Configuring Patron-initiated requests for WorldCat Discovery transcripts

Welcome to Configure patron-initiated ILL request for WorldCat Discovery.

Today you will learn how to configure patron-initiated requests for WorldCat Discovery if your library subscribes to this service. Then you will learn how to contact OCLC Support and find more training materials and documentation.

Patron-initiated ILL request allows your patrons to search and identify items, then initiate requests for those materials without the assistance of your library staff.

Some of the benefits of patron initiated requesting:

It empowers library users by letting them participate in the request process.

library staff then spend less time searching for and submitting requests on behalf of their users.

And, if your library has a large volume of ILL requests, this means less amount of time spent searching for and submitting requests on behalf of patrons.

There are two parts to the request process- the initiation of the request, and the processing, or mediation, of the request.

WorldShare ILL can accommodate combinations of both request methods:

A request that is initiated and processed by library staff directly in the WorldShare ILL interface is known as a Staff-initiated, Staff-mediated request.

A request that is submitted electronically by a patron, either via the Patron Request Form, or from a blank form, that is then reviewed and processed in WorldShare ILL by a staff member at the library, is said to be a patron-initiated, staff mediated request.

The last combination of request process is a request submitted electronically by a patron, which is then fully filtered through the Automated Request Manager according to your library configurations in the system to be automatically sent to lenders.

This is said to be a patron-initiated, unmediated request, since Borrowing library staff technically do not have to process the request until it has been filled by a lender. OCLC offers documentation on Automated Request Manager which can be configured for all 3 methods.

In this video, we will focus on in the middle, the Patron-Initiated, Staff Mediated method of processing requests using WorldCat Discovery.

The major steps in the workflow for a Patron-Initiated, Staff Mediated request are:

The first step involves a patron searching their library online catalog to find an item they are looking for.

The second step refers to the Request Item button or link that a patron will click on once they find an item in the online catalog.
The third step refers to the patron filling out and submitting the Patron Request Form.

Once the patron submits the request, the system sends the request to the Borrowing library’s WorldShare ILL queue— the category of requests known as “New for Review”. Libraries using Resource Sharing for Groups, when doing ILL within the group the requests go directly to lenders unless libraries prefer to manage the requests under the “New for Review” queue.

From there, the Borrowing library can verify the citation submitted by the patron, choose the lenders they would like to request the item from, and submit the request to them.

Then the lending library will review the request and answer.

So, let’s see how things work using WorldCat Discovery as the discovery tool and how to configure patron-initiated request for WorldCat Discovery.

The first step is to configure WorldCat Discovery to enable patron-initiated ILL requesting. This is done in OCLC Service Configuration. When using WorldCat Discovery, patrons will achieve access to the Patron ILL Request form via IP Address recognition.

Library staff can manage the IP addresses for WorldCat Discovery.

The next step in the workflow involves [Click] configuring the Request Item button.

Lastly, the Patron Request form that patrons will fill out, and can be edited under WorldShare ILL option.

Let’s talk about patron ILL access for WorldCat Discovery first.

In WorldCat Discovery, the patron must be authenticated, either via IP range or through remote authentication (and thus still within IP range) to access the patron request form. IP addresses are configured in OCLC Service Configuration

After logging in to OCLC Service Configuration, you can manage your IP Addresses for WorldCat Discovery. First click WorldCat Discovery on the left side panel, then IP Addresses and Manage IP Addresses, and [Click] click the add/Remove or Bulk Entry buttons to add or edit your library’s IP range then select the IP address range attributes such as your library’s authorization, institution symbol and product to be WorldCat Discovery.

Next, you configure the Request Item button in WorldCat Discovery.

The default text on the button itself always reads “Request Item” – that text can be customized.

If your library uses WMS (WorldShare Management System) and/or has Availability configured for WCD, you can configure when the ILL request button appears. For example, depending on whether you have holdings on an item, you may have the button appear or not appear.

The same goes for the format of items - if you want to limit whether certain items can be requested over ILL, you may control whether the button displays for a DVD, or a map, ebook, for example.

OCLC Service Configuration is where the Request Item button is configured.
You can configure the display of the Request Item button from the OCLC Service Configuration on the left panel click WorldCat Discovery then [Click]Place Hold/Request Buttons. Click Resource Sharing accordion to expand it. The text for the button label is customizable and you can add translation.

Define the type of button to be OpenURL 1.0. OpenURL is a base URL that links bibliographic information to related web services, in this case WSILL. OpenURL is used to direct your patrons to WorldShare ILL patron form when placing ILL requests and it populates that form with bibliographic information.

Then click save changes button on the lower right side for the system to retain the information and make the button available in your discovery tool to allow patrons to initiate ILL requests from there.

OCLC provides instructions in how to configure OpenURL from help.oclc.org typing “configure open url” on the search box.

OpenURL is configured in OCLC Service Configuration under OpenURL Resolvers then Manage Resolvers and click “Create Resolver” to populate the information about your institution ten save it.

If you have the Availability add-on for WorldCat Discovery Services or your library uses WMS, you have the option to further refine when to display the Request Item button. This is done in the OCLC Service Configuration under WorldCat Discovery and OPAC Statuses option.

Level 4 Fulfillment represents Interlibrary Loan. In this example, note that if a status is available (on the shelf) in my library, the ILL button will NOT display. Level 1 is for the Hold button.

Discuss why staff would want to use Discovery for searching rather than Discover Items in WorldShare ILL. Discovery has access to the full central index and is able to transfer article citations into the ILL workform.

The last step in submitting a request in WorldCat Discovery is filling out and submitting the Discovery Patron Request form.

There is a default form available in the system. The default form will appear when the Request Item button is clicked on if a user is within the institution’s IP Address range, Patron requests can be edited and customized. Libraries using WorldShare Management Service (WMS) can integrate Circulation and ILL but then the Patron ID must be a required field on the form for this to work.

The Patron Request form can be edited in OCLC Service Configuration. On the left side panel click WorldShare ILL then click Request Forms

When on the patron request form, you will notice the url on the upper right side. This is your unique url that can be used to make a blank form available for your patron to request ILL from, as an option.

Your library receives a default patron request form that can be edited at any time. It’s important to maintain the Bibliographic Section as it is as this will allow the system to automatically populate these fields on the request form. While editing the patron section on the request form, you can
make any field required and/or editable. You can eliminate any field by clicking the x radio button next to the field.

You can remove any extra patron section by clicking the Remove a Section button on the upper right side of the section or change the order of the section by clicking the arrow on the upper right side of the section.

You can also change the title of each field under the Patron Section by clicking the dropdown arrow next to it and selecting the new title from the menu. When you do that the Field Label and Field Values information change accordingly. You can also add additional fields to any section. Libraries using WorldShare Management System (or WMS) and integrating Circulation with ILL must mark the Patron ID field under the Patron Section as required information. Remember to save your form after you finish.

Then when your patron searches and finds an item in WorldCat Discovery that is not part of your library’s collection, your patron can click the ILL request button and find the patron workform to fill out, where the highlighted fields are fields your library has configured as required fields and patron must complete those fields then submit the request.

The request would move to your New for Review status in WorldShare ILL if staff mediated or would be fulfilled directly to patron if unmediated. Libraries using Resource Sharing for Groups, when doing ILL within the group, the request can either move to New for Review queue or be sent to lenders according to your library’s configuration.

You can find more documentation on this topic, including configurations and automation options and contact OCLC Support at help.oclc.org. Thanks for watching!