So hi everyone, I'm Lucia Shelton. I'm part of the member education team at OCLC, and today I'm facilitating your learning on borrowing, so welcome to our session. Please use the chat in case you stop seeing what I'm sharing, ok? I can see the chat here on my other monitor.

For those of you who are starting with the service and those of you who are refreshing your knowledge, I will guide you through the options you find available in the service for borrowing libraries. By the time you reach the end of this session, you will have learned about the best.
Practice for borrowing activities in the service. We are covering four topics.

- The basic concepts of borrowing activities in the service, 2nd, how you can easily create and submit requests and how you can allow your patrons to submit a LL request.

- How you can manage your ILL requests including the available batch processing options and to solve the issues you might encounter with your ILL requests. And finally, how you can generate reports to support your activities in WorldShare ILL.

- Well, and of course where you can access documentation and more training materials, we offer several short tutorial videos on topics related to WorldShare ILL. You can see that.
You can access that link. I'm putting the link on the chat. That's where you can access tutorial videos.

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So now let's start with topic number one, the basic concepts of world share ILL borrowing. There are three methods of requesting in world share ILL. Let me introduce you to our friends who will help you understand these three methods.

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So Susan is a library staff member responsible for ILL at her library and she will be using the staff initiated, staff mediated method. Preston is a library patron and he will be using the patron initiated unmediated method.

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Initiated, staff mediated method and Paula is a library patron too and she will be using the patron initiated unmediated method.
As a WorldShare ILL library, you have access to option to configure automation for all the three methods to speed up the processing of your ILL requests. Automation we will allow the system to automate some of the steps of the ILL processing according.

To your configured rules. If you have admin role in your account, then you can configure automation for your library. You will find the links to the documentation and short videos for the pieces to be configured and a self paced training.

And, how to configure automation.

On the copy of the presentation that I make available after this session. So automation saves you a lot of time. Let's start with the 1st method, the staff initiated staff mediated, so Susan.
Is a staff member at her library and her patron is asking her assistance to obtain an item not part of her library's collection. Susan will then use the staff initiated staff mediator method where she logs into the WorldShare

ILL interface and places an ILL request on behalf of her patron. Susan manages the request from when she creates that request until the item is supplied to the patron.

And later return to the owner in case of a physical item. That's why it's called the staff initiated staff mediated method. Susan will needed to follow the six steps in this scenario. 1st, she searches for the item in

The WorldCat database, then she selects the best bibliographic match for the item.
After that Susan has the lender string populated with the potential lenders. She applies the constant data with her library's information, completes that request, and finally submits the request. As I mentioned before, there are automation options to.

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  be configured for some of these steps.

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  So when Susan is creating the LL request, she needs to keep in mind that the request type defines the workflow of the request through the system, that way she will be able to manage the request in the proper way.

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  So the loan request for the physical item is initiated by the borrowing library. Then a lending library supplies that item. The borrowing library can manage that request until the item is returned and then the owner.
Completes that request when that item arrives at their library. The copy requests are initiated by the borrowing library, a lending library supplies that item and when the borrowing library receives.

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that copy, that electronic copy or the physical copy because there is nothing to be returned to the owner. When the borrowing library updates the system mark it as received, then the system automatically closes the request. And that’s why it's important to define which.

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  E.g., if Susan chooses the type to be copy instead of loan for a physical item, then she won't be able to manage that request because the request will be closed, she will have to work with the other library to solve that issue. And that's when.

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  automation can be very handy.
To avoid this type of mistake and then creating constant data as well. So this is the staff initiated, staff mediated method with our friend Susan, the library staff. Now let's explore, topic.

Number two a little bit to see how you can submit ILL requests in WorldShare ILL, in the staff initiated staff mediated method the same way our friend Susan, the library staff.

We will follow the six steps and see how to proceed when automation is configured. And I will explore the search options that we have available. So now e.g., imagine that you are at your library and like in Susan's

Situation, your patron needs your assistance requesting a print book and an article not part of your collection. You may gather as much information as possible, such as title, author, and format to use in staff initiated
Staff mediated ILL request method on behalf of your patron. So let's go live to check how this is done. Let me.

