



# AMEEL - ILL

## Interlibrary Loan Workshop

University of Jordan  
Amman, Jordan  
5-7 March 2007

Instructors  
Simon Samoeil  
Carol L. Jones

# ONLINE ACCESS FOR CONSOLIDATED INFORMATION ON SERIALS (OACIS) LEADING TO AMEEL

- To create a freely available publicly accessible web site featuring a continuously updated union list of Middle Eastern serials
  - In all formats (including live web links)
  - From 20+ countries (ME as defined by LC)
- To lay foundations for the future, delivering widest possible information access
  - Expanded cooperation and participation
  - Document delivery/ILL
  - Digitization and preservation
- To create a Union List of Middle East serials

# OACIS ADVISORY BOARD

Bibliotheca Alexandrina, Alexandria, Egypt

Cornell University

Ohio State University

Universitaets-und Landesbibliothek of  
Sachsen-Anhalt, Halle, Germany

University of Pennsylvania

University of Michigan

University of Texas

University of Washington

Yale University

# LIBRARIES PARTICIPATING IN OACIS

- American University of Beirut, Lebanon
- American University of Cairo, Egypt (In Progress)
- Harvard University
- New York Public Library
- New York University
- Princeton University
- School of Oriental and African Studies, University of London, UK
- Stanford University
- Tishreen University, Latakia, Syria
- University of Arizona in Tucson
- University of Balamand, Lebanon
- University of California – Los Angeles
- University of Illinois at Urbana-Champaign
- University of Jordan, Amman
- University of Utah
- Yale Law School

# ARABIC AND MIDDLE EASTERN ELECTRONIC LIBRARY (AMEEL)

- Project AMEEL is a four-year cost-sharing project funded by the Department of Education and Yale University Library.
- The project will create a web-based portal and electronic library for Middle Eastern Studies.
- Project AMEEL plans to be free and accessible to all patrons.

# GOALS OF THE PROJECT

- To create an infrastructure for the integration of major Middle Eastern information databases
- To digitize selected academic journals from and about the Arab world, pending the approval of copyright holders
- To develop interlibrary loan networks between libraries within the Arab world on a national and regional level and between American academic libraries and their Arab counterparts

# PARTNERS OF PROJECT AMEEL

- Bibliotheca Alexandrina (Alexandria, Egypt)
- Universitaets-und-Landesbibliothek of Sachsen-Anhalt (Halle, Germany)
- JSTOR (New York, USA)
- Brill Academic Publishers (Leiden, The Netherlands)
- Oxford University Press (Oxford, UK)
- Other major American and Middle Eastern libraries

# CHALLENGES OF THE PROJECT

- Gain permission of copyright holders for digitization of selected academic journals
- Reach successful agreements on access to digitized content provided by important commercial publishers
- Introduce Arabic OCR software and relevant skills into American academic institutions
- Solve infrastructure and connectivity challenges to:
  - Enable the addition of new digital materials to a repository connected to other relevant databases, such as those held by JSTOR and Brill
  - Make it possible for scholars to search in Arabic and English across many different databases

# ILL AND PROGRAM BACKGROUND

- What is ILL?
  - ILL is the sharing of materials between libraries.
- What kind of materials are shared?
  - Loans or Returnables – books, microforms, audio-visual materials
  - Non-returnables – copies (journal articles, book chapters, brief reports)
- Other names for this service
  - Resource sharing – includes loans and copies
  - Document delivery – usually copies

# ILL BACKGROUND, CONTINUED

- How do libraries participate in ILL?
  - Library to library
  - Special interest consortia
    - Borrow Direct – 7 large research universities
  - State and regional networks
    - OhioLink – 85 institutions
  - International networks
    - OCLC - a global network with thousands of member libraries

# BENEFITS OF ILL

- Provide access to previously unidentified or inaccessible scholarly resources
- Support ever-increasing research needs of faculty and students
  - No library has everything
  - Digital technologies provide faster delivery
  - Yale has over 7 million items in its collections and acquires more every year
    - During 2006, Yale libraries borrowed 38,243 items and loaned 49,213 items
    - Approximately 1/3 of items loaned and borrowed were copies of journal articles

