Rapid/ILL and RapidR
Book Chapters and Loans

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What are we talking about today?

RapidILL
- Articles
- Book Chapters
- Loans (RapidR – Pilot)

ILLiad
- Rapid Manager
- Direct ILL

RapidR Pilot
- Boston Library Consortium (BLC)
- WorldCat Local / Navigator / NRE (Navigator Request Engine)
UCONN’s Annual ILL Activity (UCW)

• Borrowing – 70,000
• Lending – 50,000
and RapidILL

- Joined RapidILL in 2004
- Obtain average of 17,000 articles each year
- Supply more than 9,000 articles each year
Currently 75 RapidILL Participants

Book Chapters

UCONN’s averages (since 2012):

Borrow: 300 month

Lend: 70 month
RapidILL Highlights

(Why Joe loves RapidILL)

• Average Filled Turn Around (12 hours)
• 96% fill rate
What’s makes a Chapter Request?

ILLiad

> One chapter/section

> OCLC # or ISBN

> Chapter # or pages
Unmediation

Like RapidILL for articles:
Link Resolver = unmediation
How does unmediation work?
Unmediation

When the appropriate ILLiad routing rule detects:

- OCLC # or ISBN
- Chapter # or Pages

ILLiad pushes the chapter request out via the Rapid Manager to potential Rapid/ILL partners.
ILLiad Routing Rule for Rapid Articles and Chapters

<table>
<thead>
<tr>
<th>RuleNo</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td>RuleActive</td>
<td>No</td>
</tr>
<tr>
<td>ProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>t.RequestType='Article' AND t.ISSN is not NULL AND ISNULL(LendingString,&quot;&quot;)=&quot;</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Awaiting Rapid Request Sending</td>
</tr>
<tr>
<td>RuleDescription</td>
<td>Moves article requests with an ISSN to a queue to be processed automatically by RAPID</td>
</tr>
</tbody>
</table>
System Requirements?

ILLiad 8.4 or higher
Must I submit my book holdings to Rapid\textit{ILL}?

Yes, Rapid\textit{ILL} needs only a few fields from your book holdings.

Rapid\textit{ILL} staff can assist with this.
Is there a maximum pages limit for a single chapter request?

The general guideline is about 50 pages.
As a **lender**, do I have to fill chapter requests within a 24 hour period?

**YES**

Are you now flinching **because of this answer**?
You are always in control concerning what portion of your collection you wish to share for the book chapter service!

Music Dramatic Arts Library

Pharmacy Library

Homer Babbidge Library
Manageable!

Music Dramatic Arts Library

Pharmacy Library

Homer Babbidge Library
Which delivery methods are supported for book chapters?

- Odyssey
- Article Exchange
- RapidX

Or ...
Chapter borrowing workflow vs. Article borrowing workflow

- Both workflows are almost identical
- Both involve ‘non-returnable’ material types
- Both do not require setting a due date
- Both involve using the Rapid Manager
- Both use the same document transmission protocols
Rapid can tell ...

If you own a book and it **IS** on the shelf ...

If you own a book and it is **NOT** on the shelf ...
So what does Rapid for chapters cost?

UCONN’s annual base participation cost:

$4,500 (journal articles only)
No additional fee for book chapters

0

Yay!
Book Borrowing/Lending
Pilot
RapidR
Pilot Participants (BLC Libraries - 17)

RapidR

• UMass Amherst
• Univ of Connecticut
• Williams College
• Northeastern Univ
• Univ of New Hampshire

Spring 2014
### Staff view of BLC Navigator

#### BLC Work Queue

<table>
<thead>
<tr>
<th>Borrower</th>
<th></th>
<th>Lender</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td><strong>Count</strong></td>
<td><strong>Category</strong></td>
<td><strong>Count</strong></td>
</tr>
<tr>
<td>Idle</td>
<td>0</td>
<td>New Requests</td>
<td>0</td>
</tr>
<tr>
<td>Idle / Auth Manual</td>
<td>0</td>
<td>New Requests Pending Today</td>
<td>0</td>
</tr>
<tr>
<td>Idle / Check Manual</td>
<td>0</td>
<td>Will Supply</td>
<td>0</td>
</tr>
<tr>
<td>Pending</td>
<td>14</td>
<td>Conditional</td>
<td>0</td>
</tr>
<tr>
<td>Pending &gt; 4 days</td>
<td>0</td>
<td>Cancel Requested</td>
<td>0</td>
</tr>
<tr>
<td>Pending &gt; 2 weeks</td>
<td>0</td>
<td>Messages</td>
<td>0</td>
</tr>
<tr>
<td>Terminated</td>
<td>0</td>
<td>Staff Review</td>
<td>0</td>
</tr>
<tr>
<td>End of lender string</td>
<td>0</td>
<td>Circulation Queue</td>
<td>0</td>
</tr>
<tr>
<td>Conditional</td>
<td>0</td>
<td>Shipped</td>
<td>809</td>
</tr>
<tr>
<td>Cancel Pending</td>
<td>0</td>
<td>Returned</td>
<td>19</td>
</tr>
<tr>
<td>Messages</td>
<td>1</td>
<td>Recalled</td>
<td>0</td>
</tr>
<tr>
<td>Staff Review</td>
<td>0</td>
<td>Overdue Today</td>
<td>5</td>
</tr>
<tr>
<td>Circulation Queue</td>
<td>0</td>
<td>Overdue</td>
<td>21</td>
</tr>
<tr>
<td>Shipped</td>
<td>20</td>
<td>Overdue &gt; 4 weeks</td>
<td>10</td>
</tr>
<tr>
<td>Shipped &gt; 1 week</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shipped &gt; 2 weeks</td>
<td>1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Received</td>
<td>319</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renew Pending</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overdue</td>
<td>42</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recalled</td>
<td>0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Returned</td>
<td>273</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Reports

