Introduction to WorldShare ILL Training session Transcript

August 7, 2024

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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 WorldShare ILL, so welcome to our introduction to WorldShare ILL session.

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For those of you who are new to the service and those of you returning to ILL to refresh your knowledge, we are covering the four topics that get you to the ILL process and the service. By the end of the session, you will have a better understanding of the.

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Necessary steps in WorldShare ILL to help you start using the service.

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So first, we will explore the basic concepts of world share LL. 2nd, you will learn why you should prepare to use the service. 3rd, you will follow the paths in how you can easily.
Create and process requests in the system.

And of course, where you can generate your reports to support the way you manage those requests and any transaction costs, and where you can find more documentation and contact the OCLC support. We offer several video short videos for you to access topics related to what. I'm sending you the link in the chat. It's the same link that you have on the copy of the presentation.

So let's walk together through the four topics. As a note, we offer other training sessions like this one for all borrowing and lending where I give more details on the functionalities in the service. You can either register for the next.

Live sessions or watch a recording.
So let’s start with topic number one, the basics of world share ILL. So for a little bit of five decades, libraries around the globe libraries like your library have been contributing to the WorldCat database making it the largest library catalog in the world with all these diversity of format in its contents. Many OCLC services including WorldShare ILL are built around WorldCat. So as a borrower, you have this rich source of materials as part of ILL to find items for your ILL request and as a supplier.

As a lending library, you can have your collections displayed in the WorldCat database for libraries to request items from you. Each library using OCLC services receives an OCLC symbol, so this chart on the right shows examples of some OCLC symbols. These symbols are assigned by OCLC during the service implementation when you subscribe to the service.
You use these OCLC symbols in which I allow to identify libraries that own an item and also to identify libraries that are requesting items in the system. You will see these symbols as we progress.

You are very familiar with these OCLC symbols in the service.

So when you go to WorldShare ILL, as a borrowing library, you follow these five things or these five things happen. 1st, you search WorldCat for an item, find your item.

2nd, you have your lender string populated with your selected lenders. Next, you send your request to your chosen lenders. Finally, you manage the request update it in the system when

The item arrives
Any addition for the physical items, you manage the request update it in the system. When your patron is done with the material, then you can return the item to the owner. You can have some of these steps automated to save you some time. You will see how automation

is configured later in the session.

You and you can also allow your patrons to initiate ILL requests and have automation process some of these steps. I cover this part of the patron initiating ILL requests in details in the WorldShare ILL borrowing session.

After searching and find your item, you can choose the lenders to populate your lender string on your request. You can select up to 15 libraries at a time to request from.

The way it works is that each lending library has a default four days to respond to the item, to the request, not including US national holidays and weekends. Lending libraries can choose days to respond, but the default is four days.
Then the system can automatically advance the request to the next lender if a lender does not respond or says NO to a request.

And the more lenders you add to the lender string, the better your chances for your request to be fulfilled. And I will talk later about the options to automate the lender string, letting the system populate the lender string automatically based on your configurations.

The request type is important because it determines the workflow of the request through the system and defines how you can manage those requests. So for long requests for the physical items, they are initiated and managed.

By the borrowing library. So the borrowing library starts that request, a lending library answers to that request. The borrowing library can manage that request until the item is returned to the owner, to the lending library, and the lending library can close that request.

Test.
Copy requests are also initiated by the borrowing library and the lending library supplies that item when the borrowing library receives that item and updates the system marking the item as received.

then the system automatically closes that request because there is nothing to be returned to the owner.

So that's how, the two types of requests are differentiated. Any questions so far? You can type your questions in the chat as we go if you have any question, ok?

Now let's move to topic number two to discuss some preparation options to help you save a lot of time when processing or answering requests instead of doing everything manually. If your library is new to WorldShare ILL, you have received a welcome letter from OCLC with your custom web address and username to sign into the system for the 1st time. If you, you are the one new to the system and you don't have your library custom web address, you can contact the OCLC support to retrieve that.
The same if you misplace through that URL, I suggest that you bookmark your custom web address.

For those libraries part of a group and using resource sharing for groups, the implementation team at OCLC configures automation and requestability for the requests within your group. If you are using allow outside of your group as well.

You might want to consider preparation for those ILL requests outside of your group.

So, let me share my browser here and I can show you some of those options.

So, if you want to login to your library's customer web address for the 1st time and you only have your username, then you, when you log in, you entered that URL, you click this set reset.
password button here on the bottom.

Enter your username, then you click request a new password. The system will send you an email message with the instructions for you to create your password. So after you have created your password, then you can enter your credentials.

To login in the system. So this is the world share ILL homepage. If you are seeing this for the 1st time, here on the upper right side of the screen.

Next to your username, this arrow language for you to access the language options for the interface, you can change your password when you need it.

