WorldShare® Interlibrary Loan: Borrowing

Lucia Shelton
Member Education
Topics

1. Submitting requests as a Borrowing Library
   Including patron-initiated requests (WorldCat Discovery)

2. Managing requests as a Borrowing Library
   Including batch processing options & issues with requests

3. Statistics reports

Documentation & Support
1- SUBMITTING REQUESTS AS A BORROWING LIBRARY
Mediated & unmediated requests

1. From the WorldShare ILL interface by library staff

2. Patron Request Form linked from WorldCat Discovery, which sends request to a queue for staff review

3. Automated Request – automated system review where patron requests bypass staff review and go directly to lenders
How staff will be using WorldShare ILL

We will be creating and submitting requests as a Borrower:

• Staff-Mediated requests processed directly from the WorldShare ILL interface
Borrower Request Workflow

Copy and Loan Requests:
1. Search for Item
2. Select appropriate bibliographic record
3. View Holdings Display
4. Check potential lender’s policies
5. Select potential lenders for lender string
6. Apply Constant Data
7. Complete request form
8. Submit request

Staff–Initiated, Staff Mediated
Request type determines workflow

Type also determines completion (Borrower or Lender)

Loan Request

B Creates Loan Request

L • Yes
    • Shipped/InTransit

B • Receives Item
    • Received/InUse

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
Patron-initiated ILL requesting

Definition:

“the process by which users search a catalog, identify items, and initiate requests for those materials without the assistance or mediation of library staff…”

Patron-initiated ILL requesting configurations

OCLC Service Configuration

Interlibrary Loan Home

Search for requests
Request ID

Active Requests / Closed Requests

Quick Links
Borrowing:
AE Alert (9)
Produced (79)
In Transit (59)
Received (37)
Unshipped (6)

Lending:
Can You Supply? (14)
Considering - Copies (3)
Considering - Loans (1)
Supplied
Not Received (1)
Overdue (40)

Other:
OCLC Policies Directory
OCLC Service Configuration
Usage statistics
OCLC Article Exchange
Resource Sharing News
Configuring WorldCat Discovery

To enable patron-initiated ILL requesting (OCLC Service Configuration):
1. Configure IP Address(es)
2. Configure Request Item buttons
3. Configure Patron Request Form
New For Review

- **Not Reviewed** - not seen by your staff.
- **Reviewed** – seen or created by your staff.

Patron–Initiated, Staff Mediated
Automated requests

• Pre-approved lenders
  - OCLC Configuration Service > WorldShare ILL> Automated Request Manager
• Patron initiates request from workform
• Requests go directly to lenders
Automated Request Manager

• OCLC Service Configuration

- Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.

- Automations allow you to determine how patron-generated requests are processed.

How to create Constant Data
How to create Custom holdings

Automated Request Manager

We want to hear your thoughts on the new Automated Request Manager.

Borrowing New Request

These standard actions are done for all Borrowing New Requests, regardless of profile:

- Bibliographic record
  - Best matching bibliographic record applied to request

- WorldCat holdings check
  - Available when holdings set in WorldCat

- Knowledge base holdings check
  - Available when OCLC knowledge base holdings set in WorldCat

- Custom Holdings Group check
  - Available when Custom Holdings Group holdings set in WorldCat

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automations are applied.
Recap

- **Three models of requests:**
  - Staff initiated/Staff mediated
  - Patron initiated/Staff mediated
  - Patron initiated/Unmediated

- **Two types of requests:**
  - Loan = physical items to be returned to owner. Closed by Lending library.
  - Copy = copy of items not to be returned to owner. Closes after marked as received.

- **Patron-initiated requests:**
  - Require extra configuration: automation & patron workform
  - Patron-initiated/Staff mediated requests are managed at *New for Review*
LIVE DEMO

SUBMITTING REQUESTS
Searching

- Basic search
- Expert search (maps, scores, articles)
- Advanced search
Loans request

Halloween

Author: Murray Leeder

Summary: The 1970s represented an unusually productive and innovative period for the horror film, and John Carpenter's Halloween (1978) is the film that capped that golden age -- and some say ruined it, by ushering in the era of... 

Copy request


Author: Julian Carade

Summary: This article outlines the consequences and conditions of emergence of a meta-narrative in Shadow of the Vampire (E. Elias Merhige, 2000), a film which invents an alternate version of the shooting of FW Murnau's Nosfer...
New For Review

- **New For Review (2)**
  - **Not Reviewed (2)**: Not seen by your staff.
  - **Reviewed (2)**: Seen or created by your staff.

Patron-Initiated, Staff Mediated
WorldCat Discovery - Patron ILL request

Text can be customized by library.
Patron workform

Worform opens from the ILL button. Required fields are customized by library.
New for Review

Borrowing Requests: New For Review (2)

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Date Requested</th>
<th>Need Before</th>
</tr>
</thead>
<tbody>
<tr>
<td>180012197</td>
<td>Not Reviewed</td>
<td></td>
<td>The Yellow River /</td>
<td>Rohrstein</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Richard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>179969999</td>
<td>Not Reviewed</td>
<td></td>
<td>Journal of the American Chemical Society</td>
<td>Morgan</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Mary</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Patron ILL request displays in WorldShare ILL
New For Review > Not Reviewed status
New For Review- Not Reviewed

Staff checks request: applies constant data and Marks as Reviewed (moves to status = Reviewed)

Staff populates lender string to send request
2. MANAGING REQUESTS AS A BORROWING LIBRARY
Managing Requests as a Borrower

Outline of managing requests workflow
1. Respond to conditional (up to 4 days to respond)
2. Receive items (loan & copy) and Receive with batch
3. Request renewal
4. Return items and Return with batch
5. Print queue
6. Open access fulfillment
7. Book-club workflow (linked requests)
Issues with requests

- Unfilled requests
- Expired requests
- Not received items
- Lost/damaged items
- Wrong type of request
- Wrong item or duplicate
- Charged fee higher than accepted
- Answered copy request without attached document
Managing Off-System Requests

For requests with libraries not participating in WorldShare ILL

The Off-system borrowing queue
Managing Off-System Requests

1- Create or reuse ILL request
2- Change Fulfillment Type to “Off-System Request”
Managing off-System Requests

Complete the Off-System form

The system prompts the borrower for information about the current off-system lender
Managing off-System Requests

- System will display request ID as Off-System
- Use the Email button to send the request to the lender
- Request will be under Off-System Requests status
Recap

• Borrowing library can choose up to 15 lenders to request.

• Borrowing library has up to 4 days to respond to conditional.

• Unfilled and expired requests can be reused to send to other lenders.

• Borrowing library must update request to change its status.

• Library can reopen request to print labels and book straps.
Reports for Borrowers

Documentation: Statistics reports for WorldShare ILL
Borrowing Quiz
Support, Documentation & Tutorials

https://help.oclc.org

Select a category

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

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 6560 Kilgour Place Dublin, Ohio 43017 US</td>
<td>☎️ +1-614-764-6009</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[Send an email]</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>☎️ 1300 260 795 (local call) ☎️ +61 (0) 3 9929 0800</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[Submit/View requests]</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US</td>
<td>☎️ 1-800-848-5800 (toll free in USA and Canada) ☎️ +1-614-755-6682</td>
</tr>
<tr>
<td></td>
<td></td>
<td>[Send an email]</td>
</tr>
</tbody>
</table>

Contact OCLC Support
Thank You!

Please remember to fill out the evaluation for this class
• Category: Resource Sharing and Delivery
• Class name: WorldShare ILL Borrowing
• Instructor: Lucia Shelton
• Date: October 26, 2022

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