

WorldShare ILL Borrowing Transcripts

January 18, 2024

0:02

So hi everyone I'm Lucia Shelton I'm part of the member Education team at OCLC and

0:10

today I'm facilitating your learning on WorldShare ILL Borrowing. Welcome to

0:18

our session! For those of you who are

0:24

starting with the service and those of you who are refreshing your knowledge

0:30

I will guide you through the options you find available in the service for borrowing libraries by the time you

0:37

reach the end of this session you will have learned about the best practices

0:43

for borrowing activities in the service. We are covering four topics first the

0:50

basic concepts of borrowing activities in the service second how you can easily create

0:59

and submit requests and how you can allow your patrons to submit ILL

1:06

requests next how you can manage your IL requests including the available batch

1:13

processing options and solve issues you might encounter with your ILL

1:21

requests and finally how you can generate reports to support your

1:26

activities in the service and then of course where you can access documentation and

1:33

more training materials let's start with topic number

1:38

one the basic concepts of WorldShare ILL Borrowing. There are three methods of

1:46

requesting in WorldShare let me introduce you to our

1:52

friends who will help you understand these three

1:58

Methods. Susan is a staff member responsible for ILL at her library and

2:07

she will be using the staff initiated staff mediated

2:14

Method. Preston is a library patron and he will be using the patron

2:22

initiated staff mediated method. Paula is a library patron as well

2:32

and she will be using the patron initiated

2:37

unmediated method let's start with the staff

2:43

initiated staff mediated method. Susan is a staff member at her

2:50

library and her patron is asking her assistance to obtain an item not part of

2:57

her library's collection. Susan will then use the staff initiated staff mediated

3:05

method where she logs into her WorldShare ILL interface and places an ILL

3:14

request on behalf of her patron. Susan manages the request from

3:20

when she creates that request until the item is supplied to the patron and later

3:30

returned to the owner that's why it's called staff

3:36

initiated staff mediated method. Susan will need to follow six steps

3:43

in this scenario first She searches for the item in the WorldCat

3:50

database then she selects the best bibliographic match for the item after

3:57

that Susan has the lender string populated with the potential lenders she applies

4:04

the constant data with her libraries information completes the request form

4:13

and finally submits the request. When Susan is creating the IL

4:21

request she needs to keep in mind that the request type defines the workflow of

4:29

The request through the system this way she we will be able to manage the

4:34

request in a proper way so loan requests are initiated by the borrowing

4:42

library and closed by the lending library when the material returns to the

4:51

Owner. Copy request is initiated by the borrowing Library

5:00
when the borrowing Library updates that request to Mark the request as received
5:07
then the system automatically closes that request. So if Susan chooses the type
5:14
to be copy instead of loan for physical item then she won't be able to manage
5:21
that request until the item is returned to the owner she will have to work with
5:27
the other library to solve that issue this is the staff initiated
5:35
staff mediated method with our friend Susan the librarian. So now let's explore
5:44
topic number two a little bit to see how you can submit ILL requests in
5:52
WorldShare ILL in the staff initiated Staff mediated method the same way our friend
6:01
Susan the librarian. So we will follow the six
6:08
steps and we will explore the search
6:14
options so now imagine that you are at your library and like in Susan's
6:21
situation your patron needs your assistance requesting a print book and an
6:28
article not part of your collection you may gather as much information as possible such as title
6:36
author and format to use the staff initiated staff mediated IL request
6:43
method on behalf of your Patron let's check how this is done so let me share
6:50
my
6:58
browser
7:08
and log in to the
7:26
Service. So this is the WorldShare ILL
7:32
interface the homepage if you haven't seen this
7:38
before on the right side upper right side of the
7:43
screen you would see your username next to the your username this Arrow you

7:51

have the options for the language interface to change it, change the password and