And you can log out from the system. Need help. General help takes you to the documentation page with instructions for the area you’re at. Contact support for you to communicate with OCLC support if you need assistance.
And community center. This is an area where you can

be in contact with other libraries using the service, so here the community center you can select the community, the product would be WorldShare ILL. Sorry.

And interlibrary loan, and then here you can participate in discussions or you can create your own discussions. You can learn about updates, events, and you can also.

Send your ideas for the product enhancement, our product team have access to this page they are monitoring this area, and you can send your ideas for things that are not part of the Services yet and you find that would be useful. You can access this directly from the homepage. On the left side panel, this is where you can start and manage your request.
In the middle section, you can search for active and closed requests using one of the index options and below here, quick links, the same options that you find on.

On the left side panel, and under other is where you find the links for the other pieces part of the service related to the service, on turnaround time for you to see the average turnaround time.

As a lender or as a borrower, how long it's taking for you to get your requests answered or how long it's taking to answer to request. And here on the top menu admin is where you can create.

Additional accounts for other staff for other staff in your library. So, you have the 1st one that OCLC created for you to access for the 1st time and then you can create request accounts for other staff. Each staff can have their own account in the system.

And to create that you click on the new user.
Enter, complete the information, you don't need to complete everything here. So basically, the 1st name, so let me see here, last name.

Then you would move to the next section and select the email option. This is very important because it's where the person would receive the instructions to create the password.

Then the next section on this barcode, you enter the username, select your library, patron type will be staff.

Then you see that the information you entered in the barcode is related to the username, is your username, click create. The system says that the account was successfully created. The next step is to define the roles, the permissions for this...
Account. There's a question here if I talk about AE. I didn't get to that yet. We still, I'm still navigating through the interfaces, so we didn’t miss anything.

Okay, roles will define if this person will have admin privilege, it means that this person can change the configurations and the policies for your

The Library.

A report viewer if this person has access to the reports and the ILL user is to create and manage ILL request. So let's just mark, you can mark this, I have to click the edit link, then select the option and save it. So now the account is created with the privileges. If you need to edit or delete an account, then you would search for that account using one of the available indexes.
You can search by the name, you can open that record. You can edit anything here, you can edit like, e.g., the username.

Clicking the edit link on the right, I can change the username, e.g., and save it. And you can also change the

The roles, the permission. I can also add this person to be a report view, save it. And if you NO longer needed this record, this account, you can click this, this delete user record button here on the top and.

The system will inform you that if you delete this, this action cannot be undone, you would have to recreate that account, then delete, and this account is NO longer in the system.

So now let's check the policies directory. Here under you click the OCLC policies directory. The policies directory, your library has access and other libraries using the system, have access as well.
And that’s why it’s important to keep this area updated.

One of the most important pieces here is under the profile tab, you see this OCLC supplier, this defines in the system if you will be just borrowing or if you will be supplying item as well. So if you are a supplier, you mark as yes. If you are not a supplier, you’re just borrowing, you mark this as NO, which means that NO library, you’ll be able to send you ILL requests. You don’t receive those ILL requests because you are not a supplier. If you are a supplier here then you mark as yes, and then you have to define the days to respond. I mentioned that the default is four days, but you have different days to select here.
And you can have different days for copies and loans. Then you save it to display as you can see here the days to respond and OCLC supplier. If you are a supplier and you want to temporarily pause

The system from sending you ILL requests for any reason because your library is closed for any reason, then you can do that using the schedule tab instead of changing the OCLC supplier

Temporarily, just go to the schedule tab and under closures.

You click this add, button on the right, give a name to your closure, select the option, select the start date, and the end date you can, when you click you can see the calendar.

Or you can type the date and this model month, day and year, and you mark OCLC supplier as NO. When you do that, the system will look into this period here and temporarily pause requests from
Arriving at your library during this time. Then you save it, you can add the notes if you find it useful. Save it to display as you can see here and the other libraries they have access to this information as well. And you can edit this at any time.

I can change the dates and save it.

It changed and you can delete this at any time as well. The operating hours is optional, but it helps also in case the other library needs to communicate with your library and you can use the form.

Clicking this add button on the right, complete the form with your information, save it, you can have multiple, as you can see here in this example and you can edit or delete this information at any time.

Another tab that's important to hear in the policies is the contacts tab because there will be some situations where the only way to solve an issue with the request is for one library to come to communicate with the other library. And it's important to have at least the general
Contact information and you can do that by clicking this add button, select your type of communication, so the contact, you can use at least the general.

