



BOSTON LIBRARY CONSORTIUM

JUNE 2024

E-BOOK ILL ROADMAPS

CHARTING PATHWAYS FOR BROADER
ADOPTION OF E-BOOK INTERLIBRARY LOAN

BLC E-BOOK SHARING WORKING GROUP

Acknowledgements

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E-BOOK ILL ROADMAPS

CHARTING PATHWAYS FOR BROADER ADOPTION OF E-BOOK INTERLIBRARY LOAN

June 2024

Introduction

The Boston Library Consortium (BLC) empowers a coalition of libraries in the northeastern United States to share knowledge, infrastructure, and resources at scale. In the realization of this mission, one area of common interest and discussion across the BLC membership is understanding how to share e-books through interlibrary loan (ILL). With a desire to turn these conversations into formative action, BLC established a strategic initiative within its [Strategic Action Plan](#) to investigate consortial approaches to expand interlibrary loan of e-books.

To execute this initiative, the E-Book Sharing Working Group was established with the following charge:

- Investigate a vendor-neutral, consortial approach to e-book borrowing and lending for libraries at BLC member institutions
- Craft documentation to detail e-book borrowing and lending procedures, including license negotiations, holdings considerations, system alterations, and adaptable workflows
- Explore potential avenues for consortial e-book sharing, advocacy, and group acquisitions

The Working Group was composed of fifteen representatives from eleven member institutions, including BLC's Resource Sharing Program Manager. After ten months of intensive conversation, resource gathering, and community engagement, the Working Group is proud to present the following E-Book ILL Roadmaps to the BLC membership and larger resource sharing community.

The pages that follow outline the practice of e-book interlibrary loan in our current resource sharing ecosystem, provide step-by-step workflows and considerations for adopting both the borrowing and lending of e-books, and discuss what needs to change in the resource sharing landscape in order for e-book ILL to continue evolving as a sustainable practice.

E-Book ILL as practice

E-Book interlibrary loan is a non-monolithic practice with multiple approaches to sharing e-resources. The following chart provides details on the current approaches to the practice and the nuances that distinguish their execution:

	Non-Returnable E-Book ILL (Whole PDF)	Returnable E-Book ILL (Tokenized Access)	Returnable E-Book ILL (Owned E-Books)	Controlled Digital Lending (CDL)
Description of approach	Sharing a whole, legally acquired e-book as a single PDF.	Share a whole, legally acquired e-book via a tokenized access link.	Sharing a resource to a legally owned (not licensed) e-book.	Digitization of a legally acquired print resource and sharing it electronically with DRM protections.
Content origin?	Digital	Digital	Digital	Print
Duration of access to material?	Unlimited - resource is provided DRM-Free and patron has perpetual access to the resource.	Limited - resource provided via tokenized access link for short duration.	Limited - resource provided via tokenized access link or DRM viewer for short duration.	Limited - resource provided via tokenized access link or DRM viewer for short duration. No access to print copy during the loan period.
License negotiation required?	Yes - entity owned by rights holder & loanable via license clause.	Yes - entity owned by rights holder & loanable via license clause.	No - entity is owned by a library or institution and is lent in the manner of a print resource.	No - print origin of resource applies different rules to the manner in which it can be shared.
Additional notes	This approach is the focus of these roadmaps.	ProQuest launched a pilot for this approach in January 2022.	Rare approach as many e-books are licensed and not outright owned.	Legality of practice varies by country & jurisdiction.

Note that while controlled digital lending is included in the above chart, that practice is distinctly different from e-book ILL. The primary difference between CDL and e-book ILL is that materials shared via CDL originate as print resources. As print and digital ownership do not carry the same principles and protections, CDL relies on the first-sale doctrine and fair use in the United States to justify its approach to sharing digital surrogates of print resources.

E-Book ILL in the broader resource sharing landscape

The past two decades have seen an evolution in collection development with the increased acquisition of electronic resources. E-Books in particular have grown in popularity for library collections, with acquisition options ranging from individual purchases to EBA or DDA selection models to e-book deals brokered through library consortia. Growing e-book collections provide broader access to information as libraries seek to deliver services for a growing global population.

Alongside these trends, interlibrary loan services have evolved to meet the needs of users and provide access to valuable resources. With new material formats brings new opportunities to share them across libraries and information organizations. With sharing physical books and articles or book chapters now commonplace, sharing whole e-books through interlibrary loan is a logical next step in this service. Institutional collections policies are often e-preferred, limiting the number of print books eligible for interlibrary loan. Some titles are only available in an electronic format and many patrons need access to equitable services regardless of their physical location.

