**ArticleReach Direct Quick Guide rev 22 Jan 2018**

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| Topic | Guidelines | Other comments |
| Policy - Costs | There shall be no charges for services rendered within this consortium (i.e. – no charge for supplying materials). Council Guidelines – approved 2/21/2014 |  |
| Policy - Copyright | Requests will be compliant with copyright law and licensing requirements. Libraries will be responsible for paying appropriate copyright fees according to their legal obligations. Council Guidelines – approved 2/21/2014 |  |
| Processing Requests | 1. ARD requests should be considered top priority, excluding weekend and holiday receipts 2. 24 hour turnaround time 3. Inability to fill should also be processed within 24 hours 4. Turnaround time begins when the request arrives in the queue 5. Provide copies with no page limits 6. Requests not filled within 5 days will automatically move on to another site if there are matching holdings. Avoid too long a delay between printing paging slips and filling requests as the request could potentially have moved to another site by the time the original scan is put in Dropbox. \*Requests paged too long are the biggest cause of delays and impact on consortium turnaround times\* | As a baseline service, all members shall make requests received from within this consortium a top-priority for processing, with the expectation that the vast majority, if not all, of the requests be processed within 24 hours of receipt. Indications of “inability to fill” should also be processed within 24 hours (excluding weekend and holiday receipts). Council Guidelines – approved 2/21/2014  Method of receipt: In group training, Jan 17-18, 2007, the group elected to not allow patrons to indicate their preferred method of receipt (electronic vs. hardcopy).  (Committee) |
| Passing & Cancelling Requests | As a rule always pass requests rather than cancelling. This is to ensure unfillable requests end up back at the patrons’ site for handling.  Pass requests if   1. Site does not hold it 2. Site cannot scan it 3. Site cannot share due to licensing, citing “Policy problem” as the reason 4. If there is a possible copyright violation   Include notes on all items passed for the information of partner libraries e.g. not on shelf, too tight to scan, temporarily unable to supply  Cancel requests if   1. There is absolutely no way to locate the article due to an incomplete or wrong citation which cannot be corrected 2. The request is a duplicate | Cancelling or passing requests: We will cancel a request only if:  The request is a duplicate  The citation cannot be figured out.  We'll pass a request if:  we cannot fill it (don't have it, copyright/license doesn't allow)  it's for a dissertation (?)  our technology won't let us scan it. (If it's too many pages for our scanners to accommodate, we'll pass the request, and work on fixing the technology.  (Committee) |
| Resends | 1. Verify complaint 2. Copy link at bottom of request and check in browser 3. E-mail resend request 4. Use generic e-mail address found in contact list on Google Docs site 5. Use “ARD Resend Request” as the subject line 6. Describe problem with scan 7. Resends should be handled as soon as possible or within 24 hours of receipt of resend request, excluding weekends and holidays 8. Libraries should maintain current contact information on the Google Docs pages and include a, generic e-mail if possible for resend contact | Resends: We will send each other requests for resends either via Fax or email.  If fax, write "please resend" across the top. Use the fax numbers here.  If email, use the generic account listed above. (You can search via request ID and then print it to email.)  (Committee) |
| Scanning & Image Quality | 1. Copies must be scanned at a resolution of at least 300 dpi 2. Minimal black space along the margin edges and gutters 3. Use paper or crop function to block off margins and black space 4. No extraneous items like hands, jewelry, etc. 5. Color images    1. If able to scan in color, scan at 120 dpi with 256 colors to limit the file size    2. Or, only add color scans for images that require color for interpretation 6. Keep grayscale images to a minimum, the size of the file can choke the system. 7. It is not necessary to include a cover sheet for supply of electronic articles 8. Upside down pages should be avoided if possible 9. Scan only one image per page if possible 10. Preview scans for quality before sending 11. Conduct periodic auditing of scanned images 12. Complaints: When complaints about the quality of the scans are heard, libraries will attempt to determine specifics and will notify the scanning library. The scanning library can determine if the quality was due to poor original paper or electronic copies, to machine problems, or to staff errors.   Do not split a single article across multiple scans.  There is no maximum size for scans. Note that larger files may cause requests to clear slower from the queue in the staff interface ([Supportal](https://iii.rightanswers.com/portal/app/portlets/results/viewsolution.jsp?solutionid=171120053132448&page=1&position=8))  Do not add information to the request number in file names e.g. 123456pt1. | Complaints: When complaints about the quality of the scans are heard, libraries will attempt to determine specifics and will notify the scanning library. The scanning library can determine if the quality was due to poor original paper or electronic copies, to machine problems, or to staff errors.  (Committee) |
| Lending Priority / Request Balancing | AR contains a lending priority for each site.  When there is a group of sites which all have holdings matching a new request, the site with the highest lending priority will be paged first.  Sites can have their lending priority adjusted by opening a ticket via the Supportal. |  |
| Links to scanned articles break | Log via Supportal with examples  Alert AR list |  |
| Holiday Shutdown | Over Christmas / New Year sites typically temporarily switch off requesting and/or supply so requests do not get held up.  Log ticket via Supportal.  Inform sites via AR list.  When supply is suspended, your site is not paged for any requests.  When your site suspends requesting, your patrons will be blocked from requesting at the point of authentication. |  |
| Dropbox problems | e.g. scans stuck in Dropbox  Try ‘[Rejoining a shared Dropbox folder](https://drive.google.com/open?id=0B2ANoNhx7yIjbHp0ZVQxa0RqV1k)’  Or log via Supportal  Alert AR list |  |
| ArticleReach emails | AR sends 9 different emails to patrons for various types of request cancellation and fulfilment .  Selected parts of system emails are centrally customisable as follows :  Subject, status and action.  Refer <https://drive.google.com/open?id=0B2ANoNhx7yIjVkFzaXM4SlhySk0> |  |
| Webpac holdings | Holdings are contributed from sites in the form of -   * LIB HAS fields in bib records (mapped to 866 in AR institution records) * 856 fields in bib records (mapped to 856 in AR institution records) * LIB HAS fields in checkin records (mapped to 947 in AR institution records)   866 holdings currently (June 2017) generate a message in the AR webpac “Unable to display local holdings information”  Some records also contain holdings but a Request link does not display in the AR webpac.  Note that in these situations the system will still try to match on these holdings if a request comes in directly via the webpac form (e.g. from a link resolver) |  |
| Requesting & ISSNs | ARD contains records with and without ISSNs. Typically, sites are set up to contribute only bibligraphic records containg ISSNs but there are options to allow contribution of records without ISSNs.  If a user initiates a request from a specific record in the ARD webpac and the attached holdings match, the request will be accepted and paged even if there is no ISSN in the record.  Requests initiated via a blank form or a link resolver require an ISSN in order to match on database holdings (even though ISSN is not a mandatory element in the form itself).  Requests lacking an ISSN will be handled according to each site’s configuration for managing unpageable requests i.e. cancelled, mediated or Pass2ILL. |  |
| Record Contribution / Matching in the Central Database | Innovative has set out the default matching for records contributing to the ARD central database as follows (@ Jan 2018) –  1 MARC 001 (OCLC) - The Primary Match Key evaluation  Secondary Match Keys  2 MARC 020 (ISBN), all subfields  3 MARC 022 (ISSN), all subfields  4 MARC 022 (ISSN), subfield |y only  ARD suppresses the Primary Match Field Validation after the program identifies a match based on a Secondary Match Field. |  |
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