Complete the the four with the contact information. You can add any notes you find useful, save it. The email address is very important. And it displays here, as you can see in this example, you can edit this in case this person is on vacation, e.g., and you want that other libraries contact another person, so you can edit this or you can delete this at any time. And if you are a supplier

You would use the collections tab for your collections with the special rules and your policies for the, how you supply items and to whom you supply items. So you have three options here, deflections, deflections

is for you to allow the system to automatically answer NO on your behalf for those items that do not circulate outside of your library for any reason.
You can have multiple deflection policies. You can create these using the add button, you can have policies based on copy loan or both, based on cost.

Or types of libraries you supply to, the formats, the age of materials, you can combine the types of deflections, save it, and it displays as you can see here, everything in green.

With the check mark means that you are deflecting, you do not supply, and anything with the X mark in red means that it's excluded from the deflection, your library supplies. So.

Deflection is optional, but you should at least have the policies for copies and loans. Copies you have the form as well in this add bottom on the right to complete your copy policy.

You can have for different types of copies. If you have a question, deflections ok, there is a question about deflection. Let me just go back a little bit here deflection.
Deflection. This is, e.g., my library does not supply, copies or does not supply loans for certain type of materials because they do not circulate like reference materials. They do not circulate outside.

of my library or my library does not supply certain type of items for any reason or I do not supply items for certain group of libraries. Instead of receiving those requests in my library and manually answering NO to those requests

I can't have the system.

Automatically answering NO on my behalf according to the policies that I created here under deflections. I go over in details in the WorldShare ILL lending session. I go in details about deflections and we also offer short videos in how to create different types of deflection policies. But it's something that saves you a lot of time because the system is automatically answering NO on your behalf. You will never receive those requests in your instance.
Okay.

And you get in this page from the home page you see under other OCLC policies directory link. It's the easiest way for you to access from your home page, and there are

Some other question, just a sec a 2nd. I'll go back to the contacts tab. So deflection is optional. As I mentioned, you should at least have the copies and loans policies, you can, this, the copies and loans is just information. You are not stopping any requests from arriving at your library. This is to help other libraries to identify

If they should select your library or not, for the lender string. So, this helps for libraries not to send you requests because you have costs or because, you, have some
Conditions to supply those items. So here you can use the form, complete, give a name to your policy, you have can have multiple. And if you charge anything for the copies, e.g., you can add here.

The increment, the minimum maximum, and how much and the currency. Borrows, OCLC group are groups created by OCLC on behalf of the libraries, like consortia, e.g..

You can include, which means that you supply or you can exclude, which means that you do not supply for these groups. If you mark as any, you supply to everyone, the same thing with the libraries

Categories, include to supply exclude to not supply any to everyone, and locations include or exclude, e.g., if you do not supply outside of your country, you simply include here and select

Select your country.
And then the system will understand that you are not an international lender. You are not listed here as international lender. And the items, the collections that you have added under the collections tab.

You can include if you supply or exclude if you do not supply.

And formats, you can include the formats that you supply or you can exclude those that you do not supply. And if you have any restrictions, then the details in how you

Accept the requests, how you handle those requests, you can have multiple fields here, just click the plus sign.

How you deliver those requests and how you accept the payments. OCLC IFM is using OCLC account, both libraries must accept this option and instead of sending
Payments to the other library, you receive the debt in your OCLC account, and you manage your invoices, monthly invoices to send those payments. So, it saves you paying the bank fees for those transfers.

Add notes if you find it useful, then save it. To display as you can see here, everything in green means that you supply everything with the X red mark means that you do not supply.

And the same thing with the loans, you have a similar form for you to complete, and save it to display as you can see here. So these are do not supply. The check mark you supply. So the X mark you do not supply.

Not supply. And as I mentioned, the other library, they can see all the details about your policies here when they are selecting libraries to their lender string.

The question about the contacts tab, this, this is just for the other library to contact you. This is not for the mailed ILL items. I will
Explain in a little bit for your request when you want something shipped to your library, you have to create something else. This, this contacts tab is only when the two libraries need to communicate with each other to solve some issues. So that's why you need this contact tab.

completed, ok?

So this is the policies directory. Do you have any, any additional questions?

So now let's talk about the OCLC service configuration. The OCLC service configuration is the area where you can customize your experience with the service.

You need admin role in your account to create or change configurations and for the policies directory as well, I will get to you about a shipping address. Just a 2nd. We're getting there it's in the OCLC service configuration.
So even if it's not your responsibility to work on the configurations for your library, it's important for you to understand where the options you have available on your instance are coming from because if anything is missing there, you can contact the person who is responsible for the configuration.

Okay.

And the 1st option is to create constant data as a borrower or a lender. Constant data is the information about your library that does not change from request to request, like your address, e.g.. So your shipping address that's where

It's done and updated in your constant data in the service configuration.