Several innovators have publicly shared their work in establishing processes for e-book ILL at their institutions or consortium. These include the [University of Connecticut](#), a BLC member institution, and the [VIVA Consortium](#), a consortial colleague to BLC. Despite these innovations, e-book ILL still faces many hurdles towards broader adoption. One of the largest challenges lies in the multi-system network required to fill e-book ILL requests. Integrated library systems (ILSs) hold key license information needed to determine if an e-book is lendable through interlibrary loan. This license language is sometimes but not always made public in a discovery layer or online public access catalog (OPAC). This software is often separate from the resource sharing software utilized to intake, monitor, and process e-books requested.

Libraries often use different combinations of proprietary and open source software to manage their resources and resource sharing requests, making the ability to establish recommended practices even more difficult due to the mix-and-match nature of each solution utilized. Every system has their place in the fulfillment of e-book requests, but this fractured nature often complicates the ability to streamline workflows and provide adequate information to staff on what resources can actually be supplied via interlibrary loan.

An additional factor in this complicated e-book ILL ecosystem is workflow creation and development. These processes are often developed by practitioners in the field and not by the vendors through which requests are processed. This lack of vendor-supplied or -approved practices leaves the impetus of learning how to lend e-books on individual library staff as prior to these roadmaps, there are no all-in-one resource to fully explain the process.

E-Book ILL & BLC

While there has been broad consortial interest in full e-book sharing, only a small number of BLC member institutions are actively lending and/or borrowing e-books. Challenges that have impacted adoption include the variety of resource sharing softwares and integrated library systems utilized across the membership, in addition to limited time and staff capacity to implement the practice. The development of these roadmaps is intended to help eliminate much of the guesswork involved in adopting e-book ILL and instead focuses on the fundamental questions to be considered and answered while working towards implementation.

Ideally, there would be standardized practices and workflows across members of the consortium to facilitate e-book ILL. However, the fractured nature of the practice and localization of certain workflows limits the effectiveness of a fully consortial standard. The roadmaps work to balance these needs by providing several general recommendations and system-specific examples of adaptable workflows to meet the needs of individual practitioners and libraries.

Scope of the E-Book ILL Roadmaps

DRM-Free: While many approaches to e-book ILL exist per the previous chart, these E-Book ILL Roadmaps will distinctly focus on adopting the DRM-Free approach. This approach is the most accessible to libraries as it builds off practitioner-developed workflows and does not require the oversight of a digital loan period for patrons to access materials. DRM-Free e-book ILL also provides the most benefit to users as they will have unlimited access to the resource over the course of their studies and beyond into their professional career.

Opt-In: While a balance of lending and borrowing is integral to interlibrary loan, participation in implementing e-book ILL is entirely opt-in. Each participating member institution will be empowered to share e-books as their institutional licenses allow, based on current and future negotiations.

