Hi everyone I'm Lucia Shelton, I'm part of the member education team at OCLC and today I'm facilitating your learning on WorldShare ILL borrowing. Welcome to our session! Before we proceed, I have a question for you. Let me open the question here.

You have to click yes and accept and answer.

What is your most challenging ILL task as a borrower? Feel free to type in your answer.

I see some answers here already showing.

Thank you.
So I see some answers: damage, probably damaged item, make sure to send the correct item.

The workflow for deciding when to purchase the item and when to ill the item workflow, Journal and articles, managing the patrons expectation, the request, more practice need more practice. So these are some of your answers.

Let me see if I can share this.

Share this.

In the slides, so you can see it.

ILS more, practice. Thank you, thank you for your answers.

Just copy this.
So thank you for participating. Let me share.

Let me share your answers.

So these are some of your answers, some of the challenges you find when trying to do ILL as a borrower.

So, ILS, more practice, so familiarity with the interface and all these topics.

So for those of you who are starting with the service and those of you who are refreshing your knowledge, I will guide you through the options you find available in the service for borrowing libraries. By the time you reach the end of this session, you.

will have learned about the best practices for borrowing activities in the service. We are covering four topics first to the basic concepts of borrowing activities in the service. How you can easily create.

Requests and how you can allow your patrons to submit ILL requests
How you can manage your ILL requests, including the available batch processing options and solve some issues you might encounter with your ILL request, somebody mentioned about damaged items, for example, and finally, how.

You can generate reports to support your activities in WorldShare ILL, and then of course where you can access documentation and more training materials.

So let's start with topic number one, The basics, the basic concepts of WorldShare ILL borrowing. So there are three methods of requesting in the service. Let me introduce you to our friends that will help you.

Understand these three methods. Susan is a staff member responsible for ILL at her library and she will be using the staff initiated staff mediated method.

Preston is a library patron and he will be using the patron initiated staff mediated method and Paula is a library patron too and she will be using the patron initiated unmediated method.

So, let's start with the first one. Susan is a staff member at her library and her patron is asking her assistance to obtain an item, not part of her library's collection. Susan will then use
The staff initiated staff mediated method where she logs into the WorldShare ILL interface and places an ILL request on behalf of her patron. Susan manages the request from when she creates that request until the item is supplied to the patron and later returned to the owner. That's why it's called Staff initiated staff mediated method. Susan will need to follow six steps in this scenario.

First, she searches for the item in the WorldCat database, then she selects the best bibliographic match for the item after that Susan has the lender string populated with the potential lenders. She applies the constant data with her library's Information completes the request form and finally submits the request.

I will demonstrate how you can complete each of those steps in WorldShare ILL during the demo. When Susan is creating the ILL request, she needs to keep in mind that the request type defines the workflow of a request through the system this way she will be able to manage the request in a proper way.
So, loan request for physical items is initiated by the borrowing library and closed by the lending library when the material returns to the owner and the borrowing can manage that request. Copy requests are initiated by the borrowing library and when the borrowing library receives that item and updates in the system, marking the request as received, then the system automatically closes that request because there is nothing to be returned to the owner.

So this is the staff initiated staff mediated method with our friend Susan the Librarian. Let's move to the second method. Patron initiated staff mediated method Preston is a patron at the library in his neighborhood, Preston is searching for an item on his library's online catalog using a discovery tool. in this case, WorldCat Discovery, but the item is not part of his library's collection. So.

Preston finds this request this item button the library has configured in the system clicks that completes the patron ILL form and sends the ILL request that will then be processed by a staff member at
His library.

In the patron initiated staff mediated when Preston submits the ILL request form, then the request lands in his libraries WorldShare ILL interface under

The new for review not reviewed status for a staff member to mediate that request, approve that request and once a staff member approves the request, then the request moves to the reviewed.

Status, and stays there until the request is sent to lenders to be fulfilled. This is the patron initiated staff mediated method with Preston, the patron number one.

The third method patron initiated unmediated. Paula is a library patron too and she is searching for an item on her library's online catalog, but the item is not part of her library's collection and.

Like, like Preston, she finds the request item button completes the ILL form and submits the ILL request. Because Paula's Library has configured automation in automated request manager in the system to send
The request directly to lenders, then her ILL request goes directly to lenders, which will supply that item. This is the patron initiated unmediated method when the staff does not need.

To touch that request until it’s fulfilled by the other library, and this is with our friend Paula, the patron number two. This is the method used for libraries using resource sharing for groups within the group. So let's check the configuration.

For all these three methods, those libraries using resource sharing for groups have these configurations done on their behalf.

The configurations are done in OCLC service configuration, the easiest way to access OCLC service configuration is from your ILL homepage. So let me share my browser and go live to show you.

How you can do that. So let me pause, this for a second.

Go to the homepage.
So if you haven’t seen the WorldShare interface, this is the interface on the upper right side where you see your username, this arrow.

