Wednesday– October 25, 2023

Introduction to WorldShare Interlibrary Loan

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Member Education
In this course you will learn...

- The basics of WorldShare ILL
- Why prepare for WorldShare ILL
- How to create and manage requests
- How statistics reports can help

Documentation & Support
1- BASICS OF WORLDSHARE ILL
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)

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
2- PREPARING FOR ILL
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.

Accessing WorldShare ILL – new staff
# 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>x</td>
</tr>
<tr>
<td>Author ad-hoc reports in the</td>
<td>WorldShare ILL User</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>WorldShare ILL Admin</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</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

Note how hours have adjusted to their format and time.

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.

3. Speed up processing - Custom Holdings

- EASTFREE: 590 symbols
- STATEFREE: 56 symbols
- CITYFREE: 24 symbols
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.
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

2. Search

Institution Symbol: CGA

Custom Holdings Group

<table>
<thead>
<tr>
<th>Custom Holdings Group</th>
<th>In my group</th>
</tr>
</thead>
<tbody>
<tr>
<td>10COPIESCH</td>
<td>Yes</td>
</tr>
<tr>
<td>1CTFREE</td>
<td>Yes</td>
</tr>
<tr>
<td>1FREEPA</td>
<td>Yes</td>
</tr>
<tr>
<td>1OHFREE</td>
<td>Yes</td>
</tr>
<tr>
<td>2CTFREE</td>
<td>No</td>
</tr>
</tbody>
</table>

Help on this screen
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**

## WorldShare ILL

<table>
<thead>
<tr>
<th>Interlibrary Loan Options</th>
<th>Borrower Data</th>
<th>Lender Data</th>
<th>Custom Holdings Groups</th>
<th>Custom Holdings Paths</th>
<th>Automated Request Manager</th>
<th>Purchase Options</th>
<th>Patron Request Workforms</th>
</tr>
</thead>
</table>

## Automated Request Manager

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

### Borrowing New Request

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

- **Bibliographic record**
  - Best matching bibliographic record applied to request

- **WorldCat holdings check**
  - Available when holdings set in WorldCat

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

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

### Main Automations

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

## How to create Constant Data

- 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.
IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions using the libraries OCLC account. Both libraries must accept IFM.

IFM – Interlibrary Loan Fee Management

- Borrowing Library
- Lending Library

- $10 (Debit)
- $10 (Credit)

IFM
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

ILL Fee Management (IFM):

Maximum Cost: 5.00 USD

If you only want items that are free, enter 0.00
If you do not enter an amount, you will be responsible for whatever the lender charges.

Copyright Compliance (US only)

- CCG: Conforms to CONTU Guidelines
- CCL: Conforms to U.S. Copyright Law
- None

Affiliations

Billing Notes

Save As New  Save  Cancel
Specifying IFM preference
ILLA 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
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 five times. Staff preview does not count.

Files no larger than 120 MB. Up to 1000 files a day per authorization.
3. HOW TO CREATE AND MANAGE ILL REQUESTS
Deflection

Requests sent to lenders with deflection policies will be automatically declined and moved to next lender on the string according to the policies.
October

Author: Zoë Wicomb

Summary: "A letter from her brother Jake calls Mercia back to Kliprand, the parched dorp she left for a life in Scotland years ago. Had she not been abandoned by her partner of twenty-four years,"

Show more ▼

Print Book. English, 2014
Publisher: Umuzi, Cape Town, 2014

Copy request

Verniana

Verne’s Forgotten, Youthful Swashbuckler

Brian Taves

Submitted October 18, 2010
Proposed le 18 octobre 2010
Published December 12, 2010
Publié le 12 décembre 2010
221937173: October: a Novel

Patron Summary

Source: WSILL
Status: Returned

Title: October: a Novel
Author: Wicomb, Zoe

OCLC: 852389971

Type: Loan
Format: Book

Language: English
Preferred edition: Any edition
Supplier: WSTPV
Requested on: 10/02/2023
Received Date: 10/02/2023
Need Before: 11/01/2023
Return Date: 10/02/2023
Due Date: 11/01/2023
Verification: WorldCat (852389971) Physical Description: 239 pages; 22 cm

