

Introduction to WorldShare ILL Transcripts

May 9, 2024

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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

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WorldShare Interlibrary Loan session.

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For those of you brand new to the service and those of you returning to ILL to refresh.

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Your knowledge we are covering the 4 topics that get you to the ILL process

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in the service, by the end of the session, you will have a better understanding of the necessary steps in WorldShare ILL

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1st, we'll you explore the basic concepts of WorldShare ILL

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2nd, you will learn why you should prepare to use the service.

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3rd, you will follow the path in how you can easily create and process requests in the system.

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Finally, you'll learn how to generate reports to support the way you manage those requests and any transaction costs.

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And, of course, where you can find more documentation and contact OCLC support.

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As a note, we offer other training sessions like this one for WorldShare ILL borrowing and WorldShare ILL lending where I give more detail on the functionalities in the service. You can either register for the next live sessions.

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or watch a recording, so let's start with topic number 1, the basics of WorldShare ILL

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For a little bit over 5 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, uh, diversity of

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The formats in its contents many OCLC services, including WorldShare ILL are built around WorldCat. So, as a borrower as a borrowing library, you have this rich source of materials as part of WorldShare ILL

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To find the items for your requests, and as a supplier, you can have your collections displayed in the WorldCat database for libraries to request items from, you.

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Each library using OCLC services receives a symbol, the screenshot on the right shows examples of some OLC symbols. Uh, the symbols are assigned by OCLC during the service implementation.

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We use these symbols.

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In WorldShare ILL to identify libraries that own

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An item, and also to identify libraries that are requesting items in the system, you will see these symbols as you progress into the session. And for those of you returning to ILL, you are pretty familiar with these OCLC symbols in the service.

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So, when you go to WorldShare ILL to request an item as a borrowing library, these 5 things happen.

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1st, you search WorldCat for an item.

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Find your item 2nd, you have your lender string populated with your selected lenders.

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Next you send your request to your chosen lenders.

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And finally you manage the request update it in the system when the item arrives, mark it as received.

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In addition for physical items, you manage the request.

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Update the request in the system when your patron is done with the material, and then you can return the item to the owner.

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You can have some of these steps automated to save you some time. You'll see how automation is configured later in the session. We'll talk a little bit about that.

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After searching and finding your items.

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You can choose the lenders to populate the lender string on on your request.

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You can select up to 15 libraries at a time to request from. And the way it works is that each lending library has as default 4 days to respond to the item. Not including, uh, U. S, national holidays and weekends. Lending

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Libraries can choose days to respond, but the default is 4 days and then the system can automatically advance the request to the next lender. If a lender doesn't respond, or says no to a request. So, the more lenders you add to the lender string the better

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Your chances for your request to be fulfilled, I will talk later about options to automate the lender string, letting the system populate the lender string automatically based on your configurations.

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The request type is important, because it determines the workflow for requests through the system, and it defines how you can manage those requests. So loan requests they're initiated by the borrowing library. The

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Borrowing library creates that request a lending library answers that request and that request is closed when the item is returned to the lending library and that library updates the system. And Mark as received.

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Copy requests are initiated by the.

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Borrowing library, then a lending library supplies that item and when the borrowing library receives the item and updates the system mark it as received, then the system automatically closes that request completes that request because

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7:18

There is nothing to be returned to the lender.

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Any questions, so far if you have questions, as I said, you can use the chat.

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7:42

Now, let's move to topic number 2 to discuss some preparation options to help you save a lot of time in processing or answering requests instead of doing everything manually. If your library is new to WorldShare ILL, you have received a

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Welcome letter from OCLC with your custom web address and username to sign into the system for the 1st time.

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8:11

If you are the one new to the system, and you don't have your library's customer address, you can contact OCLC support to retrieve that. The same if you misplace that URL. I suggest that you bookmark your

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custom web address. For those libraries, part of a group and using OCLC resource sharing for groups, the implementation team at OCLC configures, automation and requestability for the requests within your group. If you are using WorldShare ILL

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Outside of your group as well, you might want to consider the preparation for those ILL requests outside of your group.