Timestamp 00:24:06.260 → 00:24:24.820

Takes you to the language options, the interface options. This is where you can change your password and log out from the system, need help this arrow general help takes you to the documentation pages for instructions.

Timestamp 00:24:25.260 → 00:24:45.700

Contact support for you to email OCLC support, if you need assistance and Community center is for you to access an area where we can communicate with other libraries using the service, you can access directly from your.

Timestamp 00:24:45.820 → 00:25:06.180

Homepage and the left side panel is where you can start and manage your requests. The middle section you can search for requests using any of these indexes options and you can search for active or closed requests.

Timestamp 00:25:07.460 → 00:25:26.660

Under quick links you find similar options that you find on the left side panel and under other is where you find the links to the other parts of the service and it’s where you find the OCLC service configuration. So let’s click that.

Timestamp 00:25:29.220 → 00:25:30.340

Oh.
So this is the service configuration think of the service configuration as the area where your library can customize your experience with the service, you need to have admin permissions to be able to access this area and make changes because you make changes, not only for your login as a librarian, but for the entire library. So let's start with the configurations for the patron.

Initiated request to allow your patrons to initiate requests. So the first option here is to configure the IP addresses. So your technical staff should work in adding.

The IP ranges for your library.

Authenticating your users when they are using the service, your discovery or your own catalog from your library. So here manage IP addresses can use the buttons to add or remove or bulk.

Entry and once this is added, they can select here. This is for the discovery tool.
The second step is to configure that request item button for ILL, and this is done here in WorldCat Discovery on the left side panel and place a hold request buttons resource sharing

So the text that goes in the button can be customized. You can customize this text up to forty characters, add translation and the type of a button configuration.

If you are configuring for WorldCat Discovery, you use the WorldShare ILL option if you are configuring for different discovery tool. You can use the open URL and our instructions in how you can.

Apply the open URL for the request for, for your patron request form. Let me see if I can find the link for that, and I can send this.

This is the link for.

For the patron URL form.

So within the chat, if you want to check on that.
And once you add all this information, selected the options you need to save the changes for the system to retain that information.

Then after you configure the button, you need to update customize the patron work form and this is done on the.

Let me close it find this.

We'll be here on the left side panel under WorldShare ILL and request forms.

Request form.

This url is your form. It's your blank form. You can have this blank form. See you can have this blank form available on your website as well. for those patrons that know what they're looking for, like.
The researchers, for example, they know the exact material they're looking for and they prefer to fill out a blank form, you can make that available.

And you can configure your patron work form, you can select some options here. Make some fields required. You can change, you see the, the, this is a sections, you can move the sections. The one you want on the top.

On the bottom, you can remove an entire section, you can add additional fields. You have an option to add additional fields and you can select the fields you want.

the patron to fill out when they complete that form.

These are the options you can select the ones you want to be required, which means that they must be completed or be added. You can have as many as you want here

This is the bibliographic section. You can have the other section on the top, for example, the patron section and under the patron section is also where you can add a copyright, for example.
Region has some corporate rules that you want to add, so you can add the copyright? Acknowledge and you can also add then the copyright declaration and add the URL for that document for.

82
Timestamp 00:32:15.840 --> 00:32:25.320
Example and make this requires that the library must accept that copyright rules.

83
Timestamp 00:32:27.880 --> 00:32:35.080
And after you customize this form, you need to save it.

84
Timestamp 00:32:37.480 --> 00:32:57.320
And after you save it, then you can preview your form how it looks like how your patron would see that for when the patron clicks that request button. So this is how you can customize.

85
Timestamp 00:32:59.240 --> 00:33:01.080
Form for your patron

86
Timestamp 00:33:05.000 --> 00:33:23.560
Only the fields that are required, they are the ones the patron needs to complete the bibliographic information will automatically be populated on the form. You have to concentrate more on the patron section to have the information you

87
Timestamp 00:33:23.720 --> 00:33:27.040
need in the form.
Other areas here keep in mind that I cover the ILL configuration options in detail in the introduction to WorldShare ILL class. The next class is in December or you can access the latest recording. So there are several options.

For configuring your experience and another area that's very important, if you are allowing your patron to initiate the ILL request, another option is to use the automation. So.

Automated request manager is where you can automate, and this is available, not only for the patron initiated for the staff initiated as well, you can have the system automatically applying your rules according to what you have configured here.

For example, as a borrowing library, you can have the system automatically selecting the best matching according to your rules looking at your holdings in WorldCat to check if you have that item or not if you have your knowledge base.

Configured with your E- resources, the system can also look at that and custom holdings groups, your pre-selected preferred lenders to send requests to, you can create the
Custom holdings groups here in the service configuration select the libraries and then set up the path that you want the system to look into to automatically populate your lender string according to the libraries in your groups.

So you have to click this add a new button, give a name to your automation, the priority you can set the priority and the match for the bdiographic match. So you have all these options, you can add.

Additional fields you can keep adding additional fields or eliminate fields and then the actions you want the system to apply in your request, you can have the system automatically applying your constant data, your constant, the data is the.

