Tuesday– March 15, 2022

Introduction to WorldShare Interlibrary Loan

Lucia Shelton
Member Education
Topics

• How WorldShare ILL works
• Why prepare for WorldShare ILL
• How easily create and manage requests
• How stats reports can help you manage ILL
• Where to find more information
Built around the WorldCat database

Over 500 million bibliographic records with over 3 billion holdings. Members fill an ILL request every second.
Holdings information in WorldCat became available for Interlibrary Loan purposes

<table>
<thead>
<tr>
<th>STATE</th>
<th>LOCATIONS</th>
</tr>
</thead>
</table>
| OH    | AK FBGJL
| AL    | AK ANG
| AZ    | AZNDonor
| CA    | AHD FVTHC
| CO    | COYRDW
| CT    | CTBIB
| DC    | DCDDU
WORLDSHARE ILL – HOW IT WORKS
• **Borrowing Library**
  A library requesting items in WorldShare ILL.

• **Lending Library**
  A library supplying items in WorldShare ILL.

• **Loan Request**
  A physical item such as a book, DVD, magazine, etc. to be returned.

• **Copy Request**
  An item not to be returned (i.e., electronic or paper copy of articles or book chapters/pages)
How is a request submitted electronically in WorldShare ILL?

1. Search WorldCat for Item – Discover Items
2. Choose your lenders from libraries with holdings
3. Send Request
4. Receive Item
5. Return Item
Borrower Request Workflow

Lender String is list of potential lenders you select for an item

Can request items from up to 15 lenders at a time.

Each lender has (as default) 4 days to respond to request, until system automatically moves request to next lender.

The more lenders in the string the better the chance for request fulfillment.
Request type determines workflow

Type also determines completion (B=Borrower or L=Lender)

Loans Request

B Creates Loan Request
L • Yes • Shipped/InTransit
B • Receives Item • Received/In Use
B • Returns Item • Returned
L • Checked In/Complete • Closed

Copy Request

B Creates Copy Request
L • Yes • Shipped/InTransit
B • Receives Item • Closed

No Due Date on Copy requests
PREPARING FOR ILL

support@oclc.org
## Interlibrary Loan role comparison

<table>
<thead>
<tr>
<th>Action</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Author ad-hoc reports in the analytics environment (Tipasa only)</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Can use OCLC Service Configuration.</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Delete users.</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>WorldShare ILL Admin</td>
</tr>
</tbody>
</table>
Accessing WorldShare ILL – new subscribers

WorldShare ILL is a subscription service

When your subscription process is complete, you will be sent a welcome email that includes:

• Your library’s custom Web address for WorldShare ILL
• Your WorldShare ILL Username (can be changed later)
• Instructions for setting up your WorldShare ILL Password
• A 9-digit Authorization Number and Password for Stats
If your library already has access to WorldShare ILL:

- Consult with your colleagues; they may be able to give you your institution’s custom Web address. If not, OCLC Customer Support can provide it.
- A colleague can create a User Name for you, or you can create one for yourself.
- If a colleague creates a User Name for you, you will still have to create your password.
- User Names can always be changed later on.
Prepare for ILL

Why to prepare?
Because it saves time, avoids mistakes and helps on issues resolution.

1. Set your policies
   OCLC Policies Directory

2. Speed up processing of request form
   Service Configuration > WorldShare ILL > Constant Data

3. Make your OPAC visible
   Service Configuration > WorldCat Registry > Online Catalog
1. Prepare for ILL - Set your policies

Set in the OCLC Policies Directory
2. Speed up processing - Create Constant Data

Created in OCLC Service Configuration
Provides a way to organize and prioritize lenders based on reciprocal arrangements, geographic location, and special services.

