


SWAN Using OCLC Article Exchange for Electronic Copies




March 16, 2020

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Agenda

1. Demonstration of Using Article Exchange
 - For article requests through WorldShare ILL
 - Directly accessing AE – e.g. sending library pdfs to patrons
2. Setup and Configuration
3. Brainstorming other uses



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LIBRARY SERVICES
EST. 1974

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Accessing Article Exchange

WorldShare® Need Help? SWAN Support
User support info

Metadata **Interlibrary Loan** Analytics Admin

Interlibrary Loan Home JSZ Reg ID: 10097

Discover Items
Borrowing Requests
Lending Requests
Purchasing Requests
Print Queue (0)

Interlibrary Loan Home

Search for requests
Request ID
 Active Requests Closed Requests

Quick Links

Borrowing:	Lending:	Other:
Produced (4)	Can You Supply? (1)	OCLC Policies Directory
Unfilled (3)	New - Loans (1)	OCLC Service Configuration
Received	Supplied	OCLC Usage Statistics
Renewal Approved (2)	Returned	OCLC Article Exchange
Returned	Returned/In Transit (2)	Resource Sharing News
		WS ILL Training Resources
		OCLC Community Center

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OCLC® Article Exchange

Signed in as Oak Brook Public Library [Sign out](#)

Select a file to drop:

This document-sharing site provides a single, secure location where lending libraries can place—and library users can retrieve—articles, book chapters and other electronic-format materials obtained via interlibrary loan. Article Exchange adds convenience, security and enhanced copyright compliance to online ILL sharing.

[Quick Reference](#)
[About Article Exchange](#)
[Terms of Use](#)
[Give us feedback](#)

Instructions for lending library staff

OCLC Article Exchange lets you upload files for pick-up by library users anywhere in the world. Only persons with the correct URL and password combination will be able to download the file.

Select the file you would like to drop off, then click "Drop File" and you'll receive a URL and a password with which the file can be retrieved.

Next you need to:

- Save the URL and password and insert them into the Lender workform in Lending Notes or the Alert field.
- Update the ILL request to YES.
- Send an e-mail to let the borrower know there is a document available for pick-up. Click on the e-mail button and insert the borrowing library's e-mail address. Also include the interlibrary loan record number so the borrower can trace the request.

Once a document has been uploaded, it is available for 30 days or 5 views, whichever comes first.

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File Types, Sizes, and Usage

- Viewed files are deleted after 5 views and unviewed files are deleted after 30 days.
- Files up to 120 MB—including high-resolution documents—can be placed on the site for pick-up by library users.
- Article Exchange supports delivery of documents in the following formats: BMP, GIF, J2K, JIF, JFI, JFIF, JP2, JPE, JPEG, JPF, JPM, JPX, JPG, MDI, MJ2, PEG/JFIF, JPEG 2000, PDF, PNG, PSD, TIF, TIFF, TGA, TPIC, WEBP and ZIP.
- Users may upload up to 1,000 files per day per authorization. There is no limit to the number of documents a library user can retrieve daily.

<https://www.oclc.org/en/worldshare-ill/features/article-exchange.html>

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Configuration & Set Up

1. Update OCLC Policies Directory to indicate acceptance of Article Exchange electronic delivery
2. Update OCLC Service Configuration Constant Data to reflect preference of electronic delivery via Article Exchange
3. Within WorldShare ILL requests forms, use embedded forms for inserting Article Exchange URL/password for patron email notification

OCLC YouTube Video -

<https://www.youtube.com/watch?v=skEaxlktWgg>

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1. OCLC Policies Directory

- Review Contacts
- If no contact type for Article Exchange is listed, click Add

Search

OCLC™ Policies Directory

Welcome: SWAN (JSZ) Sign Out / Help

Oak Brook Public Library (JSZ)

Profile Collections Policies (4) Schedule **Contacts**

Last updated Friday, January 17, 2020 3:17:55 PM EST

Contacts 1 ADD

TYPE	CONTACT
Lending Information	<p>Attention: Oak Brook Public Library</p> <p>Address: 600 Oak Brook Rd Oak Brook, Illinois US 60523</p> <p>Phone: 630-368-7700</p> <p>Fax: 630-368-7704</p> <p>Email: jsz@oakbrook.org</p>
Location	<p>Attention: Oak Brook Public Library</p> <p>Address: 600 Oak Brook Rd Oak Brook, Illinois US 60523-2202</p> <p>URL: http://www.oak-brook.org/library</p>