Information about your library that does not change from request to request and you created this here under the borrower data, then you can select the one you want the system to automatically apply for all those requests, then you can.

Add additional actions build the lender string and so you can create your custom holding groups and select the ones, the one you want the system to automatically apply to your request, your favorite one.

You can add additional options here for the patron initiated for the patron initiated, a minute please. This, if you are allowing your patron to do unmediated request, then you can select the send request to lenders
You are pre approving lenders to receive those requests directly from your patron, like Paula, the patron initiated unmediated request, and then you can select the custom holdings as you want to be automatically applied for.

Pre-approved lenders, otherwise you can just select the custom holdings and.

Route request to review this is when you are allowing unmediated request, but you prefer to mediate those requests so you can change that by selecting for the system to send those requests to review instead.

Of being unmediated directly to lenders and then you can add exceptions if duplicate send for review, mostly for the ones unmediated. So instead of having automatically sent to lenders.

Duplicated, the system can send for your review, if you held by custom holdings groups, send it to review and if held by my institution send it to review. These are exceptions for the, unmediated option. So you'll see that you can apply.

Automation for all the three methods using the options you have available here, and then you save it and the system will follow these rules every time you are creating a request, so it can save you a lot of time in creating your request.
And if you are creating automation, my recommendation is that in inter-library loans options, the consistent setting you set this as unchecked, because then you allow the system to apply the.

Constant data that you are configuring for automation and not the one that is set there, not the default. Okay, so these are options you have available and after you configure that, then your patron can initiate those requests

Directly from the discovery tool and the staff can have the automations available there as well. Any questions.

Hi, I see a question here You mentioned that maybe variable copyright rules per region where can I find these rules for my region in regards to the Impact on my local ILL program?

You have too check this. I'm, I'm not sure I can't check for you where you can find those copyright rules, but you probably have these in the local government is usually the copyright

Country side, so you probably can find it at those government documents where you can add that to, to the system, and if you subscribe to e-resources, your provider.
Usually provides you with that information as well. Okay.

I'll take note of this to see the best place where I can find this, but I, I would say that probably government documents.

And there is another question here, this persistence setting allows for automated request settings to be applied to our incoming request. No, the persistence setting. Let me go back there. just a second.

This persistent setting here is only for constant data. You have to set the automated request manager, your rules first here save it, the system will apply. The only thing that will prevent the system applying automation is the constant data, if you leave this on it will apply your default constant data and not the one you want the system to use. So that's why you have to uncheck this. Okay, this is for the constant data.

To not apply the default to apply the one you set up in the automated request manager.
So while you're thinking and typing your question, I have a question for you. Let me open you need to accept it and mark yes.

read the question and select your option so select the correct statement. The patron work form cannot be customized, automation allows the system to automatically find the best record match.

Populated the lender string, apply constant data to request according to the configurations, the patron initiated requests are never managed by library staff and, four selecting the type of request loan or copy is not important, which one do you think.

Is the correct one?

Thank you for participating. This is to allow to check if you understood the concepts so far.

So I see that everybody chose number two, let's check the correct answer. The correct answer is number two, automation allows the system to automatically find the best record match populated the lender string and apply constant data to request according to the configurations.
The other options are incorrect. You can customize the patron work form you can manage library staff, manage Patron-initiated request and the type of request is very important. Thank you for participating.

So.

Now let’s explore topic number two, how you can submit ILL request in WorldShare ILL in the staff initiated staff mediated the method the same way our friend Susan, the librarian.

So we will explore the search options that you have available.

And now imagine that you are at your library and like in Susan’s situation, your patron needs your assistance requesting a print book and an article, not part of your collection you may gather as much information as possible such as title, author and format

To use the staff initiated staff mediated ILL request method on behalf of your patron. So let’s check how this is done. So let me share my browser
Again, and go live.

So we are back to the homepage.

We start with the discover items on the left side panel. Search the WorldCat database, you have options here for searching you can start with a basic search searching WorldCat database or your library holdings and choosing the index

You can perform an expert search using the WorldCat indexes.

This is basically more for when you're trying to find the music scores, some material that are very specific or something that was catalog by specific library.

Using the Boolean operators and then you can get to the results in a easier way or you can use an advanced search where you can also search the WorldCat database and your holdings, you have.

And you have more indexes, options and qualifiers to filter your search. So the more information you enter the fewer records you have to work with. So let's start searching
By the book, the title, when you search in the title, a tip here avoid using.

Situations like a comma, colon

Symbols you can use part of the title you can use asterisk or you don't need to use any asterisks. So for example, for this title, I can enter part of the title, instead of using the punctuation.

Then I use the Boolean operator to combine with author, and I can enter the author last name.

Then I filter by format to be book.

In English.
So this is the result the result comes the relevances by the largest number of libraries owning the item, but you can change the relevance. You see the system looking if I own that item. So it's not held by my library.

