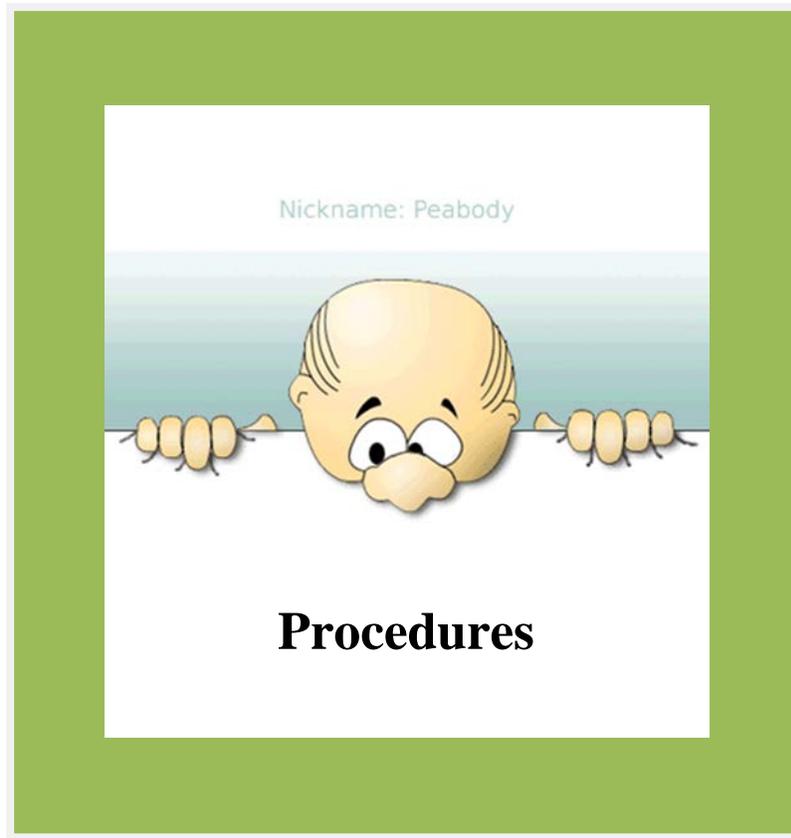




OCLC INTERLIBRARY LOAN



White Pine Library Cooperative

PROCEDURES FOR SUPERIORLAND COOPERATIVE MEMBERS
REVISED OCTOBER 2014

For items that cannot be filled through locally or through MeLCat

Last updated: 11/13/2014

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Limitations

Any type of library material needed for the purposes of study, instruction, research, or recreation may be requested on loan or by photocopy (within copyright guidelines) from another library. Libraries may also request duplicates of titles already in their own collection.

Guidelines for borrowing materials are:

- Only a few books on any one subject should be requested for a patron at a time.
- Items which are not suitable to request beyond the Cooperative level are: Current publications (items published within the last six months. Titles in sudden demand or popular (because of a fad or a recent TV show).
- Holdings that are in Reference or Genealogy collections do not normally circulate. Genealogy items are rarely loaned but photo copies might be possible if enough details are provided.

Librarians should screen all interlibrary loan requests carefully and reject any that do not fit the guidelines listed above.

The Library of Congress is the lender of last resort and they only lend books. Their policy states "USE ONLY ON LIBRARY PREMISES, PLEASE."

See also:

[Interlibrary Loan Code for the United States](#)

[Interlibrary Loan Code for the US, Explanatory Supplement](#)
endorsed by the OCLC Resource Sharing Advisory Committee

[IFLA guidelines, International Lending](#): Principles and Guidelines for Procedure, rev. 1987

Holdings that are in Reference or Genealogy collections do not normally circulate.

Introduction

The White Pine Library Cooperative Interlibrary Loan system, nicknamed Peabody is accessible to participating libraries through the web. Here's a brief explanation of the process:

Superiorland Cooperative members

The Librarian takes the request from the patron getting as much detail as possible. Complete details include: format, author, title, publisher, date, ISBN, and may also include: edition, number of items in the set, abridged, unabridged, large print, etc.

Verify the request in <http://worldcat.org>. Worldcat will show owning libraries and the OCLC number. This will help avoid incorrect requests being submitted.