Share my browser here and go to my interface and show you how this is done.

Okay. So this is the.

Interface the home page. If you haven't seen this before, here on the upper right side of the screen where you see your username, this arrow language for you to change the language interface, these are the options.
You can change your password when you need it and this is where you can log out from the system at the end of the day. Need help, this arrow general help takes you to the documentation.

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Pages for you to check, the documentation regarding to the area you you are at. Contact support for you to contact OCLC support if you need assistance and community center for you to access a page where you can be in contact, be in touch.

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With other libraries using this service, you can participate in discussions. You can start your own discussions to share your experience or your doubts. You can learn about new releases, events, and you can also send the.

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Ideas for enhancements, things that are not part of the service yet, and our product team, they have access to that page. Here on the left side panel, this is where you can start to manage your requests in the middle section.

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You can search for active or closed request using one of the available index options and below quick links, these are very similar options as you can see on the left side panel. And here on the other.

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Is where you can access the other pieces of the service. So let's start with the book 1st, the physical item, the loan request, and you start here under discover items.

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And under discovery items you have three options for searching. You have the basic search where you can search WorldCat database or your library holdings, and then you have these index options.

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And enter your term. You can also use the expert search using the Worldcat index options, and here in this.

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And question mark, that's where you can find the link to the indexes, and you can enter the indexes, like e.g., I can enter for the subject.
And this is for when you are searching for specific items, the boolean operator, the format, I'm searching for.

Musical scores, and the year, then search.

Then you can easily get to your results or e.g. you want to search for specific items from a specific library, you can use the expert search. And you can also use the advanced search where you are searching.

WorldCat database or your library holdings. You have more options in the indexes.
You can combine up to five types of indexes using the Boolean operators and or or not whenever you are excluding one of the indexes, and you have more qualifiers here.

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For the format, language, and the source of cataloging as well, and for you to filter your search. Ah we will start with the advanced search.

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With title, and the author you can enter the author last name, the full name or, or.

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Just the last name in any order and the system can find it, the format. So the more information you added here, the more you are filtering your search.

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Search, and then search. And this is the result page. The relevance is by the largest number of libraries owning the item, but you can change the relevance.
This icon next to the title gives you a brief bibliographic information about the item, the search for versions with the same title and author, it shows you the same title, same author in different formats.

Okay.

And if you have configured automation, then the one thing that you have to do after you select your bibliographic record is to click this Create Request button on the right, and then the system will take care of adding all the automation.

Related the options like your constant data with your library information and the list of lenders.

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As well, because I don't have that option here, then I have to manually select that option. So let's go back to my result here and I can click in one of the options in the middle because I don't have the automation configured.

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And when you don't have the automation configured then you every time you are creating a request you have to do all these steps. 1st of all, here on the bottom you see the list of libraries that own that item.

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And, you see, the supplier column, it tells you if the library's supplying in the system or not. If you don't see the yes, you cannot add that library to your lender string, and you have the days to respond.

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And the cost is involved and if they accept the payment through IFM with the payment through OCLC account. You can sort the supplier column.
And, this icon next to the library’s name takes you to the policies directory for you to check the policies. And when you see the hyperlinked name, it means that you can check the online catalog to.

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Check the availability for that item.

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So, because you don't have created your list of preferred landers or any automation, every time you're creating a request you have to do all this research and then click on the YES link to add those.

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symbols to your lender string up to 15. If you have created your list of preferred lenders or custom holdings groups, then you can select from here.

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And the custom holding groups what does the system automatically go through your list of lenders and select those that own that item to randomly populate your lender string with up to.
Preferred lenders. You can also request multiple items, e.g., for book club, the same customer wants several copies of the same title, and you can.

Either select the lender string from the list of owners or if you have created your customer holdings groups, you can click on go and the system will automatically populate, your lender string. Each.

Request, each copy is turned into individual ILL request with an individual ID number and this is to speed up the processing so you can receive the copies about the same time and.