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Add Contact Type

- Select Contact Type = Article Exchange
- Scroll down to select Illinois as State
- Scroll down to Save

Add Contact * Required Fields

*Contact Type: Article Exchange

For **Electronic** contact types use the Attention: field to note the type of electronic contact (Skype, Yahoo messenger, etc.) and the URL: field to define the specific address (if one is needed)

Attention: _____

Phone: _____ Fax: _____

Email: _____ URL: _____

State/Province: Illinois Country: United States

Cancel **Save**

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Verify:

- Contact added successfully
- Suggestion to update Constant Data

Search

Oak Brook Public Library (JSZ)

Profile Collections Policies (4) Schedule **Contacts**

Last updated Sunday, March 15, 2020 7:00:14 PM EDT

✓ Contact added: [Article Exchange -](#)

⚠ You may need to update your Constant Data records in the OCLC Service Configuration module, if you plan to use this information as part of your constant data. Log in to the Service config module to update your Constant data <http://worldcat.org/config/SignIn.do>

▼ Contacts Add

TYPE	CONTACT
Article Exchange	Address: Illinois US Edit Delete

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2. OCLC Service Configuration – Constant Data

- Service Configuration > WorldShare ILL > Borrower Data
- Add Electronic Delivery Service choice = Article Exchange
- Repeat for all Constant Data records

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Direct Request Profiles

Postal Code: 60523

Ship Via

ILDS (XGV) / Library Rate / fax

Electronic Delivery

Add new Electronic Delivery methods via OCLC Policies Directory (refresh this Constant Data page once you've added new options in the Policies Directory)

Optionally select your preferred choices of Electronic Delivery method in order of preference for this constant data record. You cannot select the same delivery option more than once.

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Electronic Delivery Service choice 1: Article Exchange

Electronic Delivery Service choice 2: -Select an Electronic Delivery option-

Electronic Delivery Service choice 3: -Select an Electronic Delivery option-

ILL Fee Management (IFM)

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3. Use within WorldShare ILL Form - Borrower

Borrowing Request

Borrowing Library –
verify Preferred
Electronic Delivery is set
to Article Exchange

▼ Borrowing Library

Electronic Delivery
Preferred ▼

Alternate ▼

Alternate ▼

Shipping
Ship To

Address

City

State/Province ▼

Country ▼

Postal Code

Ship Via

Fax/Phone Ex: 777-555-1010

Email

Group Affiliations

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3. Use within WorldShare ILL Form - Lender

Lender receives request

Interlibrary Loan Home

Discover Items

Borrowing Requests

▼ Lending Requests

Can You Supply? (2)

New - Loans (2)

Lending Requests: Can You Supply? (2) JSZ Reg ID: 10097

Batch respond to "Can You Supply" items [Yes](#) [No](#)

Results 1 - 2 of 2 Rows 20 ▼

ID	Status	Media Type	Title	Borrower	Referral Date
202487276	Submitted		TEST - DO NOT FILL Community Mitigation Guidelines to Prevent Pandemic Influenza	JDP	03/15/2020

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3. Use within WorldShare ILL Form - Lender

1. Verify copy request
2. Verify URL Type
3. Click OCLC Article Exchange link and select file for transfer
4. Drop File to Article Exchange

Request ID: 202487276

Status: Submitted

Type: Copy

Source: WSILL

Lenders: *JSZ

URL Type: Article Exchange

URL: [OCLC Article Exchange](#)

Title: TEST - DO NOT FILL Community Mitigation Guidelines to Prevent Pandemic Influenza

Borrower: JDP

Max Cost: USD 20.00

Status: Submitted

Type: Copy

Source: WSILL

Lenders: *JSZ

URL Type: Article Exchange

URL: [Community Mitigation Guidelines to Prevent Pandemic Influenza](#) [OCLC Article Exchange](#) [Drop File](#)

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3. Use within WorldShare ILL Form - Lender

202487276: TEST - DO NOT FILL Community Mitigation Guidelines to Prevent Pandemic Influenza

