OCLC Resource Sharing User Group

Meeting: Tips to start the new year off right!
Today’s host

Peter Collins
OCLC Director, Resource Sharing
2022 GOALS
1.
2.
3.
User Group Agenda

• Topic 1: Accessibility
• Topic 2: Controlled Digital Lending (CDL)
• Topic 3: ILL workflows
• Upcoming events in 2022
• Open Q&A
What do you think about when you see news footage of snowy and cold weather?

A. Walking in a winter wonderland  
B. Heading to the ski slopes  
C. Booking a flight to someplace warm  
D. Oh wow. Enjoying the sunshine here  
E. Snow. What’s snow?
TOPIC 1: ACCESSIBILITY
Presenters

Dennis Massie
Senior Program Officer, OCLC Research
Library Partnership

Ron Figueroa
Resource Sharing Manager
Syracuse University

Travis Goode
Senior Librarian
University of Texas at Dallas
What we’ll cover

• ILL Accessibility resource document (Dennis)
• A case in point: ScannX (Travis)
• Suggested accessibility language for the U.S. ILL Code (Dennis)
• Adding accessibility services to your ILLiad 9.1 Web pages (Ronald)
2019 SHARES Executive Group survey

7 questions
- Current practice
- Technology
- Verifying patron eligibility
- Services offered beyond OCR
- Managing user expectations and workflow
- Best practices
- Questions, support needs, comments

SHARES ACCESSIBILITY SURVEY
- 45 RESPONSES
- 39 INSTITUTIONS
2019 SHARES ILL accessibility survey

**RECOMMENDATIONS FOR THE FUTURE**

**OCR INTEGRATION**
Approach vendors to seek integration of OCR capabilities into electronic delivery services such as Odyssey and Article Exchange.

**TOOLKITS**
Create a toolkit at consortia levels summarizing standards, guidelines and basic training techniques for OCR.

**INTERLIBRARY LOAN CODE**
Add accessibility guidelines section to the Interlibrary Loan Code. Consider providing OCR’d articles whenever possible.

**REPOSITORY**
Seek channels to shared repository to access reformatted items.

**GROUPS & DIRECTORIES**
Add a group affiliation with institutions that can provide OCR’d articles. This will help create better custom holdings groups for borrowers.

**BEST PRACTICE**
It would be helpful for the SHARES Executive Group to present some universal guidelines.
ILL Accessibility resources document

• Workflows and best practices
• Copyright
• Technology
• Next steps
• Resources

Making Library Materials Available in Accessible Formats via Interlibrary Loan
January 2022

SHARES Executive Group Subgroup on Accessibility
• Ron Figueroa, Syracuse University
• Travis Goode, University of Texas at Dallas
• Dennis Massie, OCLC Research Library Partnership

SHARES Executive Group Statement on Accessibility and Library Materials:

As authorized entities, libraries have the right to reproduce and to request and receive copyrighted materials in accessible formats for eligible persons. We are committed to providing access to library materials for all and to promote library services to underserved populations.

Outline

1. Workflows and best practices
2. Copyright
3. Technology
4. Next steps
5. Resources

I. Workflows and best practices

The addition of accessibility procedures in the Resource Sharing arena is still a work in progress.
Workflows and best practices

**Scan quality:** It is important to keep in mind that the very first step to converting a text to an alternate format is the scan quality. The scan must be clear, flat, and clean. OCR will not work properly if the scan is not good, and the patron’s needs will not be met.

**Teamwork:** The ILL office should maintain constant and open communication with the Disability Services Office and Disabilities Librarian. Make sure all parties are aware of needs, services offered, and systems’ (ILLiad, WS) capabilities.