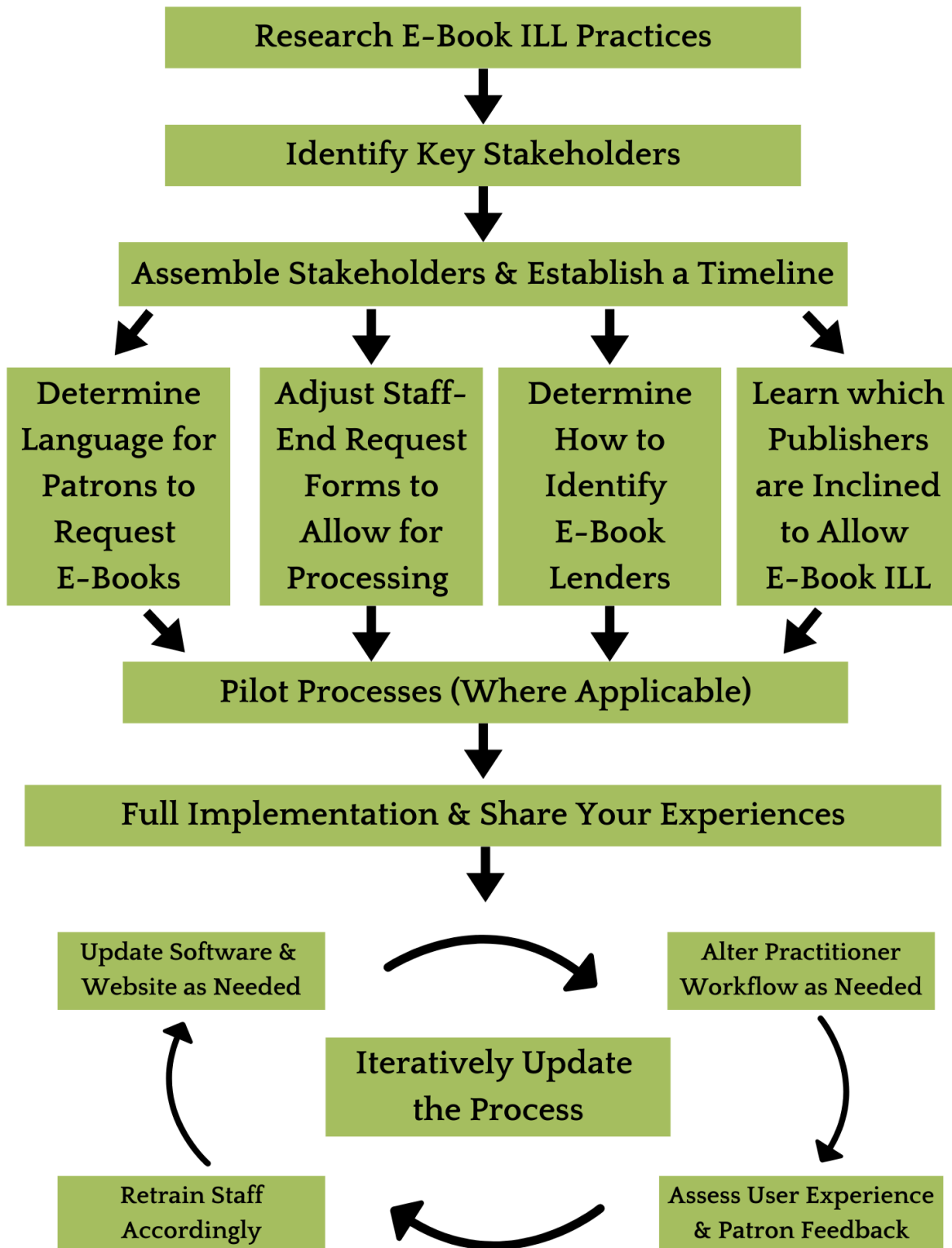
Vendor-Neutral vs. Vendor-Inclusive: The Working Group's initial charge identified that our approach would focus on providing vendor-neutral guidance to e-book ILL adoption. In developing the first draft of the roadmaps, several questions arose in how to best convey its contents: Do we provide broader recommendations that require libraries to shoulder the burden of independently determining workflows to adopt e-book ILL? Or should we include specific workflows for relevant systems to provide a baseline for member institutions to build off and meet local needs?

In this vein, The Working Group ultimately decided to shift its scope from being vendor-neutral to being *vendor-inclusive*, providing details about the majority of systems currently used by BLC's member institutions (ILLiad, Tipasa, WorldShare ILL, Alma, and FOLIO). The two exceptions are WorldShare Management Services (WMS) and Rapido. WMS includes the option to link licenses

to e-resources, but this functionality leaves much to be desired as each digital asset still requires individualized notes to determine its lendability. Rapido's current requesting options are binary (book or article/chapter) and currently unable to intake or identify e-book requests. However, ExLibris announced that e-book ILL functionality is in development and would be in production sometime in 2024.

The Working Group's vision for these documents is that they do not remain static and are regularly updated in accordance with software developments and other shifts in the resource sharing landscape. Once guidelines for WMS, Rapido, or other relevant systems used by BLC member institutions have been identified, they will be adapted into future versions of these roadmaps.

Borrowing Roadmap Framework



1. Research e-book ILL practices

There are many existing resources about the practice of e-book ILL. The E-Book Sharing Working Group has compiled a [list of e-book ILL resources](#); we recommend reviewing these to contextualize the practice and gain a baseline understanding of how it works. If you have any recommendations for additional resources to add to this list, please contact Marc Hoffeditz, Resource Sharing Program Manager, at mhoffeditz@blc.org.

2. Identify key stakeholders

Once you've reviewed this background information, identify who at your institution is responsible for the following (NOTE: this may be a single person or multiple individuals):

- Systems administration for your resource sharing software
- Altering your resource sharing request forms (patron and staff-facing) and website
- Processing ILL borrowing requests
- Library user experience, outreach, and/or engagement

3. Assemble stakeholders & establish a timeline

Gather your stakeholders for a synchronous meeting to discuss the process, gain insight into areas you are less familiar with, and strategize how to move this implementation forward in a timely manner. Work collaboratively to identify a timeline for your implementation and decide on your specific milestones for the project. Some recommended milestones may include:

- Determine language for patrons to request e-books and update the website accordingly
- Finalize alteration of request forms for your resource sharing software
- Establish a practice for reviewing/identifying e-book lenders (if not automatically built into your workflow)
- Finalize a workflow for ILL practitioners
- Go-Live date (ie. begin processing e-book borrowing requests)

Given that staff time is limited and valuable, timelines may vary due to the number of stakeholders and other competing work priorities. We recommend including additional buffer time to adapt or respond to unforeseen circumstances.

