WorldShare® Interlibrary Loan: Borrowing

Lucia Shelton
OCLC Member Education
In this course you will learn…

- Basics of WSILL Borrowing
- Submit requests as a Borrowing Library
  - Including patron-initiated requests (Discovery tool)
- Manage requests as a Borrowing Library
  - Including batch processing options & issues
- Generate statistics reports

Documentation & Support
1- BASICS OF WSILL BORROWING
The three ILL request methods

- **Staff-Initiated, staff-Mediated**
- **Patron-Initiated, staff-Mediated**
- **Patron-Initiated, unmediated**

- **Susan**
  Librarian

- **Preston**
  Library patron

- **Paula**
  Library patron
1. Staff-initiated/staff-mediated method

Requests processed by staff directly from the WorldShare ILL interface

Susan Librarian
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
L • Shipped/InTransit
B • Receives Item
B • Received/InUse
B • Returns item
B • Returned
L • Checked In/Complete
L • Closed
```

Copy Request

```
B Creates Copy Request
L • Yes
L • Shipped/InTransit
B • Receives Item
B • Closed

No Due Date on Copy requests
```
2- SUBMIT REQUESTS AS A BORROWING LIBRARY

Staff–Initiated, staff-Mediated

Susan Librarian
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
Searching

- Basic search
- Advanced search
- Expert search (maps, scores, articles)
Loan request

NOVEMBER 1918: triumph and tragedy in the final days of WW1

Author: GORDON BROOK-SHEPHERD

Summary: "The account of the Great War portrayed in this book spans the last hundred days of the conflict: from the surprise blow struck by the British at Amiens on 8 August, down to the signing of

Show more ▼

Print Book. English, 2018
Publisher: BLOOMSBURY READER, [S.I.], 2018

Copy request

Functional Ecology

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

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

1Department of Biology, University of St. Thomas, St. Paul, Minnesota 55105, USA; and 2Department of Integrative Biology, Oklahoma State University, Stillwater, Oklahoma 74078, USA
2. Patron-initiated/staff-mediated method

PatronRequest Form linked from your Discovery tool, which sends request to a queue for staff review.

Preston
Library patron
New For Review

Not Reviewed - not seen by your staff.

Reviewed – seen or created by your staff.

Patron–Initiated, staff - Mediated

Preston
Library patron
3. Patron-initiated/unmediated method

Automated system review where patron requests bypass staff review and go directly to lenders.

Paula
Library patron
ILL requesting configurations

OCLC Service Configuration
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.

How to create Constant Data
How to create Custom holdings

All 3 ILL request methods

Automated Request Manager self-paced training

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 are set in WorldCat

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

- Main Automations
  - Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

Purchase Options
Patron Request Workflows
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.
SUBMIT REQUESTS AS A PATRON

Patron–Initiated, staff - Mediated

Preston
Library patron

Patron–Initiated, unmediated

Paula
Library patron
WorldCat Discovery - Patron ILL request

Patron–Initiated, staff - Mediated

Preston
Library patron

Patron–Initiated, unmediated

Paula
Library patron
Patron workform

Workform 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>DateRequested</th>
<th>NeedBefore</th>
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<tbody>
<tr>
<td>1800120197</td>
<td>Not Reviewed</td>
<td></td>
<td>The Yellow River /</td>
<td>Rohrstein,</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Richard</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1799699999</td>
<td>Not Reviewed</td>
<td></td>
<td>Journal of the American</td>
<td>Morgan,</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Chemical Society</td>
<td>Mary</td>
<td></td>
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</table>

Patron ILL request displays in WorldShare ILL
New For Review > Not Reviewed status
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
3. MANAGE REQUESTS AS A BORROWING LIBRARY
Manage Requests as a Borrower

1. Respond to conditional (up to 4 days to respond)
2. Receive items in batch (loan and copy)
3. Request renewal
4. Return items in batch (loan)
5. Multiple copies of item workflow (linked requests)
6. Unfilled requests
7. Expired requests
Managing Off-System Requests

For requests with libraries not participating in WorldShare ILL

The Off-system borrowing queue

Off-system for Borrowing.
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

The system displays the request in off-system format
4. STATISTICS REPORTS
Reports for Borrowers

Search for requests
Request ID
Go
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
The four topics…

1. Basics of WSILL Borrowing ✓
2. Submit requests as a Borrowing Library ✓
3. Manage requests as a Borrowing Library ✓
4. Generate statistics reports ✓
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

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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 6560 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1 614-764-6009</td>
</tr>
<tr>
<td>Australia and New Zealand</td>
<td>OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU</td>
<td>+61 (0) 3 9929 0800</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States 6560 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1 614 795-8662</td>
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Congratulations! You completed WorldShare ILL Borrowing training!
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: January 18, 2024

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