Welcome to Borrower off system ILL requests

off system ILL requests are those requests initiated outside of WorldShare ILL that you can bring into the system to take advantage of managing all your ILL requests in one place and making those requests part of the supported usage reports.

The first step is to configure your ILL Partners in the OCLC Service configuration under WorldShare ILL category then Address book for you to refer to them when adding off system requests to WorldShare ILL.

Let's see how you can configure your partners and then add those requests to the system for you to manage them.
This is the WorldShare ILL homepage the easiest way to access the OCLC Service configuration to configure your partners is clicking the respective link in the middle section under Other.

Now you are in the OCLC Service configuration you need admin role in your WorldShare ILL account to be able to use this piece of the service because you are configuring for your library and not for your account only to configure your partner on the left side panel click WorldShare ILL then Address book select Partners tab.

To add a new partner click the Add Partner button located on the upper right side keep the active box checked then complete the form with your partner information the symbol field
can be completed using the institution well-known symbol or you can create one with three to 20 characters in length and using valid characters. This symbol cannot be changed after creation.

Symbol is a required field. The ILL email is a required field as well, enter this information.

Define the role borrower and lender, borrower, or lender, then select the Days to respond for copy and Days to respond for loan.

The online catalog link field is optional. Continue completing the form with the information about your partner such as locale, shipping address, billing address, return address, contact address, add any notes you find useful, then click the create button located on the lower right side of the screen. Your partner is then added to the system.
you can click your partner's name to open
the record in case you need to update any
information

Now that you have your partners configured

you can add the requests created outside of
WorldShare ILL into the system

to add a request first search for the item
on the left side panel under Discover items

you can perform a basic search selecting one
of the available indexes options and entering

the term or an advanced search where you can
find more indexes options and can combine

the indexes using the Boolean operators and
or or not

For this example let's search using basic
search and using a unique information such

as ISBN and entering the
term and click search then you select the
appropriated bibliographic record and click the create request button located on the right

now you click the save for review button your request is on the left side panel under borrowing requests in the category of new for review with the reviewed status click the ID or the title to open your request apply your constant data complete any information such as your Patron information then click the change fulfillment type to off system request select your partner from your configured Partners all the information comes from the configuration confirm the need before date you can change using the calendar icon click save button and now your request is added to the off system and you can find your request when you need to manage your request you find it on the left side panel
under off system request borrowing

You click to open your request and you can
use the drop down arrow next to change status

button to update your request accordingly
and now your request is part of the supported

ILL usage reports as well you can find more
documentation on this topic and contact OCLC

support at help.oclc.org.

Thanks for watching!