# BENEFITS OF ILL, CONTINUED

- Co-operative Collection Development
  - Offset scarcity of funds; increase “buying power” of each library’s budget
  - Provide access to materials that are difficult to purchase, e.g., out of print
- Development and support of mutually beneficial relationships with other libraries
  - Support research needs and interests of faculty and students at institutions in the Arab world
  - Facilitate research and study on the Middle East, its history and culture, by Yale faculty and students
- Provide technical expertise to encourage and develop interlibrary loan capabilities of libraries in the Arab world

The slide features a light beige background with the word "BREAK" centered in a dark green, serif font. On the left side, there is a vertical strip with a blue and white geometric pattern at the top and a solid brown bar below it. On the right side, there is a vertical strip with a blue and white geometric pattern.

BREAK

# GROUP REPORTING

- Participants will share what they are doing and/or what they hope to do in the future.
- Yale's experience – some success, but not everything works out as planned
  - Borrow Direct
  - OACIS
- Others
  - Who's doing what?
  - What would you like to do?

# AMEEL - ILL

- Develop an ILL framework for Middle East libraries to foster sharing of scholarly information
- Introduce ILL concepts to Middle Eastern librarians
- Consider institutional policies and workflows
- Discuss how to accommodate differing needs of and constraints on libraries in the Middle East
- Focus on the provision of journal articles

# WORKSHOP GOALS

## DAY 1

- Build workshop participant relationships, provide a base level of knowledge for all, and communicate a sense of where the workshop will lead.

## DAY 2

- Participants will understand the basic elements of requesting items through ILL.
- Participants will understand the basic elements of providing items through ILL.
- Participants will understand basic ILL workflow.
- Participants will send a sample ILL request.

# WORKSHOP GOALS, CONTINUED

## DAY 3

- Participants will understand how ILL tools function and their role in the ILL workflow.
- Participants will receive a sample ILL item.
- Participants will understand what ILL activities can be measured and why statistics are important.
- Participants will understand basic elements of ILL agreements and why such agreements are important.
- Participants will discuss challenges to developing ILL at institutions in Arab countries and next steps for the AMEEL ILL project.

# AFTER THE WORKSHOP

- MARCH – Evaluation form will be completed by each participant at the end of the workshop. A summary of the initial evaluations will be reported to all participants via email.
- APRIL - Notes from workshop will be distributed to all participants via group email. By the end of April, two institutions will be identified to partner with Yale for future AMEEL ILL development.
- MAY – Workshop participants will be asked for comments and suggestions about future activities.
- By DECEMBER, participants will be asked to complete a follow-up survey about their plans for developing ILL services.

