# WorldShare ILL Borrowing Transcripts

2.72MB/s

**April 11, 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 borrowing. Welcome to our session.

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For those of you who are starting with the service.

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And those of you who are refreshing, your knowledge, I will guide you through the options you find available in the service for borrowing libraries.

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By the time we reach the end of this session, you will have learned about the best practices for borrowing activities in the service we are covering for topics. 1st, the basic concepts of borrowing activities in the service.

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2nd, how you can easily create and submit requests.

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And how you can allow your patrons to submit ILL requests, how you can manage your ILL requests, including the available batch processing options, and solve some issues. You might encounter with your requests. And then finally.

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How you can generate reports to support your activities in WorldShare ILL, then, of course, where you can access the documentation and more training materials.

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So, let's start with top number 1, the basic concepts of WorldShare ILL. borrowing.

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There are 3 methods of requesting in WorldShare ILL

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Let me introduce you to our friends who will help you understand these 3 methods.

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Susan is a staff member.

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Responsible for ILL at her library, and she will be using the staff initiated staff mediated method.

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Preston is a library patron.

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And he will be using the patron initiated staff mediated method.

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Paula is a library patron too, and she will be using the patron initiated

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unmediated. As a WorldShare ILL library you have access to the option to configure automation for all the 3 methods to speed up the processing of your requests automation

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will allow the system to automate some of the steps of the process, according to your configured rules.

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If you have admin role in your WorldShare ILL account, then you can configure automation for your library.

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You will find the links to the documentation page and short videos for the pieces to be configured and, uh, self paced training in how to configure automation on the copy of the presentation that I make available after the session. So, automation saves

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you a lot of time.

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Now, let's start with the 1st method. Susan is a staff member at her library, and her patron is asking her assistance to obtain an item not part of her library's collection. Susan will then use the staff initiated staff

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mediated method where she logs into the WorldShare ILL interface and places an ILL requests on behalf of her patron Susan manages the request from when she creates that request until the item is

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supplied to the patron and later returned to the owner.

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That's why it's called staff initiated staff mediated method.

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Susan will need to follow 6 steps in this scenario.

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1st, she searches for the item in the WorldCat database then she selects the best bibliographic match for that item.

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After that Susan has the lender string populated with the potential lenders she applies the constant data with her library information.

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Completes the request form and finally submits the request as I mentioned before there are automation options to be configured for some of these steps.

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When Susan is creating the request, she needs to keep in mind that the request type defines the workflow of a request through the system. This way. She will be able to manage the request in the proper way. So loan requests for the physical items are

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Initiated by the borrowing library

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5:42

And closed by the lending library, the owner when the material

**Timestamp**

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Is returned. Copy requests are initiated by the borrowing library.

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And when the borrowing library receives the item and updates the system marked it received, then the system automatically closes the requests because there is nothing to be returned.

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If Susan chooses the type to be copy instead of loan for a physical item, for example, then she won't be able to manage that request until the item is returned to the owner. She'll will have to work with the other library to

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Solve that issue that's when automation can be very handy to avoid this type of mistake.

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This is the staff initiated staff mediated method with our friend, Susan, the librarian.

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So, now let's explore topic number 2 a little bit to see how you can submit requests inn the staff initiated staff mediated method the same way as our friend, Susan, the librarian.

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We will follow the 6 steps and see how to proceed when automation is configured.

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we will explore the search options.

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Now, as an example, imagine that you are at your library and like, in Susan situation, your patron needs your assistance, requesting a print book and an article, not part of your collection. You may gather as much information as possible such as

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title, author and format to use the staff initiated staff mediated ILL request method on behalf of your patrons. So let's check live, How this is done. Just give me a 2nd, let me share my browser here.

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8:01

And connected to the service, so you can see, uh, how this is done.

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So this is the WorldShare ILL interface if this is the 1st time you see in this interface on the upper right side where you see your username this arrow is where you can change the

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language interface these are the available language interfaces. This is where you can change the password.

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8:53

And log out from the system. Need help.

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8:59

This arrow general help takes you to the documentation pages where we can find the instructions contact support for you to contact OCLC support. In case you need assistance. Community Center is, uh, for you to be in contact with

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Other libraries using the service so, uh, when you click on this link, a page opens for you to

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9:27

Use your connection.

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9:37

Oh.

**Timestamp**

9:42

And the access, uh, the areas where you can, uh.

**Timestamp**

9:48

Participate in discussions, learn about events, learn about new releases on the service and suggest enhancements to our product team. So, it's, it's an area for the community in the service.

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10:05

On the left side panel, it's where you can start and

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Manage your requests in the middle section, you can search for your requests using 1 of the

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Available index options.

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The ID number is a unique number for every request each request to receive that automatically. And it's the easiest way for you to search for your request and you can search for active or closed requests as well.

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Below quick links, similar options that you find on the left side panel. And under other is where you can find the other pieces

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Related to WorldShare ILL so let's start with creating those 2 requests, the physical item loan requests and the article.

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You start on the left side panel, discover items. There are 2.

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11:14

Options for searches here you can start with a basic search where you search in the worldcat database or your library holdings using 1 of the available index options.

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And entering the term, or you can start with an, advanced search you're also searching.

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11:36

Ah, worldcat database or your library holdings you have more index options.

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You can combine the indexes using the Boolean operators and or or not.

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You can add more fields.

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Or eliminate fields, and you have more qualifiers to, uh.

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12:02

Keep filtering your search, so the more information you add here, the more filtered your search will be, and you'll be dealing with fewer records in the result page.

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12:16

So, let's start with, uh, the, advanced search. Are you.

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12:21

Enter the title for that book you can copy and paste the information in the field as well.

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12:35

And you can add just part of the title.

**Timestamp**

12:39

Let's combine with the author.

