Introduction to WorldShare Interlibrary Loan

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Member Education
In this course, you will learn …

➢ How WorldShare ILL works
➢ Why prepare for WorldShare ILL
➢ How easily create and manage requests
➢ How statistic 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.
The library’s OCLC symbol

Holdings information in WorldCat became available for Interlibrary Loan purposes
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

• Up to 15 lenders at a time.
• System automatically moves request to next lender.
• The more lenders in the string the better the chance for request fulfillment.
• Options for automation of lender string.
Request type determines workflow

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

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**Loan Request**

1. **B** Creates Loan Request
2. **L** Yes • Shipped/InTransit
3. **B** Yes • Receives Item • Received/In Use
4. **B** Yes • Returns Item • Returned
5. **L** Yes • Checked In/Complete • Closed

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**Copy Request**

1. **B** Creates Copy Request
2. **L** Yes • Shipped/InTransit
3. **B** Yes • Receives Item • Closed

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No Due Date on Copy requests
PREPARING FOR ILL

support@oclc.org
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.
## Interlibrary Loan role comparison

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

• All values are now stored with a full UTC date and time stamp

• This enables display of dates to users in their locale's preferred format and correct for their institution's time zone

• Institution format/time zone are derived from the WorldCat Registry
  – Time Zone from Open Hours
  – Locale from Currency and Locale
Where will users see changes?

- Policies Directory
  - Schedule tab: Open Hours, Closure Dates
- Staff UI
  - Request History dates/time stamps
  - All user-supplied dates:
    - Need by date
    - Request date
    - Shipped date
    - Due date
    - Received date
    - Returned date
Policies Directory Changes – Hours

NDHCO (US Central Time UTC – 6:00 hours) viewing their own open hours

NDSTJ (Newfoundland Time UTC – 3:30 hours) viewing NDHCO's open hours

Note how hours have adjusted to their format and time.
Policies Directory Changes – Closures

NDDRW (Australian Eastern Daylight Time UTC +11:00 hours) viewing their own scheduled closure

NDHCO (US Central Time UTC –6:00 hours) viewing NDDRW's scheduled closure

Note the dates and formats are adjusted.
Time Zone – what is not included?

- Printing – both dates and formats
  - Recommend that users select the option not to print due dates on book straps
  - Will be addressed with the next release
- Notifications – both dates and formats
  - Will be addressed with the next release
- Requests still in flight from before time zone fixes were installed (this is not a retroactive conversion of dates)
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.
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

Required fields are marked with an asterisk (*)

Display groups: by group name | by symbol

1. Enter symbol: CGA
   - Search

2. Institution Symbol: CGA

3. In my group:
   - **10COPIESCH**
     - Yes
   - **1CTFREE**
     - Yes
   - **1FREEPA**
     - Yes
   - **1OHFREE**
     - Yes
   - **2CTFREE**
     - Yes
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 Custom holdings

How to create Constant Data

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 autom
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
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

Files no larger than 120 MB. Up to 1000 files a day per authorization.

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

Author: Collier Schorr

Summary: In the early 1990s Collier Schorr began working on and off in Southern Germany, compiling a documentary and fictional portrait of a small town inhabited by historical apparitions.

Print Book, English, 2022
Edition: First edition
Publisher: MACK, [London], 2022

Functional Ecology

Trade-offs among locomotor performance, reproduction and immunity in lizards

Jerry F. Husak, Haley A. Ferguson and Matthew B. Lovern

doi: 10.1111/1365-2435.12653
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 a question mark 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 cosentim@oclc.org <donotreply@oclc.org>

To: Shellen Luck

Expiry: 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/AB/3YzKf2h0k

Use this case-sensitive password: 38F5PFeSd

Borrower: UF

Request ID: #11392257

Title: Verniana

Please note the following time constraints:

• Only one document has been uploaded, it is available for 30 days or 5 views, whichever comes first.

General Request Information:

Request Identifier: 211392257

Status: In Transit

Request Date: 23 December 2021

Send Out Date: None

Due Date: None

Request Type: Corr

OCLC Number: 236177110

Borrower: UF

Lender: WSTPV

Send Before Date: 20 January 2020

Bibliographic Information:

Title: Verniana

Language: eng

ISBN: 1565-8972

Imprint: Haifa:
Manage off-system requests
Set up a borrower or lending partner in OCLC Service Configuration
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
STATISTICS REPORTS

stats@oclc.org

9-digit authorization (no spacing) and password
Statistics reports
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>Reason For No</th>
<th>Lender Unfilled Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>210842006</td>
<td></td>
<td>GUNS, GERMS, AND STEEL: THE FATES OF HUMAN SOCIES</td>
<td>35792200</td>
<td></td>
<td>1997</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPV (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/1/2021</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>211201047</td>
<td></td>
<td>THE SEVEN HUSBANDS OF EVELYN HUGO A NOVEL</td>
<td>957077586</td>
<td></td>
<td>2017</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPV (BETA)</td>
<td>AGED TO UNFILED</td>
<td>12/27/2021</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>211234689</td>
<td></td>
<td>ABBEY ROAD</td>
<td>20389812</td>
<td></td>
<td>1987</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPV (BETA)</td>
<td>AUTO. DEFLECTION: FORMAT TYPE</td>
<td>12/14/2021</td>
<td></td>
</tr>
<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-TPV (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/23/2021</td>
<td></td>
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Select the month

Export it to Excel or send it to your email address.
Upcoming training

- WorldShare ILL Borrowing
  September 13, 2023
  Register

- WorldShare ILL Lending
  September 20, 2023
  Register
Thank You!

Please remember to fill out the evaluation for this class

- Date: 08/16/2023
- Instructor: Lucia Shelton
- Category: Resource Sharing and Delivery
- Class name: Introduction to WorldShare Interlibrary Loan

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