4A. Determine language for patrons to request e-books

Language will need to be included and/or altered in ILL request forms for patrons to identify their desired format and, where possible, the conditions they will accept if that format is not available. Because some e-books cannot be lent through ILL, some prefatory language is also suggested to inform patrons about the general availability of e-books through ILL.

For ILLiad, Tipasa, and WorldShare users, the Working Group recommends including the following language in two separate questions. The first asks the user to identify their preferred format and alerts them that an e-book version is not always possible to borrow.

The second identifies whether the patron will accept an alternate format if their preferred one is unavailable:

Format Preference?

Note: E-books are not always available due to licensing restrictions. Additionally, not all titles are available as e-books.

- Print*
- Electronic*
- Either one is fine*

If we can't get this material in your preferred format, would you accept a different format?

- Yes, get me whatever you can.*
- No, cancel this request if the preferred format is unavailable.*

4B. Adjust staff-end request forms to allow for processing

For your resource sharing system to correctly intake an e-book request, you will need to ensure that the important fields in your request form are correctly mapped to your ILL software.

When altering request forms, it's important to plan for tracking e-book sharing statistics. Differentiating between e-books and print books in resource sharing systems can be difficult, so strategizing ahead of time will help when statistics are needed.

ILLiad

- Edit an existing field into a format preference field to house this information OR route the information from the two questions into a combined entry in the notes field. The latter approach can be accomplished via scripting language (i.e. Javascript)
- When processing a request, be sure to instruct ILL staff to double-check the notes field for any format indications. Preferences may also be indicated by patron-supplied ISBNs (e-book ISBN vs. print ISBN)
- Examine existing reporting practices for how you gather returnable statistics, and how they can be adapted to account for e-books vs print books. Custom flags, routing rules, or title field alterations can be used for tracking

Tipasa

- Via the backend Tipasa Service Configuration, edit fields in the work form to include these questions. Identify the questions as required to ensure the information is adequately passed onto ILL staff
- Create a tag denoting e-book requests. This can be applied by the Automated Request Manager or by staff at the point of processing. Tags can be searched in closed requests, or identified via the OCLC Report Designer

4C. Determine how to identify e-book lenders

Given the relative novelty of e-book ILL, the resource sharing landscape has not yet identified a singular mechanism for identifying which libraries are willing and able to lend their e-books and from which publishers they are able to lend. The following are recommended locations to search for this information, including practices for building a localized library group in your resource sharing software:

EBOOK

OCLC hosts a profiled group of libraries that lend e-books called EBOOK. This specific list can be accessed through the OCLC Policies Directory in ILLiad, WorldShare ILL, or Tipasa. While it identifies who lends e-books, it does not specify which publishers they lend from or any specific policies/limitations regarding their ability to lend e-books. To access the list of libraries in this group:

1. [Log into OCLC](#). If you do not have an account, just click **Sign In**.
2. Under Institution Information in the top left, search by **Group Symbol** and enter **EBOOK** into the search box. Then click **Search**. The current list of e-book lenders should appear.

Whole E-Book Lending Tracker

Created by BLC member Dev Singer, this spreadsheet provides a vendor-neutral listing of libraries that lend e-books, which specific publishers they can lend from, and any limitations on their ability to lend their materials. We encourage you to share this tracker with your colleagues and, if you currently lend e-books, to fill it out with your institution's information.

- [View the Whole E-Book Lending Tracker](#)
- [Submit your institution's information to the Whole E-Book Lending Tracker](#)

Developing your own E-Book Lending Group

With these resources on hand, a localized set of libraries will need to be created in your resource sharing software to more easily determine which libraries lend their e-books and, subsequently, if any of them have the book you want to borrow. This is especially important as not every library that shares e-books through interlibrary loan advertises the practice.

For ILLiad, Tipasa, and WorldShare users, you can create a Custom Holdings Group in your OCLC WorldShare account. Name the group (e.g. E-Book Lenders) and add the OCLC symbols of designated e-book lenders. Click **Save** and double-check your resource sharing software to verify that the new holdings group is visible. For detailed instructions, please review [OCLC's documentation on creating Custom Holdings Groups](#).

4D. Learn which publishers are inclined to allow e-book ILL

Understanding which publishers are generally open to lending their e-resources can help ILL staff determine if a request should be sent through as an e-book or print format.

