Workflow integration: ILL and Circulation

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Course description

This recorded session reviews and demonstrates the normal workflow between Discovery/ILL/Circulation when all integration configuration is complete. Common exceptions in the workflow, errors, and workarounds are included. Configuration steps and decisions required to integrate WorldShare Interlibrary Loan and WorldShare Circulation which automatically creates a temporary item and place a hold for the patron when the ILL request is created are covered. The recording provides best practice suggestions and shares examples of circulation policies affecting ILL loans.

Topics covered include:

- Normal workflow between WorldCat Discovery, WorldShare Interlibrary Loan, and WorldShare Circulation
- Workflow exceptions, errors, and workarounds
- Configuration steps to automatically create a temporary item and place a hold for the patron when the ILL request is created
- Best practice suggestions and examples of circulation policies affecting ILL loans

Recording Time Markers:

- 0:00:00 – Integration Workflow and Demonstration
- 0:43:10 – Exceptions
- 1:02:30 – Configuration and Policy Considerations

Managers of Circulation and ILL for institutions using the integration functionality between these systems. Circulation and ILL staff responsible for day-to-day processing should also attend.

View a recorded session

View a recorded session (75 minutes)

Request closed captioning

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Cancellation policy

In the event of low attendance, OCLC may cancel a training session. In this situation, registrants will be notified by email in advance of the session.