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9:02

So, let me share.

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9:05

My screen here, my browser.

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9:10

And I can show you, so I'm here, my

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Custom web address for my instance, if you, are

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Logging in for the 1st time, you only have the username you don't have for your password. Yet. The 1st step is to click this set reset password.

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Enter your user name.

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Click the request new password, the system, we'll send you an email message with instructions and the mail address that is related to your username.

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For you to create your password, and after you create your password, then you can enter your credentials.

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And can sign into the system. This is the WorldShare ILL interface if you are seeing this for the 1st time here on the

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Upper right side where you see your user name, if you click this arrow, that's where you find the options to change the language interface. If you are in a different country.

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These are the options, you can change your password and that's where you can log out from the system

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at the end of the day, for example. Need help the arrow.

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11:01

General help takes you to the documentation pages.

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11:05

Contact support for you to contact OCLC support if you need assistance and community center, it is an area where you can communicate with all the libraries using the service. You can access it directly from here and, uh, it asks for you.

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11:25

To sign in and create your account if you don't have your account yet and once you're there, you can select, uh.

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11:33

WorldShare inter library loan and you can, uh, participate in discussions, or you can open a discussion yourself, any issues you are facing with the service you can.

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11:47

Learn about new releases or everything new about the service events that are taking place and you can.

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11:57

Send suggestions, recommendations or enhancements for the service things that you think that should be added to the service and our product team. They are looking into the ideas that are being sent in the community center.

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12:14

On the left side panel, it's where you can start and manage your requests.

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In the middle section, you can search for your requests, either active or close requests using 1 of the index options.

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The request ID is a unique number that's generated by this system for every request. And this is the easiest way.

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12:45

To search for your request.

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Below quick links, they are very similar options that you can find on the left side panel. And other is where you can find the links to the other pieces of the service.

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13:00

Let's start with the, uh, the option for you to create additional accounts. You need to have admin privileges in your account to create additional accounts. Each staff in the library can have their own account to access the service and you can do that under the

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Admin tab clicking on new user.

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You don't need to fill out the entire form. Basically just need to enter.

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The 1st name last name.

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And, uh, the.

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2nd area here under library record, you select the E mail.

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address and enter that information here.

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14:05

Then you select the user name, this can be changed later.

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14:11

and the patron type to be staff.

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14:16

Select your library.

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14:19

And you scroll down, you can see that. The user name is the same name that you typed.

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14:25

Into barcode then you click the create button

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14:29

And the system, uh, says that the account was successfully created.

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The next step is to.

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14:44

Define the roles, the privileges, the permissions this staff will have in WorldShare ILL. So.

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Roles you click to expand the accordion and then you click this edit link.

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15:00

On the right and then define the roles, if this person, gonna have the admin privilege.

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15:09

Which allows to create additional accounts and change the configurations for your library.

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15:16

Or this person will only have access to the reports, or will be, uh, WorldShare ILL user, which means you can create and manage requests in the system. Then I save it.

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15:31

So the account was created with the permissions, the privileges.

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Now, if you need to manage this account.

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15:45

You can search for that staff.

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Using 1 of the index options. You can search by the name for example.

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16:00

Open that record and on the

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16:04

upper right side, you have the option to edit

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16:08

The user information.

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16:11

I can change the username, for example.

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16:19

Save it and the change was saved. You can do the same thing with the roles the permission.

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16:29

Click the edit, and I can make this person as admin as well.

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Save it, and now all the changes were applied if you no longer need this record, because this person is not part of your library any longer, or it's not working in the ILL department, you can delete this records using the button on

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The top delete user record delete and, uh, the system.

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has confirmed that it was deleted and, uh, this account is no longer in the system.

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So, that's how you can manage that.

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Going back here to the home page.

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Uh, the other option you have here under other is the.

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Policies directory, the policies directory is where you can have a basic information about your library in the system and if your library is either only borrowing items or.

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Is also supplying items.

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It's very important to keep your policies directory page updated so the other libraries can understand how they can communicate with your library and can understand about your policies as well. So you click.

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18:03

Policies directory and the.