You can.
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Manage those requests individually and return them in different times as well. So let's go back to one. Clear this. I'm gonna send this request, then after you populated your string, then create request and

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Apply your constant data

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So automation would take care of all of this. And then you see the type of request is coming from the constant data. The need before date you can change using the calendar is coming, it's coming from the.

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The constant data, but you can change that.

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And the list of libraries from your string, all the information about your library coming from the constant data, including the maximum cost which is very important, even if it's zero, you need to populate this field otherwise you are accepting.

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Whatever charges the lender is sending for that request, so you don't want to deal with that. Then you can enter your patron information. The other library won't have access to this information.

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The patron barcode and the email, and everything is completed, then you can send this request.

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And the system, the system creates this ID number that you can use to manage your request, so you can search for this request, e.g..

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Oh, give me a 2nd, so this is the request, is under submitted at this point before.
Any library answers to your request, you can add a note, you can edit anything here. Let me just, just give me a 2nd.

Okay give me a 2nd that's timed out on the system.

Okay, uh.

Okay, uh.

Okay, let me go back and search for that.
Requests again, so before any library answers to your request, then you can edit any field here, I can change, e.g., the need before date.

And save it. You can add a note, like this is an internal note for other staff in your library to know why you're still working in this request or you can cancel your request.

Your request will be here under borrowing requests accordion on the left side panel. Under awaiting response, this is your request submitted. You can manage from here as well.

The other library has, three options. The library can answer NO, and the request moves to the next lender and the lender string. The library can answer conditional and your request goes under conditional.
Or the library can answer yes and supply your request, your request to be in transit, so your request to be here in transit. You can see when the material was shipped to your library.

And, you have two options here. You can either mark as received if the item has arrived at your library or if you haven't received the item, you can mark as not received. Your request goes under the not received status. The other library will.

See that and then you can use this email.

button on the upper right side of the screen to communicate with the other library to solve this issue. So let's mark this as received. You can mark to print the book straps if you provide this with the material for your patron. So I marked this as received.
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Now your request moved from the in transit to received in use. This is your request. You have three options here. Lost is when, the material was damaged or lost.

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By your patron or in your library, so you can mark as lost. The request moves to received but missing status to be solved with the other library. You can request renewal if your patron needs more time with that.

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Yeah.

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If the material is ready to be returned, then you can return that item and you can mark to print return labels and return, and then you can find your labels.

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Your book straps here in your print queue on the left side panel, so it will be the book straps will be here and the return labels, you can.

Print multiple labels at a time. You can select the options you want in your labels. The paper size comes from the configuration. You can define the position where you want to start printing. I can change this, e.g..

Then print your shipping labels to attach to the item and return that item. So this is how Susan can create and manage the physical item. Like e.g., if she needs to create a copy request.
As for that article, then she'll go under discover items and she can search at item level using the advanced search option and select the format as article. But because many libraries they catalog at journal level, you have.

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Have more chances if you are searching at the journal level. So let's use the ISSN.

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So this is the item I'm looking for. It's the same thing, the relevance you can change the icon bibliographic information and the other versions. So you can also use the automation and start creating these requests directly from the create record.

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button.

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Everything is very similar. You can use these options as well if you don't have automation configured and you can apply a custom holdings path. This will be for copy.
And because I'm searching at journal level I need to provide the information. You see this magnifying glass icon takes you back to the search results and this view holdings link takes you back to the lender string in case you need to change that.

So the information coming from the constant data, and I need to add the additional information for this journal, I have the name of the article.

I have the auto, and I have the date, and the need before date, you can use the calendar to change as well.

Then eh, I can add my patron information and email and then I can send this request.
And the same way the system creates this ID number that you can manage from this number or you can start managing. I'm gonna close all these tabs here. You can start managing from the borrowing request accordion. Your request is here.

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Here under awaiting response.

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as submitted the status and the same thing, the other library has three options, answer NO, it moves to the next lender and the lender string conditional, and the library can't supply that item and if the library's supplying using article.

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Exchange which is part of the service, then your request will be also under article.