7:58

log out from the system. Need help General help takes you to the

8:07

documentation page and contact support for you to contact support if you need

8:14

Assistance. On the left side panel is where you can start and manage your

8:22

requests in the middle section you can search for your request using one of the

8:29

indexes options and entering the term you can

8:37

search by active and closed

8:42

requests and quick links it's very similar to what you find on the left

8:48

side panel so to start searching for those items for the ILL request you start

8:57

with the Discover items there are two options for search here you can start

9:03

with a basic search you are searching the WorldCat database or your library

9:11

Holdings using one of the available indexes entering the term or you can use

9:18

the advanced search where you can also search the WorldCat database or your

9:24

library Holdings so we get you're searching everything all the

9:30

Libraries. There are more options in indexes you can combine the search using

9:40

the Boolean operators and or or not you can add more fields to keep combining or

9:48

you can eliminate fields and you have more qualifiers to filter your search so

9:53

let's start searching for the book first using the advanced search so I start

10:00

with the title I enter part of the

10:08

title combined with the author last

10:17

name then I will filter by format to be book in

10:24

print the language and I have the Edition as

10:31

well so this is the result page

10:36

the relevance here is showing by the largest number of libraries that own

10:43

that item but you can change the relevance this blue eye icon next to the

10:53

title gives you a brief bibliographic information about the record

11:01

and the search for versions with same title and author you are searching for

11:09

the same title in different formats and

11:20

versions and if you have created automation if you have configured

11:26

Automation in the system you can start creating your request using the create

11:33

request button so automation would apply your constant data would populate your

11:40

lender string and the only thing you'll have to do is check the request and send that

11:49

request if you haven't created automation configured Automation

11:56

in the system then I would click in one of the options in the

12:04

middle and now I have the list of the libraries that own that item and

12:12

the ones that I see with this sign under the supplier they are not supplier so I can sort this

12:19

column now they are all suppliers on the top so you can see a brief information

12:27

about their policies this I icon next to the name of the

12:32

library takes to the policies directory for you to check the policies in

12:39

details the hyperlink name takes you to the online catalog to see the item

12:50

availability and then you can check days to respond the cost if they accept

12:56

payments through OCLC account and then if I want to add those

13:03

libraries I would click on the Yes link to add those

13:10

symbols if I have created custom Holdings groups the group of preferred

13:17
libraries so I can search for that in here and apply
13:24
that and the system randomly looks into the
13:29
the list to populate the lender
13:34
string you can select multiple copies of the same
13:41
title and the system treats each copy as one individual ILL request they can be
13:53
populated with different group of libraries for the lender string and
13:59
they can be supplied and returned at different time
14:05
as well so let's request
14:13
one let's create the request and now I need to apply the
14:19
constant data I'm doing this manually if you have done through the
14:27
automation you would skip these steps so I'm doing this
14:32
manually free loan so when I apply the constant data the type of request is
14:40
automatically populated it's coming from the constant data configured in the
14:47
service configuration then the need before date
14:53
I can use the calendar icon to select that date
15:02
you see the lending libraries from the Lender string they're listed here all the
15:08
information about my library is coming from the constant
15:15
data then I can enter the patron information
15:23
here this is for the borrowing library's control the other library is not seeing
15:29
this
15:35
information the email
15:43
address and then after I have everything I need in here I can send this

15:49

request so I click the send request button the system creates this unique ID

15:57

I can use this number to manage this request I can go to the

16:03

homepage and search for this request using the request ID

16:10

index and at this point before any library have answered to my request I can

16:17

edit any information here I can change any information here and save that

16:25

information I can add a note this is an internal note for all the staff in the

16:32

library to see why I'm still working in this request and if I no longer need this