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18:12

Let's see.

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18:20

Uh, if it if for me.

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18:59

Uh, can can you hear me? Can you see what I'm sharing?

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19:12

Okay, uh, Webex just crashed here. It was something that unexpected.

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19:19

Okay, so let me.

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19:25

Go back and share.

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19:45

Yeah, it's something that happened at my side here. Uh.

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It just closed everything.

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20:06

So, let's continue.

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20:11

The policies directory, it lands on your profile tab where you can see a brief information about your library and one of the most important areas here is.

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The supplier and days to respond. So if your library does not plan to supply items, this is the easiest way to stop or prevent libraries from sending requests. So you click this edit link.

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And, uh, then the.

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OCLC supplier should have sat as no when you set it as no.

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21:01

The system automatically.

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21:04

Prevents any libraries from sending requests to your library.

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21:10

The other hand, if you plan to supply items, if your libraries plans to supply items, then you mark as yes.

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21:21

And you need to define your days to respond as I mentioned before the default is 4 days, but you can have different days to define.

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21:33

This doesn't mean that you take that longer to respond. It just means that the request will stay at your library up to those days.

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21:44

And you can have different days for copies and loans, and it's important to save that for the system to retain that information.

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Either as a borrowing or a lending library.

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21:58

The contacts tab is important information, because there are some situations where the.

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only solution is for 1 library to communicate with the other and if you have your information added here under contacts, the other library can come to your policies directory page and find that information. So, uh, you can have several contact information I suggest you to have at least the general.

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You click this add button here, complete the form.

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22:31

With your information, save it and it displays as you can see here, you can edit this at any time.

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22:40

And you can delete as well.

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22:45

Another tab you have here is the schedule.

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The scheduled tab is optional, but for example, if you're a lending library and you just want to pause requests, you don't want to stop supplying items. You want to keep your profile as a supplier. You just want to pause temporarily.

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23:11

You can use closures.

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23:14

Option for that the schedule tab under closures, you click this add button, give a name to your closure.

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23:24

Select the option to find the start date using the calendar.

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23:30

The end date and the supplier, you mark as no.

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23:36

And you can add a note that you find the useful.

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23:41

Then save it when your mark as no and you have those dates, the system will temporarily pause any requests from arriving in your library during this period.

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23:54

Then you save it and it displays as you can see here on this example.

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24:00

You can also have the operating hours.

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24:03

Using the form, the add button.

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24:08

Enter the information you can have multiple as you see in the example I have the weekdays and the weekend.

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24:17

hours. Save it to display as you can see here and this help the other libraries If in case they decide to call your library. They know your operating hours, uh, the best time to call.

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24:33

As a landing library, then you can have the collections tab to add the collections that have special, uh, rules for circulation outside of your library, or they don't circulate at all and then you can create your policies. Uh, there are 3 options here.

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24:53

Deflections, which means you're allowing the system to automatically answer no on your behalf for those items, or those collections that don't circulate outside of your library according to your rules here that you define under deflections, you can have your.

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25:13

Copies.

Timestamp

25:14

And you can have your loans as well and as I mentioned the other libraries, they have access to your page, and that they can look at your policies before selecting your library to the lender string. So, as I mentioned, there are, um, documentation that are short videos.

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25:34

That explain step by step how you can set up the collections and the copies and loans and I go in detail in the WorldShare ILL borrowing and WorldShare ILL. lending sessions.

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So this is for the policies directory.

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Another option you have here from your home page is the configuration.

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26:03

You need to have.

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26:06

Admin privilege to your account to either change your policies or to change your configurations in OCLC service configuration. But even if you don't have those privileges it's important for you to understand where the options that

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26:26

You you have available on your instance, are coming from.

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So, the OCLC service configuration is the area where you can customize your experience with the service.

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So, for example, uh.

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On the left side panel under WorldShare ILL

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26:47

You can create your constant let me make this a little bit bigger. So you can see better.

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26:58

So, under WorldShare ILL, you can have constant data either as a borrower or a lender. Constant data is the information about your library that does not change from request to request and can be easily applied to your request.