**Timestamp**

12:42

Last name, you can enter the full name or.

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12:47

Only the last name, and the system can recognize it. The format.

**Timestamp**

12:52

Let's set up this to be book and print the language.

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12:57

And search, so this is the result page because I added all that information I'm dealing with, uh, fewer records, uh, the relevance he is based on on the large number of libraries owning that item, but you can change the relevance.

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This I icon next to the title, gives you a brief bibliographic information.

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About the title, the search for version with same title and author is to give you all the versions available for the the same title and author.

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If you have a configured automation.

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I will talk briefly about automation configuration in a bit. If you have configured that for, for your library.

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At this point when you find that record that you're looking for, you can click on this, create to request

**Timestamp**

14:00

Button on the right when you click on this button the system will automatically, uh, apply constant data with your library information, select your group of preferred lenders and populate all that information. And the only thing you have to do.

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14:20

Have to check if everything is correct. Uh, add your patron information and send that request.

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14:28

If you haven't done that, then you have to manually proceed with all the process. So you'd click on 1 of the options here in the middle.

**Timestamp**

14:41

And then, uh, if you haven't created your Pre selected.

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14:50

Lenders your custom holdings

**Timestamp**

14:55

groups, then you have to do all the research with the list of libraries that own this item.

**Timestamp**

15:02

So, you see here, uh, the brief information about their policies, uh, the supplier column, where you don't find the link, it means that those libraries don't supply, you can sort this column.

**Timestamp**

15:20

The libraries with the hyperlink it means.

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You can access their online catalog to check the availability.

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15:31

And this icon next to the library's name, takes you to their.

**Timestamp**

15:40

ILL lending policies, directory page.

**Timestamp**

15:44

For you to check their policies.

**Timestamp**

15:48

And you have the days to respond how long they take to respond the costs involved and after you have selected your libraries, then you click the yes. Link.

**Timestamp**

16:02

What the symbols to be added to the lender string.

**Timestamp**

16:08

If you have created your custom holdings path with your Pre selected libraries, you can select that.

**Timestamp**

16:19

Here, and what this does is, this allows the system to randomly look at your groups and select those libraries that own that item.

**Timestamp**

16:32

And populate your lender string with up to 15 lenders.

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16:39

You can select the multiple copies for the case of book clubs, for example, and add.

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16:50

The lenders for each copy, because they're treated individually.

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16:56

And you can also apply custom holdings

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17:01

path for your Pre selected libraries in the system, you select different libraries for each

**Timestamp**

17:08

Copy this is to speed up the process.

**Timestamp**

17:11

So, let me clear dear and send this request create the request and, uh, because I don't have automation.

**Timestamp**

17:24

Configured I'm doing this manually, so you'll see why automation saves you a lot of time. So I select my constant data.

**Timestamp**

17:33

This is for physical item for loan. So my constant data for loan already describes the

**Timestamp**

17:44

type of request, so I don't make a mistake with that.

**Timestamp**

17:52

The need before date, it comes from the constant data, but you can use the calendar icon to change that. If you need to change it.

**Timestamp**

18:02

The need before date and you have all the information, uh, the list of, uh, lenders.

**Timestamp**

18:10

And all the information about your library coming from the constant data.

**Timestamp**

18:16

Then I can add the patron information.

**Timestamp**

18:20

Name, ID, email.

**Timestamp**

18:34

And whenever I think it is completed.

**Timestamp**

18:38

Then I can send this request when I clicked the send request button.

**Timestamp**

18:46

The system creates, generates the request ID number, and I can use this number to start managing that request.

**Timestamp**

18:59

I can search by request number.

**Timestamp**

19:02

Active at this point before any library has answered to my request, I can, uh, edit anything.

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19:15

on this request and save it.

**Timestamp**

19:18

For example, I can change the information, save it.

**Timestamp**

19:26

Oh, I can cancel this request.

**Timestamp**

19:30

After a library started answering to my request, let me close everything here the year.

**Timestamp**

19:38

After library, uh, it starts answering to my request.

**Timestamp**

19:44

After I have created that request, I can start managing from the borrowing request accordion on the left side panel. My request is here on the awaiting response.

**Timestamp**

19:56

Uh, we've just created this, uh, the other library has 3 options to answer to the request. If the library says, no, the request moves automatically to the next lender in lender string.

**Timestamp**

20:11

Eh, if the library answers conditional your request to be here under

**Timestamp**

20:18

Conditional and then you have a.

**Timestamp**

20:23

Four days to take action.

**Timestamp**

20:27

If you don't take any action, the request will automatically move to the next lender, uh, in the lender string.

**Timestamp**

20:35

If the library answers yes, your request will be here in transit.

**Timestamp**

20:40

And this is the request, you can either click the ID number or the title to open the request. You can see here, uh.

**Timestamp**

20:58

Hello.

**Timestamp**

22:01

I apologize for.

**Timestamp**

22:05

What's the issue? Let me see here, something happened here.

**Timestamp**

22:09

Let me share.

**Timestamp**

22:58

Can you, can you, uh, can you see what I'm sharing.

**Timestamp**

23:16

Yes, can you see what I'm sharing? Okay. Uh.

**Timestamp**

23:20

Webex did something unusual here, it closed everything.

**Timestamp**

23:25

So, thanks for the feedback. Um, so let's, let's go back there.

**Timestamp**

23:30

Uh, so here, uh, your request is in transit and you can see when this was shipped to your library it's be listed here under shipped date.

**Timestamp**

23:46

Column and you can see, uh, the date that this was sent to a library so you can make a decision if your mark as received or not. So you can either click the ID.

**Timestamp**

23:58

or the title, if you have received that item.