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alert besides of being here in transit. And if the library supplies using article exchange, Article Exchange creates this unique URL and password. You can preview the document.
To see if it's correct, and, then you can supply this to your patron. You use this email doc to patron button here on the right. You see that the patrons email.

Is automatically populated because I added that information to the request and all the information about the request goes on the body of the message, including the.

Link to the article and the password, you can add a note that this is valid for 30 days or after, viewed.

Five times. After that, that, item automatically expires and the patron won't be able to open that item. Then you can send that to your patron. And after you send that to your patron, then you can mark this as received.
When you mark this as received because this is a copy request, then your request is automatically closed. So if I go to the homepage under closed request and I search for that request.

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You see the status here is as closed supplier because it's a copy of request. Do you have any questions regarding to the staff initiated staff mediated request for either loan or copy?

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You can send your questions to the chat. I can see it here.

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Okay, so now let's move to the 2nd request method, patron-initiated staff mediated

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So, Preston is a patron at the library in his neighborhood and Preston is searching for an item on his library's online catalog using a discovery tool. In this case WorldCat Discovery.
It could be D2D or any other supported discovery tool.

But the item is not part of his library's collection, so Preston, searches that item, and then he finds this button or link to request that item.

Through ILL and when he completes that form that opens as he clicks this button, then the request goes to the library.

For a library staff to complete to process that request. So in the patron initiated staff mediated method, once Preston submits the LL request then the request.
Arrives at his library at their interface under the new for review, not reviewed status for a library staff member to mediate the request to approve that request. And once a library staff member approves the.

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  Request, then the request can move to the reviewed status and it stays there until the request is sent to lenders to be fulfilled. So this is the patron initiated.

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  staff mediated method with Preston, the patron number one. The 3rd method is patron initiated unmediated. Paula is a library patron as well and she's searching for an item on her libraries online.

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  catalog, but the item is not part of her library's collection and like Preston, she finds that request item button or link, completes that form and submits her ILL request. Then because Paula's

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Library has configured full automation in the automated request manager in the system. Then her ILL request goes directly to lenders, which will supply that item. This is the patron initiated unmediated method.

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With Paula the patron number two.

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So if you have admin roles in your account, you can configure the patron initiated methods for your library. The configurations are done in the OCLC service configuration, and the easiest way to access OCLC service configuration is from your home.

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Page, clicking on the respective link. So those libraries using resource sharing for groups have these configurations done on their behalf. So let me go live and briefly show you, these options that will allow your patrons to.

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Create ILL requests in the system.
So we're back here to our instance and on the homepage is where you find in the middle section the link to the service configuration. Service configuration is where you can customize your experience with.

This system with the service, let me see here if I can, system is not cooperating today.

Give me a 2nd, give me a 2nd so I can.

Refresh that.

Okay, uh.
Okay, just try to.

I'll Connect here again.

Okay, I apologize for that.

That's just I'm trying to reconnect here.

Just give me a 2nd.
Okay, uh.

I apologize for that. Now you have here the service configuration, as I mentioned before, service configuration is where you can customize your experience with the service and it's also where you can configure to allow your patrons to initiate the ILL request directly from your discovery tool. So, let me start here. The 1st step here is under IP addresses.
On the left side panel, you need to authenticate your patrons, so you need to add your IP addresses here. Your technical staff can take care of this to add your IP addresses here.

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Or any other types of authentication, including EZproxy. The 2nd step is to configure that request item link or button, and this is done in here.

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WorldCat Discovery. This is where you can use the place hold request buttons and you choose the resource sharing, the

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Text that goes on the button can be customized. You can enter anything that you find that will be very intuitive for your patron. You can add a translation for that as well. And the type of configuration, you need to choose the open URL 1.0.

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Open url is a basic URL that links information to related web services in this case LL. So open url is used to direct your patrons to the ILL patron form.
When placing that ILL request and it populates that form with the bibliographic information for that item. I provide the link to documentation with detailed instructions on open url configuration on the copy of the presentation. And then.