And you have the options to see a brief information about the Bibliographic record clicking on hover over this icon, and you have the brief information if you click this link search for versions with.

Same title and also you’re searching different formats at the same time.

And if you have created a custom holdings path you can select that option here and start creating a request. Let's click the all holding fields. So these tabs here.

It's according to how near the library is to your library. All Holdings will be everything. so you see this search my library's online catalog link means that if you have configured that in the service configuration you can search your

Online catalog before.
Proceeding with that request. You have all the list of libraries that own that item here on the bottom. Some of these fields are sortable the supplier when you find this symbol, it means that this library is not a supplier.

149
Timestamp 00:50:50.980 --> 00:51:09.300

Let's sort this column and now I have everybody that is supplier when you see this hyperlink on the library's name, it means that you can access the online catalog to check for availability.

150
Timestamp 00:51:12.580 --> 00:51:31.140

So you see the days to respond. It doesn't mean that the library takes that long. It means that the request can stay at the library that long and how much they charge for that request and if.

151
Timestamp 00:51:31.340 --> 00:51:51.180

They accept IFM, which is receiving payment through your OCLC account. So after I do all this research, I need to click the Yes to populate the Lender string, if I have.

152
Timestamp 00:51:51.660 --> 00:51:56.300

Created custom holdings path. I can select that.

153
Timestamp 00:51:58.020 --> 00:52:14.060

When I click this Go button, the system is randomly looking into my groups and populating my lender string. That's why this saves a lot of time. You don't need to do all this research here. You can select

154
Timestamp 00:52:15.300 --> 00:52:35.780
Up to twenty copies of the same title. So when you do that, the system will treat each request as an individual request, and when I click this go to apply the custom holdings, you see the system is applying.

Different symbols, this is to speed up the processing of your request.

So let me send this. So after the lender string is populated with up to fifteen lenders, then you click the create request. It's important to have, the more you add to the lender string, the better the chances for

A library to answer yes, to your request, then if you had applied automation, the system, when you click that create request, the system would apply all the automation according to your rules, if you haven't, then you have to manually apply your constant data.

With your library's information, the constant data would complete the type, so you don't have to worry about that. So you check the need before date. You can change this.

You can change to another date.

You see the libraries, the lending libraries on the list. All the information about your library is coming from the constant data.
Including the maximum cost that must be completed with even if it's zero, if you leave this in blank, you're accepting whatever the lender is charging. So, add, even if it's zero, you can add your patron information and after everything is fine.

You click this send request.

The system will create this unique ID, you can start managing this, for example, from your homepage.

Using the request ID index.

At this point, you can cancel this request if you made a mistake or no longer need that you can add a staff note, for example, so all the staff in the library knows what you're doing with this request. You can edit anything in the request and save it, like, for example, I can change this date and anything you change here you need to save it.
And after you create your request, you find your request here under borrowing request on the left left side, panel your request to be here under produced awaiting response. This is our request here.

The lending library has three options if they answer no to your request, your request automatically moves to the next lender in the lender string. The library can answer conditional, which means that they can provide, if you accept the conditions.

We will be talking about this in a bit, and if the library answers, yes, your request will be in transit. You, you find your request here in transit.

For you to, to proceed with your request.

So when your request is shipped you would find. let me show you something here.

You can find here under shipped date when that material was sent to your library, so you can make a decision if you.
Want to mark this as not received, for example, because it passed too long, so that's how you can, you can check. So once you receive the material, you need to open that request and you have the option to Mark as

Received or not received for this example, we are marking as received, you can check to print the Bookstraps if you do that to send to your patron. Mark as received it's very important to update the request. So the other library knows that the item has arrived at

Your library, so once you click as received your request, moves to the status as received in use. So your request will be here, received in use if you forgot to.

To print that bookstraps here on the right Print Now you can add the bookstraps to your print queue.

To print it, your print queue would be here on the left side it's the last option and you'll find your bookstraps here you can print multiple at a time. The paper size comes from your configuration and then.

Your bookstraps can be printed.
When your request is here under received in use, you have the options when your patron is done with that item, you have the option to return that item.

You can renew that item, and if the patron lost that item or the, the item is damaged, came back damaged and you need to return it you mark that as lost and that request goes as received but missing and

You can use this email button here to communicate with the other library informing what happened to that request and the two libraries can work together to solve this situation. So if you’re ready to return, you mark the print return labels, return.

And now your item is under returned status.

And at this point there is nothing you can do because for physical items, the request is completed when the other library receives that item back and marks in the system as received, if you forgot to print that label again, here on the upper right side Print Now

and you can send that return label to the printer queue and go there to print your.
Labels.

You can print multiple at a time. All the configuration, all the paper size comes from the configuration, you can select what you want included on the labels. You can select if you are reusing paper, you can mark where the.

Paper is starting to print and then you print that.

Now your return labels.

You can print individual or you can print several, if you no longer need them, you can select them and Mark to remove if you don't remove they will stay here. So if you need to reprint that.

