Introduction to WorldShare® Interlibrary Loan

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OCLC Member Education
In this course you will learn...

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

Documentation & Support
1- BASICS OF WORLDSHARE ILL
Built around the WorldCat database

WorldCat is the world’s most comprehensive database of information about library collections. OCLC delivers quality, discoverability and value. Member libraries provide the foundation. Partners support WorldCat growth.

WorldCat is filled with millions of popular and unique items.

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 is a request submitted electronically in WorldShare ILL by staff?

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

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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
Accessing WorldShare ILL – new staff

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>
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<tbody>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
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<tr>
<td>Author ad-hoc reports in the analytics environment (Tipasa only)</td>
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<tr>
<td>Can use OCLC Service Configuration.</td>
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<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
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<tr>
<td>Delete users.</td>
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<tr>
<td>Perform all operations, including assigning roles to users.</td>
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<table>
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<tr>
<th>Roles</th>
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<tr>
<td>WorldShare ILL Admin</td>
</tr>
<tr>
<td>WorldShare ILL User</td>
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- x indicates the role is available for the corresponding user type.
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**
2. Speed up processing - Create Constant Data

Created in **OCLC Service Configuration**
3. Speed up processing - Custom Holdings

Provides a way to organize and prioritize lenders based on reciprocal arrangements, geographic location, and special services.

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<th></th>
<th>EASTFREE</th>
<th>STATEFREE</th>
<th>CITYFREE</th>
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<tr>
<td>Symbols</td>
<td>• 590</td>
<td>• 56</td>
<td>• 24</td>
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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

1. Display groups: by group name, by symbol
2. Enter symbol: CGA
3. In my group

- 10COPIESCH: Yes
- 1CTFREE: Yes
- 1FREEPA: Yes
- 1OHHFREE: Yes
- 2CTFREE: Yes
Deleting Custom Holdings Groups

Attempting to delete a Custom Holdings Group that is used in a Custom Holdings Path will product the following error:

```
1. Remove Group from Path(s) OR Delete Path(s) where referenced
2. Then, delete the Group
```
OCLC Service Configuration

Automated Request Manager

• 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 Constant Data
How to create Custom holdings

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 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 will be performed.
IFM – Interlibrary Loan Fee Management

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

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

[Image of the IFM preference workform with highlighted sections]
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 ILL REQUESTS

Overview
Deflection

Requests sent to lenders with deflection policies will be automatically declined and moved to next lender on the string according to the policies.
The colors of nature: culture, identity, and the natural world

Authors: Alison Hawthorne Deming, Lauren E. Savoy

Summary: From African American to Asian American, indigenous to immigrant, "multiracial" to "mixed blood," the diversity of cultures in today's world is reflected in our

Print Book, English, 2011
Edition: Rev. ed
Publisher: Milkweed Editions, Minneapolis, Minn., 2011

Verniana
Jules Verne Studies/Études Jules Verne

Verne's Forgotten, Youthful Swashbuckler

Brian Taves
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
Process 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.
4. STATISTICS REPORTS

support@oclc.org

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

Interlibrary Loan Home

Quick Links

Borrowing:
- AE Alert (9)
- Produced (75)
  - In Transit (50)
  - Received (27)
- Unfiled (4)
- 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 Newswire
- Resource Sharing News
Statistics reports

Select the report
Statistics reports

Resource Sharing Borrower Reasons For No Report

Select the month

Export it to Excel or send it to your email address.
After you configure the email address(es) to receive the reports automatically every month.

WSTPU -- The report (Borrower Activity Overview Report -- Institution 20231101)
The four topics…

- The basics of WorldShare ILL
- Why prepare for WorldShare ILL
- How to create and manage requests
- How statistics reports can help
Congratulations! You completed Introduction to WorldShare ILL Training!
Thank You!

Please remember to fill out the evaluation for this class

- Date: 02/15/2024
- Instructor: Lucia Shelton
- Category: Resource Sharing and Delivery
- Class name: Introduction to WorldShare Interlibrary Loan

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