You have to save, this button for the system to retain the information. So after you completed this piece, then you need to go.

to WorldShare ILL option on the left side panel and select the request forms. This is for the patron to complete when they are submitting requests through your.

Discovery tool. This can be customized by your library. The only recommendation here, the, you see the bibliographic section, don't change anything here because this is configured to allow the system to automatically.
Pull the information from the record and populate the form automatically so the Patron don't need to be copying and pasted that information. So you keep this as it is. The patron section, you can.

Customize, you can add more fields, you can eliminate fields, you can make fields required or not, and anything that's required, the patron must complete to be able to submit that request. You can add more fields.

Using this add field option here or you can eliminate fields using the X.

You see this X red button, you can use that to eliminate a field. You can move the, you can remove a section because you have two patron sections here. You can eliminate one of the sections.
Using the remove sections, and you can move the sections. E.g., if you prefer the pay transaction to be, before the bibliograph sec section, then you can use this arrow to send this to the top.

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So this becomes the 1st option or you can send this to the top, you see it becomes the 1st option. And after you customize the your.

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Form, then you save it and this becomes available for your patron. And this URL you see here on the top, you can copy this in case you want to make available as a blank form.

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In your website, e.g., There are other options here for configuration, so, be mindful that I cover this area in the introduction to WorldShare ILL session.
You can access the recording or you can register for one of those sessions. I go over the other options you have available here for configuring your experience. So this is just to allow your patron to.

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Be able to, initiate those requests. And, if you want, e.g., to automate some pieces of those requests, including for Paula's situation where you're giving full automation, then you need to.

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Add automation from automated request manager under WorldShare LL, and as a borrowing library, you can add your automation, you give a name to your automation, you can have several.

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Here, and if you have several, you need to number them and the lowest number will be the priority. So you can have several types of matches.

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For the record, you can have several options here under actions if you want to automatically apply constant data and you select the one that will be applied for those type of requests, either copy or loan.

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  You can have multiple options here. Build lender string, you can select your custom holdings groups the one you have pre selected. I go over this option how you can create those in the introduction to WorldShare ILL session.

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  And I will also added the link to the short video that you can access from the copy of the presentation. So you can select this.

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  You can eliminate actions using the minus sign, and the request to review is this when you are allowing the full automation in the case of unmetriated request in a situation. So in.

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  Instead of us sending directly to, the lenders, you want to review those requests.
You can do that as well, and, send the request to lenders. If this is the policy situation they are mediated, then you are approving the group of lenders that you want those requests to be sent and those.

Lenders will fulfill those requests directly. So you can select your customer holdings that have created for those pre approved lenders. And the exceptions, these are for the the case of all of the unmittigated so.

If you duplicate the request or the case of Preston as well, if you duplicate the request, the same item, so you need to review 1st if it's owned by a group.

And to review, and if this is held by my institution route to review. So these are the options you can select in here and then you save it and the system will take care of those options. So these are the, the steps you have to take care when allowing.
your patron to initiate requests in the system.

Do you have any questions so far?

Yeah Remember you can send your questions in the chat.

So let's continue exploring topic number two. This time, let's see how a patron can place a request in the system after your library has configured this option. Let's see how our friend Preston can place a request in the patron initiated staff mediated method.

And how our friend Paula can also place a request in the patron initiated unmediated method.
So now suppose your library subscribes to WorldCat Discovery or D2D or has any other supported discovery tool and has ILL option configured there as I showed you, your patron wants to request this book title.

That's not part of your collection. Let's see how this happens in this situation similar to Preston, in the patron initiated is staff mediated method or the situation similar to Paula's, the patron initiated unmediated method.

And how you can manage the request when you want to mediate the processing.

So this works for libraries using resource sharing for groups as well. So let me go live. And for this example that will illustrate this example, I'm using.
WorldCat Discovery as the discovery tool. For you to have an idea of how this works. It'll be very similar to any other discovery tool.

So this is the example the WorldCat Discovery.

So, for the patrons to search here, they don't need to be authenticated, but if they want to submit ILL requests, they must be authenticated and that they can start searching. So let me get my example here.