JSZ Reg ID: 10097

Can you supply? Yes No - No reason given Conditional - Additional info needed

Print Shipping Labels Print Book Straps/Stickers

Group Affiliations: SILO

Apply constant data: Actions: [DEFAULT](#) [Note](#) [Mark as Considering](#) [Save](#) [Email](#) [Print Now](#)

Request ID: 202487276

Status: Submitted

Type: Copy

Source: WSILL

Lenders: *JSZ

URL Type: Article Exchange

URL: <https://worldcat.org/ILL/AE/rA8VfJuo8> [OCLC Article Exchange](#) [Preview](#) [Cancel](#)

Password: mKGD2deG

Borrower: JDP

Max Cost: USD 20.00

Need Before: 04/15/2020

Requested on: 03/15/2020

Shipped Date: 03/15/2020

Borrowing Notes: Not-For-Profit Institution/F.E.I.N.:36-2606822 (maxCost: \$20.00) [show more](#)

Don't forget to respond Yes to supply the request. The requesting/borrowing library will be notified it is supplied via Article Exchange.

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3. Use within WorldShare ILL Form - Borrower

Borrower/Requesting Library is notified of receipt of AE Alert
(electronic copy available)

WorldShare® Need Help? User support info SWAN Support

Metadata Interlibrary Loan Analytics Admin

Interlibrary Loan Home JDP Reg ID: 73937

Discover Items

Borrowing Requests

AE Alert (1)

New For Review

Produced (1)

In Transit (1)

Returned

Create Request

Search for requests

Request ID Go

Active Requests Closed Requests

Quick Links

Borrowing: AE Alert (1)

Lending: Produced (1)

Other: In Transit (1)

Supplied Returned

OCLC Policies Directory

OCLC Service Configuration

OCLC Usage Statistics

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3. Use within WorldShare ILL Form - Borrower

- Library gets a “free” Preview to verify that the electronic copy is as expected.
- Once verified, Email doc to the patron

Produced (1)

In Transit (1)

Returned

Create Request

Lending Requests

Purchasing Requests

Print Queue (0)

Request Staff Notes 0

Request Details (Request ID 202487276)

Patron Summary

Source WSILL

Status In Transit

Lenders *JSZ

URL Type Article Exchange

URL https://worldcat.org/ILL/AE/rA8VfJuo8

OCLC Article Exchange Preview Cancel

Password mKGD2deG

AE Alert: <https://worldcat.org/ILL/AE/rA8VfJuo8>

Password: mKGD2deG

Preview Email doc to patron

Search my library's online catalog

Open Access

No links found

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3. Use within WorldShare ILL Form - Borrower

Email is pre-populated with URL, password, and full request information.

Library can customize this message, change subject, and include additional information.

From: ill@swanlibraries.net

To: dawne@swanlibraries.net

CC:

Subject: The article you requested is now available

Body

Note:
Your requested file is available at <https://worldcat.org/ILL/AE/rA8VFJuo8>
Use this case-sensitive password: mKGD2deG

Borrower: JDP

Request ID: 202487276

Title: TEST - DO NOT FILL Community Mitigation Guidelines to Prevent Pandemic Influenza

Send Cancel

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3. Use within WorldShare ILL Form - Borrower

- Mark as received, so request is closed

Metadata Interlibrary Loan Analytics Admin

Interlibrary Loan Home

Discover Items

Borrowing Requests

AE Alert (1)

TEST - DO NOT FILL Community Mitigation Guide...

New For Review

Produced (1)

In Transit (1)

Returned

Create Request

Lending Requests

202487276: TEST - DO NOT FILL Community Mitigation Guidelines to Prevent Pandemic Influenza JDP Reg ID: 73937

Did you receive this item?

Date received: 03/15/2020 Options: Print Book Straps/Stickers

Mark as received Not Received

Request Staff Notes 0

Request Details (Request ID 202487276)

Patron Summary

Source WSILL
Status In Transit
Lenders *JSZ

AE Alert: <https://worldcat.org/ILL/AE/rA8VFJuo8>
Password: mKGD2deG

Preview Email doc to patron

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Patron Received Email

Embedded link and password are at top of the message.

