WorldShare® Interlibrary Loan: Borrowing

Lucia Shelton
OCLC Member Education
In this course you will learn...

➢ Basics of WSILL Borrowing
➢ Submit requests as a Borrowing Library
  Including patron-initiated requests (Discovery tool)
➢ Manage requests as a Borrowing Library
  Including batch processing options & issues
➢ Generate statistics reports

Documentation & Support

WSILL tutorial videos:
https://oc.lc/WSILLvideos
1- BASICS OF WSILL BORROWING
The three ILL request methods

- **Staff-Initiated, staff-Mediated**
  - **Susan**
    - Library staff

- **Patron-Initiated, staff-Mediated**
  - **Preston**
    - Library patron

- **Patron-Initiated, unmediated**
  - **Paula**
    - Library patron
Automated Request Manager

- **OCLC Service Configuration**

  - **Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.**

  - **Automations allow you to determine how patron-generated requests are processed.**

  - **All 3 ILL request methods**

  - **How to create Constant Data**
  - **How to create Custom holdings**

**Automated Request Manager**

**self-paced training**

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 automation will be applied to a request.
1. Staff-initiated/staff-mediated method

Requests processed by staff directly from the WorldShare ILL interface

Susan
Library staff
Borrower Request Workflow

Copy and Loan Requests:

1. Search for Item
2. Select appropriate bibliographic record
3. Select potential lenders for lender string
4. Apply Constant Data
5. Complete request form
6. Submit request

Automation options

Staff–Initiated, staff-Mediated
Request type determines workflow

Type also determines completion (Borrower or Lender)

Loan Request

1. B Creates Loan Request
2. L • Yes • Shipped/InTransit
3. B • Receives Item • Received/InUse
4. B • Returns item • Returned
5. L • Checked In/Complete • Closed

Copy Request

1. B Creates Copy Request
2. L • Yes • Shipped/InTransit
3. B • Receives Item • Closed

No Due Date on Copy requests
2- SUBMIT REQUESTS AS A BORROWING LIBRARY
Borrower Request Workflow

Copy and Loan Requests:

1. Search for Item
2. Select appropriate bibliographic record
3. Select potential lenders for lender string
4. Apply Constant Data
5. Complete request form
6. Submit request

Automation options

Staff–Initiated, staff-Mediated

Susan
Library staff
Searching

• Basic search
• Advanced search
• Expert search (maps, scores, articles)
July
by Ossip, Kathleen
Print book, English
Publisher: Louisville, KY : Sarabande Books, 2021
ISBN: 9781946448781 (paperback ; acid-free paper) | OCLC#: 1225170159

Verniana
Jules Verne Studies/Études Jules Verne
ISSN 1565-8872

Verne's Forgotten, Youthful Swashbuckler

Brian Taves
2. Patron-initiated/staff-mediated method

Patron Request Form linked from your Discovery tool, which sends request to a queue for staff review.

Preston
Library patron
New For Review

- **New For Review (2)**
- **Not Reviewed (2)**

- **Not Reviewed** - not seen by your staff.

- **Reviewed (2)**

- **Reviewed** - seen or created by your staff.

Patron–Initiated, staff - Mediated

Preston
Library patron
3. Patron-initiated/unmediated method

Automated system review where patron requests bypass staff review and go directly to lenders.

Paula
Library patron
ILP requesting configurations

OCLC Service Configuration
Configuring ILL for Discovery

To enable patron-initiated ILL requesting (OCLC Service Configuration):
1. Configure IP Address(es)
2. Configure Request Item buttons
3. Configure Patron Request Form

How to configure OpenURL

Patron–Initiated, staff-Mediated

Patron–Initiated, unmediated

WorldCat Discovery and WorldCat Local
- Search Settings
- Item Detail Settings
- User Interface Options
- Display Settings
- Relevancy and Scoping
- Full Text OpenURL Resolvers (outgoing requests)
- Place Hold/Request Buttons
- OPAC Statuses, Locations and Circulation Policies
- Holding Codes & Shelving Location Messages

1. IP Addresses
2. Place Hold/Request Buttons
3. WorldShare ILL
Automated Request Manager

- OCLC Service Configuration

Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.