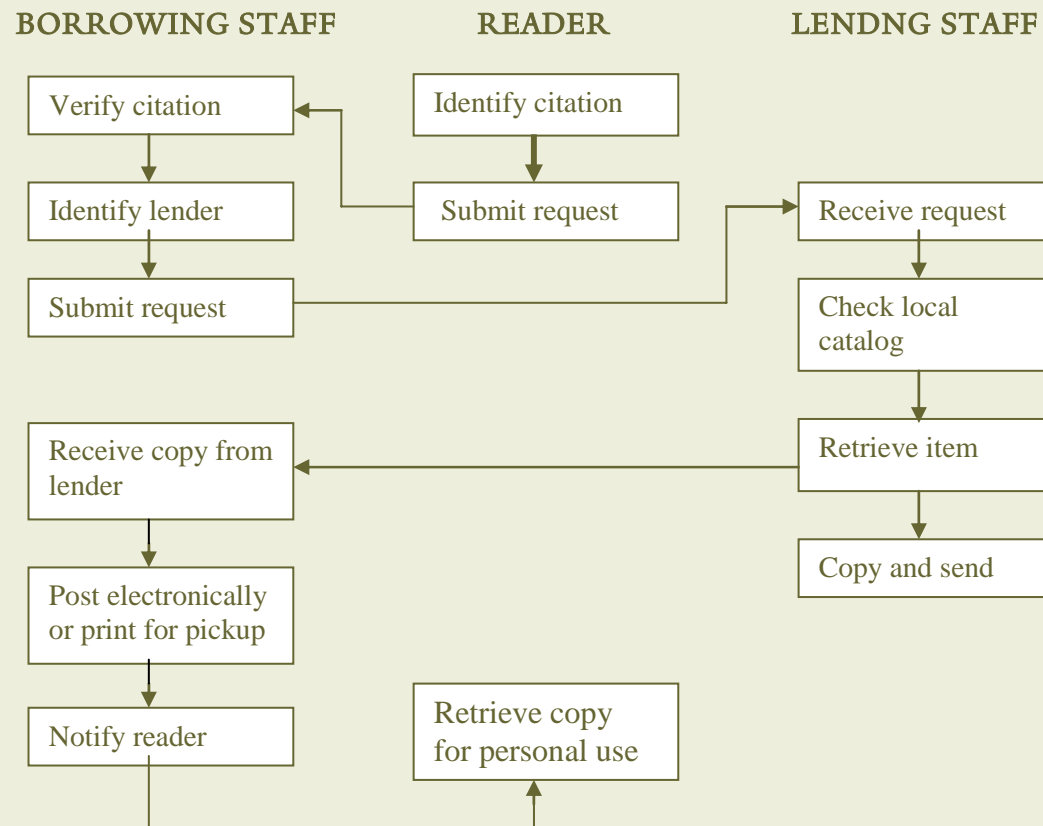
# AMEEL ILL WORKSHOP

## DAY 2

- Brief recap of main points from 1<sup>st</sup> day
- Outline day 2 schedule

# ILL TASKS AND WORKFLOWS

## THE INTERLIBRARY LOAN PROCESS



# THE READER/RESEARCHER

## THE INTERLIBRARY LOAN PROCESS

### READER

Identify citation



Submit request



Retrieve copy for  
personal use

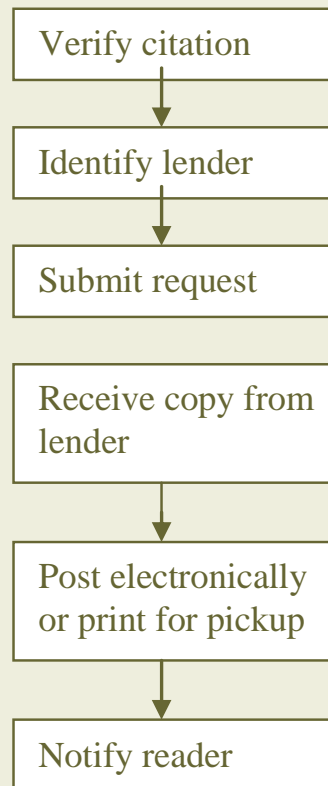
# THE READER/RESEARCHER

- Reader/researcher needs information.
- Reader identifies a relevant journal article but cannot find it in your library.
- Reader starts the ILL process by submitting a request to the borrowing staff.

# BORROWING TASKS

## THE INTERLIBRARY LOAN PROCESS

### BORROWING STAFF



# BORROWING TASKS

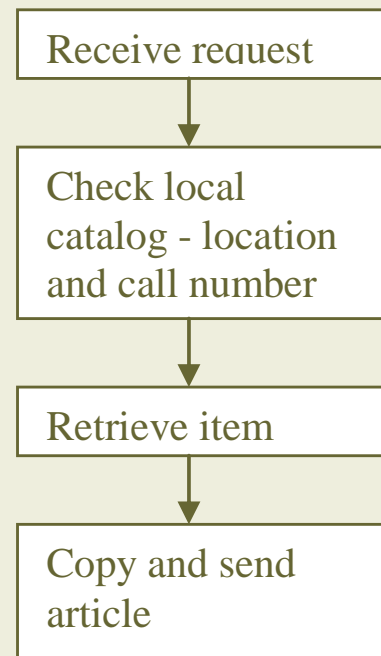
- Review reader's request
  - Confirm that item is not held locally
  - Verify that the citation is correct
- Identify potential lenders (suppliers)
- Send the request to one or more lenders
- Receive the copy from the lender
- Deliver the copy to local reader

BREAK

# LENDING TASKS

## THE INTERLIBRARY LOAN PROCESS

### LENDNG STAFF



# LENDING TASKS

- Request is received at the lending library.
- Lending staff confirm that they own the requested item, its shelving location, and that it is available.
- The journal is retrieved from the shelf.
- The needed article is photocopied and the copy is checked for completeness and legibility.
- The copy is sent via the desired delivery method and the borrowing library is notified that the request has been filled.