16:39

request I can cancel this request so if a library answers yes to

16:45

this request I can also manage this request under the borrowing request

16:52

accordion my request would be here produced awaiting response

17:01

and the other Library can answer no if the library

17:07

answers no the request moves automatically to the next lender in the

17:12

lender string the library can answer conditional and the request goes into

17:20

the conditional status and you can see the

17:25

conditions if the library answers yes the request will be here in

17:31

transit so this is the request you can see when the item was shipped to your

17:38

library so you can make a decision if the item hasn't arrived for a long

17:45

period you can click either the ID number or the title to open that

17:54

request and at this point you have two options here if if you haven't

17:59

received the item for a while you can mark this as not received you can use

18:05

this email button under actions on the upper right

18:11

side to email the other Library to solve this issue so you

18:18

see all the information about the request goes on the body of the

18:24

message and the two libraries can solve what's next and if you have

18:32

received the item then you can mark this print book straps if your library uses

18:39

this option and update the request mark this

18:45

as received so now the request moved from

18:52

in transit to received in use your request is here received

19:00

In use this is the request so at this point you have three

19:06

options here if your Patron or anybody in the library lost or damaged this item

19:15

you can mark this as lost and use that email option on the upper right side

19:22

of the screen to communicate with the other library and check how you would

19:28

replace that item and that request goes as received

19:36

but missing status and will stay here until this is solved until this issue is

19:43

solved and it's up to the other library to close this request after the issue

19:49

is solved you can request renewal for this item if your Patron needs more time

19:56

with the request this is up to the other library to accept or

20:02

not and if you are ready to return the item you can click the print return

20:10

labels and click the return

20:16

item and now the request moved to returned and your request is here in

20:27

returned and at this point there's nothing you

20:32

can do because loan request starts with the borrowing Library creating that

20:38

request and is closed when the lending library receives that item and then

20:46

updates the system all the book straps and labels

20:54

that you marked to be printed will be here in your print queue on the left

21:00

side panel so you can print your book straps

21:06

you can print multiple at a time so you can mark the

21:11

options and print so your book straps would print

21:17

like this if your library uses this to to add to the material to provide the

21:23

material to your Patron and the same thing with the return labels your labels would be here

21:32

you can print multiple at a time the paper size this comes from your

21:39

configuration you can add include anything you want on the label and

21:45

decide the label position if you want to reuse the label I can change the

21:51

position for example Mark three instead so it's starting from the three print

21:58

and here are your return labels if you forget to

22:07

Mark the return labels or book straps in the request you can always reopen that

22:13

request for example from received in use if you

22:19

forgot to print the book straps you can always here on the upper right side

22:27

There's an option for you to add the book strap to your print queue the

22:36

same thing under the returned if you forgot you can reopen and there is the

22:44

option for you to add the return label to your print

22:49

queue so this is for the physical item for

22:54

the loan let's see how you can assist your Patron with the

23:03

article so for the article let's go to discover items and for the article let's use

23:12

the basic search you can search at advanced search as well you can search

23:19

at article level let me show you an

23:26
example
23:37
combining with the author and select the format to be
23:47
article and you can find the article but because many libraries they catalog
23:54
at Journal level if you search at article level you might not find the
24:01
article even though many libraries own that item so my suggestion is that you
24:09
search at Journal level so you can find more libraries owning that item so let's
24:15
search by
24:26
issn so here's the journal I'm looking at it's very similar to the
24:34
physical item to loan you still have this icon to see the bibliographic
24:44
information you have the search for versions with same title and author and
24:50
the relevance as well so let's create this
24:56
request and the same thing if you have configured
25:02
automation you would click on the create request and then the system would apply
25:09
everything and the only thing you have to do is send that request you don't need to manually
apply constant data or
25:17
populate the lender string so this would be the process when you have automation
25:23
configured so because I don't have configured it, this would be the option
25:31
to click one of the links in the
25:37
middle and do all that research with the libraries that own that
25:43
item and add the symbols click on the yes link or using the custom Holdings
25:53
path if you have created it and select the one you want
25:58
for the system to automatically populate your lend string that's why
26:03

custom holding path saves you a lot of time the custom Holdings groups so let's
26:10
create this and apply the constant data for
26:19
copy so now you see the type is copy and because we searched
26:28
at Journal level we need to add additional information to help the other
26:34
library to understand which part of the journal you
26:40
need so let's add the article
26:48
title as much information you can provide to help the
26:54
other Library I have the author as
27:03
well I have the issue and the
27:08
year and the
27:15
pages the need before date is very
27:22
important so you see your lender string all the information that comes from the constant
27:29
data and then the patron's
27:37
name the ID number and the
27:43
email so when I added the email address here in the patron
27:50
information then when that item is provided using article exchange then the
27:57
system automatically populates that information you will see this
28:04
later so everything is ready so I can send this
28:10
request the request is created this is the
28:18
ID you can also search for that using the request ID
28:24
index and very similar to the loan request at this point you can edit
28:30
anything and save it you can add a note or you can cancel the
28:38