**Timestamp**

24:06

Then you can mark as received then you can mark to print the bookstraps stickers. If you provide that with the book, uh, for your patron. So you can mark this print book strap this goes to your print queue and then you can mark this as received.

**Timestamp**

24:26

If you haven't received the, uh, you can mark it, not receive it, but let's Mark is received and then you can go to your print queue.

**Timestamp**

24:37

Which is on the left side panel it's the last option and your book straps will be here. You can print multiple at a time.

**Timestamp**

24:47

If you have multiple listed here.

**Timestamp**

24:50

You can click the print option.

**Timestamp**

24:56

And then print, the bookstraps that you need to have printed, and after you've done that you can remove anything that you no longer need to come back. For example, they are no longer needed and remove from.

**Timestamp**

25:12

The list, otherwise they will stay here until you remove them.

**Timestamp**

25:16

So now your request move it from in transit to received in use.

**Timestamp**

25:24

This is the request after your patron is done with the request, that's where you can update the system or if.

**Timestamp**

25:36

For any reason that material that item got lost, or your patron needs more time with the request, that's where you.

**Timestamp**

25:45

You come to update that request, received in use. So you have the 3 options here.

**Timestamp**

25:53

To renew, Mark as lost, or to return that item. If if you are ready to return, you mark this print return labels and return that item. If you forgot to print that book straps.

**Timestamp**

26:10

That's where you can reprint to that.

**Timestamp**

26:14

In the next stage, the.

**Timestamp**

26:17

Received in use so mark to print the return labels and Mark as return item.

**Timestamp**

26:24

And they can go to the print queue.

**Timestamp**

26:29

And the return labels, you can also print multiple at a time.

**Timestamp**

26:35

Uh, the paper size comes from the configuration for your library, you can mark anything you want in that label.

**Timestamp**

26:44

And the start position is, uh, as default 1, but if you want to reuse paper, uh, the label, you can mark the position you want to start and then print your

**Timestamp**

27:01

Return labels to return your items.

**Timestamp**

27:06

And now your request is on the returned.

**Timestamp**

27:13

And there's nothing you can do at this point because, uh.

**Timestamp**

27:18

Physical item loan request starts with the borrowing library, creating that request. And then the lending library is the 1 to complete that request when the items arrives there. So it will stay here until the lending library closes. The request.

**Timestamp**

27:36

So this is for the physical item, and the staff initiate staff mediated method. Now, Susan needs to create the, uh, request for the copy as well. So, for the discover item for the copy for the article.

**Timestamp**

27:56

She can start using the advanced search at the article level, but because many libraries catalog at the journal level for the chances of finding that item is higher. So, let's start using the basic search at Journal level.

**Timestamp**

28:20

So, I enter the number search.

**Timestamp**

28:26

And the same thing, uh, the highest number.

**Timestamp**

28:29

Of library owning that item, but you can change the, uh, the relevance.

**Timestamp**

28:36

You also have for the I icon.

**Timestamp**

28:40

To see that the bibliographic information, and you have the search for versions with same title and author as well.

**Timestamp**

28:49

So, it's the same thing. If you have automation, you can click the create request button and automation will take care of applying your constant data, matching the record and, uh, populating your lender string automatically and, you.

**Timestamp**

29:09

Only need to complete with your patron information and send that request. Otherwise you have to do this manually.

**Timestamp**

29:17

Doing all that research with the libraries, or applying your custom holdings path let's create the request.

**Timestamp**

29:31

And I'm applying the cost of the data copy.

**Timestamp**

29:39

The need before date. I can select that.

**Timestamp**

29:48

From using the calendar, and because I'm creating the request at Journal level, I need to give more information about the article.

**Timestamp**

29:57

Such as the name as much information as you have.

**Timestamp**

30:03

To help the other library to understand what piece of information you need in this journal.

**Timestamp**

30:15

I have the author, um, the issue and the year.

**Timestamp**

30:22

I have the pages as well.

**Timestamp**

30:31

Then all the information about the library, come from the constant data.

**Timestamp**

30:38

And I enter the patron information.

**Timestamp**

30:43

The ID the email.

**Timestamp**

30:50

And then I can send this request.

**Timestamp**

30:57

And the same thing, the system automatically generates this ID

**Timestamp**

31:04

Number for the request, I can start managing it from the home page.

**Timestamp**

31:13

And very similar to the physical item. I can add anything here. I can add, a note I find useful, uh, for all the staff from the library to understand why I'm still working and this request, I can cancel the request.

**Timestamp**

31:31

The request will be here under borrowing requests.

**Timestamp**

31:37

awaiting response, and the other library has 3 options.

**Timestamp**

31:43

Conditional as I showed you that you have 4 days to work on, that it moves to the next lender in the lender string.

**Timestamp**

31:56

And if the library has supplied the item, it will be here in transit.

**Timestamp**

32:02

And if the library has used article exchange, which is part of the service to supply that, that copy, eh, you can also find here under the article exchange alert.

**Timestamp**

32:16

And article exchange creates this unique URL and password to protect the document.

**Timestamp**

32:25

You can preview that to see if it's the correct 1.

**Timestamp**

32:30

And then you can forward this to your patron.

**Timestamp**

32:36

Here on the right you see the E mail doc to patron.

**Timestamp**

32:42

Click that button and because I have added the email.

**Timestamp**

32:48

Information on the request, then that information automatically populates in the email.

**Timestamp**

32:56

That goes to the patron, and I can add a note here that the document expires.

**Timestamp**

33:05

After viewed.

**Timestamp**

33:10

5 times or after 30 days.

**Timestamp**

33:19

And then I can send this to my patron.

**Timestamp**

33:25

And after I sent that document to the patron, I can mark as received.

**Timestamp**

33:31

So, let me copy this again when I mark this as received, because it's a copy request, uh, the system will automatically close that request. So when I go to the homepage, and I search for that request.