OCLC Borrowing through White Pine Library Cooperative

- The library will log into the White Pine Library Cooperative's OCLC ILL system, nicknamed "Peabody" and add their request.
- WPLC Staff will process the request and update the status of the item to "In Process" –or- if a record could not be located, WPLC staff will mark the request as "Unfilled" and provide a reason.
- Once the item is requested, WPLC staff will access the record on Peabody, input the IL number, and update the status to "Forwarded to OCLC".
- WPLC staff will check OCLC to see if the request had been sent.
 - If the item is shipped, the record will be updated to "Sent" and will include the library who shipped it and the due date.
 - If the item is unfilled, it will be updated to "unfilled" and a reason will be input a field titled "Reason for No".
- The requesting library will be responsible for updating Peabody to "Received" and "Returned".
- The system will automatically update the item to Complete after 1 month past the returned date.

Billing

White Pine Library Cooperative will bill Superiorland quarterly at a rate of \$5.50 per request. Superiorland will be invoiced for all requested items, even if they are unfilled. It's important that libraries request items that are within the guidelines to avoid unnecessary charges. Statistics can be printed by each member if desired.

Lending

- WPLC staff will print the OCLC lending requests.
- Each request will be looked up in Melcat to see if participants have the item available.
- If the item is available:
 - The request will be input into Peabody and the owning library will be attached to the record and will include the call number that is listed in MelCat.
 - At 1:15, the system will automatically email a notice to the owning library.
 - Libraries should check their ILL email on a daily basis.
 - The email will include the date that the request will expire. The request cannot be processed after this date.
 - The library will check their shelves and update Peabody.
 - If the item is not available, the library will say “no” to the request.
 - If the item is available, the library will update the record to “Yes”, print off the mailing label, and send the item. A due date of at least one month should be indicated. A return label should be included with the item.
 - When the item is returned, the Peabody record needs to be updated to “Received back”.

Email accounts will be used to request renewals; check on the status of items, etc.

White Pine Interlibrary Loan Contact Information:

Sheila Good
3210 Davenport Ave.
Saginaw, MI 48602
Phone: (989) 793-7126
Fax: (989) 793-7257
Email: wpl-ill@vlc.lib.mi.us

Borrowing (Library)

The librarian will input the request directly into Peabody, giving as much detail as possible. Verifying in Worldcat.org will provide the OCLC number and shows what OCLC libraries own the item. WPLC will then process the request.



Requesting Items for your patrons

The member library staff takes the request from the patron-- getting all needed information. The best place to verify the item is at <http://worldcat.org> to locate more detailed information, as needed.

The more information you provide the better chance of you receiving the correct item.

Log in to Peabody at
<http://www.wplc.org/peabody>

Contact WPLC for this information

ID:
Password:

CRO
White Pine Library Cooperative

Home Add Requests Search Your Requests Search Your Loans Get Pending Stats Exit

Format:

Author/Performer [lastname, firstname]

Title

Publisher Date: ISBN or other number:

Notes. Indicate other details here like number of discs in the set, Large Print, edition, unabridged, Maximum Cost your are willing to pay (MAXCOST: \$5) etc.

Patron Info: (for library use only)

If this is a Periodical....

Periodical Name

Volume/Page/Date: [v.16 no. 5 / p. 23-27 / Feb. 2, 2001]

Patron information can be input in the provided field, if you desire.

After submitting the request, there will be an option to print the request.

Print the request and file it in an order that will help you locate it when needed.

WPLC Processes the Request

WPLC will print and process the requests the next day.

Once the item is requested, WPLC staff will access the record on Peabody, input the IL number, and update the status to “Forwarded to OCLC”

If the item is shipped, the record will be updated to “Sent” and will include the library who shipped it and the due date.

If the item is unfilled, it will be updated to “unfilled” and a reason will be input into the “Reason for no” field.

Check Status of Your Request (Library)

In the Peabody database:

The Library’s requests will have a status of Forwarded to OCLC while it’s pending on OCLC.

When an item has been “sent”, WPLC will update the record to “Sent” and indicate who sent the item and what the due date is in the *Peabody* database.

If an item is “unfilled”, the status will be updated to “unfilled”. Check the “Reason for No” field to see if there’s a reason the item could not be filled.

When you update a request to “returned”, after 1 month, the program will automatically update the item to “complete”.

Receiving

When the item comes in, put the date received on the appropriate sheet in your file

Access the *Peabody* website (<http://www.wplc.org/peabody>)

Login using your assigned ID & Password.

Click on “Search Your Requests”

You can leave all fields blank or you can search Author or Title and select Search.

Click on the radio button next to “Received”. This will update it to received and input today’s date.

Click on “Save Changes”.

Status Choices

To Be Requested
In Process
Forwarded to OCLC
Sent
Received
Returned
Not Received
Unfilled
Cancel
Lost
Received Back
Not Received Back
Complete

Cancel Request

If you cancel the request, please check the *Peabody* database, to see if the request was added.