request after a library answers to your request you can manage your request
28:45
under borrowing request accordion as well so your request is here awaiting
28:54
response produced awaiting response. If the other Library answers no the request
29:00
moves to the next lender in the lender string if the library answers
29:07
conditional then it will be under the conditional status and you can see the
29:13
conditions if the library answers yes then your request will be here in
29:19
transit and if the library uses article exchange to send the file article
29:26
Exchange is part of the service then your request will be also here under the
29:33
article exchange alert on the top and you can open your
29:38
request and article exchange creates a unique URL and password to protect the
29:46
document you can preview to check if it's it is the correct
29:54
article and if it is the correct article then you can email this
30:00
information to your Patron here on the right email doc to
30:06
Patron and all the information about the request go on the body of the message
30:13
because I added the patron email address to the request now the system
30:18
automatically populate this information in the email message and you
30:23
can add a note to the patron that this file will be available for 30 days or
30:32
for Five views after that the uh article
30:37
automatically expires and after you send this to your
30:45
patron let me copy this you can mark this as
30:51
received and because it's a copy request this request is now as closed
30:59
because copy requests start with Library the borrowing Library

31:05
creating that request and when you update that request in the system Mark
31:12
the request as received then the system automatically closes the request so here
31:18
the status closed and if you forgot to
31:24
send the item to your Patron you can still do that as long as it's
31:32
still under the 30 day-deadline you can see here the date that was shipped so
31:39
it'll be good until February 16, and you can email that to
31:46
your patron before that
31:52
deadline so this is the situation for the
31:58
staff initiated staff mediated process like with
32:04
our friend Susan the librarian do you have any
32:13
questions if you have any questions you
32:18
can use the chat to send your
32:26
questions
32:35
so let's move to the second request method Patron
32:42
initiated Staff mediated so Preston is a patron at the library in his
32:50
neighborhood Preston is searching for an item on his libraries online catalog
32:57
using a discovery tool in this case WorldCat Discovery it could be
33:04
D2D or any other supported discovery tool but the item is not part of his
33:11
Library's collection so Preston finds this
33:16
request item
33:23
button that the library has configured in the system clicks that completes the patron ILL form
33:33
and sends the ILL request that will then be processed by a staff member at his

33:43

Library so in the patron-initiated staff mediated method once Preston submits the

33:52

ILL request then the request lands in his library's WorldShare ILL

33:59

interface under the new for review not reviewed status for a staff member to

34:07

mediate the request and once a staff member approves the request then the

34:15

request moves to the new for reviewed status and stays there until

34:21

the request is sent to lenders to be fulfilled this is the Patron

34:28

initiated staff mediated method with Preston the patron number

34:36

one the third method the patron initiated staff

34:42

unmediated Paula is a library Patron as well she's searching for an item on her

34:49

Library's online catalog but the item is not part of her

34:54

library's collection and like Preston she finds

34:59

the request item button completes a form

35:05

and submits her ILL request because Paula's library has

35:11

configured the full Automation in automated request manager in the system

35:19

then her ILL request goes directly to lenders which will supply that item this

35:28

is the patron initiated unmediated method with Paulo the patron

35:35

number two let's check the configurations for these two methods

35:41

There are some configurations that need to be in place for these two situations two

