
***2014–2015 Resource Sharing Committee Annual Project:
Recommended Workflows***

Executive Summary

The Resource Sharing Committee has provided CARLI members a set of five recommended workflows to assist them with recording the lending of materials through OCLC in their local circulation system.

When an OCLC request is placed for a returnable item that might have been requested through the library's own consortium (like I-Share), there are a number of overlaps that often lead to confusion for both the borrowing and lending libraries, and the possibility of unnecessary fines or blocks levied against patrons or libraries. It is our hope that by providing examples of a number of sample workflows, we are able to help CARLI members better handle recording OCLC Interlibrary Loan lending requests in their local circulation systems.

Before developing the workflows, the committee examined how these types of lending requests were handled at each of the member's home libraries. It became apparent that each library had developed individualized workflows to record the OCLC lending transactions in their local circulation systems, and that recommending a single best practice would never meet the needs of all member libraries. This idea was verified by responses to the committee's questions on the CARLI Resource Sharing interest group email list.

The recommended workflows provide guidance to member libraries and allow them to choose which method might work best for them. Each workflow is accompanied by a pro and con list that details some of the advantages and disadvantages. Two of the workflows, carry a heavier list of cons than the other three, although the workflows have been successfully implemented at a number of institutions.

The document also provides background gathered from our e-mail discussion list questions on the advantages and disadvantages of allowing direct OCLC requests by patrons, and the recommendation that all I-Share Libraries attach an OCLC Loan band to in-state loans to other I-Share libraries, when the request was generated through OCLC instead of I-Share.

Our "Sample Workflows for OCLC Lending" documentation is available on the CARLI website:
<http://www.carli.illinois.edu/products-services/i-share/circ/OCLCLendingWorkflows>