You can only update the status of the request to “Cancel” if the status is “To be requested”, “In Processing” or “Forwarded to OCLC”.

You may also want to email WPLC ILL staff so we are sure to catch it in a timely manner. The item may have been sent before we’ve had a chance to Cancel but we will try.

Returning

When your patron returns the item, put the date returned on the appropriate sheet in your file

Access the Peabody website (<http://www.wplc.org/peabody>)

Login using your ID & Password.

Click on “Search Your Requests”

Search the item you want to Return (Author, Title or Request ID), and Click on Search.

Click on the radio button next to “Returned”. This will update it to returned and input today’s date.

Click on “Save Changes”.

Items you haven’t received

If you notice an item has had the status of “sent” for over 2-3 weeks, you may want to contact WPLC via email or phone to check on the item. You can also go into the record and update it to “Not received”.

Access the Peabody website (<http://www.wplc.org/peabody>)

Login using your WPLC ID & Password.

Click on “Search Your Requests”

Search the item that you haven’t received (Author, Title or Request ID), and Click on Search.

Click on the radio button next to “Not Received”. This will update it to returned and input today’s date.

Click on “Save Changes”.

Items your patron lost

If your patron lost an item, please contact the lending library to work out payment obligations. If you notice an item has had the status of “sent” for over 2 weeks, you can contact WPLC to find out the contact information or search the Worldcat registry at: <http://www.worldcat.org/registry/Institutions>. Please update (*Peabody*) database record to “Lost”.

Snippet “From The Interlibrary Loan Code for the United States”

The requesting library assumes a small but inherent risk when material is supplied through interlibrary loan. Although the percentage is very small, some material is lost or damaged at some point along the route from the supplier and back again. The requesting library's responsibility for this loss is based on the concept that if the request not been made, the material would not have left the supplier's shelf, and thus would not have been put at risk. This section clearly delineates that the requesting library is responsible for the material from the time it leaves the supplying library until its safe return to the supplying library.

See: www.ala.org/ala/rusa/rusaprotocols/referenceguide/interlibraryloancode.htm

Unfilled

Items that are not filled will have a status of unfilled. Check the “Reason for no” field for the reason it was not filled.

If you receive an ILL item that doesn't need to be returned.

You need to update it to received so that we can update it on OCLC. Wait 4-5 days, then you can update the record to "Cancel". Re-search the item. At this point you can update the item to "complete". I had to do the program this way because people were completing the items instead of updating to received/returned and it messes up our records on OCLC.

1. Search the item
2. Update the item to "cancel"
3. Re-search the item
4. Update it to complete.

Renewals

If your patron needs to have the item renewed for a longer period of time please email wpl-ill@vlc.lib.mi.us and request the renewal.

To: wpl-ill@vlc.lib.mi.us

Subject: Please renew -- IL:99999999 – [title of item]

Body: Author: [author name]

Title: [title of the book]

Any other information you want to put.

WPLC will request the renewal and when we get a response, we will email you the answer. If the renewal was OK, we'll include the new due date.

Lending

Libraries all over the United States can request items from WPLC participating libraries. WPLC updates OCLC with holdings to reflect what is owned by WPLC member libraries. Since it isn't possible to take WPLC holdings from MelCat, we've updated OCLC from the VLC catalog. If WPLC members' holdings were attached to a record, this record was sent to OCLC where they attached the EZW holding to a matching record. If records no longer have holdings attached on the VLC catalog, these records will be submitted to OCLC for deletion.



Incoming Requests

WPLC will print out requests that are pending on OCLC and input this information in the (*Peabody*) database after finding out who owns the item (using MelCat). These requests bounce to the next lending institution on OCLC after 4 days. Therefore these pending items will expire after 3 days on the *Peabody* database. (We need time to add the request and update OCLC)

Check Pending

If you have items we want you to fill, you will receive an email message in your ILL email account letting you know that there are pending requests in Peabody. These requests will only be in Peabody until the date indicated, so it's important that you process these items ASAP.

The email message can be used to gather the items, but be aware there may be additional requests pending that you may not have received an email for yet.

Normally this process runs at 1:15 each day. The requests are put on in the morning but there may be times that this isn't possible.

You need to let us know if you can or can't fill the item. If you can't fill the item, please update the request and give us a reason why. Please contact White Pine staff to let them know if you have issues with items that we are asking you to fill.

- Access the *Peabody* website (<http://www.wplc.org/peabody>)
- Login using your ID & Password.
- Click on "Get Pending"
- Go to your shelves and get the items
- Indicate whether you can send the item or not and what the due date is. Notice that each item has to be submitted separately.
- WPLC will update OCLC for items that are sent or unfilled.