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27:18

To save you some time and avoid mistakes, like for example, defining if it's a loan or it's a copy.

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27:27

So, as a borrower, you can have as many as you want. I suggest that you have at least 1 for copy and 1 for loan. So you can.

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27:42

Easily select those, you fill out.

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27:46

The request. You click this create new CD record on the right complete the

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Form select the

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Type of request is very important. The need before date. If you add the, these, uh, in days usually 30 days. So if you add it.

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28:08

30 days from the day you are creating, then the system will automatically populate that date on the form you don't need to type that.

Timestamp

28:18

You complete your information if the billing is the same as.

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28:23

Uh, the shipping you click the copy from shipping information button, or you can complete the information. Ship via. Is your preferred courier, uh, ups, USPS, DHL, FedEx.

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28:43

And the electronic delivery, it's for when you are creating constant data for copy request so you can select, uh, how you'd like to receive the electronic file.

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28:59

ILL Fee management is

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29:02

A way of receiving or paying for requests with.

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29:07

Transaction costs using your OCLC account instead of sending payments directly to the library. So if you mark this option, then the system will automatically either debit or credit to your account. If you are.

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29:27

Or, if you are supplying item, the maximum cost is very important. Even if it's 0, you need to enter here because if you don't, you are responsible for whatever the lender charge. So you are.

Timestamp

29:43

Receiving the material, and if you leave this in blank, the other library probably has created the deflection based on cost and the request goes through your library gets charged when you don't accept any charge. So it's very important to select that. And select the.

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30:03

Currency, uh, if your library is in euro zone.

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South Africa, Australia, UK, Canada, you'd have your local currency configured here for your library for those requests within your region.

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And then you can add any other information, find useful, save it and then you have your constant data to be use it and to be added at any time, you can open and add it at the end of time.

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30:41

You need to save your new and you also have to save anything you edit and if you no longer need any, any of, uh.

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The constant data you have created, you can scroll down.

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30:58

Open that record scroll down and click the delete

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31:02

record. The Lender

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31:06

Constant data is very similar.

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31:12

And you have either as a borrower, or a lender, you have a default already created for your library. The difference is that the default as a borrowing library for example, you don't have the request type defined there. And that's why I suggest to have at least 1 for copy in 1 for loan.

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31:32

So this is constant data after you create your constant data, then here in inter, library loan options, the 1st option, the persistence setting I suggest that you leave this unchecked. Mainly if you are creating automation because.

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31:52

this allows the system to apply the 1 you want to be applied.

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31:58

If you, uh, mark this his on, then the system will always apply the last 1 that you have used and you don't want that. So, keep this unchecked.

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32:11

Then you have options for notifications.

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32:15

Article exchange is part of the system when a library supplies copy requests and sends the file using article exchange. You can set up to receive notifications for those requests. You can mark it as on enter.

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32:35

To 5 email addresses, then save it.

Timestamp

32:40

And the system will notify you.

Timestamp

32:43

Unfilled requests these are requests that no library has answered your request or have answered No, your request goes as unfilled. You can receive notification for those as well. Same thing. Click on.

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33:03

Up to 5 email addresses and save it.

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33:06

And if your library is lending is supplying, and you think you will receive only a few requests. So, instead of going to the system, all the time to check, if you have a new request, you can receive notifications as well. Mark on

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33:25

Up to 5 email addresses then.

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Save it you can test everything here to see if it's working properly.

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The another option that can save you a lot of time is.

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33:43

Pre selecting your lenders. This is called custom holdings groups and customer holdings path.

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33:54

First you create the group, then.

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33:57

You create the path that you want the system to use to automatically populate your lender string. So let's start with creating the group.

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34:09

You can create as many as you want. So I click this create new custom holdings groups and I can.

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34:20

Create a group called Ohio libraries.

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34:28

Uh, this is, uh, no spacing and up to 40 characters. Then I enter a brief information.

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34:45

This is for you to understand why you have created this and the next step is to select the libraries that will be part of your group. So, here on the.

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34:55

Add Edit symbols button on the bottom. You click that. Then I need to go to the policies directory to find those libraries. So, here on the policies directory.