You need to check them to remove if you no longer needed them.

So this is for the physical item. so we went from awaiting response in transit received in use and returned. Now let's see the example for the copy request for that.
Article same thing. Discover items either basic or you can use advanced search. You can search by article level, for example, I can select the title of the article.

And then combined with the author

And then select the format to be article.

And find that the article, but because many libraries they catalog at journal level, so sometimes you search at article level and you don't find anything, but there are several libraries that own that item. So my recommendation is instead of searching at Article level, you can search at journal level to increase the number of libraries owning that item. So I will search this by ISSN at the journal level.

And this is the result it's the same thing. The I icon to give bibliographic information and I can select that all holdings. See you can research is similar to.
Loan request, you can do all this research. You can use the custom holdings path and I can send this to create a request and because I'm creating the request at the journal level I need to provide additional.

Information for the other library to understand, and because I'm not using automation here and I have the persistent to see what the persistent does it reuses the previous constant data. So I'm gonna add the copy so it's a copy request.

And I will enter the information that I have.

On this article, anything that can help the other library to understand.

Which piece of the journal you need. I have the.

Author, issue and date, and I also have the pages.

Then the need before date.
Let's put this.

The end of the month. All the information about the lending libraries all the information that's coming from your constant data. Your preferred electronic delivery method. It'll come from your constant data, you can enter.

Your patron information.

So let me.

Enter my patron information.

And I enter the email.
And everything is good to go. I click the send request the same thing. The ID number, you can use this number to manage your request.

Timestamp 01:05:24.440 --> 01:05:27.040
You can add a note.

Timestamp 01:05:28.480 --> 01:05:48.760
Anything you find useful, you can edit anything here before any library has answered to your request or you can cancel your request. So once a library answers to your request it's the same thing. The library answers No, it moves to the next lender in the lender string. The

Timestamp 01:05:48.920 --> 01:05:59.880
Lending library does not see your patron information. They only see the request information, so you can add your patron information there.

Timestamp 01:06:01.560 --> 01:06:21.400
Your request will be here under awaiting response after the library answers the library can answer No it moves to the next lender in the lender string, conditional, you can accept or not, in transit, you see your request will be here.

Timestamp 01:06:22.040 --> 01:06:25.720
In transit, and if your

Timestamp 01:06:27.200 --> 01:06:46.640
Library has a, if the library has used article exchange for the request, then you can find also here under article exchange. So, for example, the request would be here.

218
Timestamp 01:06:49.080 --> 01:07:08.120
Article Exchange creates this unique URL and passwords to protect the document. You can preview that to see if it’s what you’re looking for, and if it’s what you’re looking for, then you can email this to your patron. Let me, let me.

219
Timestamp 01:07:08.240 --> 01:07:17.280
Do something here. Let me go to the other library and receive that request because I want to show you what happens.

220
Timestamp 01:07:19.200 --> 01:07:23.480
To that copy request that we just sent.

221
Timestamp 01:07:45.880 --> 01:07:49.280
I want you to see what happens with that request.

222
Timestamp 01:08:30.680 --> 01:08:44.160
I want to respond to that request and because I put it all the information about the patron, so you see what happens when you add that information about your patron.

223
Timestamp 01:09:46.200 --> 01:10:01.800
Oh, it’s not, it’s not happening. So let me use the same the same one. So after you want to mark this as received you first, you send this to email this document to your patron.
And the patron has thirty days to open this document or five times after that, the document automatically disappears and the patent receives these URL and password and all the information about that.

When you add the patron's email to the request, the system automatically populates this on this email message, you can add that note that the patron has thirty days or five times to try to open the document. Then you send that to your patron after.

Send that to your patron, then you can mark as received. Let me copy this. You can mark this as received and after you mark that as received your request is under closed, is automatically closed because copy request, there is not to return.

So the status here is closed automatically closed if you forgot to email that document to your patron, you can still do that as, as long as it is within the thirty day deadline, you can still send that, but your request is as closed that what's happened to.

The copy request.
Any questions so far?

A question here, just to make sure I understand this properly all online resource. I already request to be submitted as copy requests to the lender that's correct. All electronic materials and when you request a copy of a book chapters.

Or pages of book or copy of a map or pages of a music musical is course, You are using copy requests loan is only for physical items. Okay.

So that's why it's important, copy request for electronic resource.

Now suppose your library subscribes to WorldCat Discovery or the discovery, tool and has ILL option configured there and your patron wants to request this book title that's not part of your collection.

Let's see how this happens in this situation similar to Preston's in the patron initiated staff mediated method or the situation similar to Paula's the patron initiated unmediated method and how you can manage the request when you want to mediate
The processing and this works for libraries using resource sharing for groups as well. So let me go back there, share my browser and then.

We can.

So I'm here. This is the WorldCat Discovery page. The patron must be authenticated to be able to request ILL through the discovery tool. There is a question here is there a best practice using the email doc to patron through Article Exchange versus downloading the article as a PDF, any emailing through through an outside email server. I would suggest for you to use that email doc to patron because it.