35:47

methods to be available so let me share my browser

35:55

again

36:01

and go back to the homepage so here on the homepage on the middle section under

36:09

other is where you find the other pieces for the service and the OC LC service

36:17
configuration is where you can configure to allow your
36:22
patron to submit ILL requests in the system
36:28
so let's click
36:33
there so in the left side panel is where you find the options the first option
36:40
is to make sure that your library has the authentication methods
36:47
configured for your Patron to use that when using the resources in the
36:54
library so you can have this added the second step is to configure
37:01
the request item button it's done here under WorldCat
37:08
Discovery so to configure the button Place hold request
37:15
buttons and resource sharing the text that goes on the button
37:23
can be customized you can add
37:28
translation and you can Define the type you are
37:35
configuring it could be resource sharing WorldShare ILL open URL 1.0 when you're
37:42
configuring for another supported discovery
37:48
tool and then you have to save the changes after you configure the button
37:56
then you have to configure you have to update the patron form this is done
38:04
here on the left side panel WorldShare ILL and the request
38:15
form so here WorldShare ILL request
38:22
form you can remove sections
38:27
you can move the sections which goes on the top like for the patron section to
38:33
go on the top you can select the field when you change anything here
38:42
the field label changes

38:49
accordingly and you can Define if the fields will be required or
38:55
editable you can add more fields or you can eliminate
39:05
fields and after you have customized your patron form then you
39:13
save it and that form will be available when the patron clicks that request button
39:22
in the discovery tool so these are the configuration
39:37
options and this is where you can configure the other pieces to customize
39:42
your experience with the service. I talk about this in the introduction to WorldShare ILL how
39:51
you can create custom Holdings groups and the
39:57
constant data and your print setting options as
40:17
Well. So after you have configured all of
40:25
that let's continue exploring topic number two this
40:31
time let's see how a patron can place requests in the system after your
40:38
library has configured this option let's see how our friend Patron can place a
40:44
request in the patron-initiated staff mediated method and how
40:51
our friend Paula can also place a request in the patron initiated
40:57
unmediated method so now suppose your library
41:03
subscribes to WorldCat Discovery or D2D or any other supported Discovery tool
41:12
and has this option configured there your Patron wants to request this book title
41:20
that's not part of your collection let's see how this happens in the situation
41:27
similar to Preston the patron initiated Staff mediated method or the
41:35
situation similar to Paula the patron initiated unmediated method and how you
41:42
can manage the request when you want to mediate the processing. This works for libraries

41:49

using resource sharing for groups as well so let me share my browser again

41:55

and I use the WorldCat Discovery as an

42:09

example and your Patron must be authenticated to be able to place ILL

42:18

requests in the

42:25

system

42:30

so this is as an example I'm using WorldCat Discovery as the discovery

42:36

tool for you to have an idea so the patron is searching for this

42:42

item doing a basic

42:53

search then the patron finds the result and you see the

43:00

result it's not owned by his library is not part of his library's

43:06

collection so when he the patron clicks the Yellow River

43:12

here so when Preston is placing that request he would see this request this

43:20

item button that the library has configured and when he clicks

43:27

there he finds this Patron form the one

43:33

that was configured in the system as I showed

43:39

you all the bibliographic information is automatically transferred to the form so

43:46

Preston completes with his

43:55

information

44:02

submits that

44:08

Request. Oh I forgot here the need before date so you see the system

44:14

shows the errors so I skipped one information so if Preston

44:20

doesn't fill out this he can't proceed so let's select this to

44:30
be February submit the request because this
44:38
the needed before data is a required field according to the library so when
44:46
Preston submits this request he receives this information about the request and
44:53
the ID number he'll be able to manage this in his
45:00
account and this request lands in the
45:05
libraries WorldShare iLL page to be managed by
45:16
Staff. The staff can also use
45:22
the same option as Preston use the discovery tool to initiate the request
45:29
on behalf of the patron so for example if the
45:36
staff would start this request on behalf of Preston instead of filling out
45:43
that form it could also use the Staff ILL
45:49
either way and this would go to
46:07
a second um let me find
46:24
the
46:32
so the request would land here for the staff to complete this request and
46:40
send that request directly so when either the patron
46:47
or the staff sends that request that request would be here under not reviewed
46:56
so this is the patron sent that request it would be under not reviewed for the
47:04
staff to approve this and either save the request or send this request
47:12
automatically to the
47:18
lenders and the one that the staff completed would be here under the reviewed
47:26
the steps so not reviewd when the patron