Publishers vary in terms of their sector (e.g. trade, educational, academic, etc.) and each has different attitudes towards sharing e-books through ILL. As of January 2024, the following publishers have some form of e-book ILL arrangement with specific BLC member institutions:

- Brill
- Cambridge University Press
- De Gruyter
- Gale (titles published by Gale, not Gale-aggregated titles)
- Edward Elgar
- Elsevier
- Emerald
- Springer Nature
- Taylor & Francis
- Wiley

5. Pilot processes (where applicable)

Once workflows have been established, pilot them and determine if any alterations are needed. Note that some processes may be difficult to replicate without officially launching the practice. Keep track of these various moving pieces once your go-live date is reached.

6. Full implementation & share your experiences

Going live for e-book borrowing will involve:

- Ensuring your updated request form is live (allowing patrons to request e-books)
- Having your e-book borrowing groups set up (allowing staff to select e-book lenders)
- Training staff (both professional & student) on how to process e-book requests
- Establishing a process for gathering statistics on the number of e-books requested vs. what was actually filled

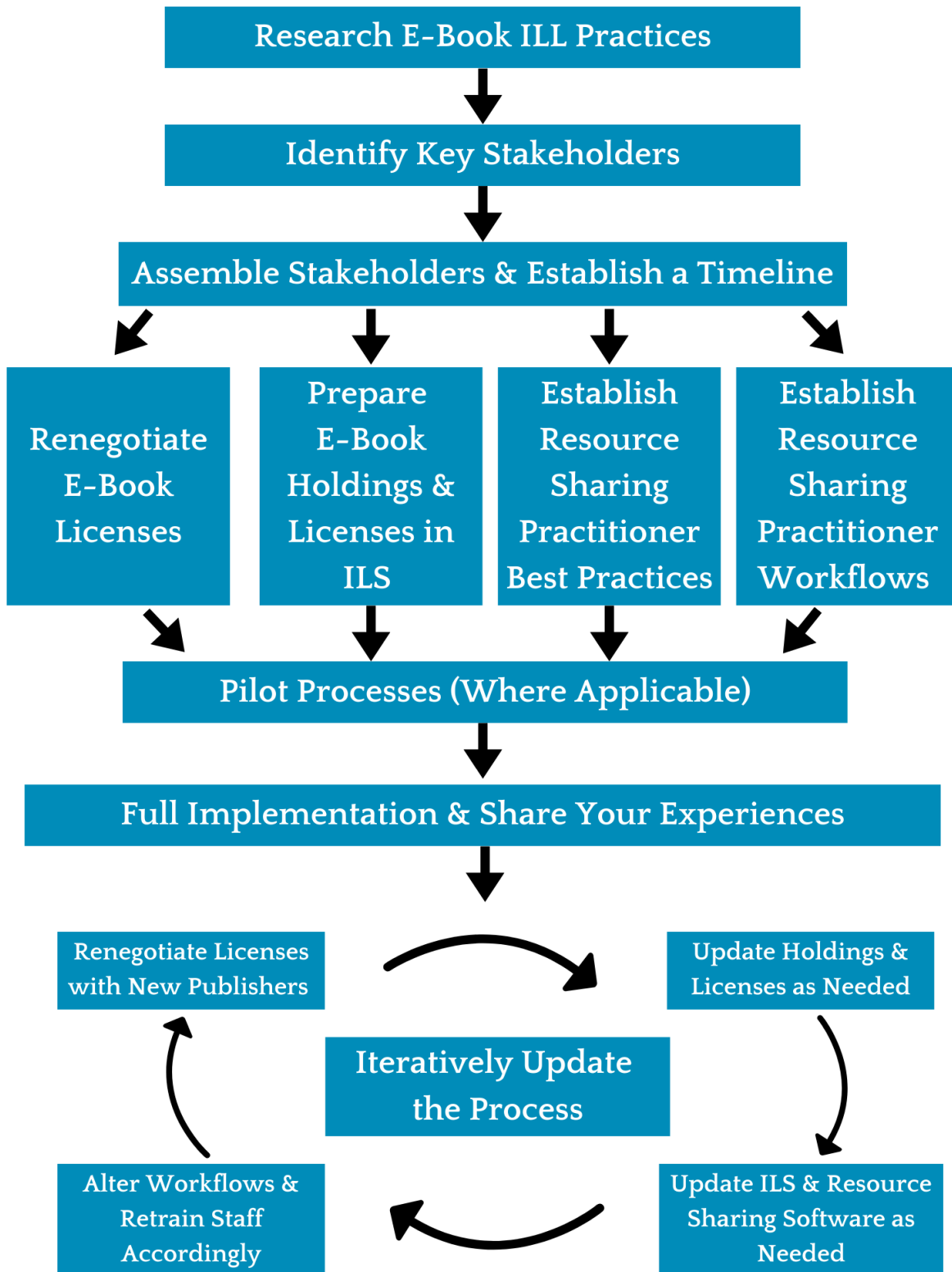
Given that e-book ILL is a relatively new practice in the resource sharing space and is not always discussed freely in the open, we highly encourage you to share your experiences with your BLC colleagues and others to spread the word about the impact that e-book ILL can have on your local user communities.