3. Speed up processing - Custom Holdings

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTFREE</td>
<td>• 590 symbols</td>
</tr>
<tr>
<td>STATEFREE</td>
<td>• 56 symbols</td>
</tr>
<tr>
<td>CITYFREE</td>
<td>• 24 symbols</td>
</tr>
</tbody>
</table>
How to create Custom Holdings

Custom Holdings are created in **OCLC Service Configuration**

They consist of two components - Groups and Paths

- First Create a Group
- Then Create a Path
Managing Custom Holdings

Review at least annually

Some lender’s policies will change

Some lender’s services may change, making them no longer a good match for your group
If you find a lot of “Aged to Unfilled”, “Aged to next lender” or “Auto-deflection” reasons, you may want to remove those lenders from Custom Holdings Groups.
Managing Custom Holdings Groups

OCLC Service Configuration

Custom Holdings Groups Symbol Search

Enter symbol: CGA

Institution Symbol: CGA

Custom Holdings Group

<table>
<thead>
<tr>
<th>Custom Holdings Group</th>
<th>In my group</th>
</tr>
</thead>
<tbody>
<tr>
<td>100COPIESCH</td>
<td>Yes</td>
</tr>
<tr>
<td>1CFTFREE</td>
<td>Yes</td>
</tr>
<tr>
<td>1FREEPA</td>
<td>Yes</td>
</tr>
<tr>
<td>1OHFREE</td>
<td>Yes</td>
</tr>
<tr>
<td>2CFTFREE</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Deleting Custom Holdings Groups

Attempting to delete a Custom Holdings Group that is used in a Custom Holdings Path will produce the following error:

1. Remove Group from Path(s) OR Delete Path(s) where referenced
2. Then, delete the Group
IFM – Interlibrary Loan Fee Management

• Automates the billing of ILL transactions

Borrowing Library

Lending Library

-$10 (Debit)  

+$10 (Credit)
Where to specify IFM preference

- OCLC Policies Directory (Lenders)
- OCLC Service Configuration (Constant data)
- Within the ILL request workform
Specifying IFM preference

OCLC Policies Directory
Specifying IFM preference
OCLC Service Configuration

- Set constant data records to indicate IFM use
Specifying IFM preference
ILL request workform

- Mark IFM option and enter the max cost
4. Make OPAC visible – Update WorldCat Registry

List of lenders, some with links back to their OPACs

[Image of a library catalog interface with options to search for items and links to various libraries' OPACs]

- AMERICAN UNIV
- CATHOLIC UNIV OF AMERICA
- DISTRICT OF COLUMBIA PUB LIBR
- GEORGE WASHINGTON UNIV

[Arrow pointing to the option to search the library's online catalog]

[Arrow pointing to the link to your library’s OPAC]
4. Make OPAC visible – Update WorldCat Registry

Service Configuration: WorldCat Registry > Online Catalog
OCLC Article Exchange

Note: Document expires in 30 days or after viewed 5 times. Staff preview does not count.

Files no larger than 120 MB. Up to 1000 files a day per authorization.
HOW DOES EVERYTHING FIT TOGETHER? LIVE DEMO
Deflection

Requests sent to lenders with deflection policies will be automatically declined and moved to next lender on the string according to the policies.
Why nations fail: the origins of power, prosperity, and poverty

Author: Daron Acemoglu, James A Robinson
Publication: Why Nations Fail.
Summary: Why are some nations more prosperous than others? This book sets out to answer this question, with a compelling and elegantly argued new theory: that it is not down to climate, geography or culture, Read more...

Verniana
Jules Verne Studies/Études Jules Verne
Issn 1565-8872
Submitted October 18, 2010
Proposé le 18 octobre 2010
Published December 12, 2010
Pubblicato il 12 dicembre 2010

Verne's Forgotten, Youthful Swashbuckler

Brian Taves
Loan request

1. Discover and select your item

2. Populate your lender string and create your request

3. Apply constant data and submit your request
Manage loan request

Manage your loan requests and update the status until item is returned to the lender. Any request pending of action will have an exclamation point next to the status and needs update.
Copy request

• Same process of loan request
  - Discover item, populate lender string, apply constant data, submit

• If searching at journal level, provide article level information in the request.