**Web page request forms:** Customize request forms with clear options for users. That way, patrons in need of this service can communicate needs more comfortably and easily.
Resources: a work in progress

- Lawsuit: Publishers File Suit Against Internet Archive for Systematic Mass Scanning and Distribution of Literary Works
- Mass digitization aggregations
  - HathiTrust Accessible Text Request Service
  - Internet Archive Disability Access
- US Copyright Law
  - § 121, Limitations on exclusive rights: Reproduction for blind or other people with disabilities
  - § 121A, Limitations on exclusive rights: reproduction for blind or other people with disabilities in Marrakesh Treaty countries
- Organizations doing work on accessibility
  - Daisy Consortium
  - Educational Materials Made Accessible (EMMA)
  - NYU How-to-Guides on Making Digital Materials Accessible
Technology

Scanners used by SHARES ILL units providing materials in accessible formats

Twelve different scanners are in use among SHARES survey respondents:

- BookEye III and IV
- Zeuthschel Zeta & OS 1200
- KIC Scanner
- Wide Tek
- Canon ImageRunner
- ScanEx
- Edge Scanner
- Xerox
- HP MFP
- BookEdge ScannX
- BookScanner 7145
- Konica Minolta

Question: As a user, do you have any comments about the scanners listed above? Our goal is to build an annotated list of scanners used for reformatting library materials. Send comments to massied@oclc.org.
A CASE IN POINT: SCANNX
Reproducing in alternative formats

- Scan Quality: Provide a clean legible scan. Attempt to make OCR your default for all scanning
- Alternative Formats: OCR, Word, Audio
- Delivery Methods: ILLiad, WorldShare, email, OneDrive, and secured shared folders

Copyright Statement Example:
- PLEASE NOTE: Further reproduction or distribution in a format other than an accessible format for an eligible person is an infringement of copyright.
SUGGESTED ACCESSIBILITY LANGUAGE FOR THE U.S. ILL CODE
U.S. ILL Code revision

• SHARES members drafted text that would introduce accessibility to the code and explanatory supplement
• We received guidance from a member of the codes committee and from an accessibility librarian
2. What revisions (if any) would you like to propose to the Responsibilities of the Requesting Library section?

New section between 4.4 and 4.5: Be aware that as authorized entities libraries have the right to request and receive copyrighted materials in accessible formats for the exclusive, individual use of eligible persons, per Section 121 of US copyright law (Title 17, USC).

3. What revisions (if any) would you like to propose to the Responsibilities of the Supplying Library section?

New section between 5.4 and 5.5: Be aware that as authorized entities libraries have the right to reproduce copyrighted materials in accessible formats for the exclusive, individual use of eligible persons, per Section 121 of US copyright law (Title 17, USC).
Supplement suggestions

2. What revisions (if any) would you like to propose to the Responsibilities of the Requesting Library section?

4.4: The requesting library should denote if the copy is being requested exclusively for use by an eligible person as defined under Section 121 of U.S. copyright law (Title 17, U.S. Code) and provide specific information about what is needed. Examples include one page per scan; no black borders or gutters; optimize for Optical Character Recognition (OCR).

3. What revisions (if any) would you like to propose to the Responsibilities of the Supplying Library section?

5.11: When providing an electronic copy, the electronic file should be as complete as possible, and the supplying library should accurately report if the electronic file has enhancements or features including, for example, an OCR text layer or additional markup. The Supplying library should strive to evaluate the requested conditions and communicate back to the Requesting library indicating which conditions can be met rather than responding “Unfilled” if all the conditions cannot be met.
ADDING ACCESSIBILITY SERVICES TO YOUR ILLIAD 9.1 WEB PAGES
The Syracuse University libraries optimized the ILLiad webpages to provide more efficient alternate format services after 9.1 upgrade.

Special thanks to Kate Deibel for her guidance and enormous help with this project. Kate worked at SU as the Inclusion & Accessibility librarian between 2018 and 2021.
All request forms offer 3 options for alternate formats:
- Optimized for Magnification: Basic – OCR
- Optimized for Screen Readers: Full remediation
- Optimized for Text-to-Speech (ex. Read&Write): Some tagging is needed.
Fields customization is done through the ILLiad customization manager.
We add a code to identify the service requested to a “chosen field” designated just for this purpose.
Through a tag added to the webpage code, 'Service request' has been made the default option for patrons when submitting a request. Patrons still have the option of choosing a different service if needed.

```
<div class="form-group col-md-9">
    <!-- TestField stores the Alternate Format Service information -->
    <input type="hidden" name="TestField" value="TestCode">

    <label for="YourChosenfieldfromRequestForm">
        <span class="field">
            <span class="bold valid">
                Alternate Format Service
            </span>
        </span>
    </label>
```

Disability Accommodation:
Patrons requesting library materials in alternate/accessible formats must be registered and authorized to receive this service by the Center for Disability Services. To register or learn more, please contact the Alternate Format Service.