## BORROWING TASKS, PT.2

- Borrowing staff receive the copy and review it for completeness and legibility.
- The copy is sent to the reader electronically or placed on the pickup shelf in the Circulation Department.
- Reader is notified via email that the copy is available for pickup.

## READER/RESEARCHER, PT.2

- The reader views the copy online, and may print it out or save it on personal computer.
- If the copy was provided in print, the reader picks it up at the Circulation Desk.

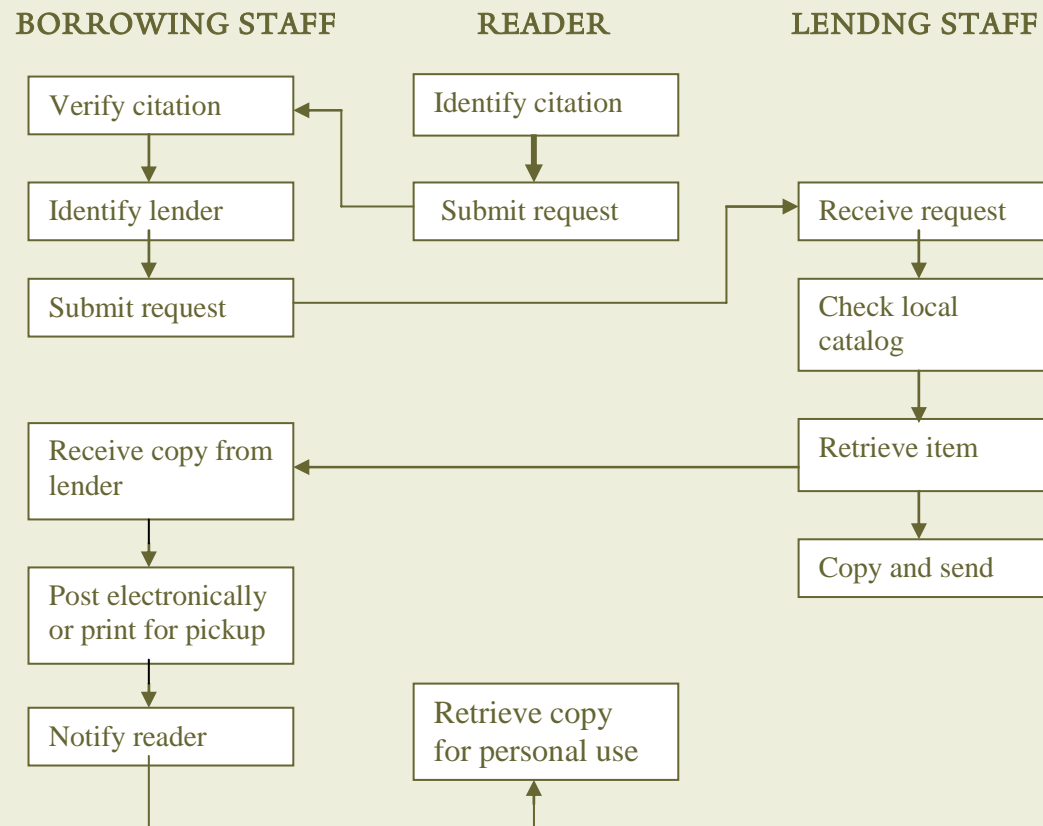
# GROUP ACTIVITY

- Distribute copies of workflow (English version)
- Divide participants into three groups and assign one section of the workflow to each group
- Each group will select a recorder and a reporter
- Each group will write up its section of the workflow in Arabic
- Each group will present their Arabic version to the group as a whole to receive feedback, comments