- Automations allow you to determine how patron-generated requests are processed.

How to create Constant Data
How to create Custom holdings

All 3 ILL request methods

Automated Request Manager

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Policies Directory Changes – Hours

NDHCO (US Central Time UTC –6:00 hours) viewing their own open hours

NDSTJ (Newfoundland Time UTC –3:30 hours) viewing NDHCO’s open hours

Note how hours have adjusted to their format and time.
Policies Directory Changes – Closures

NDDRW (Australian Eastern Daylight Time UTC +11:00 hours) viewing their own scheduled closure

NDHCO (US Central Time UTC –6:00 hours) viewing NDDRW's scheduled closure

Note the dates and formats are adjusted.
SUBMIT REQUESTS AS A PATRON

Preston
Library patron

Paula
Library patron
WorldCat Discovery - Patron ILL request

Vietnam Investment review
Authors: Vietnam, Ministry of Planning and Investment
Journal, Magazine 1996
Hanoi.

Subject Headings:
- Source not specified
- foreign investments
- Vietnam
- Southeast Asia
- Show Less

Notes (General):
- OpstNet soonJournal / newspaper

More Author/Title Info:
- Ministry of Planning and Investment.

Database:
- WorldCat

MARC View (Employees Only):
- MARC Record
Patron workform

Workform opens from the ILL button. Required fields are customized by library.
New For Review

- **New For Review (2)**
- **Not Reviewed (2)**

- **Not Reviewed** - not seen by your staff.

- **New For Review (2)**
- **Reviewed (2)**

- **Reviewed** – seen or created by your staff.

- **Patron-Initiated, staff Mediated**
New for Review

Patron ILL request displays in WorldShare ILL
New For Review > Not Reviewed status
Staff populates lender string to send request
3. MANAGE REQUESTS AS A BORROWING LIBRARY
Manage Requests as a Borrower

1. Respond to conditional (up to 4 days to respond)
2. Receive items in batch (loan and copy)
3. Request renewal
4. Return items in batch (loan)
5. Multiple copies of item workflow (linked requests)
6. Unfilled requests
7. Expired requests
Managing Off-System Requests

For requests with libraries not participating in WorldShare ILL.

The Off-system borrowing queue

Off-system for Borrowing.
Managing Off-System Requests

1-Create or reuse ILL request
2- Change Fulfillment Type to “Off-System Request”
Managing off-System Requests

Complete the *Off-System* form

The system prompts the borrower for information about the current off-system lender.
Managing off-System Requests

- System will display request ID as Off-System
- Use the Email button to send the request to the lender
- Request will be under Off-System Requests status
4. STATISTICS REPORTS
Reports for Borrowers

Interlibrary Loan Home

Search for requests
Request ID

Quick Links
Borrowing:
AE Alert (2)
Produced (23)
Conditional (1)
In Transit (16)
Received2 (16)
Expired (3)
Unfilled (3)
Received
Renewal Approved (1)
Returned

Lending:
Supplied
Returned

Other:
OCLC Policies Directory
OCLC Service Configuration
OCLC Usage Statistics
OCLC Article Exchange
Resource Sharing News
WS ILL Training Resources
OCLC Community Center

Documentation: Statistics reports for WorldShare ILL

stats.oclc.org
The four topics…

1. Basics of WSILL Borrowing

2. Submit requests as a Borrowing Library

3. Manage requests as a Borrowing Library

4. Generate statistics reports
Support, Documentation & Tutorials

https://help.oclc.org

Welcome to OCLC Support
How can we help you?

Search

Select a category
- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing

OCLC support regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific</td>
<td>OCLC Asia Pacific 6560 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614-764-8009</td>
</tr>
<tr>
<td>Australia and New Zealand</td>
<td>OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU</td>
<td>+61 3 9929 0800</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States 6560 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614 755-5662</td>
</tr>
</tbody>
</table>

Submit/View requests
Send an email
Thank You!

Please remember to fill out the evaluation for this class

• Category: Resource Sharing and Delivery
• Class name: WorldShare ILL Borrowing
• Instructor: Lucia Shelton
• Date: July 17, 2024

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