Received and Returned

Because of the way OCLC works, items you loan will not be updated to “received”. They will only be updated to “returned”.

Received back

When the item is received back you need to update the (*Peabody*) database with this information.

- Access the *Peabody* website (<http://www.wplc.org/peabody>)
- Login using your WPLC ID & Password
- Click on “Search Your Loans”
- Search the item you’ve received (Author, Title or Request ID), and Click on Search.
- Click on **Select** to Select the record.
- Click on the radio button next to “Received back”. This will update it to received back and input today’s date in the appropriate field.
- Click on “Save Changes”.
- After an item has been marked received back, WPLC staff will update the record on OCLC Resource Sharing to “Complete”. The record is removed from OCLC.

Renewals

An email message will be sent to you to request renewals for OCLC libraries.

Please check your email daily and please let WPLC know if you have a new contact information.

Other

Status Update Warnings

Members will receive warnings to update your statuses if the following conditions happen.

Member Borrowing

Items with a status of “Sent” and the date sent is more than 15 days.

Items with a status of “received” and the date received if longer than 50 days.

Member Lending

Items with a status of “returned” and date returned is more than 40 days.

If an OCLC library has “not received” something you said was “sent”.

Statistics

The following Statistics are available to print. Drop down boxes let you select one month or several months.

Items Participants Loaned

Items Participants Requested (This is what you will be billed for)

Items processed for participants

Items Participants Borrowed

If You Receive an Item That Is Not Your Request

There's an issue with OCLC requested items being sent to the incorrect libraries. If you receive an item through the mail, UPS, Etc. that you suspect might be an OCLC request, please either search Peabody or contact White Pine before sending it back to the lending library. You may be able to use Rides to send it on to the library that requested the item. This issue is happening because libraries are using an OCLC product called ILLiad. This product isn't pulling addresses from the "Ship To" fields in the request. Some libraries that use this product are not checking the actual request and are accepting the default address that appears in ILLiad, which is normally the last address they used for (EZW- White Pine's OCLC code).

Searching for the item in Peabody:

Access Peabody and click on [List all requests \(for all libraries\)](#). This will take you to a screen that allows you to search by IL number, Author, or Title. If you leave all the fields blank, the search result will be for everything in Peabody. Don't do this unless you are unable to locate the item using the other search methods.

I want to let the lending library know about the issue. If you received an item and send it on the requesting library it would be helpful if you could include the form letter that I've provided. The link to the form letter can be found by clicking on the link on Peabody's homepage. "[If you receive an item that is not your request](#)". Please also include the note to let the requesting library know they should include the form letter with the item when returning.

Tips

1. If you have trouble finding a title, you can leave all the fields blank on the search screen and click search. This will pull up all your loans or requests, depending on what tab you select.
2. Here's another trick if you need to redo a mailing label.
 - Pull the label up on your screen
 - Select all with Ctrl/A (*holding Ctrl down and press A*)
 - Copy the data with (Ctrl/C)
 - Open Wordpad
 - Start
 - Programs
 - Accessories
 - Wordpad
 - Paste what was copied with (Ctrl/V)
 - Make the needed changes to the label
 - Print

Automated Tasks (these run every night)

[Archive_requests]

This process goes through and copies requests that have the status of 'lost', 'complete', or 'unfilled' with a request date over 720 days ago to the requests_archive table in the database. It then deletes the items from the requests table –

[Cancel_delete]

This process goes through the request file and deletes records that have a status of "cancel" and date requested older than 30 days.

[complete_unfilled]

This process goes through the request file and changes the status of unfilled to complete for items requested over 60 days

[duplicate_delete]

This process goes through the request file and deletes records that have a status of "Duplicate request".

[Pending_expire]

This process goes through the pending file and "expires" requests. The pending_date is set when WP Interloan staff member inputs the libraries the request [OCLC_status_change_to_not_filled]

If an OCLC library requests an item and all member libraries "no" the request, or it expires, this process will update the status to "Unfilled".

[OCLC_status_change_to_complete]

This will go through and update any OCLC filled item to "received back" if the item was returned by WPLC member libraries over 30 days. This will also update items that were marked 'not received', for more than 2 months, to "complete"

[status_change_to_not_filled]

This process goes through and changes the Member Request status to 'unfilled' if the answers are "expired" or "no".

[pending_not_needed_delete]

This process goes through the pending file and deletes records that have the answer of "Not needed".

[Pending_with_no_request_delete]

This process goes through the pending table and deletes records that are no longer attached to a request.