47:31
starts that request and it needs to be approved and
47:38
reviewed if the library started that request in the discovery tool or the
47:44
library has reviewed and marked as reviewed if the library instead of
47:50
sending directly to the lenders has only Marked as reviewed this request would be
47:58
here until it's sent to the lenders so this is the patron
48:07
initiated staff mediated the patron Starts Here the request lands in new for
48:14
review queue under not reviewed to be approved now for example imagine the
48:24
situation of Paula the unmediated request so Paula will do the same
48:31
process search for the item click this request
48:37
item complete this form when Paula submits the request the request goes
48:46
automatically to the lenders because her library has configured full
48:51
Automation and the staff does not touch that request the staff member does
48:59
not touch that request until that request is supplied
49:04
by a library it's unmediated it goes directly to the
49:10
approved lenders it's different it does not land there in the reviewed not reviewed
49:17
so it would land there and the library would start managing the
49:22
request starting with the option in transit and so
49:33
on so this is for the patron
49:40
initiated staff unmediated
49:54
process
49:59
do you have any
50:08
questions so let's move to the third topic manage requests as a

50:14
borrower once you have your request in the system in any of the three methods
50:21
you will need to manage and update them and solve issues you might encounter
50:26
with your request so let me go live to the system and check the other options
50:34
you have there to manage your
50:49
request you saw a little bit of how to manage the
50:54
request by updating the request in received not
51:01
received no now let's see all the options you have
51:16
available so back to the service at
51:24
homepage under borrowing request
51:29
accordion you have here the conditional status let's open the conditional status
51:36
and see how you can proceed with that so you can see the conditions you have four
51:44
days to take action if you don't do anything after that your request
51:50
automatically moves to the next lender in the lender string so when you open
51:56
your request you see three options you can answer no and the request moves to
52:03
the next lender in the lender string you can cancel your request if you no longer
52:09
need your request or you can accept the conditions before you accept the
52:16
conditions you have to check the conditions and update the request
52:23
according to the conditions this situation the library cannot
52:29
lend the entire book but can offer copies of some pages chapters so I can
52:37
update these three questions on the pages I can inform
52:44
chapter one so these are
52:50
the pages I want for from this material

52:57

and then I save it here on the upper right

53:03

side and now I can accept the conditions when I accept the conditions the library