• Supplied electronic copies will be under “In Transit” status.

• Supplied electronic copies via Article Exchange will also be under AE Alert status.
The article you requested is now available

Sent from OCLC WorldShare ILL on behalf of casentim@oclc.org <donotreply@oclc.org>

To: Shelton, Luck

Retention Policy: 2 Year Delete - Default (2 year)
Expires: 12/23/2023

Note: The file is available either for 30 days before clicking the link or after 5 times clicking the link.

Your requested file is available at:
https://worldcat.org/ill/AB/3vTkF2j068

Use this case-sensitive password: USPPfJnB

Borrower: WSTPV

Request ID: 313022257

Title: Verniana

Please note the following time constraints:

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

General Request Information:
Request Identifier: 313022257
Request Status: In Transit
Request Date: 23 December 2021
Renewal Req: N/B
Dates Due Date: No Date
Request Type: corr
OCLC Number: 236177110
Borrower: WSTPV
Lender: WSTPV
Need Before Date: 23 January 2022

Bibliographic Information:
Title: Verniana
Language: eng
ISSN: 1565-0872
Imprint: Haifa:
STATISTICS REPORTS

stats@oclc.org

9-digit authorization (no spacing) and password
Select the report
## Resource Sharing Borrower Reasons For No Report

**Reporting Period:** December 2021  
**Institution:** OCLC Eastern Training - TPU (BETA)  
**Symbol:** WSTPU

<table>
<thead>
<tr>
<th>Lender Position</th>
<th>ILL Record Number</th>
<th>Illiad TN</th>
<th>Title</th>
<th>OCLC #</th>
<th>Article(Citation)</th>
<th>Date(Citation)</th>
<th>Imprint Date</th>
<th>Lender Symbol</th>
<th>Lender Full Name</th>
<th>Reason For No</th>
<th>Lender Unfilled Date</th>
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<tbody>
<tr>
<td>1</td>
<td>210842006</td>
<td></td>
<td>GUNS, GERMS, AND STEEL : THE FATES OF HUMAN SOCIETIES</td>
<td>35792200</td>
<td></td>
<td></td>
<td>1997</td>
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<td>AGED TO EXPIRED</td>
<td>12/1/2021</td>
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<tr>
<td>1</td>
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<td></td>
<td>THE SEVEN HUSBANDS OF EVELYN HUGO : A NOVEL</td>
<td>957077586</td>
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<td>AGED TO UNFULFILLED</td>
<td>12/27/2021</td>
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<tr>
<td>1</td>
<td>211234689</td>
<td></td>
<td>ABBEY ROAD</td>
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<td>12/14/2021</td>
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<tr>
<td>1</td>
<td>211234801</td>
<td></td>
<td>THE CODE BREAKER : JENNIFER DOUDNA, GENE</td>
<td>1187220557</td>
<td></td>
<td></td>
<td>2021</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/23/2021</td>
</tr>
</tbody>
</table>

**Select the month**

**Export it to Excel or send it to your email address.**
Support, Documentation & Tutorials

[Image: A screenshot of the OCLC Support website]

- **Website**: [https://help.oclc.org](https://help.oclc.org)

## OCLC Support Regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific</td>
<td>OCLC Asia Pacific 6569 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614-764-6009</td>
</tr>
<tr>
<td>Australia and New Zealand</td>
<td>OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU</td>
<td>+61 3 9929 0800</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614 773-5662</td>
</tr>
</tbody>
</table>

## Select a category

- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing
Next steps

• WorldShare ILL Borrowing
  April 19, 2022

• WorldShare ILL Lending
  April 21, 2022
Thank You!

Please remember to fill out the evaluation for this class

• Date: 03/15/2022
• Instructor: Lucia Shelton
• Category: Resource Sharing and Delivery
• Class name: Introduction to WorldShare Interlibrary Loan

Training questions? Contact OCLC Training training@oclc.org/