Optimized for Text-to-Speech (ex. Read&Write)
TOPIC 2: CONTROLLED DIGITAL LENDING
Presenters

Sara Juel
Access Services Project Manager, Atlas Systems

Stephanie Spires
Chief Operations and Service Officer, Atlas Systems
Join us to celebrate ILLiad’s 25\textsuperscript{th} Birthday on March 17\textsuperscript{th} from 1 – 4pm EST!

What’s CDL?

PDF Viewing Restrictions
• Limits to 1 person at a time
• Can’t copy text or download PDF

Source: https://controlleddigitallending.org/
Choose an option from the choices below.

- **Electronically Received Articles**
  You have no electronic delivery requests

- **Checked Out Items**
  You have no items

- **Outstanding Requests**
  Journal of Foot and Ankle Research: Physical and mechanical therapies for lower limb symptoms in children with Hypermobility Spectrum Disorder and
Topic 2: CDL

Q&A

Peter Collins
Director, OCLC Resource Sharing
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Stephanie Spires
Chief Operations and Service Officer,
Atlas Systems
sspires@atlas-sys.com

Because what is known must be shared.®
TOPIC 3: ILL WORKFLOWS
Presenter

Tony Melvyn
Product Manager, Resource Sharing
This Photo by Unknown Author is licensed under CC BY-SA-NC
Agenda

• General reminders
• ILL tools and tips for the pandemic
  – Which should stay and which should go?
  – It depends – ebbs and flows?
OCLC Policies Directory

• Supplier: Yes or No?
• Deflections: deflect book requests?
• Days To Respond (for copies and loans)
• Have your policies changed?
• Is your contact information up to date?

illpolicies.oclc.org
OCLC Policies Directory: Profile

<table>
<thead>
<tr>
<th>OCLC, Online Computer Library Center (OCLC)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile</strong></td>
<td><strong>Collections</strong></td>
</tr>
</tbody>
</table>

**Summary**

- **Name (Symbol):** OCLC, Online Computer Library Center (OCLC)
- **Location:** Columbus, OH 43217-3805 US
- **Shipping Address:** Not Defined
- **Institution Type:** Other
- **OCLC Membership:** Yes
- **Days To Request:**
  - Copies: 12 days
  - Loans: 20 days
- **Non-Circulating:** newsprint, unbound journals, computer files, audio-visual except within strobe
- **Period:** 1 Day(s) - 1 Month(s)
- **Loan Period:** 5 Day(s) - 2 Years(s)
- **Points:**
  - Loans: 0.00 - 5.00 USD
  - 0.00 - 15.00 USD
  - 15.00 - 50.00 USD
  - 50.00 - 100.00 USD
- **Request Methods:**
  - Loans: Fax, WebMail, OCLC, ILL
- **Delivery Methods:**
  - Copies: Air Mail, FedEx, FTP, Articles Exchange, Email, Fax, Online, Other, Postal
- **Group Affiliations:**
  - Group Access in Oklahoma
  - LEGEND Electronic Networking Group
  - Michigan Libraries Statewide
  - NO Test Group
  - Network of Alabama Academic Libraries
  - OCLC Training Group
  - OCLC Union Listing Demonstration
  - VENDORS PUBLISHERS GAC
- **International Lender:**
  - Copies: Any Country
  - Loans: Any Country

Last updated: Sunday, December 18, 2014
OCLC Policies Directory: Contacts

https://illpolicies.oclc.org/
OCLC Service Configuration

• Update your custom holdings?
• Update your constant data?

worldcat.org/config
OCLC Service Configuration: Custom Holdings
OCLC Service Configuration: Constant Data
Patron requesting

- Are OpenURL buttons enabled?
- Are patron request forms enabled? Any updates needed?
- Are automatic notifications turned on? Any updates needed?
OCLC ILL responds to the pandemic