And, they can be easily applied to your request to save you some, some time and avoid mistakes. This is done in OCLC service configuration and the easiest way to access the service configuration is from your home page, your
WorldShare ILL homepage in the middle section, click the respective link. We

Offer documentation in a short video on how to create constant data and I placed the link to here in the copy of the presentation that you can access as as reference. So let's go live to see this option.

All the options you have available in the service configuration So we are back here to our WorldShare ILL

Homepage and the easiest way to access the OCLC service configuration is from the home page here under other OCLC service configuration. As I mentioned before, you need admin role to be able to change the configurations because the

Configurations
They are for the entire library, not only for your account, individual account. So, see here on the top on the upper right side, you still have the option to find the, to access the OCLC support and documentation.

Help with documentation and support and also to change the language interface. So on the left side panel, you click WorldShare ILL and 1st let's create a constant data as a borrower.

So you click the borrower data. You have the default created for your library, when your library subscribed to the service, but you see that on the default you don't have the request type defined.

So that's why it's important to have at least one for copy and one for loan, so you don't make that confusion about the type of request. You can apply the correct one for your request. And to create a new constant data, you click this link, create new CD record here on the right
you give a name to your constant data without spacing let’s called this free loan ohio. And a brief description, this is for

The request at NO cost, then the need before date, you can leave this in blank, but if you mark this then.

The date will be automatically added to your request form, like, e.g., I can say plus 30 days. You can change this later, but if you add this, the system automatically adds that. And the request type let’s

This is loan.

editions, I leave this in blank because this can change from request to request, shipping information, the attention is very important if your library is large, e.g. a large library, and then when the item arrives at your library, the
Person receiving that material knows that they need to send this to the ILL department and to this person, the address, the street address, if the address is too long, use the 2nd line because

Libraries can use smaller labels to ship the item and if the address is too long, then we won’t fit in in that label this theory select the.

Country, the state of province if it applies the postal code, the phone number is important because libraries they ship through couriers.

And, they need this information such as a phone number and email address to contact you in case there’s any problem with the shipment. If the billing information is the same, you click this

Copy from shipping information button.
Or you can complete this information if it's different. Shipping via or shipping via, this is the type of a courier, USPS, UPS, fedex, e.g..

Electronic delivery, this is for when you are creating constant data for copy requests then you can select your options of preferred service to receive data electronic file.

IFM, as I mentioned before, is for to receive payments to receive or send payments using your OCLC accounts, you can mark this if you want to receive that. Maximum cost, you have to complete this even if it's zero.

Because if you do not

Mark as zero, you are accepting any charges that the lender, might send for those type of requests and the currency, if you are in Canada, South Africa, euro zone.
England, you are South Africa. You have your local currency added here configured for your library for those requests within your territory.

Then you add any notes, billing notes or borrowing notes, then you save this as new. Okay, now you have this constant data created, you can edit this at any time. E.g., anything changed.

Here.

Your address changed. It is very important. Your address has to be very accurate, otherwise you won't receive those items because this is the information that goes to the ILL request for the other library. So you need to keep this updated if if there is any change here,

You can select from the borrower data, you can select the one you want to edit. You can apply any changes here, then save it. If you NO longer need this constant data.
You can delete this record, ok? So did I answer your question about where you can update your shipping address? This is where you can update your shipping address, your constant data, under WorldShare ILL borrower.

Data, ok? The lander data as a landing library, you have a default already created. It’s optional if you want to create, any additional ones because you have some special rules.

And you would use a similar form, create new CD record, and complete that form then with your information and save it. After you create your constant data, then you would go on the Inter

Persistent settings is for your constant data. I would highly recommend that you keep this unchecked mainly if you are using automation, if you’re configuring automation, because then you allow the system to apply the correct constant data.
If you mark this as on, then the previous.

Constant data you have applied, you automatically show up in your form. So I would recommend to leave this unchecked and either you or the system can apply that constant data. Then the knowledge base active link.

This is when you have your electronic collections defined in the WorldCat knowledge base and you want, the system to check if you own that item before sending that request or.

If you want that item before you are answering to those requests, so you can check this on and the system would look into your knowledge base. Article exchange email notification, article exchange is part of the service, lending library

can use this to supply copy files for copy requests and if you want to receive a notification when those materials arrived, then you can check this as on. Enter up to five email addresses.
You can send a test, you can preview this. When you add this you need to save it for the system to retain that information and any time you receive a request to supplier through article exchange, you will receive a notification on the email addresses provided here. Unfilled request email notification unfilled are those requests that NO libraries have answered to your request or they have answered NO, and your request are

Went as unfilled, you want to receive a notifications for those so you can take action. You can as well mark as on, up to five email addresses, you can test and preview, save it for the system to retain and you can receive those notifications.

