Customize Interlibrary Loan for patrons

You can let your library's patrons submit requests to your library while they are using FirstSearch databases that cover materials suitable for requests.

The following features in the administrative module let you customize WorldCat Resource Sharing:

- **ILL Access**: This feature lets you control whether your patrons can submit any requests while using FirstSearch.
- **ILL Settings for Databases**: This feature lets you control the FirstSearch databases from which patrons can submit requests, and the method used to process the requests for each database.
- **WorldCat ILL Access**: This feature lets you control the WorldCat document types your patrons can request.
- **Patron ILL Request Form**: This feature lets you customize the FirstSearch request form for your patrons.
- **ILL via E-mail**: Even if your library does not use WorldCat Resource Sharing, you can use the ILL via E-mail features to let your patrons submit requests to borrow items.

**OCLC ILLiad and WorldCat Resource Sharing**

Libraries that use WorldCat Resource Sharing, OCLC ILL Micro Enhancer for Windows software, and OCLC ILLiad Resource Sharing Management software can easily set up WorldCat Resource Sharing to work effectively with OCLC ILLiad.

OCLC ILLiad provides a comprehensive ILL management system that automates the routine borrowing and lending functions within the ILL department for libraries of all types and sizes. It integrates borrowing automation, lending automation, and electronic document delivery in one web-based customer interface. Information about OCLC ILLiad is available at [https://www.oclc.org/illiad/](https://www.oclc.org/illiad/).

The administrative module steps for setting up WorldCat Resource Sharing to work with OCLC ILLiad are:

1. Use the ILL Processing screen to turn on ILL Access and select the FirstSearch databases in which patrons can submit requests. You can also select the Review File or Direct Request Profile method you will use to process the requests in those databases.
2. Use the Patron ILL Request Form screen to customize the FirstSearch ILL request form. When using this form:
   - Provide a library note to patrons telling them where to obtain an ILLiad username (required for submitting ILL requests).
   - For the First Name field, change the field label to **ILLiad Username** and check the Required, Displayed, and Modifiable boxes for the field.
   - If you want patrons to enter a password, change the label of the Patron ID field to a label for the password and check the Required, Displayed, and Modifiable boxes for the field.
   - For every other field that your library does not need on the request form, remove any checks from the Required, Displayed, and Modifiable boxes.
ILL access

Description

The ILL Access feature is described in the following table.

| PURPOSE | Use ILL Access to control whether your patrons can submit any ILL requests while using FirstSearch and to customize the text of the ILL link. |
| LOCATION | Click the Resource Sharing section of the main menu, then choose ILL Processing from the drop-down list under Patron ILL Settings in the sidebar menu to go to the screen that contains ILL Access. |
| DEFAULT SETTING | Off. Users cannot submit requests from any database. |

Available values

The values that you can select for the ILL Access feature are described in the following table. The setting for this feature applies to all of your FirstSearch databases that cover materials suitable for requests.

| On (checked) | If the box is checked, patrons can submit requests. You control the databases in which patrons can submit requests through the Database ILL Settings feature. |
| Off (not checked) | If the box is not checked, patrons cannot submit requests from any database. |

ILL settings for databases

Description

The ILL Settings for Databases feature is described in the following table.

| PURPOSE | If you let patrons submit ILL requests while using FirstSearch, ILL Settings for Databases lets you control: |
| | • The databases from which patrons can submit requests |

https://help.oclc.org/Discovery_and_Reference/FirstSearch/WorldCat_Admin/Customize_Interlibrary_Loan_for_patrons

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• The method used to process the requests for each database
  Note: If ILL Access is turned off, your patrons cannot submit requests in any database and settings for Patron ILL Request Form, ILL Settings for Databases and ILL via E-mail are ignored.

LOCATION
Click the Resource Sharing section of the main menu, then choose ILL Processing from the drop-down list under Patron ILL Settings in the sidebar menu to go to the screen that contains ILL Settings for Databases.