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35:08

On the left side panel, you can search for.

Timestamp

35:12

any library using any of those.

Timestamp

35:16

Options and you can also search for group of libraries based on, uh, certain criteria here and I want to search for libraries in Ohio. So when you select the, uh, the states to be Ohio.

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35:46

And I want a at no cost.

Timestamp

35:49

So, I want the fee to be 0 You have several other options here days to respond international lender formats and so on then I click search.

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36:03

I have all those libraries, you see the libraries that you see suppliers no, you cannot add those libraries. The system will not accept those because they are no supplier. So you have the days to respond the fees they charge. You can select those you can copy those.

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36:23

Symbols and paste into a note pad.

Timestamp

36:26

Those ones that supply, and for this exercise, I will select everything and I click this display symbols

Timestamp

36:35

button on the top now I have all the list of the libraries that supply they are suppliers. And I highlight

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36:43

everything and I click copy.

Timestamp

36:47

Then I go back to the service configuration and paste it. The same thing if you are using a notepad. So you need the symbols.

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36:56

Update symbols, if you need to eliminate anything here, you can use the.

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37:03

X radio button.

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37:06

And now I can save this. I have my group.

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37:12

Okay, and I can keep creating groups under the same category and after I have created those groups, I can.

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37:24

Create a path I want the system to look into my groups. So custom.

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37:30

Holdings path, and it is to create a new 1.

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37:36

So, I click to create new custom holdings path.

Timestamp

37:42

I'll call this Midwest libraries.

Timestamp

37:47

no spacing, a brief description.

Timestamp

37:57

Now, I need to select my groups, so if you scroll down, you can see here I have 2 boxes. The 1st one, all the groups I have created, uh.

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38:07

So, I will select those I want to add I select, I highlight add.

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38:16

Highlight add highlight add.

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38:31

highlight add. If I have added anything here that, uh, is not supposed to be part of my group. I can select that.

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38:41

And click remove, and after I have selected my groups, then I can save that, uh, profiled groups by the way these are consortias with agreements and if your library is part of those. You can select it.

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39:01

Instead of, uh, the groups.

Timestamp

39:04

Save as new. Okay. So now I have the groups and I have the path. So the system will look into these groups.

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39:20

That I have, uh, added and, uh, every time I'm searching for an item, the system, will randomly select those libraries that own

Timestamp

39:31

That item and automatically populate the lender string with up to 15 libraries. And the order here matter the system will go 1st in this 2nd group. Then 3rd group, you can change the order of the groups.

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39:49

And save it, and now you have that available for you to be

Timestamp

39:58

Applied to your requests or apply to your automation.

Timestamp

40:05

Talking about automation, your library can configure automation to allow the system to automatically apply your constant data and custom holdings and other options to speed up the processing of your requests. Instead of doing everything manually.

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40:25

You can have automation as a borrower and as a lender. So, here in the service configuration

Timestamp

40:34

under automated request manager, you can have automation as a borrowing library. The the system can look at best matching. Bibliographical record can check.

Timestamp

40:51

Into your availability in the world cat can look into your constant data and your custom holdings groups and apply automation on those steps. You don't need to do that manually when you are creating your request. So to add.

Timestamp

41:11

Automation, you click this, add a new, give a name to your automation, a priority. The lower number will be, uh, on the top of the priority for the system to look into that. So you can have by.

Timestamp

41:27

Best bibliographic match you can have multiple options.

Timestamp

41:32

You can add an action the action could be apply a constant data and then you select the 1 you want to be applied to all those requests.

Timestamp

41:46

You can set for the system to automatically populate your lender string, and you select the custom holdings path that you want the system to use for all those requests.

Timestamp

41:59

And, uh, let me eliminate these. You can eliminate anything that you don't need. And if you are allowing your patrons to submit a request through your supported discovery tool, you can.

Timestamp

42:19

also select for the request to go automatically to your.

Timestamp

42:24

pre selected lenders and you can choose the custom holding path you want to be applied for those situations and when you allow your patrons to submit the request and have those automatically, uh, supplied by the lenders directly to the

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42:44

patron, you can add exceptions.

