hormonal symptoms

Author: Robert Maly Cates

ISBN: 9781602861000

Publisher: New York: Noble, [2012]

Format: Book

Language: English

Edition: First edition

Physical edition: The editor

Verification: source:vk:veritas:exp:veritas:Physical Description: 275 pages, Illustrations, 24 cm

Search Google Scholar

Search Google Books

Search Google

88

22529137: The Gellveston diet: the doctor-developed, patient-proven plan to burn fat and tame your hormonal symptoms

Can you supply? Print Shipping Labels Print Book Shipping Labels

Group Affiliations: SL, KJ, KJPL, LVS

Apply content date actions: DEFAULT, Note, Mark as Considering, Save, Email, Print Item

Request Staff Notes

Shipping Information

Ship to

Library

Address

City

State/Province

Country

Postal Code

Library Use

Electronic Delivery

Preferred

Account Exchange

Address Exchange

Email Address

Group Affiliations

Bill to

Library Expense

Address

City

State/Province

Country

Postal Code

89

22529137: The Gellveston diet: the doctor-developed, patient-proven plan to burn fat and tame your hormonal symptoms

Can you supply? Print Shipping Labels Print Book Shipping Labels

Group Affiliations: SL, KJ, KJPL, LVS

Apply content date actions: DEFAULT, Note, Mark as Considering, Save, Email, Print Item

Request Staff Notes

Post Code: 40425-5102

Lending Information

Lending Charges

Insurance Amount

Lending Name

Lending Restrictions

Return Via

Return To

Address

City

State/Province

Country

Postal Code

Request History

Circulation

90



Recalling a Shipped Item

- Your patrons come first. If your patron wants a resource you've lent via ILL, you are fully within your rights to RECALL that material.
- This is an issue that should be addressed in your library's interlibrary loan policy. Some libraries choose not to recall items that they have already lent.

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WorldShare Interlibrary Loan Home

22535515: Beau John

Request: Staff Notes (0)

Status	In Transit	Borrower	RR1
Type	Loan	Need Before	05/29/2024
Source	WSLL	Requested on	04/29/2024
OCLC	7159714	Due Date	06/10/2024
Lenders	KSL, KMM	Shipped Date	04/29/2024

Title: Beau John
Author: Adkinson, Rufus M.
Publisher: New York : Ace Books, 1979. 61978.
Format: Book
Language: English
Published edition: Any edition
Verification: WorldCat (7159714) Physical Description: 344 pages, 18 cm

Search my library's online catalog
Local ID: [input field]

Open Access: No links found
Local Holdings: [input field]

Symbol: KSL
Summary: Local Holdings Available
Format: Unknown

98

WorldShare Interlibrary Loan Home

Search for requests
Request ID: [input field] Go

Quick Links

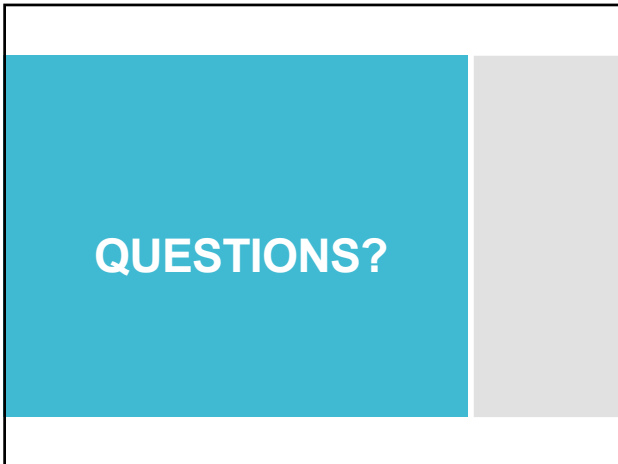
Borrowing	Lending	Other
New For Review (0)	Can You Supply? (1)	Request Status
Not Checked (0)	New Loans (1)	Request Status
Produced (7)	Supplied	Request Status
In Transit (0)	Returned	Request Status
Unfilled (0)	Returned to Transit (0)	Request Status
Received		Request Status
Request Denied (1)		Request Status
Overdue (0)		Request Status
Returned		Request Status

Article Exchange

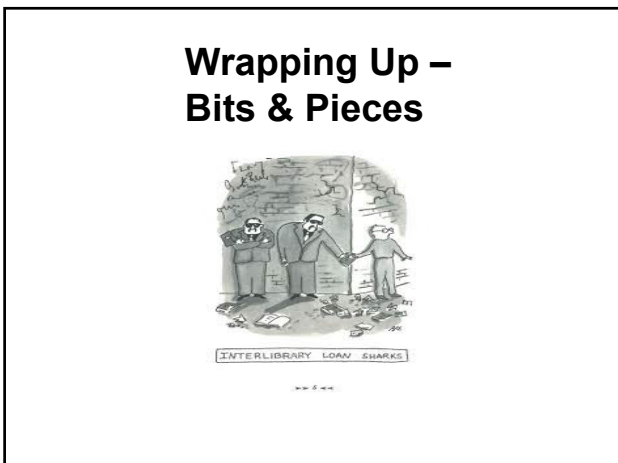
99



100



101



102



112



113



114
