Introduction to WorldShare® Interlibrary Loan

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

- The basics of WorldShare ILL
- Why to prepare for WorldShare ILL
- How to create and process requests
- How statistics reports can help

Documentation & Support

WSILL tutorial videos:
https://oc.lc/WSILLvideos
1- BASICS OF WORLDSHARE ILL
Built around the WorldCat database

Over 500 million bibliographic records with over 3 billion holdings. Members fill an ILL request every second.
The library’s OCLC symbol

Holdings information in WorldCat became available for Interlibrary Loan purposes

<table>
<thead>
<tr>
<th>STATE</th>
<th>LOCATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH</td>
<td>AKR amhl1 APL BGU bsc CAU CLE CUL DMM DUE gmpmt KSU MAL mecdc MRC MSC ORE OCP OCT OFA ofp OH6 OMI OMM osd OUS OTC OXB SDL tlm UAP wadpl1 WPL WSU</td>
</tr>
<tr>
<td>AK</td>
<td>AKFNS AKLPS Q2L q2t Q2V Q2Z UAF x88 x8y xy4 XYZ XZ$ XZU Y4Z</td>
</tr>
<tr>
<td>AL</td>
<td>AFB ABJ ACM AD$ a15cw ALEPL ALFLP ALM ALOXF AMP ANO MBG MWD MXB RED</td>
</tr>
<tr>
<td>AR</td>
<td>AJP AKC APJ AVR BMQ FSM HOT RC8 RL9 RPB</td>
</tr>
<tr>
<td>AZ</td>
<td>AZD A2H AZU CGPIL FV6 FX8 GC0 H06 MC2 MCT MSA MY8 NBV PMD POR PR# SVZ YFL ZPT ZZC</td>
</tr>
<tr>
<td>CA</td>
<td>AD# ALH asr BVT catbs CBC cc8 CCI CCR CCS CCT CCX CCY CDU CER CFS CGD CGF CGI CGL CHU cj1 ckv CPA CPD CPE crg CRU CSG CSL csn CUS CVU CUY CVP DAC EHU fad FUP GAVCL GH$ HAY HBL HDC rty JQF jqF jQK JQL JQR JSQ jqz JRB jrd jrf JRG JRH JRL jrn JQR JRS JRT jta JTD JTE jtf JTH JTL JTV jtw KLC LOD lpc11 lyt MSQ M$9 MB@ MCF mx$ MERC MIR MMR MS$ mtj MYP MXL ONT ORK p@k PAX sj2 SMP smx SOU SPA STQ SXQ TCB tpk TSL up1 VW VEL YOL</td>
</tr>
<tr>
<td>CO</td>
<td>byv cclaf COA COP COA daj dpv DVN E3V fiu HEV HFU lmi Q03 SQ$ sx8</td>
</tr>
<tr>
<td>CT</td>
<td>bib bpt cke ctbs CTD CTL CTW FAU gfp gjl gjt gkv glu gme gnu goy GPR gqt GTA gvj gyv gwy gyd HUS MCP MH$ NCV nph pss STJ TXN TYC XOF YUS</td>
</tr>
<tr>
<td>DC</td>
<td>DDU DGU dwp G6G</td>
</tr>
</tbody>
</table>
How is a request submitted electronically in WorldShare ILL by staff?

1. Search WorldCat for Item – Discover Items
2. Choose your lenders from libraries with holdings
3. Send Request
4. Receive Item
5. Return Item
Borrower Request Workflow

Lender String is list of potential lenders you select for an item

- Up to 15 lenders at a time.
- System automatically moves request to next lender.
- The more lenders in the string the better the chance for request fulfillment.
- Options for automation of lender string.
Request type determines workflow

Type also determines completion (B=Borrower or L=Lender)

Loan Request

B Creates Loan Request

L Yes

B Receives Item

B Returns Item

L Checked In/Complete

Copy Request

B Creates Copy Request

L Yes

B Receives Item

B Closed

No Due Date on Copy requests
2- PREPARING FOR ILL

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Accessing WorldShare ILL – new subscribers

WorldShare ILL is a subscription service

When your subscription process is complete, you will be sent a welcome email that includes:

• Your library’s custom Web address for WorldShare ILL
• Your WorldShare ILL Username (can be changed later)
• Instructions for setting up your WorldShare ILL Password
• A 9-digit Authorization Number and Password for Stats
Accessing WorldShare ILL – new staff

If your library already has access to WorldShare ILL:

• Consult with your colleagues; they may be able to give you your institution’s custom Web address. If not, OCLC Customer Support can provide it.