Lending request email notification is for libraries that are

Lending libraries and you think you would receive only few requests then you can mark it as on to receive notifications when a new request arrives in the service. And you have to save everything for the system to retain.
The other option you have available here is, for allowing the system to automate your lender string to create your pre selected your preferred libraries to

Request items from or as a lending library, select your priority libraries that you want to supply items first or group of libraries you don't want to supply or or you cannot supply, you can create those groups here. 1st you create the groups.

And then you create the path. So let me show you an example how you can pre select your libraries for your requests.

So I can create a new one, create a new custom holdings group link here on the right. So I need to give a name to my group. Let me call this on Arizona libraries, no spacing.

This is the system does not accept the spacing. A brief description, this is to help you, and the other staff in your library to understand why you have created this group.
And this is also very useful when you want to select a group of libraries that do not charge anything for supplying items, so you can create this group of libraries here.

And now you need to select the libraries for these groups. So I click this add, edit symbol button here on the bottom, and now I go to the policy directory to search for those libraries.

Here on the left side panel, you can search by institution symbol, name, group name or group symbol. I want to search by location, so I would

Selected here the state, and I want, I need Arizona and you have several other criteria to select here for your search.

I want libraries in Arizona at NO cost. You have more options here as well. So I'm gonna search. I have all those libraries. You see those libraries that I have suppliers No, I cannot add those libraries to my groups because these
Do not supply items, the system will not select those libraries, and that's why it's important to define the OCLC supplier.

I can then copy the symbols to a notepad because the system uses the symbols as I showed you at the beginning of the session. And you have the supplier you can sort this.

Column, you see everything here, hyperlinked you can sort those, you have the days to respond, the fees, the cost. You can copy those symbols to a notepad or for this exercise I will simply click this display symbols

button here on the top, and I will highlight everything, Right click and copy. Then I go back to the service configuration and paste. You will do the same thing with your notepad.

Now I have all the symbols I want. I click the update symbols, and I have all those libraries in my group. I, if you want to eliminate any library here, e.g., I don't want this library, I can click this X, radio button here on the right.
And I eliminated that and now I save this as new, and I have my group, I can keep creating groups in the same category, and the next step now is to create the path. The path is to tell the system.

System how I want the system to search for libraries in my groups and populate that lender string.

So paths, create a new custom holdings path. I give a name, I'm gonna call this Southwest libraries, get the description.

Then I can select my custom holdings groups in that category, so I can select the ones I want. I want this one here, I can add, can add this one.

I can add another one. So e.g., I added this one by mistake, I don't want this one. I can easily remove this by selecting the library, the group.
And clicking the remove button on the bottom, so now you see it's removed. The order of the groups will tell how you want the system to look into.

Those libraries. So e.g. if I want the system to look into this group 1st I put this on the top, or the one on the bottom should move over here

So I put this on the top, so the system would look 1st in this group, then 2nd in this group and 3rd in this group to find those up to 15 libraries to populate my lender string. You can also add your profiled groups here as well if you're part of

Consortia or part of these groups, and then I can save this as new, ok. Oh, this name already exists so I can change the name. It has to be a unique name, otherwise the system.

Would say that this already exists. I save this as new and sorry clear it cleared my selection.
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So anything you make mistakes here, the system would notify you before you proceed, so you need to have everything here save it, and I have my custom holdings path created and I can

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Easily apply this when I'm creating requests instead of doing all the research in the libraries that own that item. So you're pre selecting the libraries. You can also, instead of creating the groups, if you

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I want to create a path for, profiled groups only, you can start with the custom holdings path, give a name to your path, and then instead of selecting your custom holdings groups, you just

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Select your profiled groups.

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And save it so you can do both, both ways. Any questions so far? Constant data and custom holdings?
Another thing here I want to show you is the print settings. This is to define the size of your, the size of your shipping labels and the book straps, so you can select the, the size.

You can add your logo, you can test the URL to see if the logo is showing displaying correctly. You can customize your book straps to add, the due date and your patron information if.

Your library uses bookstraps and as a lender, you can also customize the bookstraps if you send those with the item, adding any specific notes to to that bookstrap.

And you save it for the system to retain. And the one important piece here is the automation. Automation can save you a lot of time, so after you create constant data and custom holdings, then you can configure automation to allow the system to automatically apply your constant data and your custom holdings and other options to speed up the processing of your requests instead of doing everything manually. You can have automation as a borrower and as
a lender, so here on the left side panel under world share ILL, automated request manager.

So you see you can have as a borrowing or a lending library as a borrowing library that you can have automation for the system to find the best bible graphic record.

Check your WorldCat holdings in the WorldCat knowledge base as I showed you in the inter library loan options. Your custom holdings.

Groups and paths if you have created that and to create an automation as a borrowing library, you click this add a new button here on the right. Give a name to your automation.