Timestamp

42:48

Like, for example, if a duplicate request route that request for the staff in the library to review before sending to lenders, if it's something that's, uh, my group of libraries other group of libraries own.

Timestamp

43:04

route for review, and if it's held by my institution to review, and you can save that.

Timestamp

43:12

And the system will you look into your automations,

Timestamp

43:15

your rules configured here. Here as a lending library, and you can have the system looking into your deflection policies, your supplier status, looking into your collections.

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43:30

Time you take to respond your real time availability that requests, requires further configuration and the system only sends to your library, those requests that your library is ready to supply. So that's why it saves you a lot of time to have automation.

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43:50

It's optional, but it helps a lot. So.

Timestamp

43:54

Your library can have it both as borrowing or as a lending library.

Timestamp

44:01

Another option you have here is the print settings.

Timestamp

44:08

For your labels, uh, your shipping labels or book straps, you can define the size, you can add the logo of your institution.

Timestamp

44:19

You can enter the URL and test that.

Timestamp

44:23

As a borrowing library, you can customize your book straps to inform the due date. And the patron have the patron information, you can preview that.

Timestamp

44:36

And as a lender, you can add, you can customize adding notes to the book straps. If your library uses that when shipping item to another library.

Timestamp

44:47

So these are the options you have here in the service configuration.

Timestamp

44:53

Do you have any questions?

Timestamp

45:10

Another option you have here is, uh, that you can set up is your links back to your library online catalog in several places in WorldShare ILL. So, when you are creating a request, for example, and you see those name of libraries that are.

Timestamp

45:30

Hyperlinked it means that you can access their online catalog to check availability.

Timestamp

45:37

And when you see this search my libraries online catalog link, it means that you can search your own catalog to track If you have that item in your collection before starting, an inter library loan request and the same thing as a lender, you can.

Timestamp

45:57

Check if the item is available, uh, if you have that item, uh, to supply or not.

Timestamp

46:08

So, you can do that in the service configuration under WorldCat registry, online catalog. You select your library system, enter your base URL, save that Mark available online and the system takes care of adding those links. And the

Timestamp

46:33

Article exchange is part of WorldShare ILL, as I mentioned, and it's an option for lending libraries to supply copy requests. You can drop many files a day per authorization and article exchange then automatically creates a unique URL

Timestamp

46:53

And passwords to protect the document, then the borrowing library can forward this unique URL and password to their patrons.

Timestamp

47:04

The document expires in 30 days, or after 5 views, and it does not count.

Timestamp

47:12

Staff preview.

Timestamp

47:16

Do you have any questions? While you think about your questions, I have a question for you. Let me check here.

Timestamp

47:33

And see, if I still have my question here.

Timestamp

47:40

Okay, so let me open. I'm sending you the 1st question.

Timestamp

47:46

Select the correct statement below.

Timestamp

47:50

Custom holdings is the option to Pre select and save a group of lenders or borrowers two article exchange is the option to select lenders to the lender string.

Timestamp

48:02

3 IFM is the option to define days to respond, or four automation is configured for borrowing libraries only which 1 do you think is the correct 1? you can either vote, uh, using Slido, or you can type into the

Timestamp

48:20

Chat as well, I don't see who is voting. I just see numbers here so feel free to participate.

Timestamp

48:40

I can see that. Most of you have answered the number 1 let's check the correct answer. That's the correct answer custom holdings is the option to Pre select and save group of lenders or borrowers. The other options are incorrect article exchange is for

Timestamp

49:00

Copy file, IFM is for the payment.

Timestamp

49:05

And automation can be configured for both borrowing and lending libraries.

Timestamp

49:11

Thanks for participating. So now we are arriving at a topic number 3 where everything fits together for you to create and manage requests and now you will see

Timestamp

49:31

Why the preparation is so helpful and saves you time. So, let's have an overview of this part. I cover this in detail in WorldShare ILL borrowing session and we offer short videos on this topic as well.

Timestamp

49:47

So now imagine that your patron needs your assistance requesting a loan request for this book title.