7. Iteratively update the process

As system updates and efficiencies are realized, iteratively update your workflows and forms as necessary. Some of these updates may include:

- Systems updates as needed (for ILS & resource sharing software)
- Website updates as needed
- Alter practitioner workflows as needed
- Assess user experience & patron feedback
- Re-train returning student staff accordingly

Lending Roadmap Framework



1. Research e-book ILL practices

There are many existing resources about the practice of e-book ILL. The E-Book Sharing Working Group has compiled a [list of e-book ILL resources](#); we recommend reviewing these to contextualize the practice and gain a baseline understanding of how it works. If you have any recommendations for additional resources to add to this list, please contact Marc Hoffeditz, Resource Sharing Program Manager, at mhoffeditz@blc.org.

2. Identify key stakeholders

Once you've reviewed this background information, identify who at your institution is responsible for the following (NOTE: this may be a single person or multiple individuals):

- Systems administration for your resource sharing software & integrated library system
- Altering your website for ILL policy updates
- Processing ILL lending requests
- Negotiating e-resource licenses & updating them in your ILS
- Creating or managing metadata for electronic resources

3. Assemble stakeholders & establish a timeline

Gather your stakeholders for a synchronous meeting to discuss the process, gain insight into areas you are less familiar with, and strategize how to move this implementation forward in a timely manner. Work collaboratively to identify a timeline for your implementation and decide on your specific milestones for the project. Some recommended milestones may include:

- Finalize license negotiations based on your publisher engagement strategy
- Establish a process for identifying e-book holdings and uploading them to the appropriate locations
- Identify a location for license visibility in your discovery layer(s)
- Establish practitioner workflows to fill e-book lending requests
- Go-Live date (i.e. begin processing e-book lending requests)

Given that staff time is limited and valuable, timelines may vary due to the number of stakeholders and other competing work priorities. We recommend including additional buffer time to adapt or respond to unforeseen circumstances.

4A. Renegotiate e-book licenses

Identify publishers for renegotiation or clarification of licenses

Explicit clauses must be included in publisher license agreements to allow for e-book ILL. To determine which publishers to engage with, we recommend the following approaches:

- Review your current e-book portfolio
 - Which publishers/platforms do you have the largest collection of e-books from?

- What download methods are required for different e-book platforms? (This will impact ILL practitioners having to potentially download and combine larger numbers of PDF files.)
- Review your current e-book licenses
 - Do any of your current licenses allow for whole e-book ILL?
 - Is there language where it's not explicitly prohibitive and could be clarified?
- Review existing e-book licenses clauses for inspiration
 - [VIVA Consortium's ILL Rights in E-Book Contracts](#)
 - [Examples e-book ILL clauses from BLC member institutions](#)
 - [RUSA Model License Language](#) (NOTE: This clause does not include specificity of e-book ILL, but may be used as inspiration for future language development).
 - Does any of the license language mirror your current licenses?
- Check any licensing agreements you have with other consortia
 - Do these include explicit clauses for whole e-book ILL?

Based on the review of your collection and licenses, identify a list of publishers and contact information for those with whom you'd like to engage with to add e-book ILL clauses

Renegotiate!

Planning a timeline for this part can be quite challenging. Some negotiations can be resolved in a matter of days; others in a matter of weeks or months. For consortial consistency, we recommend utilizing language from other BLC e-book ILL agreements for specific publishers. (NOTE: this language may evolve over time. It is recommended that you regularly review these licenses and note any potential changes).

To prepare for negotiations, the Working Group recommends utilizing the following talking points for publishers who might be wary about e-book ILL. These talking points are adapted from works by Michael Rodriguez, Senior Strategist for Content & Scholarly Communication Initiatives at Lyris and Beth Denker, E-Resource Licensing and Administrative Manager.

- [E-Book ILL Talking Points](#)

During your negotiations, work to include both whole e-books AND chapters from e-books (unless the latter is subsumed into the former). Avoid any agreements surrounding a specific number of transactions allowed for e-book lending. If unsuccessful, ask publishers what it would take for an e-book ILL addendum to be possible. Requesting permission to lend chapters from e-books may be a viable pathway if whole e-book ILL is not possible.