So it's an article for the patron enters the article name here, Searching title.
And then the Patron sees that their library, in the case of Preston, e.g., he sees that his library doesn't own this item, so he clicks to open the details.

And find the, this request this item button here on the right, he clicks on this and then that form that I showed you how to customize opens, you see that information is automatically populated.

Including the OCLC number, which is a unique number for this item.

And this is a copy, it's automatically showing as a copy because it's an article. The need before date anything with asterisk, these are required fields. That's what happens when you select a field that's required. So the patron must complete this to.
Be able to submit the request, then the Patron can complete this information the patron ID is important information because you might have patrons with.

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  Similar names, so I would suggest to make the patron ID a required field. Then submit that request and receives this information that the request was submitted and this is the request ID number.

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  And the patron will be able to manage that. So when the patron does that, the request, because Preston is patron initiated staff mediated the request, the request then will arrive at the WorldShare ILL interface at his library.

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  So let me go to that area, and show what happens to that request.
Okay. So this.

Request arrives here at his library. Let me make this a little bit bigger under borrowing request under new for review, not reviewed status.

So this is his request here, it is not reviewed. So you as staff, you would open that request either the ID number or the title, and you can check the request and approve and mark as reviewed.

And when you do that, the request moves as reviewed for another staff to proceed with that. If you are the same person submitting the request, you check the request if everything is correct. You can check your libraries. This is your libraries.
Online catalog. If you have configured that, you can check your online catalog to see if you have that item available, before proceeding with this. This is a copy request, so you see here the type of request is incorrect, so you can correct that. You can apply your constant data.

For copies, so this will be a copy, and the need before date to check everything, you need to populate your lender string if you have applied the.

Automation, that’s why automation configure automation when you are allowing your patron to submit request is very important because all the other fields will be automatically populated, including the constant data with the correct type, and you can just check here, approve your.
And then you can send your request to your lenders. So that's how you manage that request that was submitted by Preston in the patron initiated staff initiated request.

Now this was Preston, Imagine in the situation of, our friends Paula. Paula is a little bit different. So when Paula finds searches for that item and.

Finds this request

This item button or link. When she completes this request form and submits this request because her library has configured the full automation, this request will not land in the ILL interface
for her library, this request will go directly to lenders and because it's a copy request, this request, uh.

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  Will be supplied directly by the lenders to that patron. So Paula receives that article directly from the lenders because it's a patron initiated unmediated method. Okay, do you have any questions regarding to this?

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  Either Preston example or Paula's.

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  Okay, uh.

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  Okay now let's move to topic number three. Manage request as borrower. Once you have your requests in the system, in any of the three methods, you will need to manage and.
Update them and solve the issues you might encounter with your requests. So I will go over these options and show you how easy it is to take these actions in the system.

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So let me share my browser again and you can see how you can do that.

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Okay, ok.

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So let's start 1st with responding to conditionals. So remember that one of the options for the other library to answer to your request is using the conditional option.

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So your request is under conditional status and you have four days to take action. If you don't take action in four days, your request to automatically move to the next lender and the lender string. So you can open the conditional
status, you can see the conditions here.

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The library cannot lend the entire book, but they can send copy of some pages. You can open that request and now you have three options here. You can cancel this request if you NO longer need it. You can answer NO, you don't accept the.

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Conditional and the request moves automatically to the next lender and the lender string. If you want to accept the conditions, then you need to.

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Take some actions here, update your ILL request. So the option here is that cannot lend copy which pages so I can scroll down and on the pages field I can say.

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I need chapter one. My patron needs the chapter one and after you enter that information, you can save it and mark yes. When you mark yes, your request.

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It's no longer under conditional status. Your request is here under awaiting response. Under the conditions accepted, the other library cannot send another conditions. They can only send the conditions once, and this is to speed

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Up the processing of the request. And your request will be here until the library supplies that item. Another option, as I mentioned before, is you can request renewals for your request.

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So e.g., you have your request here on the received news. It's with your patron, and let's open this request here the 1st one. Your patron is going on vacation and the needs to.