• A colleague can create a User Name for you, or you can create one for yourself.

• If a colleague creates a User Name for you, you will still have to create your password.

• User Names can always be changed later on.
## Interlibrary Loan role comparison

<table>
<thead>
<tr>
<th>Action</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td>WorldShare ILL Admin: x</td>
</tr>
<tr>
<td>Author ad-hoc reports in the analytics environment (Tipasa only)</td>
<td>WorldShare ILL User: x</td>
</tr>
<tr>
<td>Can use OCLC Service Configuration.</td>
<td>WorldShare ILL Admin: x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>WorldShare ILL User: x</td>
</tr>
<tr>
<td>Delete users.</td>
<td>WorldShare ILL Admin: x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>WorldShare ILL User: x</td>
</tr>
</tbody>
</table>
Prepare for ILL

Why to prepare?
Because it saves time, avoids mistakes and helps on issues resolution.

1. Set your policies
   OCLC Policies Directory

2. Speed up processing of request form
   Service Configuration > WorldShare ILL > Constant Data

3. Make your OPAC visible
   Service Configuration > WorldCat Registry > Online Catalog
1. Prepare for ILL - Set your policies

Set in the OCLC Policies Directory
OCLC SERVICE CONFIGURATION
2. Speed up processing - Create Constant Data

Created in **OCLC Service Configuration**

How to create Constant Data
Provides a way to organize and prioritize lenders based on reciprocal arrangements, geographic location, and special services.

3. Speed up processing - Custom Holdings

<table>
<thead>
<tr>
<th></th>
<th>Symbol Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASTFREE</td>
<td>590 symbols</td>
</tr>
<tr>
<td>STATEFREE</td>
<td>56 symbols</td>
</tr>
<tr>
<td>CITYFREE</td>
<td>24 symbols</td>
</tr>
</tbody>
</table>
How to create Custom Holdings

Custom Holdings are created in OCLC Service Configuration

How to create Custom holdings

They consist of two components - Groups and Paths

• First Create a Group
• Then Create a Path
Managing Custom Holdings

Review at least annually

Some lender’s policies will change

Some lender’s services may change, making them no longer a good match for your group
If you find a lot of “Aged to Unfilled”, “Aged to next lender” or “Auto-deflection” reasons, you may want to remove those lenders from Custom Holdings Groups.
Managing Custom Holdings Groups

OCLC Service Configuration

Custom Holdings Groups Symbol Search

Required fields are marked with an asterisk *

Display groups: by group name | by symbol

1. Enter symbol: CGA

2. Search

3. In my group
   - 10COPIESCH: Yes
   - 1CTFREE: No
   - 1FREEPA: No
   - 1OHFREE: Yes
   - 2CTFREE: No
Deleting Custom Holdings Groups

Attempting to delete a Custom Holdings Group that is used in a Custom Holdings Path will produce the following error:

1. Remove Group from Path(s) OR Delete Path(s) where referenced
2. Then, delete the Group
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 requests are processed either as Borrowing or Lending.
IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions using the libraries OCLC account. Both libraries must accept IFM.

