May 9, 2024

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

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

<table>
<thead>
<tr>
<th>STATE</th>
<th>LOCATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH</td>
<td>AKR amhl1 APL BGU bsc CAU CLE CUL DMM DUE gmpmt KSU MAL mecdc MRC MSC MOR OBE ocp OCT OFA ofp OHG OMI OMM osd OSU OTC OXBB SDL tlm UAP wadpl WPL WSU</td>
</tr>
<tr>
<td>AK</td>
<td>AKFNS AKLPS Q2L q2t Q2V Q2Y UAF x08 xy4 XYZ xZ$ xZU Y4Z</td>
</tr>
<tr>
<td>AL</td>
<td>ABF ABJ ACM AD0 alScw ALEPL ALFLP ALM ALOXF AMP ANO MBG MWD MXB RED</td>
</tr>
<tr>
<td>AR</td>
<td>AJP AKC APP AVR BMQ F5M HOT RC8 RL9 RPB</td>
</tr>
<tr>
<td>AZ</td>
<td>AZD AZH AZU CGPIL FV6 FX8 GCO H06 MCZ MCT MSA MV8 N8V PMD POR PR# SVZ YFL ZPT ZZC</td>
</tr>
<tr>
<td>CA</td>
<td>## ALH asr BVT ctbts CBC cc8 CCI CCR CCS CCT CCX CCY CDU CDR CFS CGD CFG CGI CGL CHU cjl ckv CPA CPD CPE crg CRU CSG CSL css CUU CVU CVY CVP DAC EHU fad FUP GAVCL GH0 HAY HBL HDC lry JQf JQf jQf JQL JQR JQS jqz JRB jrd jrf JRG JHR JRL jrn JQJ JRS JRT jta JTD JTE jtf JTH JTL JTV jtw KCL LC0 Lpcil lyt MSQ M#B MB@ MCF mcX MERUC MMR MMS mtj mVp MXX MLX ONT ORK pkO Pax sj2 SMp smx SOU SPA STQ SXQ TCB tpk TSL upl \V1 WEM YOL</td>
</tr>
<tr>
<td>CO</td>
<td>bvy ccldf C0A C0P CQA daj dpV DVN E3V fiu HEV HFU lmi Q03 SQS sx8</td>
</tr>
<tr>
<td>CT</td>
<td>bib bpt cke ctbms CTD CTL CTW FAU gfp gJL gjt gkv glu gme gnu goy GPR gqt GTA gjv gyv gvw gyb HUS MCP MH# NCV nhp pss STJ TNX YTC XOD YUS</td>
</tr>
<tr>
<td>DC</td>
<td>DDU DGU dwp GQ6</td>
</tr>
</tbody>
</table>
How does it work?

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
  - L Shipped/InTransit
- B Receives Item
  - B Received/InUse
- B Returns item
  - L 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- PREPARING FOR ILL

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

Created in OCLC Service Configuration

How to create Constant Data
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

How to create Custom holdings

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. Custom Holdings Group:
   - 10COPIESCH: Yes
   - 1CTFREE: Yes
   - 1FREELPA: Yes
   - 1HFREE: Yes
   - 2CTFREE: Yes

In my group:
- Yes
- No
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
Automated Request Manager

- OCLC Service Configuration

**Automation self-paced training**

**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 trigger.
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)
4. Make OPAC visible – Update WorldCat Registry

List of lenders, some with links back to their OPACs

[Image of a screenshot showing a library's online catalog with links to other libraries.]

Link to your library’s OPAC
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
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 loan 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
Statistics reports

Select the report
Statistics reports

Select the month

Export it to Excel or send it to your email address.
Statistics reports – automatically sent after you configure the email address(es) to receive the reports automatically every month.
The **four** topics...

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

Please remember to fill out the evaluation for this class

- Date: 05/09/2024
- Instructor: Lucia Shelton
- Category: Resource Sharing and Delivery
- Class name: Introduction to WorldShare Interlibrary Loan

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