Search Google Scholar

Search my library's online catalog

Search for "October: a Novel" by Wicomb, Zoe

Library Mail Dim: 173.5.0
From: ILL DEPT - ATT MICHAEL WORKER
6565 KILGOUR PLACE
DUBLIN OH 43017
RETURN SERVICE REQUESTED
TO: INTERLIBRARY LOAN DEPARTMENT
OCLC TRAINING
123 MAIN ST
RIVERSIDE IL 60604
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.
Article to patron

The article you requested is now available

Sent from OCLC WorldShare ILL on behalf of cosentim@oclc.org <donotreply@oclc.org>

To: Shelton, Luck

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

Expires: 10/23/2023

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/3yTkfJy0hK

Use this case-sensitive password: 7B32FvDB

Borrower: WSTPO

Request ID: 711322257

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: 211322257
Request Status: In Transit
Request Date: 23 December 2021
Sentinel Req: NONE
Desired Due Date: No Date

Request Type: corr
OCLC Number: 236577110
Borrower: WSTFD
Lender: WSTPO
Need Before Date: 23 January 2022

Bibliographic Information:
Title: Verniana
Language: eng
ISSN: 1565-6872
Imprint: Haifa:
4. STATISTICS REPORTS

stats@oclc.org

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

Interlibrary Loan Home

Search for requests
Request ID

Quick Links
Borrowing:

AE Alert (9)
Produced (79)
In Transit (39)
Received (27)
Unfilled (6)
Received

Lending:

Can You Supply? (14)
Considering - Copies (3)
Considering - Loans (11)
Supplied
Not Received (1)
Overdue (40)

Other:

OCLC Policies Directory
OCLC Service Configuration
OCLC Usage Statistics
OCLC User Community
Resource Sharing News
Statistics reports

Select the report

- Resource Sharing Borrower Reasons For No Report
- Resource Sharing Lender Reasons For No Report
- Borrower Resource Sharing Stats Report
- Lender Resource Sharing Stats Report
- Strategic Union List Report
- Borrower Activity Overview Report
- Borrower Transaction-Level Detail Report
- eSerials Requests by Journal Title Report
- Serials Request Overview Report
- Copyright Compliance Payment Report
## Statistics reports

### Resource Sharing Borrower Reasons For No Report

**Reporting Period:** December 2021  
**Institution:** OCLC Eastern Training - TPU (Beta)  
**Symbol:** WSTPU

<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 SOCIETIES</td>
<td>357092200</td>
<td></td>
<td>1997</td>
<td></td>
<td>WSTPV</td>
<td>OCLC Eastern Training-TPU (Beta)</td>
<td>AGED TO EXPIRED</td>
<td>12/1/2021</td>
</tr>
<tr>
<td>1</td>
<td>211201047</td>
<td></td>
<td>THE SEVEN HUSBANDS OF EVELYN HUGO A NOVEL</td>
<td>957007786</td>
<td></td>
<td>2017</td>
<td></td>
<td>WSTPV</td>
<td>OCLC Eastern Training-TPU (Beta)</td>
<td>AGED TO UNFILED</td>
<td>12/27/2021</td>
</tr>
<tr>
<td>1</td>
<td>211234689</td>
<td></td>
<td>ABBEY ROAD</td>
<td>20389812</td>
<td></td>
<td>1987</td>
<td></td>
<td>WSTPV</td>
<td>OCLC Eastern Training-TPU (Beta)</td>
<td>AUTO. DEFLECTION: FORMAT TYPE</td>
<td>12/14/2021</td>
</tr>
<tr>
<td>1</td>
<td>211234891</td>
<td></td>
<td>THE CODE BREAKER : JENNIFER DOUDNA, GENE</td>
<td>1187220557</td>
<td></td>
<td>2021</td>
<td></td>
<td>WSTPV</td>
<td>OCLC Eastern Training-TPU (Beta)</td>
<td>AGED TO EXPIRED</td>
<td>12/23/2021</td>
</tr>
</tbody>
</table>

Select the month and export the report to Excel or send it to your email address.
The **four** topics...

- The basics of WorldShare ILL
- Why prepare for WorldShare ILL
- How to create and manage requests
- How statistics reports can help
Support, Documentation & Tutorials

https://help.oclc.org
Congratulations! You completed Introduction to WorldShare ILL Training!
Thank You!

Please remember to fill out the evaluation for this class

- Date: 10/25/2023
- Instructor: Lucia Shelton
- Category: Resource Sharing and Delivery
- Class name: Introduction to WorldShare Interlibrary Loan

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