**Timestamp**

33:47

It will be here under closed requests.

**Timestamp**

33:51

So, you can see the status is closed supplied because there's nothing to be returned. And if for any reason, you forgot to email that to your patron. You can still do that.

**Timestamp**

34:04

As long as if it is still, within the 30 day timeframe.

**Timestamp**

34:11

So, you can still email this to your patron, and you can see here where, where this was, uh, shipped to your library. So you can count that you can use to have until May the 10th to send this to your patron.

**Timestamp**

34:27

Something like that so this is, uh, for the staff initiated staff

**Timestamp**

34:37

mediated.

**Timestamp**

34:40

Method do you have any questions.

**Timestamp**

34:58

So, now, let's move to the 2nd, request method. The patron initiated staff mediated.

**Timestamp**

35:06

Preston is a patron at the library in his neighborhood.

**Timestamp**

35:11

Preston is searching for an item on his library's online catalog, using a discovery tool, uh, supported discovery tool in this case WorldCat discovery it could be D2D or any other supported discovery tool that accepts open URL.

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35:31

But the item is not part of his library's collection. So Preston finds this

**Timestamp**

35:41

Button this request item button that his library has configured in the system.

**Timestamp**

35:48

He clicks that completes the form and sends the ILL request that will then be processed by a staff member at his library.

**Timestamp**

36:02

In the patron initiated staff mediated method once Preston, submits the ILL request. Then the request lands in his libraries WorldShare ILL interface under the new for review, not reviewed status for.

**Timestamp**

36:22

Staff member to mediate the request, and once a staff member approves the request, then it moves to the new for review.

**Timestamp**

36:33

Reviewed status, and it stays there until the request is sent to lenders to be fulfilled. This is the Patron initiated staff mediated method with Preston, the patron number 1.

**Timestamp**

36:52

The 3rd method Patron initiated

**Timestamp**

36:56

Unmediated. Paula is a library patron as well.

**Timestamp**

37:01

She is searching for an item on her library's online catalog, but the item is not part of her library's collection. And, like, Preston, she finds the request item button, completes the form and submits the request.

**Timestamp**

37:21

In this case, because Paula's library has configured the full automation in the automated request manager in the system with the Pre approved lenders. Then Paula's request goes directly to lenders, which will supply.

**Timestamp**

37:41

That item this is the patron initiated staff unmediated method with Paula the patron number 2.

**Timestamp**

37:53

Uh, if you have admin roles in your account, you can configure the patron initiated methods for your library. The both methods the configurations are done in the service configuration. The easiest way to access

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38:13

OCLC service configuration is from your WorldShare ILL homepage, those libraries, using resource sharing for groups have these configurations done on their behalf. So, let me briefly show you these options. So, keep in mind that I cover the.

**Timestamp**

38:33

ILL configuration options in detail in the introduction to WorldShare ILL class, you can register to the next class or access the latest recording. So, let me, uh, share my browser.

**Timestamp**

38:50

Again, and we can navigate through those options.

**Timestamp**

38:58

So, here on the homepage.

**Timestamp**

39:01

And the middle section on the other is where you find the old, the configuration.

**Timestamp**

39:09

And there are some options, uh, that you have to take care here for, uh, those.

**Timestamp**

39:16

Both methods to be available for it to allow your patron to.

**Timestamp**

39:21

Request ILL through your discovery tool.

**Timestamp**

39:27

So, the 1st, is to make sure that your patron is authenticated, uh, that, uh, authentication is configured.

**Timestamp**

39:36

It can be any type of authentication, or Ezproxy, for example, for the address range in your library it comes from here on the left side panel on the IP addresses and the manage address that's

**Timestamp**

39:53

Where your technical staff can add those uh.

**Timestamp**

39:58

I P, ranges the 2nd step is to configure the request item button under here WorldCat discovery.

**Timestamp**

40:08

And that is the option here to place hold request buttons.

**Timestamp**

40:15

Resource sharing, uh, the text that the goes in the button can be customized up to 40 characters.

**Timestamp**

40:25

You can add translation and that type of configuration button is open. Url.

**Timestamp**

40:34

1.0. This is the option for either, WorldCat discovery or any other supported discovery tool.

**Timestamp**

40:44

Open URL is a base URL that links bibliographic information to related web services in this case WorldShare ILL, is used to directly your patrons towards.

**Timestamp**

41:01

the patron form when placing ILL requests, and it populates that form with the bibliographic information. I provided a link to the documentation with detailed instructions on how to configure open URL on the copy of the presentation.

**Timestamp**
41:21
And then after you've selected these options, then.

**Timestamp**
41:25
You can save the changes.

**Timestamp**
41:30
Then, after you have configured the.

**Timestamp**
41:35
That button, the next step is to customize the patron work form. Uh, it's here on the.

**Timestamp**
41:44
Um.

**Timestamp**
41:50
Go a little bit.

**Timestamp**
41:54
And a request

**Timestamp**
41:57
Form

**Timestamp**
42:03

You can't customize this, but keep in mind the bibliographic section do not change or eliminate anything here because this is what allows the system to automatically populate the bibliographic information about the record that your patron.

**Timestamp**

42:23

Wants to request in the system, uh, you can move this section to the bottom if you want to using the arrow.

**Timestamp**

42:34

But do not remove the section or remove the fields.

**Timestamp**

42:38

Uh, the other section that you can customize is the patron section. Uh, you can, uh.

**Timestamp**

42:46

Customize the fields here and make the fields required or not.

**Timestamp**

42:54

The patron ID must be, uh, a required field.

**Timestamp**

43:00

If you are using a.

**Timestamp**

43:04

Automation to, uh, allow that to be populated as well.

**Timestamp**

43:11

And every time you change any field here, and then the field, the label.