Let me call this test one. The priority, it means that the lowest number will be applied 1st. So let's call this ten, e.g., Then the match you have for the age of material. E.g., if.
you prefer new materials or old materials you can define the range, the languages. So you have the options, you can use the CTRL key to select multiple languages.

You can delete that option. So you can select the options here, patron departments. This is more for academic libraries like a biology department, a patron note, if the patron is initiating the request and added the note.

So then the request would come for the library to approve that.

How much the patron is willing to pay, the formats, request type, and request source. So let’s select here the formats for just for you to have an idea, I want to automate anything that is.

You use the CTRL key to select the options you want. You can add another matches, you can keep adding matches like for
The request type to be copy. You have both options here, and I can select, e.g., if I’m creating this automation for patron initiated, I can select how much are the patron willing to pay, I can eliminate that. Then the actions, you have to apply constant data, then you select the one you want to be applied to those requests. You can add additional actions.

View the lender string, then you select the custom holding path you want to be applied. I want to, e.g., to apply, this one. Or

This one, e.g., and you can keep adding actions, route requests to review. This is when you are creating this automation for

Patrons create a request and you want the request to come to your library to be approved before being sent to lenders, so you can select that. And then you have the exceptions. This is.
So when you are allowing the patron to initiate request and if it's duplicate, you need to approve 1st. If it's held by the group of libraries you want to be approved 1st and if it's held by your institution, you want that to be approved 1st, you don't want anything beside.

Something being sent automatically to lenders.

Then you can save this, the automation displays as you can see here, you can edit or delete this at any time. This is as a borrowing library. As a lending library

When you create automation, the system will you look into your deflection policies, your supplier status, including your scheduled tab when you're temporarily

Pausing requests, it's looking into your knowledge base for your electronic resource to make sure you have those items. Group affiliations, your time to respond, how long it takes to
Answer to those requests. Real time availability which requires more configuration. This will allow the system to use Z 39.50 to look into your collections and see if those items are available or if they are checked out.

E.g., and, the system after looking at everything, will only send to your library those requests that your library is ready to answer. So you can add it to automation using the add new button, you need to enable the automation, give a name to your automation, the priority, select the matches, if for select your groups, you can select your groups to be added there.

Okay.

You can, select the format, the request type, you can have multiple matches here, and you can add an action, apply constant data. Then you save it.
And then the system will take care of sending to your library only those requests that you are ready to answer. So automation saves you a lot of time either as a borrower or as a lender. And, you have

Okay.

Access to self-pace training. I provided the links to those resources on the copy of the presentation as well. Any questions?

The other piece of information you can set up are the links back to your libraries online catalog in various places in WorldShare ILL. E.g., when you are in the request form and you see

These hyperlinked library names. This means that you can access the library's online catalog to check and see the item availability. When you see this search my libraries online catalog link, this is for you to
To check your own online catalog to check if you have that item before you are answering to a request or before you are proceeding completing that request as a borrowing library.

And both borrowing and lending libraries can have links back to the online catalog displaying in the interface. You can set up the list and OCLC service configuration under WorldCat Registry.

Online catalog, you mark available online, you define your library system, enter your basic URL for your online catalogs save it, and the system takes care of applying those links within the system.

Article Exchange is part of and it's an option for landing libraries to supply copy requests. You can draw up many files a day per authorization and article Exchange then automatically creates a unique URL and password to protect the document.
Then the borrowing library can forward this unique URL and passwords to the patron. The document expires in 30 days or after five reviews and the staff preview.

Does not count

Okay, we are arriving at task number three where everything fits together for you to create and manage IRL request.

You now will discover why the preparation is so helpful and saves you time. So let's have an overview of this part. So now suppose your petrol needs your assistance requesting a loan.

Request for this book title and I can't request for this article. Let's see how you as a library staff can create ILL requests on behalf of your patrons.
If your library's part of a consortia or use the resource sharing for groups, some of your requests will be initiated by your patrons, but you can also initiate those requests on behalf of your patrons.

So let me share my browser here and let's start with the.

Book title 1st the loan request on the left side panel discover items. You have two options here. You can start with a basic search. You are searching WorldCat database or your library holdings.

Using one of the availables in the axis and entering the term. Basic search is for when you have a unique information such as yes bin, ISSN, or OCLC number, and it's easy for you to find.

Find that item.
This question mark means that you can use the export search using the WorldCat indexes. You have the link here where you can find the indexes and how you can search for that information. Like e.g., let me copy.

This is one. This is for the musical scores, so you can find this easily or when you can search for material.

From a specific type of libraries, you can use the export search. Or, you can use the advanced search here on the right where you are also searching Worldcat database or your library holdings.

You have more indexes options.

You can combine up to five indexes using the volume operators and or or not. And you can use more qualifiers such as formats and languages. E.g., the more information you enter here.
The more filtered your search will be. So let's start using the title. You can copy and paste this information.