# LUNCH

# ILL TASKS AND WORKFLOWS

## THE INTERLIBRARY LOAN PROCESS



# WORKFLOW AND PROCESSES

## REVIEW AND QUESTIONS

- Borrowing
  - Unable to verify citation provided by reader
  - What other print or electronic resources are available locally?
  - What is a known item?
  - Unable to identify a potential lender
- Sending requests
  - Citation information and format are important
  - IFLA guidelines and samples for requests via fax and email
  - Resending an unfilled request

# WORKFLOW AND PROCESSES, CONTINUED

- Lending
  - Requesting clarification or corrected information
  - Responding no - provide the reason
    - Not found as cited
    - Not on shelf
    - Poor condition; cannot photocopy
- Photocopying
  - All text legible; adjust contrast as needed
  - Copy all pages; no omissions
  - Minimize dark margins
  - Illustrations can present special problems
- Scanning
  - Page by page
  - Complete article, using automatic document feeder (ADF)
  - Direct scanning can eliminate photocopying
  - Use copyright notice as appropriate

# BASIC TOOLS FOR ILL

- Hardware
  - Computer workstation
  - Scanner
  - Photocopier
  - Fax?
- Software
  - Odyssey
  - Adobe Reader
  - Scanner specific
  - Email
- Databases
  - OACIS
  - Local catalogs
  - Others?

BREAK

# BASIC SEARCH

YALE UNIVERSITY LIBRARY

## OACIS for the Middle East

[OACIS Home](#)

[Advanced Search](#)

[Options](#)

[Help](#)



Database: OACIS for the Middle East

### Basic Search

Search for:

(Omit leading articles: A, An, The, L')

Search in:

- Title 
- Place of Publication 
- Subject (Keyword) 

View Results:

- Paged (shows 20 results per page)
- Browse (shows all search results)

[عربي](#)

[Deutsch](#)

[English](#)

[Español](#)

[Français](#)

[OACIS Home](#) / [Contact Us](#) / [Yale University Library](#) / [Yale University](#) / [YaleInfo](#)

<http://www.library.yale.edu/oacis/>

# ADVANCED SEARCH

Yale University Library : OACIS -- Advanced Search - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://oacis.library.yale.edu/oacis/scripts/advsearch.php?searchmod=a&type=en


Getting Started Latest Headlines

YALE UNIVERSITY LIBRARY

## OACIS for the Middle East

OACIS Home Basic Search Options Help

Database: OACIS for the Middle East



Advanced Search ?

Search for:  All of these Search in:

AND  OR  NOT

Search for:  All of these Search in:

Limit to... Library:

[عربي](#) [Deutsch](#) [English](#) [Español](#) [Français](#)

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This file last modified December 07 2005 10:42:19.  
Send comments to [Elizabeth Beaudin](#)

Done

# OACIS: BASIC SEARCH IN ARABIC

The screenshot shows a web browser window with the following elements:

- Browser Title Bar:** Yale University Library : OACIS -- في عربي - Mozilla Firefox
- Address Bar:** <http://oacis.library.yale.edu/oacis/scripts/pgsearch.php?searchmod=b&type=ar>
- Navigation Bar:** Getting Started, Latest Headlines
- Header:** YALE UNIVERSITY LIBRARY, OACIS for the Middle East
- Menu Bar:** مساعدة, أفضليات, بحث متقدم, ابتداء
- Main Content:**
  - قاعدة بيانات: OACIS for the Middle East
  - بحث أولي
  - Virtual Arabic Keyboard
  - ابحث:
  - في:  العنوان
  - مكان النشر  (selected)
  - الموضوع
  - ابدأ البحث
- Language Selection:** Français, Español, English, Deutsch, عربي
- Footer:** OACIS Home / Contact Us / Yale University Library / Yale University / YaleInfo
- Copyright:** Yale University Library 2002-2005 ©

# TEST TRANSACTIONS

## SENDING REQUESTS

- OACIS Searching Practice

# TEST TRANSACTIONS, PT.2

## SENDING REQUESTS

- Complete IFLA email form for each test request
- Email requests to Yale ILL staff

# IFLA: EMAIL FORM REVIEW

To:  
Date:

Dear Colleague:

Are you able to supply the following journal article for one of our users?