Through the article exchange because you are within the request you are sure that you sent that to the patron, if you download that PDF and try to email that outside of the email server, you might forget in between the process.

To email that to your patron, you think you did it, but you didn't the best practice is to use that email doc to patron within the service, it's the easiest way you just click there, and if you add the email, the patron's email to the request the system will automatically populated that.
Information in the email message and another thing is that when you use, you are using the email doc to the patron, all the information about the request goes on the body of the message. You're not just sending a document. There's a history of that request within the message.

So that's the best practice. Yeah, it's a good question by the way. So in the WorldCat Discovery, the patron must be authenticated to request ILL. So after you have done all that configuration that patron can come here and do this search.

Find that item, and you see that the item is not part of his library. So Preston is here searching it's not part of his library. He's, he's clicking here in the detail and he finds the, this request this item button when he clicked, he clicks on that, then he's accessing the request form. You see that the bibliographic information transfers to the form automatically. So he can complete this.
This is according to your configuration. You see, these are the fields that I selected for the patron to complete.

These are the required fields, then when Preston clicks the submit request, you see, there is an arrow, he forgot to fill out a field. That's a required field. So I need to put the need before date.

So the system would warn if Preston does not complete. So now he has all this information about the, his request and his request will land in his library's WorldShare ILL interface under the new for review.

reviewed. So if the staff wants to create that request on behalf of Preston, this staff would click on the staff ILL go to the ILL interface and proceed with that.

And that request will be here under borrowing request. New for review not reviewed. This is Preston's request, not reviewed. So the staff needs to open that request and check if

Everything is correct, and then we can either send this request directly to.
Libraries or populate that lender string with another group of libraries as needed and send that request.

255

Timestamp 01:18:53.600 --> 01:19:01.480

The requests that are reviewed. These are request the, that the was marked as reviewed.

256

Timestamp 01:19:06.200 --> 01:19:19.040

Instead of sending directly to the lenders, if I want just to Mark as reviewed, the request will be here under reviewed ready to be sent to the lenders.

257

Timestamp 01:19:20.480 --> 01:19:40.880

That's the new for review the patron initiated staff mediated that's how the staff mediates, the staff finds the request here under not reviewed everything that was sent by a patron and that needs to be approved by a staff before

258

Timestamp 01:19:43.160 --> 01:20:01.360

Is sent to the lenders. That's how staff can mediate those requests initiated by a patron. In the case of Paula, if Paula clicks that request this item and because.

259

Timestamp 01:20:01.520 --> 01:20:21.840

Her library has configured the pre- approved lenders when she clicks this and completes the request form and submits that request her request goes directly to the lenders. It doesn't lands here in the new for review. Okay, so.

260

Timestamp 01:20:22.560 --> 01:20:42.320
It works in both case, both patrons, both completed the form. The only difference when they submit the form, if it's patron initiated staff mediated it goes to WorldShare ILL New for review if it's, if it is patron initiate unmediated

261
Timestamp 01:20:42.960 --> 01:20:51.320
it goes directly to the lenders. Do you have any questions regarding to that?

262
Timestamp 01:21:04.080 --> 01:21:23.280
How do you track unmediated requests that go directly to lenders there a way to see that history? You would see those requests once it's sent to lenders, your request will be under. Let me, let me share here your request will be

263
Timestamp 01:21:28.020 --> 01:21:45.300
In Transit all your requests will be in transit because they will be supplied directly by lenders for the physical items. The lenders will probably send to your library, so your request will be in transit.

264
Timestamp 01:21:45.980 --> 01:22:05.780
And for the electronic resource it will be sent directly to the patron. So that's how you can see those requests. The unmediated request they will be in transit. Okay, once they are supplied

265
By the library, by the other library.

266
Timestamp 01:22:25.620 --> 01:22:42.260
So now let's move to the third topic manage requests as a borrower. Once you have your request in the system in any of the three methods, then you need to manage and update.

267
Timestamp 01:22:42.900 --> 01:22:52.980
And solve the issues you might encounter with your request. So I'll show you live some examples for managing your request.

268
Timestamp 01:22:59.540 --> 01:23:03.220
Let's go back. Let me close this.

269
And go back here. So.

270
Timestamp 01:23:24.500 --> 01:23:43.060
We saw answering Marking as received. You have some situations where you have not received your request. So your request is here in transit and but you haven't received your request, so you can select that.

271
Timestamp 01:23:45.020 --> 01:23:59.540
Request, for example, one of these, you haven't received, you mark this as not received your request goes from in transit to.

272
Timestamp 01:24:01.620 --> 01:24:20.740
Not received status, it will be here not received. So this is your request and you can always communicate with the other library using this email button here on the upper right side, to solve that issue with that request.