Two two.

You don't need to type, so I'm combining with the also last name, you can enter the 1st and last name, the last name and 1st or the last name only, and the system can find that.

The format, and the language. This is the result and, the relevancy is by the highest number of libraries owned in the item, but you can change the relevance.

This eye icon next to the title gives you a brief video graphic information. The search for versions with the same title, so this gives you the same title in, in different formats.
And if you have created the automation, if you have configured automation, you can start your request by clicking the Create Request button here on the right, then you are in the form.

And you can simply click here on the, you see the send requester button, you click to send to automation and the all the automation that you have configured will be applied to this request and then you can simply send this to.

To your lenders.

If you have not created the automation configured automation, then you have to manually apply the constant data. So let's select this pretty long, and here in the request you see that.

The type of request to change it according to the constant data. This blue magnifying glass icon here takes you back to the search results in case you needed to select another graphic record.
And the view holdings takes you back to the list of libraries for you to select here the lenders. So if you haven't.

Create automation or custom holdings. You need to do all this research here on the results of library that own the item. You see these ones that you don't have the yes supplier, they do not supply, I can sort this column here.

So these are the lives that supply this item, and, then you have a brief information about the policies, they should respond costs.

If they accept IFM and you would have to manually add those libraries by clicking the yes link after you do all that research. Or if you have.

Create custom holdings path, you don’t have automation, but at least you have created your custom holdings, groups, your pro pre-selected libraries, then you can select the ones here from the list.
And when you click go, the system is following your rules and randomly selecting the libraries that own that item. You see here it populates your string. So it saves you a lot of time. That’s why it's important to pre select your libraries.

You can also select up to 20 copies of the same item. So each one will be treated as an individual request and you can apply your customer holdings.

As well and the system is selecting different libraries. This is to speed up the processing and you would populate here in the string the same way. So let me send this.

All the information is coming from the console data, the need before date is coming from the console data as well. I can use the calendar to change that, the information about my lender string.

All the information about my library, the billing information, then I can enter my patron information. The other library does not have access to this information or the patron.
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The email address, and after you have everything, then you click the Send request button, the system creates this unique ID to identify this request. You can manage your request by using.

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That number. At this point before any library has answered to your request, you can edit anything here, then save it. E.g., I want this additionally and I can save it. You can add a staff note.

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For the this is internal, just for your stuff at your libraries to see why you’re still working in this request, and you can cancel this request if you NO longer need this request. Your request is here under.

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Borrowing requests, awaiting response. This is your request submitted. The other library has three options to answer to your request. If they answer NO, your request to move is automatically to the next lender in the lender string. The library can answer conditional.

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And, you can see the conditions and you can accept it or not.
Or the library can answer yes and supply the item, your item will be here in transit. This is your item. You can see when this item was shipped to your library for you to make a decision if you mark as received or not. You can.

You click on the ID or the title link to open that request and at this point you can mark as received or not received if you haven't received this item.

If I use the bookstraps I can mark to print that to go to my print queue and mark as received. My request is now I've seen your question. Just give me a 2nd, please. Your request moved now from in transit to received in use.

And when your patron is done with the item and you are ready to return that item, you can mark to print return labels in return that item. You can also request renewal.

If your patron needs more time, you can suggest a date or you can mark as lost if the item is lost or damaged. And then you can, in this situation you use this email bottom here on the right to communicate with the other library, and that's why it's important to have your
Contact information in the contacts tab.

or Mark as returned. Now your request is under returned, here's your request, at this point there is nothing you can do because, it depends on the other library to complete that request, the loan request when they receive that item back.

Here on the return, if you forgot to print that label, you can reprint the labels and the bookstraps from, the next stage. And your print queue is here on the left side panel, the last option. You can find the book

Straps here, you can print multiple at a time.

And the same thing with your return labels, you can print multiple at a time. This configuration comes from your print of your configuration in the configuration page. You can include anything you find useful. Select the label position.
And then print to the those shipping labels to return those items. This is for the long request for the copy request for the copy request, let's see here the discover items.

Let me clear everything here, close, reset. You can search for copy requests using advanced search at article level, or you can search at journal level to have.

A better chance with a group of libraries because libraries usually catalog at the level. I see your question here if you're asking if it's acceptable to request an article copy from multiple libraries at the same time using the quantity dropdown menu to speed up the.

The process, this is not a good practice to do, because you might end up receiving multiple copies. It is not what you want. You want one copy only. And mainly for those items that have copyright rules, you might adjust.

To reach the maximum with one
Patron only when you only need one copy. So this is not a good practice. The good practice to keep your lender string with up to 15 lenders, more lenders as possible. The multiple copies is for

Book club, e.g.. That's used for that. So let's search at the journal level using the ISSN, which is a unique number, so this is,

It's very similar to the loan.