**Timestamp**

43:19

Changes, uh, accordingly and you can add more fields here.

**Timestamp**

43:25

There are 2 patrons sections you can eliminate to 1 of them if you don't need that.

**Timestamp**

43:31

And after you have customized this, uh.

**Timestamp**

43:36

Patron form, then you can save it and this is the form that your patron will see when they click that request button.

**Timestamp**

43:48

And, uh, another piece of configuration is the automation automated, the request manager on the, this is valid for all the 3 methods. There. There are.

**Timestamp**

44:01

Instructions for that you can see that you can find that

**Timestamp**

44:05

on the copy of the presentation, so basically you click this add new button you have as a borrowing library, and as a lending library as well. So you'll see it can match the bibliographic record.

**Timestamp**

44:21

Your custom holdings group, your Pre approved groups, your library's information, your constant data.

**Timestamp**

44:28

So, you can give a name, give a priority and, uh, how you want the system to match the bibliographic information.

**Timestamp**

44:38

Mainly, if the patron is the one initiating the request.

**Timestamp**

44:43

You can have multiple fields to the same the option.

**Timestamp**

44:49

And the action you want to be a applied.

**Timestamp**

44:54

apply constant data, and you can select one that will be used for all those types of requests. Uh.

**Timestamp**

45:04

Built the lender string you have Pre approved.

**Timestamp**

45:08

Request, uh, lenders, you select your custom holdings groups and paths.

**Timestamp**

45:15

That you have created to be used for all those requests.

**Timestamp**

45:22

And route request to review, this is when you are Pre approving for full automation, but instead of that, you want the request to be sent to review.

**Timestamp**

45:39

Exceptions when to send the requests to lenders is

**Timestamp**

45:52

The option when you want full automation, the.

**Timestamp**

45:57

patron ILL request.

**Timestamp**

46:01

to send directly to the lenders, and you can select the

**Timestamp**

46:07

Custom holdings path you want to be preapproved to be sent directly to your patrons.

**Timestamp**

46:14

and when you create this, to be sent directly to your patron.

**Timestamp**

46:19

You can add exceptions as well if it's duplicate,

**Timestamp**

46:25

Send for staff to approve, if it's part of your group

**Timestamp**

46:31

Sen for staff to approve, and if it's it's held by your institution to send for staff to approve, too, that new for review, instead of sending directly to the patron, and then you can save that. So these are the options you have available.

**Timestamp**

46:51

To allow your patron to initiate the request, and also to have the automation for all.

**Timestamp**

46:58

The 3 methods.

**Timestamp**

47:18

Let's continue exploring topic number 2 this time. Let's see how a patron can place requests in the system after your library has configured this option. Let's see how our friend Preston can place a request in the patron initiated staff mediated method.

**Timestamp**

47:38

And how a friend, Paula can also place a request in the patron initiated, unmediated method.

**Timestamp**

47:50

So, uh, now suppose your library subscribes to WorldCat discovery, or D2D or any other supported discovery tool and has ILL option configured there.

**Timestamp**

48:02

Your patron wants to request this book title that's not part of your collection. Let's see how this happens in the situation similar to Preston. The, patron initiated staff mediated method or the situation similar to Paula's the patron initiated

**Timestamp**

48:22

unmediated method and how you can manage the request when you want to mediate the processing and this works for libraries using resource sharing for groups as well. So let's start. Let me share.

**Timestamp**

48:38

My browser and open the discovery.

**Timestamp**

48:43

As an example, so you can see a little bit how this works.

**Timestamp**

48:48

And have an idea how this works.

**Timestamp**

49:11

So this is the worldcat discovery interface.

**Timestamp**

49:16

And the patron must be authenticated to place the request.

**Timestamp**

49:24

To access that.

**Timestamp**

49:30

For so, let's start searching here for that title.

**Timestamp**

49:39

So, Preston is searching for that title.

**Timestamp**

49:42

And he sees that his library does not own this title.

**Timestamp**

49:49

So, when he clicks the title detail, he finds that request this item from another library. button.

**Timestamp**

49:59

When he clicks this button, then he's accessing, uh, the patron work form. So you can see here that all the bibliographic information was.

**Timestamp**

50:12

Populated and now, uh.

**Timestamp**

50:18

Preston needs to complete the need before date

**Timestamp**

50:22

A required field, so he needs to inform this to his library.

**Timestamp**

50:29

Uh, the, these fields are not required, so he can skip that.

**Timestamp**

50:38

Information his name.

**Timestamp**

50:41

And, uh, I D.

**Timestamp**

50:54

And then submit that request.

**Timestamp**

50:59

And then he receives this ID number for the request. So he can, uh, follow up on his request with his library.

**Timestamp**

51:15
Oh, after.

**Timestamp**
51:18
Preston submits that request.

**Timestamp**
51:23
Because this is a patron initiated.

**Timestamp**
51:26
staff mediated request, the request goes to his library worldshare ILL interface under borrowing

**Timestamp**
51:36
Request s accordion in the new for review, not reviewed status for a staff at the library to approve that request.

**Timestamp**
51:47
The library staff member then clicks either the.

**Timestamp**
51:52
Id or the title to open the request.

**Timestamp**
52:00
And, uh, then check the request and there are some options here if automation is configured, then this staff member can click the, send the request button.

**Timestamp**
52:13
To send the request to lender s, if automation is not configured, then the staff has to

**Timestamp**

52:23

Apply the constant data, then click, the view holdings link to

**Timestamp**

52:30

Populate the lender string.

**Timestamp**

52:33

And another option here is for the staff to Mark as reviewed in case another staff member needs to work in this request. In this situation. The request moves to new for review.

**Timestamp**

52:47

Reviewed status, and it stays there until the request is sent to lenders.