4B. Prepare e-book holdings & licenses in ILS

Once license negotiations have ended, e-book holdings for lendable titles will need to be uploaded and identified accordingly so other libraries will be able to request those titles.

- **RAPID:** It is recommended that you upload lendable e-book holdings to Rapid first.
- **OCLC:** This is optional for interested libraries but not recommended as there is not an easy process to do so. One area where this might be useful is in identifying overlap between print retention and e-book holdings per Eastern Academic Scholars Trust (EAST) specifications.

Making licenses visible in your ILS & discovery layer

The Working Group has developed guidelines for adding and managing your ILL licenses in your ILS/Discovery layer. These are based on existing vendor documentation and personal experiences:

- [Guidelines for License Management in Alma & Primo/Primo/VE](#)
- [Guidelines for License Management in FOLIO & Full Text Finder/EBSCO Discovery Service](#)

In any case, be sure to have a robust discussion with your e-resources, systems, and ILL staff on where to best situate the license language so staff and patrons can fully understand the terms and conditions of each license.

4C. Establish resource sharing practitioner best practices

The Working Group recommends the following practices as they relate to e-book interlibrary loan:

When in doubt, confirm with the requesting library

This can be done via conditionals in OCLC products or by an email/phone call for Rapid requests.

This principle applies to many different scenarios:

- *If the print version of a text is requested, but you only own the e-book version.*
- *If the e-book version of a text is requested, but you only own the print version.*
- *If the desired format is not indicated, but you own the e-book version.*

Always verify that an e-book is eligible for loan

If using the Rapid or IDS logic workflow options listed below, requests will automatically appear in a specific queue as Rapid holdings will only include lendable e-books.

If *not* using the Rapid or IDS logic workflow options listed below, you will need to verify the e-book license in your library catalog/OPAC. Alternatively, you can create a chart for ILL staff to check licenses before filling an e-book lending request. The VIVA Consortium's [ILL Rights in VIVA's Contracts chart](#) is a good model from which to draw.

Develop a workflow for piecing together multi-chapter e-books

Not all e-book download processes are created equal. While some publishers allow for one-click downloads, others have their e-books hosted as individual chapters that must be pieced together before sending them to the patron. Here are some recommended workflows for different software:

- [PDF combination workflows for e-book ILL](#)

Establish a process for tracking e-book lending statistics

It's important to plan for tracking e-book sharing statistics. Differentiating between e-books and print books in resource sharing systems can be difficult so strategizing ahead of time will help when statistics are needed. Closed requests can be permanently denoted as e-book, or statistics can be gathered at regularly scheduled intervals then closed.

- **ILLiad tracking options:** custom queues (full e-book supplied/request finished), custom flags, addition of "e-book" in title or notes. Reports can then be generated within ILLiad, or via ILLiad reports
- **Tipasa tracking options:** tag denoting e-book - can be applied by the Automated Request Manager or by staff at the point of processing. Tags can be searched in closed requests, or identified via the OCLC Report Designer

4D. Establish resource sharing practitioner workflows

There are numerous routes to developing e-book ILL workflows that are adaptable to your library's local needs. The resource sharing community has developed several workflows to facilitate e-book ILL in the absence of vendor identified solutions. The following are recommended practices for the specific systems currently utilized by the majority of BLC member institutions (ILLiad, Tipasa, WorldShare, IDS, RapidILL):

ILLiad workflow options

IDS/Rapid approach

This workflow is adapted from University of Connecticut's [Interlibrary Lending of Whole EBooks](#):

- Indicate lendable e-books when providing holdings to RapidILL
- Rapid imports the URL into the request call number field, provider name into location and notes field
- IDS Logic searches the fields and routes requests to the e-book request queue
- NOTE: IDS can probably check requests even if it's been sitting in a queue

Rapid only approach

This workflow is adapted from the approach taken by Tufts University:

- Indicate lendable e-books when providing holdings to RapidILL
- Rapid searches holdings and automatically adds URL into call number field
- Set up a local routing rule to send these requests to an e-book request queue
- NOTE: ILLiad can only check something via a routing rule the first time something lands in a queue

[Non-IDS/Rapid approach](#)

These workflows are outlined by the VIVA Consortium in the following two video examples:

- [E-Book ILL Lending in ILLiad, scenario 1](#)
- [E-Book ILL Lending in ILLiad, scenario 2](#)

[Tipasa workflow options](#)

This workflow was developed with our ILL colleague Kristen Richards at Bentley University:

- Requests come in as article requests. If it comes in as a book, change it to an article.
- Use Tipasa's tagging system to designate the request as an e-book request.
- Review the request and search for the title in your online catalog. License language will ideally appear in the catalog, but a locally-created chart or guide may be needed to verify license capabilities.
- Locate the resource, download it, and compress the file size if needed.
- Send the document off through Article Exchange.