273
Timestamp 01:24:23.380 --> 01:24:43.220

There's a question here. I love the unmediated request feature which fields needed to be completed to ensure patron initiated request to come through as unmediated? This is how I showed at the beginning in the configuration you need to do all the configuration and you need to do

274
Timestamp 01:24:43.340 --> 01:25:03.700

Automation, so let me go back here. You see here on the, on the service configuration under WorldShare ILL you need to automate, automated request manage complete all the options. So.

275
Timestamp 01:25:03.820 --> 01:25:24.180

One of the options here is the actions send a request to lenders, you need to have your custom holdings groups created for you to be able to select your preferred lenders to your pre-approved lenders and you can apply constant data, lender

276
Timestamp 01:25:26.100 --> 01:25:28.180

string and.

277
Timestamp 01:25:29.740 --> 01:25:49.780

bibliographic match as well. You need to do all this information here about the request manager. At the end of the session I'll show you where you can find the information about the automated request manager and you need to add the

278
The workform as well. The request form and you need that button that you find here that place hold request button for resource sharing. Okay, you need to follow this path and this session is being record.

You'll be able to see the recording. go through the chapters to find again where I, I showed how to configure this.

So when you Mark as not received, it'll be here on the not receive the status.

If the library answered conditional, you find your request here under conditional and the conditions, like, for example, for this request, the library charges for the article, this one, the conditional cannot lend copy, you can open this request.

As a borrowing library, you have four days to answer to this request, if you don't take action the request will automatically move to the next lender in the lender string the same thing, if you answer No. If you, you can cancel the request. If you want to accept, you have to update your request

According to the conditions, So here, in this case I have to inform the page, so I want the chapter one.
And the library, the lending library will change the type of request to copy and provide you that copy, and then you can accept that and your request is no longer in conditional it's awaiting the

Timestamp 01:27:45.100 --> 01:27:47.060
Response from

The other library. Conditions accepted.

Timestamp 01:27:53.300 --> 01:28:13.780
You can request renewal as well. So, for example, your patron needs more time with the request and your request is here under received in use, your patron needs a renewal, more time. You can select the date here.

This is marked to the due date for this is.

Timestamp 01:28:22.100 --> 01:28:37.980
It passed eleven to ten then two days from now, but the patron needs more time with that. So let's set another date and ask for renewal.

Timestamp 01:28:40.660 --> 01:28:59.860
It's up to the other library to accept or not. Your request is here under renewal requested, If the other library accepts the library will Mark it as approved and accept the new date and now you have a new due date to return that item
If the library denies it, it will be under renewal denied, and you must return the item on the due date. The original due date.

So that's how you can ask for renewal. You saw returning and re- items receiving and returning items in individual, You can do that in batch as well. So everything here that you see this green arrow

Is batch processing, so you can batch receive items so I can click this link here and instead of receiving individual, I can select all the ones I want to batch receive.

And if you mark anything that's not supposed to be here you can eliminate that.

And then I can mark to print the Bookstraps for all of them, if I use Bookstraps for my patron receive items and you see everything was updated to received in use and the Bookstraps they were sent

To the print queue all of them, you can do the same thing. You can batch return items, so you click this batch return select the ones you want to return.
If you mark anything that's not supposed to be in the list. You can easily remove them then you can mark to print the return labels. You, it will send all of them to your print queue at once. Mark return items.

Updated them as returned and they were all added.

To your print queue for you to print the return label. So it's a easy way for you to do it when you have several to update at once.

We talked about multiple copies in the case of Book Club, for example, you saw that you can request multiple copies. You can manage them here under linked request they are treated as individual requests, they can be fulfilled individually in different times and they can be returned in different times as well, so you can manage them under the linked request. They're all together here.

You might encounter some issues with your request unfilled requests, a request no library in your lender string has answered to your request when that happens you can open that request and then
Instead of recreating the request, you just change the lender string. You click this view holdings link update your lender string.

To send to other group of libraries, and then you resend your request if you want to see which libraries you sent before you can look at the history and you see which libraries answered no to your request. So you don't send to them.

Again. And after you had updated the lender string, you can resend that request and your request is no longer as unfilled. Your request is as awaiting response.

Another issue you might find is the expired it means that no Library has answered to your request on your need before date, and you can open that request.

You need before date has passed and you can recreate this request by simply using this new button on the upper right side, and now your request is again in an ILL work form

And you can use the view holdings to update the lender string.
And after everything is in accordance to what you want, You can change your need before date as well.

310
Timestamp 01:34:17.960 --> 01:34:20.280
Apply your constant data.

311
Timestamp 01:34:23.080 --> 01:34:42.160
And then send your request and your request is no longer under expired, it's here awaiting response. So that's how you can solve some of the situations that you might encounter with your requests.

312
Timestamp 01:34:44.200 --> 01:35:02.760
And for those requests, you create outside of WorldShare ILL, but you want to be part of your reports you can use the off system request option, which is, you can create a request or reuse a request. You can search for a

313
Timestamp 01:35:03.400 --> 01:35:04.520
Request.

314
Timestamp 01:35:16.200 --> 01:35:25.840
You can search for that request that you have outside, and then you can have everything in one system for you to manage.

