New for Review ILL requests transcripts

Hi.

Welcome to New for Review ILL requests.

New for Review is a category in your interlibrary loan service under the Borrowing option with

the status of Not Reviewed what means requests initiated by your patron through a patron

form in FirstSearch, WorldCat Discovery, D2D or any other supported discovery tool then

routed to the system but not seen by your staff yet.

These requests need to be reviewed and approved by your library before they are sent to potential lenders.

Another status is Reviewed what means, a request seen and approved by your staff but not sent
to lenders yet or created by your staff using the Save for Review button.

These requests need to be completed and sent to lenders.

Let's start with New for Review Not Reviewed, the requests initiated by your patron.

Patron-initiated requests require further configurations.

We offer videos and documentation on how to configure patron-initiated requests at help.oclc.org.

Tom is a patron at his local library, and he needs to request this book title.

Tom will start by searching his library's online catalog using a discovery tool such as WorldCat Discovery, FirstSearch, D2D, or any other supported discovery tool according to his library.
If the item is not part of his library’s collection, then in any of these discovery tool options, Tom will reach a patron form to request the item through interlibrary loan.

Let’s see an example using WorldCat Discovery for you to have an idea of the process which is similar in any discovery tool since it involves searching and finding the item then reaching the patron ILL form.

First Tom needs to be authenticated to be able to initiate ILL requests.

In this example, Tom starts searching for the item using WorldCat Discovery finds the item but he notices that the item is not part of his library’s collection.

Then Tom clicks to see the item detail where he finds the button or link to access the
patron ILL form which is populated with the bibliographic information for that item.

Tom completes and submits the ILL form then receives the confirmation that the ILL request was sent to his library.

After Tom initiates the ILL request using any supported discovery tool, the request lands in his library's OCLC interlibrary loan service, in this example, WorldShare ILL under the category Borrowing Requests with the status New for Review- Not Reviewed,

for a staff member at the library to process it.

Library staff then clicks to open the ILL request and reviews the information.

At this point, if automation was configured for your library, then it would be applied.
to the request according to your configurations
or library staff can click the Send to Automation

button depending on your workflows.

If your library has not configured automation
then you need to manually apply constant data,

then use the View holdings link to populate
your lender string using custom holdings or

by selecting lenders from the list below.

We offer documentation in how to configure
automation at help.oclc.org.

Then you can send the request to lenders.

After a lending library answers your request,
you find it in your Borrowing requests category

on the left side panel under the In Transit
status.

For physical items, when item arrives, you
click the request to open it, either the ID
or the title then update the request- mark
as received and now your request is in your

Borrowing request category under Received-in-use
status and you can make the item available
to your patron.

When the item is for a copy request and it's
supplied using Article Exchange, then you
can email the unique url and password for
the document to your patron and update the
request- mark as received.

In this situation the request would be automatically
closed because there's nothing to be returned
to the owner.

Another status under New for Review is Reviewed.

This is a situation that instead of processing
the request directly from the Not Reviewed
status or when creating a request, library staff at the borrowing library mark the request as “Save for Review”.

There are two options why a library would use the Save for Review button: when a library staff member or worker student or intern is either initiating requests or reviewing patron-initiated requests for other library staff member to check before the requests are sent to potential lenders.

Let’s see an example with Mary who is a worker student working at the library supporting interlibrary loan activities.

Mary has initiated a request for the book title or is approving a request initiated by a patron.
Mary can create a request or open a patron-initiated request under the New for Review category under Not reviewed status.

If she is creating the request after she finishes working on the request, then she clicks the Save for Review button located on the upper left side of the screen.

If Mary is approving a patron-initiated request, then after checking the request she clicks the Mark as reviewed button located on the upper right side of the screen the request now moves to the New for Review category under Reviewed status for another librarian to proceed with the request, open it and send it to lenders.

Another situation is when the librarian needs to change the fulfillment option instead of
sending the request to lenders- Off-system for requests outside of WorldShare ILL, Open Access if item is freely available, or move to purchasing the item.

You can find more training materials and documentation, or you can contact OCLC Support at help.oclc.org.

Thanks for watching!