53:11

the other Library cannot send another conditions they can either can answer no

53:20

or Supply the item and this is to speed up the processing

53:25

so I can answer yes the request is no longer in

53:33

conditional is now under awaiting response it's here with the conditions

53:41

accepted the status waiting for the other library to supply that

53:48

item and when the library supplies that item the request will be in

53:54

Transit. You saw receiving that item marking as

54:00

received for individual request you can also batch

54:05

process that so here when you see under the borrowing request accordion

54:12

when you see this green arrow icon this means that batch processing is available

54:20

so you can batch receive and you can batch return items so let's see here the

54:29

option for batch receive so to batch

54:34

receiving you can click in this batch receive in Transit items

54:41

link then you can select the requests you want to

54:47

add to the batch processing you click on the plus

54:53

sign and the requests are added if you want to eliminate one of

54:59

the requests from the list you can click the X

55:05

button then you can Mark to print book straps for all of them at

55:11

once and when you click this receive items button all the requests in the

55:18

list will be automatically moved to the next status

55:25

in this case the received in use and the book straps for all of them will be

55:33

added to your print queue the same thing to return you can

55:41

batch return as well so here in

55:47

received you can batch return clicking the

55:53

link select the ones you want to add to the list so click the plus

55:59

sign use the X sign to eliminate then you mark the print return

56:07

labels and when you click the return items all the requests in the list will

56:16

be automatically moved to the next status in this case

56:22

returned and the return labels will be sent to your print queue all of

56:29

them at once and you can print them all at once as well so that's how you can

56:36

batch process your request you can do individually but you can also do in

56:44

Batch. You can request renewals so for example you have your requests here under

56:51

received in use and this request let's open

56:57

one of the requests your patron wants more time with this request and to

57:04

request renewal you need first to select the desired due

57:10

date using the calendar icon so you can

57:16

Mark another date and mark the renew item

57:23

Button when you do that your request moves now to Renewal

57:30

Requested so this is your request if the other Library accepts the request your

57:38

request will be here under Renewal

57:44

Accepted with the new due date if the library denies your renewal

57:52

your request will be here under the Renewal Denied and the item must be

57:59
returned on the original due date so it's very simple how to work with
58:10
Renewals. You saw the option for multiple
58:15
copies so you can request multiple items at once multiple copies of the same
58:23
title and when you do that your request will be here under linked
58:32
requests so in this example I requested three copies of the same title they all
58:41
receive individual ID numbers
58:47
they are treated as individual ILL requests they can be supplied by
58:54
different libraries they can be returned at different time as well
59:01
and that's how you can manage them to make sure that you have all the copies
59:07
your Patron
59:14
Needs. Everything that you see here on the left side panel with a question mark
59:20
it means that they are pending of action
59:26
and you can use the batch processing to batch receive these for
59:36
Example. Unfilled requests unfilled means
59:42
that no library has answered to your request or all libraries have answered
59:49
no to your request so your request goes as unfilled so when you open your
59:58
request you can submit this request to a new group
1:00:03
of libraries for that you need to click in this view Holdings link you see here
1:00:12
this magnifying glass icon is to take to the result search in case you need
1:00:19
to select another record and the View holdings takes you back
1:00:25
to the lender string so you can select another group of
1:00:32
libraries and update that request. If you want to check which group

1:00:40
of libraries you sent that item to you can scroll down to the bottom in the request
1:00:47
history you would see the libraries that answered no to your
1:00:52
request or never answered to your request they'll be here and you don't
1:00:58
send to the same libraries and after you populate that lender string you can click the resend
1:01:05
request button here on the upper left side and your request now moves to
1:01:14
awaiting response your request is now here under awaiting response waiting for
1:01:21
one library to answer to your request so you don't need to recreate that request you can reuse
the same
1:01:29
Request. Expired means that no library has answered your request before the need
1:01:38
before date you have selected for your
1:01:43
request so let's open this one. So this is as closed
1:01:52
expired because the due day the need before date has
1:01:57
passed so instead of recreating this request from scratch you can use the new
1:02:04
button you find here on the upper right side now everything is back to a
1:02:12
form and then you can use the view Holdings link to populate the lender
1:02:21
string update that request and send that request and this request
1:02:28
moves need to before date so it's incorrect because I need
1:02:36
to update this so let's put this for February you see if I forget anything here the
1:02:43
system notifies you that there's an error you need to go to that area
1:02:50
and complete that information and now the request moves
1:02:56
from the expired status to awaiting response so the request is here awaiting
1:03:04
response that's how you can solve those issues and anything you see here overdue

1:03:11
or recalled means that you need to return
1:03:16
that item you must return that item
1:03:23
immediately any
1:03:46
questions so let me talk about something else here it's an option you
1:03:53
have available that's called off-system
1:03:59
requests these are requests that you are processing with other libraries
1:04:05
outside of WorldShare ILL and first you have to create that
1:04:12
request here you need to use the service configuration
1:04:20
to first add your partner there if your partner is not added so you need to go
1:04:26
to service configuration under WorldShare ILL and the option is address book so you
1:04:36
can configure your partner here you can add your partner all the information then save
1:04:44
it so after you do that then you can create that request remember this is for
1:04:51
libraries not part of the WorldShare ILL and you're doing ILL requesting with those
1:04:58
libraries and you want to bring that request to the system so first you
1:05:04
search for that item let's search for let me search my
1:05:17
title I search for this then I can click the create request
1:05:27
button and save this
1:05:32
request now I go to the
1:05:38
save it's under here reviewed the new for review
1:05:44
reviewed and now I change the Fulfillment to be off-system
1:05:50
request I select my partner that was configure there in the service
1:05:57
configuration all the information comes from there the need before