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Keep this item at least until the end of October of August I'm sorry is the due date is August the 9th things. The petrol needs.
To keep this until the end of August, so you will change the due date by supplying a new due date, the 31st.

And you click the renew item, now your request is under the renewal requested status and it's up to the other library to accept or not your request.

If the library approves the new date, then your request will be here under the renewal approved status with the new date, new due date. If the library's denies, your request will be on the renewal.

Well deny it and you must return that item.
That date, that due date or otherwise your request will be overdue. You want to avoid that. Another option you have available is the batch processing. So, where you see these green arrow.

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It means that you have the option to batch process, so you have this in transit so you can batch, receive items, and then you have this on the received, so you can batch return items. Let's start with batching receiving.

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You have to click where you see the icon, and you have the link to batch receive items, and then you can select the items you want to batch receive, you click on this plus sign.

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So let's select few here discovery, any more voice and voice here, and if you accidentally add the one here that you.

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You don't want to.
Mark as received, you can eliminate that by clicking the X icon is eliminated. You can mark to print books traps or stickers if you use that in your library to provide that item for your pedrom.

Then, you can click the receive items and all the four items changed the status to received and all the four bookstraps are.

Added to your printer queue. You can go to your printer queue on the left side panel and your books steps would be here for you to print them. You can print them multiple and add it to those materials. So you don't need to.

Receive or or return items individually, you can do that in batch.
You can also, return in batch, so here on the received, you click the batch return receive the items, and you can select the ones you want to return. You see that you have, the, the.

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Question mark next to receiver, this means every time you see this question mark, it means that it's pending of action, so it's pending off mark as received or not. You can batch receive those as well.

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So let's mark the ones you want to batch return. So I want to batch return those. This was one recalled the library's asking for the material immediately.

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So I can return that, you can mark the other ones, these are.

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Overdue, if you mark something in incorrectly, you can easily remove those. And then you can mark to print the return labels to all of them for all of them. And then when you mark the return items bottom.

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Then all the five requests changed the status to returned and all the five return labels were added to your print queue, they are here on the return labels and you can print those.

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Both by the time, as I showed before. So that's how you can batch receive all batch return items, something to save you some time.

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As I showed in the beginning in the example with Susan, you can request multiple copies of the same title and you can manage those here on the left side panel on the linked request.

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Even though they receive individual ID numbers, they are here together for you to make sure that you have received all those items for your patroom. You can return them different times but you can manage here and solve any.

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  Issues regarding to any copy that's missing.

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  So they will be here on the link to request. There's a request for multiple copies. One issue you might find with your request is, e.g., this unfilled status. This means that NO library has answered to your request.

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  Test, so your request goes as unfilled. You can open that request. You can go to the history.

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  Scroll down, request the history, the request history, you can see which automation was applied to your request, and you can also see the supplier history if any library has answered NO to your request and the.
Soon and then you can avoid those libraries if you are resending this request. And to resend this request, you don't need to restart this request, you just open this view holdings link.

And select a new group of libraries, update the request, and then and then you can.

Change the need before date if you needed to change that, let me see. I entered the wrong, sorry I entered the wrong symbol. So you cannot update any information.

And then resend this request to a new group of libraries. That's how you can work on those unfilled requests. And once you resend that request, the request is NO longer under unfilled, the request to be under our waiting.
Response status.

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Expired, expired means that NO library has answered to your request on the need before date. E.g., you set up the need before date to be yesterday. No library has answered to your request, your request goes as unfilled.

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It's closed that is expired sorry expired is the status as closed, expired. Your request goes is expired because past the your need before date, my need before date was yesterday.

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And at this point, if you want to resend this request to other group of libraries, you can use this new button on the upper right side of the screen. And now you have everything in a form again.

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And then you can use the view holdings to select a new group of libraries and you can update anything you need here like the need before date. You can change the need before date, and then you send your request and you.

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Request is NO longer under expired, it moved to our waiting response. So you simply use the new.

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Button on the, what expired, you use this a new button on the upper right side to get your request in the form again. So this is how you can solve some of those issues with your.