Timestamp

49:57

And your patron also needs a copy

Timestamp

50:01

ILL request for this article, so let's see how you can create the request on behalf of your patron and how you can manage those.

Timestamp

50:11

So, let me share.

Timestamp

50:21

I'm gonna share, uh, my browser, so you can see.

Timestamp

50:26

How you can create the request for the book title and how you can create the request for for the copy.

Timestamp

50:49

So, let's start with the book title.

Timestamp

50:54

To start your request, first you need to search for the request under discover items. You have 2 options here. You can either start with a basic search.

Timestamp

51:08

You are searching the entire WorldCat database or your library holdings.

Timestamp

51:13

Using 1 of the index options.

Timestamp

51:16

Or you can start with an advanced search.

Timestamp

51:20

Where you also search the entire WorldCat database or your library holdings?

Timestamp

51:26

You have more index options.

Timestamp

51:32

You can combine these indexes using the Boolean operators.

Timestamp

51:37

And or or not.

Timestamp

51:40

You can have more fields up to 5 fields, or you can eliminate fields here.

Timestamp

51:46

Using the plus sign to add and the minus sign

Timestamp

51:52

To eliminate and you have more qualifiers to filter your search. So let's start. I can with

Timestamp

52:00

Typing part of the title.

Timestamp

52:03

You can also copy and paste that information.

Timestamp

52:12

Then I will combine with the author

Timestamp

52:19

Select the format to be book in print.

Timestamp

52:26

And the language to be English, so this is my result. It's showing

Timestamp

52:37

The relevance as the library count, the highest number of libraries that own that item that title, but you can change the relevance.

Timestamp

52:48

This I Icon give you a brief bibliographic information about the title.

Timestamp

52:55

The search for versions with same title and author link if you click that you are searching for the same title and author in different formats.

Timestamp

53:08

I can go back to my search, uh, using 1 of these options here.

Timestamp

53:13

On the right and if you have created automation, if you have configured automation for your library, you can start by clicking the create request button and the system will take care of adding, uh, your custom holdings.

Timestamp

53:32

Path.

Timestamp

53:35

Populate the lender string entering your.

Timestamp

53:38

Constant data everything.

Timestamp

53:42

And the only thing you have to do is to complete with your patron information. I don't have.

Timestamp

53:49

Automation here, so you can see when you don't have automation, you have to manually do all this process. Uh, and here the 1st thing is to search for the libraries that own that item.

Timestamp

54:06

And you have a list of the libraries, you see the ones that you don't have a supplier Yes you cannot add those because they added in their policies directory. No supplier you can sort this column.

Timestamp

54:21

Now, you have everything as yes. All suppliers. You have a brief information about the policies the days they take to respond, uh, the cost if they accept IFM.

Timestamp

54:36

Which is, uh, using your OCLC account for the payment uh, the

Timestamp

54:44

I icon takes you to the policies directory, so you can take a look at their policies.

Timestamp

54:56

The hyperlink takes you to their online catalog to check availability.

Timestamp

55:02

So, that's how it looks then, after you do all that research based on costs and days to respond, you have to click the yes.

Timestamp

55:15

To add the symbol to the lender string up to 15.

Timestamp

55:20

If you have created your

Timestamp

55:24

Custom holdings path, but you don't have automation. You can select your custom holdings path from the list.

Timestamp

55:37

And what the system does the system randomly.

Timestamp

55:41

Looks into the path and automatically populates your lender string. That's why custom holdings groups, uh, helps a lot. Saves you time. You don't need to do all that research request by request. You have your Pre selected lenders. you can select

Timestamp

56:01

Multiple copies of the same title for book club, for example, and when you do that, each

Timestamp

56:10

copy is treated as an individual request and, this is to speed up the processing. So you can receive the copies about the same time and you can add different libraries.

Timestamp

56:27

And each request, if you are using custom holdings path, the system can do that.

Timestamp

56:35

Populated the lender string with different symbols.

Timestamp

56:41

So, let me clear everything then I create the request.

Timestamp

56:49

On this page, because I don't have automation, I need to apply my constant data.