1:06:04
date save
1:06:13
it and then the request is now part of the off
1:06:23
system I can apply constant data if I want to I
1:06:29
can select my constant data
1:06:34
here and I can manually change the status of this request as the request
1:06:42
changes the status and all the information becomes part of your reports
1:06:50
your usage reports for the system so that's how you can add those requests
1:06:58
here in the system and you can always use the email button to communicate with
1:07:03
the other library the library you're working with all the information goes on the body of
1:07:10
the message. This is how you do
1:07:17
Off-system
1:07:22
requests and we offer documentation the copy of
1:07:28
the presentation there is information about
1:07:35
how to access the documentation as
1:07:48
well now let's talk about the last topic usage statistics after you create and
1:07:55
manage your ILL requests in the system you can generate reports to support your ILL
1:08:05
activities let's go live to see the report
1:08:17
options so from the homepage you access the reports from the OCLC usage
1:08:26
statistics entering your nine-digit authorization and password if you don't
1:08:32
have this information you can contact OCLC support to retrieve this
1:08:45
information there are several types of reports here I'll highlight two of
1:08:52
those the first one is Resource Sharing Borrower Reasons for No report this is a

1:08:59

report that shows the libraries that answered no and why they answered no to

1:09:08

your library and you can use this report in case you have created custom

1:09:15

Holdings groups for example to remove those libraries from your groups

1:09:21

those libraries that never answer to your

1:09:27

request and you can also check all the information here see all deflection

1:09:34

aged to unfilled the library never answered to your request so you can use this

1:09:40

information to pull the symbol and remove those libraries from your

1:09:47

custom holding groups and not send requests to those

1:09:52

libraries the other report is the borrower resource sharing status report

1:10:01

this is a full detailed report where under the direct

1:10:08

direct request unmediated or direct request

1:10:13

mediated under the direct request unmediated is where you can see the

1:10:20

requests that you sent to automation they will have the letter

1:10:26

Y the ones that your patron initiated unmediated like with our friend Paula or

1:10:34

Patron initiated mediated method like with our friend Preston they would have

1:10:41

the Y if they sent through because

1:10:47

They were sent through automation anything under the direct request column with the letter N as you

1:10:56

see here were staff-initiated staff mediated method like with our friend

1:11:04

Susan the librarian and done manually from start if Susan uses automation on her

1:11:13

request then the mediate the column will have the letter Y and also you can in

1:11:20

this report you can see the cost related to those

1:11:26

transactions you can export any of these

1:11:31

reports or you can email this to yourself or several email

1:11:39

addresses that's the email area

1:11:45

open you can enter several email

1:11:52

addresses separated by

1:12:00

semicolon and then you can also Mark to send monthly to receive

1:12:08

this every month automatically in the email addresses informed here in this

1:12:14

field you can select the format you want to receive this and the

1:12:20

style then you can save it and you don't need to come to this area to manually

1:12:27

pull your reports you can receive the reports automatically every month and in

1:12:33

the email addresses configured

1:12:40

Here. Any

1:12:52

Questions? So we have covered the four topics we

1:12:59

have covered the basics of WorldShare ILL Borrowing with our friends Susan Preston

1:13:06

and Paula you have learned how you can easily submit ILL requests and update

1:13:13

them in the system how you can manage your requests

1:13:19

such as renewing them and solving some

1:13:24

issues and how you can generate reports and have them sent automatically to your

1:13:31

email address on a monthly basis. In the days ahead as you start

1:13:38

creating and managing your IL request you can use our support portal as

1:13:44

reference let me go live briefly and show

1:13:52

you

1:13:57

this is the support portal you can follow the

1:14:02

path for resource sharing WorldShare Interlibrary

1:14:15

Loan to find all the categories to choose

1:14:21

from or you can search for the topic here in the search box as well and you can

1:14:28

contact support on the upper right side of the

1:14:41

Screen. So this is from help.oclc.org

1:14:46

we are reaching the end of our session you did very well in case you don't have

1:14:53

any other questions then I would like to thank you for participating in this

1:14:58

session when you leave the session a window will pop up on your screen with the evaluation form the information

1:15:06

regarding this session is on this slide we value your contribution. For any training questions

1:15:13

please contact us at training@oclc.org. Thanks again and enjoy the rest of your

1:15:22

day