An alternative workflow is outlined by the VIVA Consortium in the following video example:

- [E-Book ILL Lending in Tipasa](#)

[WorldShare ILL workflow options](#)

This workflow is outlined by the VIVA Consortium in the following video example:

- [E-Book ILL Lending in WorldShare ILL](#)

5. Pilot processes (where applicable)

Once workflows have been established, pilot them and determine if any alterations are needed. Note that some processes may be difficult to replicate without officially launching the practice. Keep track of these various moving pieces once your go-live date is reached.

6. Full implementation & share your experiences

Going live for e-book lending will involve:

- Ensuring your holdings are appropriately uploaded
- Ensuring your license review process is established (if utilized in your workflow)
- Training staff on how to process e-book requests
- Where applicable, adding your institution's information to the [EBOK OCLC group](#) and [Whole E-Book Lender Tracking](#)

Given that e-book ILL is a relatively new practice in the resource sharing space and is not always discussed freely in the open, we highly encourage you to share your experiences with your BLC colleagues and others to spread the word about the impact that e-book ILL can have on your local user communities.

7. Iteratively update the process

As system updates and efficiencies are realized, iteratively update your workflows and forms as necessary. Some of these updates may include:

- Renegotiate licenses with new publishers as desired
- Update holdings & licenses as needed
- Update systems (ILS & resource sharing) as needed
- Alter practitioner workflows as needed

Where do we go from here?

While these roadmaps outline the overarching process and the many contributions from the library community that have made it possible, more work is needed to develop and sustain the evolving practice of e-book interlibrary loan.

Systems enhancements & the larger resource sharing ecosystem

To make e-book ILL a more plausible practice to implement, the Working Group has identified several areas of enhancement for resource sharing software to more easily facilitate this practice:

- [ISO 18626](#) should be adopted in support of interoperable resource sharing, regardless of the system used to facilitate requests.
- E-books should be treated as their own individual format types or sets instead of repurposing existing article or book chapter formats.
- Solutions need to be able to handle multiple approaches to e-book ILL, including but not limited to, DRM, DRM-free, and the loaning of owned e-books or digital assets.
- Systems need to develop the capability to automatically check e-book licenses to determine if the resource is eligible to be loaned via ILL.
- ILS license information should be integrated into resource sharing platforms to reduce manual cross-system verification.

In addition to system developments, other actions need to be taken in order for e-book ILL to be an equitable practice for libraries of all sizes, sectors, and staff capacities to execute:

- Non-proprietary access to e-book holdings and availability in the form of a community lending list with the ability to interoperate with various resource sharing solutions.
- The development of a community repository of successful e-book ILL license language.
- ILL practitioners should be involved in license negotiation to raise awareness of what resources are shareable and explain why ILL is beneficial to consider in these negotiations.
- Similarly, license managers/negotiators should be aware of ILL workflows to understand how negotiated clauses impact day-to-day operations.
- Broader education efforts amongst publishers to highlight the benefits of e-book ILL as a key collection development tool used to identify collection gaps and drive acquisitions.

Advocacy & Partnerships

In its work to empower a coalition of libraries, BLC recognizes the importance of collaboration in advocating for more sustainable practices to facilitate e-book interlibrary loan. Accordingly, the Working Group recommends a multi-faceted approach to developing these practices with vendors and consortial partners:

- Engage with OCLC, Atlas, ExLibris, and any other vendors the BLC may partner with to add a specific e-book format type and workflows to support e-book ILL requests for DRM, DRM-Free, and owned e-book lending.

- Continue partnering with Project ReShare as they develop e-book sharing and other digital lending capabilities within ReShare Digital.
- Advocate for vendors to update to new ISO standards to make cross-system e-book ILL requesting possible.
- Advocate for publishers that partner with the BLC to streamline e-book downloading processes to save staff time in fulfilling e-book ILL requests.
- Support the inclusion of whole e-book ILL rights in any future consortial e-book deals for the BLC.
- Collaborate with other consortia to determine where cross-consortial partnerships may enhance the e-book ILL experience for library staff and users alike.
- Continue to educate the broader resource sharing community and the non-monolithic nature of e-book ILL, the nuances of different approaches, and how it differs from controlled digital lending.

As mentioned earlier, these documents are intended to be updated to meet the current resource sharing landscape. If you have any suggestions on how to make these recommendations clearer with the intent of promoting broader adoption of the practice, please contact the BLC's Resource Sharing Program Manager, Marc Hoffeditz, at mhoffeditz@bcl.org.

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