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned List</td>
<td>0</td>
</tr>
<tr>
<td>Pick List</td>
<td>0</td>
</tr>
<tr>
<td>Shipping List</td>
<td>0</td>
</tr>
</tbody>
</table>
Patron view of WorldCat Navigator Record and request options
So much for WorldCat Navigator and the NRE

Let’s back to RapidR ...
In the Beginning: The RapidR Pilot
Using the Rapid Add-On in ILLiad
RapidR Pilot began heavily mediated...
Rapid Manager was not used early in the Pilot
Current RapidR Workflow

Transformation: The Rapid Manager
RapidR highlights

Just like RapidILL (for articles/chapters):

• Routing Rule now removes staff mediation
• Employs the dynamic power of the Rapid Manager
• ILLiad tracks/manages the life of each request
• Utilizes live title availability to create lending “string”
RapidR Pilot Lender Expectations

- Determine to **Fill** or **Unfill** within 24 hours of receipt
- Ship title to arrive within 4 days
- Provide a 60-day loan period
- Provide no renewals
- Permit Recalls
- Allow borrower to request more than 1 volume from a multi-volume title (Nice)
What makes a RapidR Loan Request?

1. Title
2. OCLC # or ISBN
3. Pub Year (yeah, it’s nice)
Does the RapidR Pilot program allow for unmediated processing for the borrower?

Yes! Just as long as the ILLiad work form includes either an ISBN or OCLC number with the title and pub year.

AND ...
A routing rule that tells ILLiad to send the loan request to the RapidR partner libraries by moving it to the **Awaiting Rapid Request Sending** queue.

But ...
Routing rule for RapidR

<table>
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<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>u.cleared='Yes' and (t.ISSN &gt; &quot; or t.ESPNumber &gt; &quot;) and t.RequestType =&quot;Loan&quot; and (t.LendingString = &quot;% or t.LendingString is NULL) and u.NYTGC ='UCW' and u.LoanDeliveryMethod = 'Hold for Pickup'</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Awaiting Rapid Request Sending</td>
</tr>
<tr>
<td>RuleDescription</td>
<td>This rule moves Loan requests with status &quot;Awaiting Request Processing&quot; and an ISBN to Awaiting Rapid Request Sending (RapidR)</td>
</tr>
</tbody>
</table>

A routing rule that identifies a LOAN request by an OCLC number or ISBN and gets it ready for the Rapid Manager.
What if your library owns the title?

Rapid will tell you if you own the title, when it’s on your shelf:

Rapid also will report the title’s local call number:

Rapid returns the request to you **only** if shelf status indicates locally available.

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*Not* held by any RapidR partner **AND not on shelf** at your library? Rapid says:
If no RapidR lending partner owns the title, including your own library?

No worries! The request will come back into ILLiad with the news!

And then ...
The 2nd ILLiad routing rule

- Picks up these unfilled RapidR requests
- Pushes requests out, in our case, to Direct ILL
- Custom holdings build lending string / produce request. (This is why we prefer to include the OCLC number in the initial RapidR request.)
### 2\textsuperscript{nd} routing rule for Returnables

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<tr>
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<td>Borrowing</td>
</tr>
<tr>
<td>TransactionStatus</td>
<td>Awaiting Request Processing</td>
</tr>
<tr>
<td>MatchString</td>
<td>ISNULL(t.LendingString,&quot;&quot;) = 'RAPID' and t.ESPNumber &gt; &quot; and u.nvtgc=&quot;UCW&quot;</td>
</tr>
<tr>
<td>NewProcessType</td>
<td>Borrowing</td>
</tr>
<tr>
<td>NewTransactionStatus</td>
<td>Awaiting Direct Request Sending</td>
</tr>
<tr>
<td>RuleDescription</td>
<td>Moves unfilled RapidL requests to Direct Request Sending in OCLC (NewTransactionStatus: Awaiting Direct Request Sending) GPowell (verified working)</td>
</tr>
</tbody>
</table>

This routing rule takes loan requests that go unfilled in RapidR and moves them to Direct ILL sending.
But we really don’t like OCLC’s Direct ILL because WorldShare doesn’t know if another library’s copy is on the shelf or not.
The cost of RapidR
How about a cost comparison now?

This is what RapidILL could do for us at UCONN thru the BLC:

1. Provides a mechanism to obtain and supply journal articles
2. Provides a mechanism to obtain and supply book chapters
3. Provides a mechanism to borrow live and lend monographs

Annual fee:

- Journal articles: $4,500
- Book chapters: $0
- Monographs: $670

We get #1, #2 and #3!

Annual cost for borrowing and lending returnables/non-returnables:

$5,170
Thank you!

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