

# Borrowing WEST Items

## Instructions to WEST Members for System Setup To Support WEST Borrowing

### I. WEST Policies and Lending/Borrowing Support

To facilitate WEST lending/borrowing, WEST will define certain capabilities on behalf of all WEST members.

- A. **Shared Print Institution Symbol.** The WEST Disclosure Policy asks WEST Archive Holders and Archive Builders to establish and use a “shared print Institution Symbol” for materials committed to WEST. This unique OCLC Institution Symbol identifies collections subject to a shared print agreement (e.g. WEST and/or others) and facilitates discovery and lending under special policies. Working with the WEST project team, OCLC has defined shared print symbols for WEST libraries (see the attached list).
- B. **Group Access Capability (GAC).** WEST has worked with OCLC to define a Group Access Capability (GAC) called “WEST”, a grouping of all WEST member libraries’ institution symbols. All WEST members will be able to view each other's bibliographic, local holdings and summary holdings records through FirstSearch using the GAC, and the GAC may be used to control lending via automatic deflection and other rules via the OCLC Policies Directory.
- C. **Access Guidelines.** The WEST Executive Committee has adopted “Access Guidelines for WEST Archives” to govern access to and delivery of WEST materials. The Access Guidelines establish that WEST Archive Holders will lend WEST materials to WEST member libraries and may also lend WEST materials to non-WEST libraries. The WEST lending library may use its own local lending policies to administer WEST loans, including loan period, fees (if any), and restrictions on number of items lent.

### II. Borrowing WEST items

WEST Borrowers should be aware that WEST Archive Holders and Archive Builders may elect to supply materials under the OCLC shared print symbol or under the original OCLC symbol. WEST materials designated by symbols with a lower case (non-supplier) status may lend under their original symbol only. Check the OCLC Policies Directory before making requests for WEST materials to determine individual builder or holder lending policies and fees.

Borrowing requests will be made from the institution's original symbol, not the WEST shared print symbol.

To prepare for borrowing, WEST member libraries should make the following changes:

- OCLC Constant Data: Add "WEST" to the Affiliation list, so that "WEST" will automatically display on borrowing requests
- OCLC Custom Holdings: For libraries that maintain Custom Holdings groups (such as "Free Loans"), add any appropriate shared print symbols to those lists.
- ILLiad: Add WEST library symbols to Address Book
  - Create a WEST group, and "tag" WEST libraries' address book entries to mark them as part of this group.

Recommended for individual borrowing requests:

- Add a note to indicate that the physical volume is needed