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Request. And remember that overdue because the.

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Due date for you to return the item has passed and your request will be here on the overdue, you should avoid this because libraries can block your library from supplying items to you because you don't return items.
On the due date, so this needs action, so you needed to figure out what happened to that item and return that item immediately. Any questions?

This takes us to the last topic, usage statistics. After you create and manage your IRL request in the system, you can generate reports to support your IRL activities and you can access your reports from the home page. You need your nine digital.

Authorization and password. If you don't have that, you can contact OCLC support, support@OCLC.org to retrieve your nine digital authorization and password.

Let me go back to, the homepage. So here from the home page in the middle section, you find the link to the usage statistics to access your reports.
As I mentioned, you need your non digital authorization. You enter the number without spacing password finding.

Yeah. And you have several options here. The 1st one is the resource sharing borrower, reasons for NO report. This is a report where you can see in detail why a library has answered NO to your request. You see here reason for NO.

On un Unspecified and non circulating aged to one field. When you see the same symbol, with a lot of notes for your library, you can use this report to manage your custom holdings, groups, your groups of.

Please select the lenders and you can remove those blenders from your groups using this report.
Another report that's important here is the borrower resource sharing stats report. This is a more complete report. You have all the information.

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  Including the costs is a full detailed report, so this is a column here, director request.

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  Unmediated and mediator. This is where you can see your request that were sent through automation. Those request initiated by your patron or initiated by staff.

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  When you see this M letter in me, it means that was initiated by staff. If you see the letter why it means that was initiated by your patron. So you can see if it was a patron mediated or patron.

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  You'll see in this two columns, like, N is like Susan, the staff, the library staff, and why would be like our.
Friends P Preston for mediator and of any of those reports, you can export this to an Excel or you can email this to yourself.

You can enter several email addresses here.

Separated by same column, and then if you mark this send monthly box, if you mark this, and you select the format you want to receive HTML or Excel, the style.

As attachment or a hyperlink to report. And when you save this, then you automatically received this rec report on the email addresses on a monthly basis. So the two reports that I showed you, they are monthly basis.
Let me go back to the reports. The monthly basis you can select the month. The last month was June. July will be available on 5 August, so it's the 5th day of the next.

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  Month, so July will be available on on August the 5th, and you can select the month here, the monthly basis. The only report that's by six months or twelve months is the, the activity report.

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  This is a report that you can select to be, by several months you can see here, and you can also schedule to receive this automatically. So once you mark that option.

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  Monthly, you receive those reports you don't need it to come to this area to manually generate your reports. Any question about the reports?

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  Okay, we'll have covered.
The four topics, you have covered the basics of watch ILL borrowing with our friends Susan, Preston and Paula. You have learned how you can easily submit ILL requests and how your patron can submit ILL.

Requests and how you can update them in the system.

You saw how you can manage your requests such as renewing items and, solving some issues and how you can generate reports and have them sent automatically to your email on a monthly basis, e.g..

And the days ahead as you start creating and managing your IRL requests, you can use our support portal as reference. Let me briefly show you, where you can find the documentation.
So this is the report the support portal that you can access directly from, the interface from the need help, General help. So you access this area. You can click on resource sharing.

Woodside the library loan and everything is divided in category for you to easily find. There are some short videos in some of those options. And, one of the handouts is, the learners guide where I provide the links directly to the areas.

You have discussed it here during the session, and this is also where you can find more training options, as I mentioned before, and you can also type in, any option here.

To search for, e.g., that's related to, and easily find those options, but there are several options for you to access from this
As I mentioned before, you will have access to the presentation to the copy of the presentation in PDF with all the links that I added and the screenshots for you to use as reference.

We are reaching the end of the session, in case you don't have any other questions, then I would like to thank you for participating in this session. When you leave the session, a window will pop up on your screen with the evaluation form. Just click continue. The information related to this session is on this slide it's WorldShare ILL Borrowing. The Instructor today's date 17 July 2024.

We value your contribution. For any training questions, please contact us at training@oclc.org. Thanks again and enjoy the rest of your day.
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Okay.