Introduction to WorldShare Interlibrary Loan

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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

WorldCat is the world’s most comprehensive database of information about library collections. OCLC delivers quality, discoverability and value. Member libraries provide the foundation. Partners support WorldCat growth.

WorldCat is filled with millions of popular and unique items.

Over 500 million bibliographic records with over 3 billion holdings. Members fill an ILL request every second.
The library’s OCLC symbol

Holdings information in WorldCat became available for Interlibrary Loan purposes
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 does it work?

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)

Loan Request

1. Loan Request
   - B Creates Loan Request
   - L Checks B’s request
     - Yes: Shipped/InTransit
     - No: Proceeds to next step
   - B Receives Item
     - Yes: Received/InUse
     - No: Proceeds to next step
   - B Returns Item
     - Yes: Returned
     - No: Proceeds to next step
   - L Checks in Item
     - Yes: Checked In/Complete
     - No: Proceeds to next step

Copy Request

1. Copy Request
   - B Creates Copy Request
   - L Sends B’s request
     - Yes: Shipped/InTransit
     - No: Proceeds to next step
   - B Receives Item
     - Yes: Closed
     - No: Proceeds to next step

- No Due Date on Copy requests
## 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</td>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>has the Everyone role assigned.</td>
<td>WorldShare ILL User</td>
</tr>
<tr>
<td>Author ad-hoc reports in the</td>
<td>x</td>
</tr>
<tr>
<td>analytics environment (Tipasa only)</td>
<td>X</td>
</tr>
<tr>
<td>Can use OCLC Service Configuration.</td>
<td>x</td>
</tr>
<tr>
<td>Create users, regardless of</td>
<td>x</td>
</tr>
<tr>
<td>module (Circ, Acq, etc.)</td>
<td>X</td>
</tr>
<tr>
<td>Delete users</td>
<td>x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</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
Accessing WorldShare ILL – new staff

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.

<table>
<thead>
<tr>
<th>Location</th>
<th>Symbols</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTFREE</td>
<td>590</td>
</tr>
<tr>
<td>STATEFREE</td>
<td>56</td>
</tr>
<tr>
<td>CITYFREE</td>
<td>24</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
Borrower Reasons for No Report

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.
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
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 requests are processed either as Borrowing or Lending.

- 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 automation will be selected.
IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions

Borrowing Library

Lending Library

-$10 (Debit)

IFM

+$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

[Image of the ILL request workform showing the options to mark IFM for payment and enter maximum cost]
4. Make OPAC visible – Update WorldCat Registry

List of lenders, some with links back to their OPACs

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? LIVEDemo
Requests sent to lenders with deflection policies will be automatically declined and moved to next lender on the string according to the policies.
Legends of the fall

Authors: Susan Shilliday, Bill Wittliff, Edward Zwick, Marshall Herskovitz, Brad Pitt, Anthony Hopkins, Aidan Quinn, Henry Thomas, Julia Ormond, James Horner

Summary: Two sons of a retired army colonel in Montana, just after their brother's wife. Special features include commentary, deleted scenes, and more

Bluray Video. 2011

English

Publisher: Columbia Pictures, [Culver, City, Calif.], 2011
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 casentinim@oclc.org <donotreply@oclc.org>

To: Shetlin, Luck
Cc: 

Retention Policy: 2 Year Delete - Default (2 years)

Expires: 10/23/2021

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/ihr/hr/3tvTkf2h8

Use this case-sensitive password: USSFFv3d

Borrower: WSTPV

Request ID: 211392257

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: 211392257
Request Status: In Transit
Request Date: 23 December 2021
Send to: NONE
Desired Due Date: No Date
Request Type: corr
OCLC Number: 239577110
Borrower: WSTPV
Lender: WSTPV
Send Before Date: 29 January 2022

Bibliographic Information:
Title: Verniana
Language: eng
ISBN: 1565-8892
Imprint: Haifa:
Managing Off-System Requests as Borrower

1. Create or reuse ILL request
2. Change Fulfillment Type to “Off-System Request”
3. Update request status as needed

The borrower changes the fulfillment type to “Off-System Request”
Manage off-system requests as Lender

Create off-system lending requests

Use the Create Lending Request button in the Off-System Requests queue under the Borrowing and Lending sub-queues to create off-system lending requests.

1- Create lending request in the system
2- Update request as needed

Documentation
STATISTICS REPORTS

stats@oclc.org

9-digit authorization (no spacing) and password
Statistics reports

Interlibrary Loan Home

Search for requests

Request ID

Active Requests / Closed Requests

Quick Links
Borrowing:
- AE Alert (9)
- Produced (75)
- In Transit (53)
- Received? (27)
- Untilled (4)
- Received

Lending:
- Can You Supply? (14)
- Considering - Copies (3)
- Considering - Loans (11)
- Supplied
- No Received (1)
- Overdue (40)

Other:
- OCLC Policies Directory
- OCLC Service Configuration
- OCLC Usage Statistics
- Resource Sharing News
Statistics reports

Select the report
Statistics reports

Resource Sharing Borrower Reasons For No Report

<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>Symbol: WSTPV</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>1997</td>
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<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/1/2021</td>
<td></td>
<td></td>
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<tr>
<td>1</td>
<td>211201047</td>
<td></td>
<td>THE SEVEN HUSBANDS OF EVELYN HUGO A NOVEL</td>
<td>957077586</td>
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<td>2017</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>
<td>20389812</td>
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<td>1987</td>
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<td>AUTO. DEFLECTION, FORMAT TYPE</td>
<td>12/14/2021</td>
<td></td>
<td></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>2021</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/23/2021</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select the month

Export it to Excel or send it to your email address.
Access Community Center directly from WorldShare ILL Homepage.
Thank You!

Please remember to fill out the evaluation for this class

- Date: 11/09/2022
- Instructor: Lucia Shelton
- Category: Resource Sharing and Delivery
- Class name: Introduction to WorldShare Interlibrary Loan

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