- ACOV, BCOV, and CCOV profiled groups
- Days To Respond indicator
- Library map
- Aging dates for problem statuses

REALM PROJECT
REopening Archives, Libraries, and Museums
## ACOV profiled group

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Current state</th>
<th>Proposed change</th>
<th>Next step(s)</th>
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</table>
| Libraries self-identify whether they are supplying copies | Some libraries still include ACOV in custom holdings | • Discontinue ACOV as of March 1, 2022  
• Instead, use supplier status | • OCLC to communicate this upcoming change via news and presentations  
• Libraries to review/update custom holdings and automations as needed |
| Libraries use ACOV in custom holdings |                                                    |                                                      |                                                                             |
## BCOV profiled group

<table>
<thead>
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<th>Current state</th>
<th>Proposed change</th>
<th>Next step(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Libraries self-identify</td>
<td>Two profiled groups for e-books (BCOV and EBOK)</td>
<td>• Discontinue BCOV as of March 1, 2022</td>
<td>• OCLC to communicate this upcoming change via news and presentations</td>
</tr>
<tr>
<td>whether they are supplying e-books</td>
<td></td>
<td>• Instead, use EBOK</td>
<td>• Libraries to review/update custom holdings</td>
</tr>
<tr>
<td>Libraries use BCOV in custom holdings</td>
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### Library map and CCOV profiled group

<table>
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<th>Next step(s)</th>
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<tbody>
<tr>
<td>Libraries self-identify whether they are • Accepting physical returns • Lending physical items</td>
<td>Some libraries continue to use CCOV Many library statuses are out of date</td>
<td>• Discontinue CCOV as of March 1, 2022 • Instead, use supplier status and check for deflections</td>
<td>• OCLC to communicate this upcoming change via news and presentations • Libraries to review/update custom holdings</td>
</tr>
</tbody>
</table>
# Days To Respond indicator

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<th>Proposed change</th>
<th>Next step(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Libraries provide a visual cue in Policies Directory</td>
<td>Some libraries have not undone this indicator</td>
<td>• End the use of this indicator as of March 1, 2022</td>
<td>• OCLC to communicate this upcoming change via news and presentations</td>
</tr>
<tr>
<td>• 16 days = only electronic collections</td>
<td></td>
<td></td>
<td>• Libraries to review/update Days To Respond</td>
</tr>
<tr>
<td>• 20 days = both electronic and physical collections</td>
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# Aging dates for problem statuses

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<th>Next step(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure requests are not aging out before libraries can address them</td>
<td>Set at 760 days</td>
<td>• Revert back to 90 days</td>
<td>• OCLC to communicate upcoming change via news and presentations</td>
</tr>
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Topic 3: ILL workflows

Q&A

Tony Melvyn
Product Manager, OCLC Resource Sharing
melvyn@oclc.org

Because what is known must be shared.
UPCOMING EVENTS IN 2022
Product Insights

• Tuesday, February 2

• Join the OCLC Resource Sharing team where we will review recent enhancements, discuss upcoming changes, and collect feedback from the community. These sessions are open for all community members to attend.

• Register today!
International ILL Toolkit webinar

• Thursday, February 17

• Brian Miller, Ohio State University Libraries
• Lapis Cohen, University of Pennsylvania
• Dennis Massie, OCLC Research
• The International ILL Toolkit is a freely available, crowd-sourced effort to make global resource sharing easier. This session, co-sponsored by the OCLC Research Library Partnership and the ALA RUSA STARS International ILL Committee, is free and open to everyone in the resource sharing community.

• Register today!
Call for Proposals
deadline February 11

RSC22
WEB SERIES

oc.lc/rsc22
RSC22: ILL 101 courses

• **Late March** – to kick off the RSC22 web series
• **1-hour sessions, available for free!**
  • Assessment 101
  • Borrowing 101
  • Copyright 101
  • Lending 101
• **Hosted by the IDS Project**, a resource-sharing cooperative whose members include public and private academic libraries from across the country, the New York Public Library, and the New York State Library.

• **More details to come!**
Thank you!