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**
  - Susan Librarian

- **Patron-Initiated, staff-Mediated**
  - Preston Library patron

- **Patron-Initiated, unmediated**
  - Paula Library patron
Automated Request Manager

- OCLC Service Configuration

**Automated Request Manager**

- **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 applied to a request.

**All 3 ILL request methods**

- 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.
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

Automation options

Staff–Initiated, staff-Mediated

Susan Librarian
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
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

Automation options

Staff-Initiated, staff-Mediated

Susan Librarian
Searching

- Basic search
- Advanced search
- Expert search (maps, scores, articles)
A few beautiful minutes: experiencing a solar eclipse

Authors: Kate Allen Fox (Author), Khoa Le (Illustrator)

Summary: "Sky gazers experience a total solar eclipse in this descriptive picture book about the wonders of this phenomenon"— Provided by publisher

Print Book, English, 2023
Edition: First edition
Publisher: Little, Brown and Company, New York, 2023

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
2. Patron-initiated/staff-mediated method

Patron Request 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.

Preston
Library patron

Patron–Initiated, staff - Mediated
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

Interlibrary Loan Home

Search for requests

Quick Links

Borrowing:
AE Alert (9)
Produced (79)
In Transit (83)
Received (71)
Unfilled (6)
Received

Lending:
Can You Supply? (14)
Considering - Copies (3)
Considering - Loans (11)
Supplied
Not Received (1)
Overdue (46)

Other:
OCLC Policies Directory
OCLC Service Configuration
OCLC Resource Sharing
OCLC Article Exchange
Resource Sharing News
Configuring ILL for 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

How to configure OpenURL
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

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  - 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 applied to a request.

Interlibrary Loan Options
Borrower Data
Lender Data
Custom Holdings Groups
Custom Holdings Paths
Purchase Options
Patron Request Workforms

How to create Custom holdings

How to create Constant Data
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

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

- Not Reviewed - not seen by your staff.
- Reviewed - seen or created by your staff.

Patron-Initiated, staff Mediated
New for Review

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
4. STATISTICS REPORTS
Reports for Borrowers

Search for requests
Request ID

Quick Links
Borrowing:
AE Alert (2)
Produced (23)
Conditional (1)
In Transit (16)
Received (2) (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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OCLC Support
On Status Dashboard
Contact OCLC Support
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: April 11, 2024

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