**Timestamp**

52:55

Uh, this process is similar in case a staff member is placing the request on behalf of the patrons using the support, the discovery tool. So, this is the patron initiated staff mediated method. So, the patron starts in the discovery tool

**Timestamp**

53:14

It lands here in the worldshare ILL.

**Timestamp**

53:19

New for review status, not reviewed, staff can approve that, complete the request. Or if automation is working, just send that request to

**Timestamp**

53:33

The lenders or Mark as reviewed for another staff to send that request to lenders and then proceed managing that request the same way as Susan's, uh, case.

**Timestamp**

53:50

Following the, uh, this, uh, the in transit and the received in use and returned the similar process.

**Timestamp**

54:06

Any questions so far now, let's see what happens when Paula

**Timestamp**

54:15

Places that request. Let me go back to the discovery.

**Timestamp**

54:27

So, in Paula's situation, when Paula place her request, when she clicks this request item from another library button because her library has configured the full automation with preapproved lenders. The, her request goes directly to

**Timestamp**

54:47

And the copy requests would be sent directly to the patron. So, Paula would received the document directly from the lender.

**Timestamp**

54:57

And loan request for physical items might be sent to your library.

**Timestamp**

55:03

To her library, then the staff can start managing from the in transit status. That's the patron initiated unmediated

**Timestamp**

55:14

Method, so that's how.

**Timestamp**

55:19

It all works any question.

**Timestamp**

55:26

It's easy to follow. No, I have a question for you to see if, uh.

**Timestamp**

55:43

You understood the concepts. Oh, let me see here. If I'm still have that. Okay.

**Timestamp**

55:58

Okay, let me open. So, the question is select the correct statement.

**Timestamp**

56:10

The patron work form cannot be customized. Automation allows the system to automatically find the best record match, Patron initiated requests are never managed by library staff or selecting the type of request loan or copy is not important.

**Timestamp**

56:30

Feel free to participate. I don't see any names here, I just see a percentage or numbers.

**Timestamp**

56:40

Just feel free to vote which option you'll find is the correct one.

**Timestamp**

56:56

So, I can see here that you've selected number 2.

**Timestamp**

57:02

Let's see the correct answer.

**Timestamp**

57:06

The correct answer is number 2 automation allows all of these options. The other options are incorrect.

**Timestamp**

57:16

So, thank you for participating.

**Timestamp**

57:24

So, now let's move to a topic number 3.

**Timestamp**

57:28

Manage requests as a borrower once you have your request in the system in any of the 3 methods, you'll need to manage and update them and solve some issues. You might encounter with your request. I will go live to show you how

**Timestamp**

57:48

Uh, easy is to undertake these actions in the system.

**Timestamp**

57:53

So, let me share my browser and show you some examples of how you can manage and solve some of these issues in the system.

**Timestamp**

58:14

So, here back, uh, worldshare ILL interface, let's start with the topic number 1 how you can respond to conditionals. So, under borrowing requests accordion, on the left side panel, when you receive an answer as

**Timestamp**

58:34

Conditional now you have 4 days to take action so you can see here under the conditional status, the conditions and this case, uh, the.

**Timestamp**

58:47

Library requested a, uh, loan request for musical scores and the library has replied that they cannot lend the full material, but they can provide some copy which pages. So you can open that request.

**Timestamp**

59:06

So here the conditions, you have 3 options, if you answer no, the request moves automatically to the next lender in the lender string, you can cancel the request.

**Timestamp**

59:17

If you decide to answer yes, you need to provide that information according to the conditional. So they are asking which pages. So you can inform here.

**Timestamp**

59:29

Uh, for example.

**Timestamp**

59:38

Chapters of pages, you can change your need before date and then you can answer. Yes. Once you answer yes that library cannot send another conditional. They either supply the item or they answer No, and it moves to the next lender.

**Timestamp**

59:58

in the string so now you no longer have a conditional here so your request is awaiting response.

**Timestamp**

1:00:09

Until a library provides that item.

**Timestamp**

1:00:14

You saw how you can receive individual items, but you can also receive in batch. So when you have the in transit, every time you see this.

**Timestamp**
1:00:25
Arrow this green arrow, it means that allows batch processing so in transit you can batch receive.

**Timestamp**
1:00:34
Items, so, for example, I want to batch receive.

**Timestamp**
1:00:42
Items here in this list, instead of open 1 by 1 and doing it individually. So I can click in the batch receiving items. The items link on the top and select the ones I want to batch process. So I can select.

**Timestamp**
1:00:59
Click the plus sign to add those you want.

**Timestamp**
1:01:05
Add to the list if for any reason you add one here by mistake.

**Timestamp**
1:01:25
You can easily remove using the X.

**Timestamp**
1:01:30
Sign it's removed and then you can mark to print the book straps for all of them. All of them will go to your print queue list.

**Timestamp**
1:01:41
And you can mark as received.

**Timestamp**

1:01:45

So, you see that all 5 requests were updated to received in use and all the books traps are there in your print queue.

**Timestamp**

1:01:58

You can also batch return so under received

**Timestamp**

1:02:04

When you're done with those items, instead of return

**Timestamp**

1:02:08

Individually you can also batch return so you click the batch return.

**Timestamp**

1:02:15

link, select the ones you want to bet returned.

**Timestamp**

1:02:20

using the plus sign if you mark anything

**Timestamp**

1:02:33

Incorrectly you can eliminate it.

**Timestamp**

1:02:37

It's easy you just click the X button, then you can mark to print return labels to all of them. So everything will go to your print queue, and return items.

**Timestamp**

1:02:52

And all the 5 requests.

**Timestamp**

1:02:55

Updated to returned and all the 5 print labels will be

**Timestamp**

1:03:02

Sent to your queue so if you go to returned, all of them are listed here as returned.