DEFAULT SETTING
If your library has access to the OCLC WorldCat Resource Sharing, OCLC ILL Direct Request Profile is the default setting for the WorldCat database. OCLC ILL Review File is the default setting for other databases suitable for ILL requests.

If your library does not have access to WorldCat Resource Sharing, ILL via E-mail is the default setting for every database.

Available values
The values that you can select for each database in the ILL Settings for Databases feature are described in the following table. To review settings and plan changes for this feature, go to its location in the administrative module and print the screen.

<table>
<thead>
<tr>
<th>OCLC ILL Review File</th>
<th>Click the button for OCLC ILL Review File if you want library staff to review, in the OCLC ILL service, all requests that patrons submit while using the database. To use this method, your library must have access to the OCLC ILL service.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC ILL Direct Request Profile</td>
<td>Click the button for OCLC ILL Direct Request Profile if you want all requests that patrons submit while using the database to be processed automatically using the Direct Request. For this option to work correctly, you must also create Direct Request profiles. If you select this value but do not have Direct Request profiles, FirstSearch processes requests as if you had selected ILL Review File.</td>
</tr>
<tr>
<td>ILL via E-mail</td>
<td>Click the button for ILL via E-mail if you want requests that patrons submit while using the database to be sent to your library in e-mail messages. This method does not use WorldCat Resource Sharing, and your library may...</td>
</tr>
</tbody>
</table>
use it whether the library has or does not have access to WorldCat Resource Sharing. If you choose this method, you must also use the ILL via E-mail feature.

| ILL Access off | Click the button for ILL Access off if you do not want patrons to submit ILL requests while using the database. |

# WorldCat ILL access

## Description

The WorldCat ILL Access feature is described in the following table.

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>Control the WorldCat document types that your institution's FirstSearch patrons can request.</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOCATION</td>
<td>Click the Resource Sharing section of the main menu, then choose ILL Processing from the drop-down list under Patron ILL Settings in the sidebar menu to go to the screen that contains ILL Access.</td>
</tr>
<tr>
<td>DEFAULT SETTING</td>
<td>On for all document types except Archival Materials and Internet Resources.</td>
</tr>
</tbody>
</table>

## Available values

The values that you can set for the WorldCat ILL Access feature are described in the following table.

| On (checked) | Your patrons can request this WorldCat document type. |
| Off (not checked) | Your patrons cannot request this WorldCat document type. |

## Patron ILL request form

The Patron ILL Request Form feature lets you customize the FirstSearch ILL request form for your patrons. For information about this feature, see Customize the Patron ILL request form.
ILL via email

Even if your library does not use WorldCat Resource Sharing, you can use the ILL via E-mail features in the administrative module to let your patrons submit requests to borrow items. If you use the features, your library receives an e-mail message containing an ILL request each time a user submits a request while using FirstSearch. The e-mail message goes to the one or two e-mail addresses that you specify in the administrative module and it includes the bibliographic and patron information you need to forward the request to another library. Also, you should specify borrowing library information in the administrative module so the e-mail message includes that information as well. For more information, see ILL via E-mail requests that your library receives.

Note: If ILL Access is turned off, your patrons cannot submit requests from any database and settings for Patron ILL Request Form, Database ILL Settings and ILL via E-mail are ignored.

The following ILL via E-mail features are available:

- **E-mail addresses for ILL Requests.** Specify one or two of your library's e-mail addresses to receive ILL requests submitted by your patrons if you specified the ILL via E-mail method for processing the requests.
- **Borrowing Library Information.** Specify any borrowing library information to be included in ILL requests submitted by your patrons, if you specified the ILL via E-mail method for processing the requests.