This is the same thing and because I'm searching at the journal level, I needed to apply 1st apply a constant data. The same thing if you have automation, you can add to automation as well.

So I can apply the constant data, the type copy, and I enter the article information.
I have the author name, as much information you have to

Help the other library, and then need before date you can change as well. I can put this another date. Then I entered my information.

The email address and everything is ready to go. I can click the send button and I have this number to start managing the request. It's very similar.

Or I can start managing from, borrowing request under awaiting response that's here and when the library answers, the library can answer NO moves to the next lender in the lender string. Conditional

that will be under conditional status. If the library supplies the item, your request will be here
in transit and if the library responded using article exchange, then it'll be here. Somebody asked about article exchange. So, it's here. You can open this request and article Exchange creates this unique URL.

And password, you can preview this, and as a borrowing library, you can email this to your patron here on the right.

All the information about the request including the unique URL and password goes on the body of the message. You can add the note that this expires in 30 days.

Or after five views, and because I added the email address for my patron and the request form, this automatically supplies this in the

Email information here and I can send this to my patron. After I send it to my patron, then I mark this as received. Let me copy this here and after I mark this as received, this request goes as closed.
Because copy requests, they’re automatically closed after the library marks as received because there’s nothing to be returned to the lender, ok?

I go over this option in the, for the lending library in the WorldShare ILL lending session. So if you’re interested in learning in details, I would suggest that you register for that session. So this is the copy and

the loan requests, let me open the request here received in use, you can go to the request

history on the bottom you scroll down and then request history, you would see the automation that you applied to your request if you you apply the automation, you would see your supplier history here in case you want to see who answered NO

To your request and you’ll see IFM if you
They are using IFM for those cost transactions. So now let's talk about another topic.

Let's talk about our last topic: the reports, how you can generate reports to support your ILL activities. The easiest way is from your homepage; you need your nine-digit authorization and password. If you don't have that information, you can contact OCLC support to retrieve this information.

Let me go back to the system, and from the homepage, you select the OCLC usage statistic link. Enter your 9-digits authorization without spacing and password.
And here you find several options in reports. I, the two reports more, more important here is the resource sharing borrower or lender reasons for NO report. This is a report that gives you all the information, the.

Details about the libraries that answered NO to your requests or the request as a lending library you answered NO to and why you answered NO to those requests.

So as a borrowing library, you can use this report to remove libraries from your custom holdings groups. And as a lending library, you can use this report to create deflection policies, so you don't need to be manually answering no to those requests.

You can export this request or you can email this request to several email addresses. If you mark this send monthly, then you automatically receive those reports on
The email addresses informed here separated by semi colon, you will define the format you want to receive, the style, when you save this, then you, you don’t need to come to this area to pull your reports, you would receive them automatically on a monthly basis.

And the other report that is important here is the resources sharing stats report, either as a borrower or a lender. This is a more complete.

Report with several details, including the costs involved and if the request was supplied as a copy request.

And when was initiated and closed, the copyright if there's anything related to copyright and also the the cost is involved on the transactions.

And the same way you can export or email this report, you have to do that for each report to receive those automatically. These are monthly basis, you can select the month you want to.
Pull those reports. This is for the statistics. Do you have any, any questions? You have all this information on your copy of the presentation to use as reference. I provide the, screenshots and additional info.

Information for you to use as reference.

On the, on the copy of the presentation. Oh, there's a question here. Is there a report for annual statistics? Let me let's just briefly before I finish here, let me go back there.

There's only one report for that. Is this report, here's the trans transaction level detail you see this is a.

And, there's only one here, is this the activity of the view this is several months. You can select how many months.
I think this is the only one that is available, the other ones are monthly basis, same monthly base. It’s the only one, the borrower, activity overview report. The other ones are all monthly based.

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So we are reaching the end of our session. We have walked through the four topics for this session. So, we will have learned about the basics of concepts for watch ILL.

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The configuration options to save you time such as custom holdings and automation. You saw how you can easily create a loan and copy requests and update those requests and how you can generate your ILL reports.

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Okay, any additional questions? Anything that you've seen here, today you have this support page where you can find anything related to WorldShare ILL under resource sharing, then you select inter library loan. You can also subscribe to the listserv to receive updates about anything related to WorldShare ILL. So this goes on the copy of the presentation as well.
So if you don't have any additional questions, I would like to thank you for participating. When you leave this session, a window will pop up on your screen, you can click continue to answer a few questions on the evaluation form. The information about this session is on this slide, today's date August the 7th, my name is Lucia Shelton, and the class is introduction to inter library loan. We appreciate your contribution. You will receive a follow up email message with the link to the recording and the handouts for your reference.

For any training question, please contact training@oclc.org. Thanks again and enjoy the rest of your day.