<Journal title, year, volume, part, page number>  
<Article title & author>  
Call number/Shelfmark:

Verification source:

This would be CCG/CCL for copyright compliance.

Patron:

- \* We prefer to pay with: IFLA ILL Vouchers
- \* Max cost is IFLA ILL Vouchers or US\$
- \* Urgent request: needed before

Please send the item to:

Billing address:

Thank you.

<Your name>  
<Your full address>  
<Your email>  
<Your fax>

# AMEEL ILL WORKSHOP

## DAY 3

- Brief recap of main points from 2<sup>nd</sup> day
- Outline day 3 schedule

# WORKFLOW AND PROCESSES, CONTINUED

- Continue discussion and questions from previous afternoon.

BREAK

# TEST TRANSACTIONS

## RECEIVING ARTICLES

- Receive article
- Notify reader

# TEST TRANSACTIONS

## SENDING ARTICLES

- Demonstration

# ILL STATISTICS

- Why are statistics important?
  - Administrative justification
  - Financial reporting
  - Staffing levels and allocation of staff time
- What kinds of statistics are useful?
  - Fill rate: number and % of requests filled
  - Response time: amount of time to fill requests

# YALE STATISTICS

Statistical Period	ILL Lending							ILL Borrowing						
	Loans req'd	Loans sent	Copies req'd	Copies sent	Total req'd	Total sent	Fill Rate	Loans req'd	Loans rec'dd	Copies req'd	Copies rec'd	Total req'd	Total rec'd	Fill Rate
FY2006	51,099	33,702	33,361	15,511	84,460	49,213	58%	31064	25,526	15,253	12,707	46,317	38,233	83%
FY2005	43,004	29,845	28,928	14,024	71,932	43,869	61%	26073	21,430	8,986	7,367	35,059	28,797	82%
FY2004	40,382	27,403	22,758	12,160	63,140	39,563	63%	18638	16,161	7,897	6,531	26,535	22,692	86%
FY2003	37,492	22,338	27,611	15,562	65,103	37,900	58%	14061	12,172	8,989	7,640	23,050	19,812	86%
FY2002	31,519	17,223	27,565	15,761	59,084	32,984	56%	10617	9,354	9,347	7,732	19,964	17,086	86%

# GENERAL ILL POLICIES, GUIDELINES AND AGREEMENTS

- Existing policies at all levels
  - IFLA: international guidelines for ILL policies and best practices; voluntary
  - ALA: national guidelines for ILL participation; voluntary, but all ILL participants are expected to support and adhere to them
  - OCLC: specific policies and procedures; all organizational members are required to support and adhere to them
- What are the characteristics of good policies?
  - Balanced
  - Reciprocal

# GENERAL ILL POLICIES, GUIDELINES AND AGREEMENTS

- Basic elements of agreements
  - Clearly stated or defined expectations
  - Financial aspects defined; fees vs. no fees
  - Required practices or procedures
- Other useful elements of agreements
  - Collection profiles
    - Strength of collections at various libraries
    - Collection development decisions
    - Choice of best lender when sending ILL request
  - Copyright requirements and issues

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# LUNCH

# DEVELOPING AN ARAB REGIONAL PRACTICE OF ILL GROUP DISCUSSION

- What policies might be developed or adjusted by an Arab regional ILL group?
- What are the constraints that might affect or influence the development of an Arab regional practice of ILL?
- How can these constraints be overcome?
- Is there an existing organization that might provide assistance to an Arab regional ILL group? AFLI?
- Are you interested in further participation?

# EVALUATION FORM

- Evaluation of the Project AMEEL ILL workshop is very important.
  - Planning the next workshop and other future activities
  - Reporting to the Project AMEEL funding agency

# PROJECT AMEEL TEAM

- Ann Okerson, Principal Investigator
- Elizabeth Beaudin, Project Manager; Integration Specialist
- Simon Samoeil, Project Outreach Director
- Jennifer Weintraub, Digitization Specialist
- Kimberly Parker, Head, Electronic Collections
- Carol Jones, Head, Document Delivery

<http://www.library.yale.edu/ameel/>

# AMEEL ILL WORKSHOP

## CLOSING CEREMONIES

- Distribution of certificates
- Closing remarks