Email addresses for ILL requests

Description

The **E-mail addresses for ILL Requests** feature is described in the following table.

| PURPOSE | Specify one or two of your library's e-mail addresses to receive ILL requests submitted by your patrons if you specified the ILL via E-mail method for processing the requests. You must do this if you want to use the ILL via E-mail method to process any requests. |
|LOCATION | Click the **Resource Sharing section** of the main menu, then choose **ILL via E-mail** from the drop-down list under Patron ILL Settings in the sidebar menu to go to the screen that contains E-mail addresses for ILL Requests. |
| DEFAULT SETTING | No E-mail Address. |

Available values

The values that you can set for the **E-mail addresses for ILL Requests** feature are described in the following table.
No E-mail Address

The ILL via E-mail method for processing requests cannot be used.

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E-mail Address

The e-mail address for your library to which requests submitted by your patrons are sent if you specified the ILL via E-mail method for processing the requests.

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Additional E-mail Address

A second e-mail address for your library to which requests submitted by your patrons are sent if you specified the ILL via E-mail method for processing the requests.

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Borrowing library information

Description

The Borrowing Library Information feature is described in the following table.

Specify any borrowing library information to be included in requests submitted by your patrons, if you specified the ILL via E-mail method for processing the requests. The information helps you to complete requests that you forward to potential lenders. You can change the information in individual requests, if necessary, before forwarding them. Your patrons do not see the borrowing library information.

You may specify the following borrowing library information:

- Ship-to address
- Bill-to address
- Ship via
- Maximum cost
- Telephone number
- Fax number
- E-mail address
- Borrowing notes

LOCATION

Click the Resource Sharing section of the main menu, then choose ILL via E-mail from the drop-down list under Patron ILL Settings in the sidebar menu to go to the screen that contains Borrowing Library Information.
Blank for all parts of the borrowing library information, except Ship Via and Bill To address. The default for Ship Via is Library Rate. The default for Bill To address is Same.

Available values

The values that you can set for each part of the Borrowing Library Information are described in the following table.

<table>
<thead>
<tr>
<th>Blank</th>
<th>That part of the borrowing library information is not included in the request.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
<td>The specified text is included in that part of the borrowing library information. Each part must contain fewer than 256 characters and spaces. Press the Return key to include line breaks and blank lines in the text as needed.</td>
</tr>
</tbody>
</table>

ILL Via E-mail requests that your library receives

The email messages that your library receives for requests processed through the ILL via E-mail method are organized to help library staff complete the requests and forward them to potential lenders.

The messages contain the information described in the following table:

<table>
<thead>
<tr>
<th>INFORMATION</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>A place for a request ID</td>
<td>Add a request ID before forwarding the request to identify the request for your records.</td>
</tr>
<tr>
<td>Date requested</td>
<td>FirstSearch supplies this information automatically.</td>
</tr>
<tr>
<td>Borrowing (your) library name and symbol</td>
<td>FirstSearch supplies this information automatically.</td>
</tr>
<tr>
<td>Date needed</td>
<td>FirstSearch supplies this information if you included the Date Needed field in the FirstSearch Patron ILL request form and the user supplied the information when submitting the request.</td>
</tr>
<tr>
<td>Description of the requested item, including verification information and OCLC record number</td>
<td>FirstSearch supplies this information from the FirstSearch database record associated with the user's request.</td>
</tr>
<tr>
<td>INFORMATION</td>
<td>NOTES</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>A place for copyright compliance information</td>
<td>Indicate copyright compliance before forwarding the request to a lender.</td>
</tr>
<tr>
<td>Other borrowing library information</td>
<td>FirstSearch supplies this information if you specify it in the administrative module. Modify the information, if necessary, before forwarding the request to a lender.</td>
</tr>
<tr>
<td>Patron information, located near the end of the message for easy removal</td>
<td>Delete this information from the request that you forward to a lender. FirstSearch supplies this information if you included fields for it in the FirstSearch Patron ILL request form and the user supplied the information when submitting the request.</td>
</tr>
<tr>
<td>An OCLC tracking number, located at the end of the message</td>
<td>Provide this number to support staff if they request it for use in problem solving. FirstSearch supplies this information automatically.</td>
</tr>
</tbody>
</table>