315
Timestamp 01:35:34.120 --> 01:35:42.920
Oh, this let's go back here. Then here you click this create request button.
Save it for review.

And your request will be here.

under

Reviewed

Change the fulfillment to be off system, enter your information about your partner that you can configure in the service configuration under address book, the need before date. Save it.

And now you have your request here, you can add your supplier reference ID just for your control and save it, and now you can change manually change the status of your request until

it is closed and your request is part now of your reports and you can always find your request here under off system request. Your request is here.
Okay, so these are the options for you to manage requests in the system.

Now let's move to our last topic, statistics report after you created and managed your ILL requests in the system, you can generate reports to support your ILL activities. So let me go.

Let me go live to show where you can go to find your statistics reports and I will show you a couple of reports that are very useful.

You can access your statistics reports from your homepage from, under other usage statistics, enter your nine digit authorization and password if you don't have that, you can contact.

OCLC support to retrieve that information.

And you have the resource sharing borrow reasons for no reason where you can find which libraries.
Have answered no, to your reports, I saw, I saw your question here. Can you repeat again when you would use the off system requested show to us. I'll go back then in a second, just hold on for a second. So the resource sharing borrow reasons for no report. You see.

330
Timestamp 01:38:51.520 --> 01:39:11.720
Why the libraries have answered No, and you can use this report to remove libraries from your custom holdings groups because those libraries don't answer to your request. You can export this. You can email this report to yourself. You can have that different email.

331
Timestamp 01:39:13.880 --> 01:39:15.920
Addresses here.

332
Timestamp 01:39:19.400 --> 01:39:37.960
Separated by semi colon, and then if you mark this send monthly and save it, you receive this automatically on a monthly basis. Another report that you have here that's very useful is the borrow resource

333
Timestamp 01:39:38.000 --> 01:39:58.440
Sharing stats reports that's where you can find all the information about the request, including the costs, so you can manage the cost, mainly if you are using the IFM that goes to your OCLC account and.

334
Timestamp 01:39:59.080 --> 01:40:18.800
Monthly invoices and you can also email this to yourself or to several email addresses and Mark to send monthly then save it. You can select the format and the style you want to receive this, save it and you receive that on a monthly basis. Automatically.
And so your questions about the off season of season, sorry, off system request. Again, you need to create the request first or you can reuse a request that you have in the system, like, for example.

Let me see what I have in here. You can reuse a request and you.

Off system request. So you, if you have created a request, you need to save that for review and then you have this option to change fulfillment request. Once you change the fulfilment request, you select your partner.

Your partner is configured in the service configuration under WorldShare ILL

Address book, that's where you configured your partner.

And you'll have that available for you to choose.
Need before date, save it.

So you request is part of your off system. Okay, and there are complete instructions in how you can do it. I will show you where you can find that.

On the handout as well, so there are complete instructions in the copy of the presentation

And everything will go in your.

Request in your reports.

So we have covered the basics of WorldShare ILL Borrowing with our friends Susan, Preston and Paula for the type of request, you have learned how you can easily submit ILL requests and update them in.
System how you can manage your request such as renewing them and solving some issues and how you can generate reports and have them sent automatically to your email on a monthly basis. In the days ahead as you start creating and managing.

349
Requests, you can use our support portal as reference. Let me show you briefly to you there.

350
Timestamp 01:43:24.060 --> 01:43:38.660
So here the support you can contact support and under resource sharing WorldShare inter-library loan. You find everything separated by category.

351
Timestamp 01:43:40.700 --> 01:43:57.540
Short videos for some, see the custom holdings, all the borrowing processes. You find everything here the fulfillment, automation the automated request manager.

352
Timestamp 01:44:00.540 --> 01:44:03.980
The off system it's all here.

353
Timestamp 01:44:06.300 --> 01:44:25.020
Then somebody asked about purchasing requests. You can have that option as well in the automation that is sent that to you. you can have that to be sent under Purchased

354
Timestamp 01:44:26.180 --> 01:44:34.500
Request as well under automation is one of the options in the automated request manager.
Request for purchase, you can automate that, and you can receive that under your purchase options queue if you have that configured for your library, you would have the status for purchase here. Okay.

Okay.

So that's where you can find that information.

We are reaching the end of our session. You did very well congratulations. In case you don't have any other questions, then I would like to thank you for participating in this session, you will receive the link to the recording and where you can find the handouts. There's the copy of

The presentation with screenshots for the topics discussed here and there's another document, the learner guide with the links to the documentation pages for the topics discussed here for you to easily find those. When you leave the session, a window will pop up on your screen with
The evaluation form the information regarding this session is on this slide. We value your contribution! For any training questions, please contact us at training@oclc.org, if you haven't attended the introduction to WorldShare ILL you can

Also in the support portal, you can find where you can register for the session or watch a recording, thanks again and enjoy the rest of your day!