**Timestamp**

1:03:09

And all of them are in your print queue, for example, the return labels they are listed here.

**Timestamp**

1:03:16

So, it saves you, uh, sometime instead of doing that individually.

**Timestamp**

1:03:22

You can also request renewals in case. Your patron needs more time with a an item. So, for example, let's let's open 1 example here.

**Timestamp**

1:03:34

Under the received in use status.

**Timestamp**

1:03:42

Um, but in this example, your patron needs more time with this item. So I can use the calendar icon here on the top.

**Timestamp**

1:03:57

Select the the date.

**Timestamp**

1:04:02

For example, my patron needs more time until the end of May and then I click the renewal item button. It's up to the other library to accept that or not. Your request is now under

**Timestamp**

1:04:19

Renewal requested. It's here.

**Timestamp**

1:04:24

If the library accepts it, your request will be under renewal approved.

**Timestamp**

1:04:31

With the new date if it

**Timestamp**

1:04:37

The other library denies your

**Timestamp**

1:04:40

Renewal request, it'll be here under renewal denied and you have to return the item on the original

**Timestamp**

1:04:49

Due date. Okay another option you have that I showed you is the multiple copies of the same

**Timestamp**

1:05:01

Item and when you do that, you will select multiple copies your requests, even though they are treated as individual request, they'll be here under linked

**Timestamp**

1:05:16

Requests status, and you find your request listed here for you to manage until all the items are supplied. So they will stay here until the

**Timestamp**

1:05:29

Last item is supplied, uh, for you to make sure that your patron receives all the

**Timestamp**

1:05:37

Items about the same time.

**Timestamp**

1:05:44

Some, let's talk about some issues, you might find it with your requests.

**Timestamp**

1:05:49

For example, uh, the library.

**Timestamp**

1:05:53

Request is here in transit, but you haven't received that request.

**Timestamp**

1:05:59

Some time has passed, so you need to communicate to the other library that you haven't received that item. So you open the request and then you mark this as not received.

**Timestamp**

1:06:15

When you mark it as not received your request moves to the not received status, the other library receives the same information. It's under the not received there and both libraries can use this email button here.

**Timestamp**

1:06:33

To communicate with the other library to start that communication.

**Timestamp**

1:06:39

You see that all the information about the request goes on the body of the message and then you can.

**Timestamp**
1:06:46
Check with the other library, what happened to that request if you should continue waiting or if you proceed requesting to other libraries.

**Timestamp**
1:06:59
And it stays here, uh, in not received until the issue is solved.

**Timestamp**
1:07:05
Another issue you might encounter here is the unfilled

**Timestamp**
1:07:12
Status, unfilled means that no library has supplied that item.

**Timestamp**
1:07:19
And, uh, then you can open that request.

**Timestamp**
1:07:24
You can go to the history on the bottom of the request.

**Timestamp**
1:07:29
There is the history why libraries haven't.

**Timestamp**
1:07:34
Supplied that item or why library has they have supplied the item to have the history here including automation as well. Uh, why.

**Timestamp**

1:07:47

The library answered no in this case was auto deflection, that

**Timestamp**

1:07:52

Library has created as rule as the lending rules, and they don't supply, uh, sound recordings. So, came to the system as auto deflection, and, you know, to not send to this supplier or this group of libraries.

**Timestamp**

1:08:11

Anymore so, instead of recreating this request.

**Timestamp**

1:08:16

Uh, the only thing you have to do is click this view holdings link that you see here on the body of the request, the form

**Timestamp**

1:08:26

And, uh, select the new group of libraries. You can use your custom holdings path that you have created or you can select the libraries from the list.

**Timestamp**

1:08:39

And then click the update request button.

**Timestamp**

1:08:46

And then resend your request to your new group of libraries when you do that, your request is no longer under unfilled, your request is here under.

**Timestamp**

1:08:58

Uh, awaiting response. Another issue you might find is the expired, expired means that no library has answered to your request on the before needed date, or they have.

**Timestamp**

1:09:18

They have replied no, some of the libraries they haven't responded to your request and your request expired. So when your request expired.

**Timestamp**

1:09:35

You see, uh, the request is closed.

**Timestamp**

1:09:38

But you don't need to recreate this request from scratch.

**Timestamp**

1:09:43

You can use this new button on the upper right side.

**Timestamp**

1:09:48

Now, all the information is back to a form.

**Timestamp**

1:09:51

You can use the view holdings link.

**Timestamp**

1:09:55

So, select a new group of libraries.

**Timestamp**

1:09:59

Update your request and then, uh.

**Timestamp**

1:10:04

Send your, update the needed before date.

**Timestamp**

1:10:10

And send your request to a new group of libraries.

**Timestamp**

1:10:14

So, that's how you can easily solve some of those issues you might encounter with your request.

**Timestamp**

1:10:23

And how you can manage your requests, uh, And the last option here that you have is, uh, for those requests created outside of worldshare ILL that you want to bring into the system you can do that by using the off system.

**Timestamp**

1:10:42

Option. Off system request, you start by creating that request or reusing one request uh, I.

**Timestamp**

1:10:53

Let's use the ISBN.

**Timestamp**

1:10:57

A basic search, because ISBN is a unique information.

**Timestamp**

1:11:11

So this is the the item so you click this, create request button.

**Timestamp**

1:11:20

Save it for review, then under borrowing requests.

**Timestamp**

1:11:27

Uh, reviewed option.

**Timestamp**

1:11:31

The review the status, your request is here.

**Timestamp**

1:11:35

Open the request and changed the fulfillment type to be off system.

**Timestamp**

1:11:42

Then you need to have configured in the service configuration under worldshare ILL

**Timestamp**

1:11:49

And address book, that's where you configured your partner here.