Borrowing Library

Lending Library

\(-\$10\) (Debit) \(\rightarrow\) IFM \(\rightarrow\) \(+\$10\) (Credit)
4. Make OPAC visible – Update WorldCat Registry

List of lenders, some with links back to their OPACs

<table>
<thead>
<tr>
<th>Library</th>
<th>Supplier</th>
<th>Days To Respond</th>
<th>Location</th>
<th>Symbol</th>
<th>Group</th>
<th>Cost</th>
<th>IFM</th>
<th>Holdings</th>
</tr>
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<tbody>
<tr>
<td>AMERICAN UNIV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CATHOLIC UNIV OF AMERICA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DISTRICT OF COLUMBIA PUB LIBR</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GEORGE WASHINGTON UNIV</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Link to your library’s OPAC
4. Make OPAC visible – Update WorldCat Registry

Service Configuration: WorldCat Registry > Online Catalog
Note: Document expires in **30 days** or after viewed **five times**. Staff preview does not count.

Files no larger than 120 MB. Up to 1000 files a day per authorization.
3. HOW TO CREATE ILL REQUESTS

Overview
Loan request

Light in August: the corrected text
by Faulkner, William
ISBN: 0679732268 | OCLC#: 21525352

Copy request

Verniana
Jules Verne Studies/Études Jules Verne

Verne's Forgotten, Youthful Swashbuckler

Brian Taves
Loan request

1. Discover and select your item
2. Populate your lender string and create your request
3. Apply constant data and submit your request
Process loan request

Process your loan requests and update the status until item is returned to the lender. Any request pending of action will have a question mark next to the status and needs update.
Copy request

- Same process of loan request
  - Discover item, populate lender string, apply constant data, submit
- If searching at journal level, provide article level information in the request.
- Supplied electronic copies will be under “In Transit” status.
- Supplied electronic copies via Article Exchange will also be under AE Alert status.
Lending library view of loan requests
Lending library view of copy requests
4. STATISTICS REPORTS

support@oclc.org

9-digit authorization (no spacing) and password
Select the report
## Statistics reports

### Resource Sharing Borrower Reasons For No Report

**Report Period:** December 2021

<table>
<thead>
<tr>
<th>Lender Position</th>
<th>ILL Record Number</th>
<th>Illiad TN</th>
<th>Title</th>
<th>OCLC #</th>
<th>Article(Citation)</th>
<th>Date(Citation)</th>
<th>Imprint Date</th>
<th>Lender Symbol</th>
<th>Lender Full Name</th>
<th>Reason For No</th>
<th>Lender Unfilled Date</th>
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<tbody>
<tr>
<td>1</td>
<td>210842006</td>
<td></td>
<td>GUNS, GERMS, AND STEEL: THE FATES OF HUMAN SOCIETIES</td>
<td>357092200</td>
<td></td>
<td>1997</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/1/2021</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>211201047</td>
<td></td>
<td>THE SEVEN HUSBANDS OF EVELYN HUGO A NOVEL</td>
<td>957077586</td>
<td></td>
<td>2017</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO UNFILLED</td>
<td>12/27/2021</td>
<td></td>
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<tr>
<td>1</td>
<td>211234089</td>
<td></td>
<td>ABBEY ROAD</td>
<td>20389812</td>
<td></td>
<td>1987</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AUTO. DEFLECTION: FORMAT TYPE</td>
<td>12/14/2021</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>211234801</td>
<td></td>
<td>THE CODE BREAKER : JENNIFER DOUDNA, GENE</td>
<td>1187220557</td>
<td></td>
<td>2021</td>
<td>WSTPV</td>
<td>OCLC EASTERN TRAINING-TPU (BETA)</td>
<td>AGED TO EXPIRED</td>
<td>12/23/2021</td>
<td></td>
</tr>
</tbody>
</table>

- **Select the month** to update the report.
- **Export** it to Excel or send it to your email address.
Statistics reports – automatically sent

After you configure the email address(es) to receive the reports automatically every month.
The four topics...

- The basics of WorldShare ILL
- Why prepare for WorldShare ILL
- How to create and manage requests
- How statistics reports can help
Support, Documentation & Tutorials

https://help.oclc.org

Welcome to OCLC Support
How can we help you?

Select a category

- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing

Subscribe to OCLC-SHARING-L listserv.
Thank You!

Please remember to fill out the evaluation for this class

- Date: 08/07/2024
- Instructor: Lucia Shelton
- Class name: Introduction to WorldShare Interlibrary Loan

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