WorldShare® Interlibrary Loan: Borrowing

Lucia Shelton
Member Education
In this course, you will learn how to...

- Submit requests as a Borrowing Library
  Including patron-initiated requests (Discovery tool)
- Manage requests as a Borrowing Library
  Including batch processing options & issues with requests
- Generate 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 your Discovery tool, 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. Select potential lenders for lender string
4. Apply Constant Data
5. Complete request form
6. Submit request
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 of library staff…”

New For Review

- New For Review (2)
- Not Reviewed (2)
- Reviewed (2)

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
Patron-initiated ILL requesting configurations

OCLC Service Configuration

Patron-Initiated, Staff Mediated

Patron-Initiated, Unmediated
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
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.

All 3 ILL request methods

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 applies.
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.
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.
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
- Advanced search
- Expert search (maps, scores, articles)
September
Author: Rosamunde Pilcher
Summary: More than a dozen guests are invited to a September twenty-first birthday party in Scotland where they will meet their inevitable and surprising destinies

Functional Ecology
Trade-offs among locomotor performance, reproduction and immunity in lizards
Jerry F. Husak¹, Haley A. Ferguson¹ and Matthew B. Lovern²
¹Department of Biology, University of St. Thomas, St. Paul, Minnesota 55105, USA; and ²Department of Integrative Biology, Oklahoma State University, Stillwater, Oklahoma 74078, USA

Loan request
Copy request
WorldCat Discovery - Patron ILL request

2. The Yellow River
by Kim Dramer
- Print book ©2001
- Examines the history, geography, and environment of the Yellow River, and discusses aspects of Chinese culture, as well as famous locations along the river.
- No other editions or formats

3. The Yellow River
by Margaret Ray, Haris Pette
- Print book [1969]
- Describes the ways of life of the varied peoples who live along China's great Yellow River and the efforts of these people to tame this river that is sometimes friend and sometimes foe... Read More
- No other editions or formats

Text can be customized by library.
Patron workform

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

Not Reviewed - not seen by your staff.

Reviewed – seen or created by your staff.

Patron–Initiated, Staff Mediated
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>
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<tr>
<td>180012197</td>
<td>Not Reviewed</td>
<td></td>
<td>The Yellow River /</td>
<td>Rohrstein, Richard</td>
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<tr>
<td>179969999</td>
<td>Not Reviewed</td>
<td></td>
<td>Journal of the American Chemical Society</td>
<td>Morgan, Mary</td>
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</table>
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. Multiple copies of item 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
Wrong type: before Lender answers

220553227: Code girls: the untold story of the American women code breakers of World War II

<table>
<thead>
<tr>
<th>Status</th>
<th>Submitted</th>
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<tbody>
<tr>
<td>Type</td>
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<tr>
<td>Source</td>
<td>WSSIL</td>
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<tr>
<td>OCLC</td>
<td>972386321</td>
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<tr>
<td>Lenders</td>
<td>WSTPFV</td>
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<td>URL Type</td>
<td>Article Exchange</td>
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**Request Details (Request ID 220553227)**

<table>
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<tr>
<th>Borrower</th>
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<tbody>
<tr>
<td>Max Cost</td>
<td>USD null</td>
</tr>
<tr>
<td>Need Before</td>
<td>08/19/2023</td>
</tr>
<tr>
<td>Requested on</td>
<td>07/17/2023</td>
</tr>
<tr>
<td>Shipped Date</td>
<td>07/17/2023</td>
</tr>
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**Title**
Code girls: the untold story of the American women code breakers of World War II

**Author**
Mundy, Lize

**ISBN**
9780393632536 (hardcover) 0316325353 (large print) (audio)

**Publisher**

**Format**
Book

**Language**
English

**Edition**
First edition

**Preferred edition**
Any edition

**Verification**
WorldCat (972386321) Physical Description: xiv, 418 pages, 8 unnumbered pages of plates ; illustrations ; 24 cm
Wrong type: after Lender answers
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.
3. STATISTICS REPORTS
Reports for Borrowers

Interlibrary Loan Home

Search for requests
- Request ID
- Active Requests
- Closed Requests

Quick Links
- Borrowing:
  - AE Alert (2)
  - Produced (23)
  - Conditional (1)
  - In Transit (16)
  - Received? (16)
  - Expired (3)
  - Unfilled (3)
  - Received
  - Renewal Approved (1)
  - Returned
- Lending:
  - Supplied
  - Returned
- Other:
  - OCLC Policies Directory
  - OCLC Service Configuration
  - OCLC Usage Statistics
  - OCLC Article Exchange
  - Resource Sharing News
  - WS ILL Training Resources
  - OCLC Community Center

Documentation: Statistics reports for WorldShare ILL

stats.oclc.org
Support, Documentation & Tutorials

https://help.oclc.org

Welcome to OCLC Support
How can we help you?

Select a category
- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing

OCLC support regions

<table>
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<th>Region</th>
<th>Location</th>
<th>Contact Information</th>
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<tbody>
<tr>
<td>Asia Pacific</td>
<td>OCLC Asia Pacific</td>
<td>+1 614-764-6009</td>
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<tr>
<td>Australia and New Zealand</td>
<td>OCLC Support—Australia and New Zealand</td>
<td>+61 3 9929 0800</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States</td>
<td>+1 614 755 8662</td>
</tr>
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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: September 13, 2023

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