**Timestamp**

1:11:56

After you configure your partner here and save it, then you are able to select.

**Timestamp**

1:12:03

your partner.

**Timestamp**

1:12:06

Mark, the need before date.

**Timestamp**

1:12:11

Save it submit the request and now your request is on the off system.

**Timestamp**

1:12:21

Your request will be here under off system requests.

**Timestamp**

1:12:26

under borrowing, and then you can manually change the status of your request.

**Timestamp**

1:12:34

as the status changes.

**Timestamp**

1:12:38

And all this information becomes part of your reports for you to, uh, analyze your.

**Timestamp**

1:12:47

interlibrary loan activities.

**Timestamp**

1:12:50

With all the requests, including those outside of worldshare ILL

**Timestamp**

1:12:56

And you have, uh, links to the documentation page and the copy of the presentation as well.

**Timestamp**

1:13:04

to use as reference so these are the options for you to, um, manage.

**Timestamp**

1:13:12

all the requests and solve some issues you might encounter.

**Timestamp**

1:13:18

With those requests any questions you can use the, the chat.

**Timestamp**

1:13:27

If you need to send your questions.

**Timestamp**

1:13:33

So, now let's move to our last topic.

**Timestamp**

1:13:38

Uh, after you create and manage requests in the system, you can generate reports to support your activities. Let's go live to see the report options.

**Timestamp**

1:14:02

So, from your worldshare ILL

**Timestamp**

1:14:05

Homepage in the middle section under OCLC usage statistics.

**Timestamp**

1:14:13

You need your 9 digit authorization and password. If you don't have that, you can contact OCLC support to retrieve that information. And, uh.

**Timestamp**

1:14:25

It's 1 information for the entire library.

**Timestamp**

1:14:34

You have several options as reports as a borrowing library. Let's highlight some of them. The resource sharing, borrow reasons for no report is the one that tells you which libraries, uh, have.

**Timestamp**

1:14:52

Answered no to your requests and why, and you can use this report to manage your custom holdings groups. Your Pre, selected libraries. If those libraries don't respond to your request, you can remove them from your groups. So you'll have all.

**Timestamp**

1:15:12

Information and then you can export this report.

**Timestamp**

1:15:17

You can select, they are monthly based reports. You can select the month.

**Timestamp**

1:15:25

And you can also select for the system to automatically send that.

**Timestamp**

1:15:31

Report to the email addresses, uh, you want a.

**Timestamp**

1:15:36

Listed here, so you can list the email addresses mark to send them monthly the format you want to receive that the style as an attachment or hyperlink.

**Timestamp**

1:15:50

To report, save it and the system will take care of sending you emailing you that, uh, report on a monthly basis.

**Timestamp**

1:16:00

You don't need to come here manually, generate the report. Another report that's, uh, very useful. Is the borrower.

**Timestamp**

1:16:09

Resource sharing status report, you have all the information about your requests and, uh.

**Timestamp**

1:16:19

This is a full detailed report where under the you see here direct request, this is where you see this N means that.

**Timestamp**
1:16:33
These are staff initiated requests.

**Timestamp**
1:16:38
When you see, uh, the letter Y it means that the request was initiated by your patron.

**Timestamp**
1:16:46
And it can be listed here under unmediated like our a friend, Paula or mediated

**Timestamp**
1:16:55
Like our friend Preston. And you have all the information about the request, including the costs.

**Timestamp**
1:17:08
When all the information you see here, and, uh, uh, this is also a monthly based report and you can export and also set for.

**Timestamp**
1:17:21
The system to send you, uh, monthly you can list the email addresses here, separated by.

**Timestamp**
1:17:30
For example, separated by semi column, you can have multiple email addresses here and all these email addresses will receive, uh, this report on a monthly basis.

**Timestamp**
1:17:50
So, that's how you can generate your reports that are more options here, but just want to highlight and those 2, uh, that you'll be using more often.

**Timestamp**

1:18:03

Any question so.

**Timestamp**

1:18:17

We have covered the basics of

**Timestamp**

1:18:21

worldshare ILL borrowing with our friends

**Timestamp**

1:18:25

Susan, Preston and Paula

**Timestamp**

1:18:29

You have learned how you can easily submit ILL requests and update them

**Timestamp**

1:18:37

In the system, including how.

**Timestamp**

1:18:42

Your patron can submit requests.

**Timestamp**

1:18:45

You have learned how you can manage your requests such as renewing them and solving some issues.

**Timestamp**

1:18:54

And how you can generate reports and have them sent automatically to your email on a monthly basis.

**Timestamp**

1:19:06

In the days ahead as you start creating and managing your request, you can use our support portal as reference. Let me briefly show you.

**Timestamp**

1:19:27

This is our, uh, support portal.

**Timestamp**

1:19:31

So, you start in resource sharing.

**Timestamp**

1:19:38

WorldShare interlibrary loan and you see that everything is divided into categories.

**Timestamp**

1:19:47

for you to easily find them, including, uh, other training sessions.

**Timestamp**

1:19:56

Or you can start by typing a topic.

**Timestamp**

1:20:03

in the search box and easily find the areas, uh, where you can.

**Timestamp**

1:20:14

Find all information there are some, uh, short videos in some of these

**Timestamp**

1:20:20

Topics and that's how you can access, uh, this area.

**Timestamp**

1:20:41

We are reaching the end of our session in case you don't have any other questions then I would like to thank you for participating in this session. When you leave the session, uh, window will pop up on your screen with the evaluation form.

**Timestamp**

1:20:58

The information regarding this session is on this slide, you value your contribution for any training questions. Please contact us.

**Timestamp**

1:21:09

Training@oclc.org

**Timestamp**

1:21:14

Thanks again and enjoy the rest of your day.