The article you requested is now available

SF Sent from OCLC WorldShare ILL on behalf of ill@swanlibraries.net <don>
To: Dawne Tortorella
Cc: Interlibrary Loan 8:32 PM

Note:
Your requested file is available at <https://worldcat.org/ILL/AR/rA8VfJuo8>

Use this case-sensitive password: **mK0D2de0**

Borrower: JDP

Request ID: 202487276

Title: TEST - DO NOT FILL Community Mitigation Guidelines to Prevent
Pandemic Influenza

Article Title: **MMWR Recomm Rep 2017**
Number: 66 (No. RR-1):1-34

Please note the following time constraints:
*Once a document has been uploaded, it is available for 30 days or 5 views, whichever comes first.

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Get my file




Please enter your password

Password:

[Get my file](#)

Community_Mitigation_Guidelines_to_Prevent_Pandemic_Influenza... 1 / 30

 Centers for Disease Control and Prevention

Morbidity and Mortality Weekly Report (MMWR)

Recommendations and Reports / April 21, 2017 / 66(1):1-34

[Free CE](#)

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[View suggested citation](#)

Summary

When a novel influenza A virus with pandemic potential emerges, nonpharmaceutical interventions (NPIs) often are the most readily available interventions to help slow transmission of the virus in communities, which is especially important before a pandemic vaccine becomes widely available. NPIs, also known as community mitigation measures, are actions that persons and communities can take to help slow the spread of respiratory virus infections, including seasonal and pandemic influenza viruses.

These guidelines replace the 2007 *Interim Pre-pandemic Planning Guidance: Community Strategy for Pandemic Influenza Mitigation in the United States — Early, Targeted, Layered Use of Nonpharmaceutical Interventions* (<https://stacks.cdc.gov/view/stc/11425>). Several elements remain unchanged from the 2007 guidance, which described recommended NPIs and the supporting rationale and key concepts for the use of these interventions during influenza pandemics. NPIs can be phased in, or layered, on the basis of pandemic severity and local transmission patterns over time. Categories of NPIs include personal protective measures for everyday use (e.g., voluntary home isolation of ill persons, respiratory etiquette, and hand hygiene); personal protective measures reserved for influenza pandemics (e.g., voluntary home quarantine of exposed household members and use of face masks in community settings when ill); community measures aimed at increasing social distancing (e.g., school closures and dismissals, social distancing in workplaces, and postponing or cancelling mass gatherings); and environmental measures (e.g., routine cleaning of frequently touched surfaces).

Several new elements have been incorporated into the 2017 guidelines. First, to support updated recommendations on the use of NPIs, the latest scientific evidence available since the influenza A

Article Metrics

Altmetric:

- News (78)
- Blog (7)
- Policy documents (1)
- Twitter (711)
- Facebook (9)
- Wikipedia (1)
- Reddit (1)
- Mendeley (52)

Citations: 18

Views: 100,626
View equals page views plus PDF downloads [Metric Details](#)

Figures

Figure 1

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Direct Use of Article Exchange

OCLC® Article Exchange

Signed in as **System Wide Automated Network** [Sign out](#)

Select a file to drop:
 No file chosen

Your drop was successful!
 The file is available at <https://worldcat.org/ILL/AE/8K8VfJuo8>
 Password: **FvPRXFSf**

To: [Dawne Tortorella](#)

Cc:

Subject: The article you requested - from SWAN Library

Your requested article is available at <https://worldcat.org/ILL/AE/8K8VfJuo8>

Use this case-sensitive password: FvPRXFSf

Please note the following time constraints:

- * Once a file is retrieved, it remains available for thirty (30) days. After thirty days, the file will be removed from the Article Exchange site.
- * Each document file can be retrieved a maximum of five (5) times for each URL/password combination.
- * Files that are not retrieved remain available for 30 days following the original request date. After 30 days, they are automatically removed from the Article Exchange site.

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Questions & Follow-up

Send questions to our online ticketing system at help@swanlibraries.net

Visit the SWAN Support Site for access to recorded sessions.
<https://support.swanlibraries.net>

Submit a request for additional training topics.
 Help > Request Forms > Request Training or Consultation

Check the SWAN training calendar for upcoming trainings. If you don't see what you're looking for, request a training or an onsite consultation for an in depth review of your Library's work processes.

Name *

Email address

Library

I'd like to request... *

Training
 Consultation

Training details
 Describe what you topics you would like to learn about.



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