Timestamp

56:55

I'll apply for, this is a loan, a book so loan. This magnifying glass icon takes you back to the search results. In case you need to select another record.

Timestamp

57:10

The view holdings link takes you back

Timestamp

57:15

To the list of libraries for you to work on your lender string, or you can use 1 of those options. If you still have those tabs open here, you can go back to your holdings and you can go back to your search result.

Timestamp

57:34

And you can search your online and catalog.

Timestamp

57:38

If you if you need to check before proceeding.

Timestamp

57:42

So, I have the information that comes from.

Timestamp

57:46

The constant data the need before date is coming from the constant data that plus 30, but I can change that as well. Let's say this June 14. you see the list of libraries, the suppliers.

Timestamp

58:02

All the information about your library is coming from the constant data.

Timestamp

58:09

Then I can enter the patron information.

Timestamp

58:15

And, uh, the ID, the email.

Timestamp

58:30

And after everything is, okay, then I click the, send request button located on the top.

Timestamp

58:36

And the system creates this unique ID.

Timestamp

58:41

To identify that request each request, receives a.

Timestamp

58:45

This unique ID, and if I go to the homepage and search for that request.

Timestamp

58:56

At this point before any library has answered to the request that you can edit it.

Timestamp

59:03

Or add anything here, then save it.

Timestamp

59:07

I can change these and save it. You can add a note.

Timestamp

59:12

For other staff in the library to, uh, understand why you're still working in the request, or you can cancel this request if you no longer need this request.

Timestamp

59:27

You can also start managing your request.

Timestamp

59:30

On the left side panel under borrowing, requests your request will be here.

Timestamp

59:36

under produced awaiting response.

Timestamp

59:40

This is your request with the status submitted.

Timestamp

59:45

The other library.

Timestamp

59:48

They have 3 options if they answer no, the request then moves automatically to the next lender in the lender string. The library can answer conditional and the request goes under conditional status.

Timestamp

1:00:05

And you can see the conditions and your library as a borrowing library has 4 days to take action either.

Timestamp

1:00:15

Accept or not.

Timestamp

1:00:18

The conditions, or cancel the request if you don't take action the request will automatically move to the next lender in the lender string after those 4 days.

Timestamp

1:00:29

Or if you answer, no. If the library answers yes. Then your request will be here in transit.

Timestamp

1:00:38

And you can see when the item was shipped to your library for you to make a decision if you Mark as received or not received. If it has passed a long time, you can mark is not received. So you open the request.

Timestamp

1:00:55

You can, uh, Mark as received or not received if you Mark as received, you can mark to print the book straps. If your library does that to supply that item to your patron.

Timestamp

1:01:07

And mark as received now your request moved to the status

Timestamp

1:01:14

Received in use your request is here and received in use.

Timestamp

1:01:20

You can open that request and now you have 3 options here if the.

Timestamp

1:01:27

Patron or you lost or damage that item, you can mark that as lost and use this email button.

Timestamp

1:01:36

On the upper right side to communicate with the other library.

Timestamp

1:01:40

Uh, and the, the request will be on the.

Timestamp

1:01:45

Um, your request will be here.

Timestamp

1:01:52

It's not a returned. I don't have any to show. Uh, it's gonna be here received but missing.

Timestamp

1:01:58

This I don't have the status here, but the status is called received but missing and it will be in that status until, uh, the.

Timestamp

1:02:08

Issue is solved between the 2 libraries.

Timestamp

1:02:13

Renew item, you can request renewal if the patron needs more time with the item and you can select here using the calendar icon on the top. You select the new date.

Timestamp

1:02:27

And click the renew item, your request moves to renewal requested, then

Timestamp

1:02:35

It's up to the other library to accept it, or not if they approve it, your request will be here under renewal approved with the new due date. If it's denied, then your request will be here on the left side panel under renewal denied. And

Timestamp

1:02:55

You must return that item on the original

Timestamp

1:02:58

Due date. If you are ready to return that item that you have the item in hand,

Timestamp

1:03:07

You click the print return labels.

Timestamp

1:03:10

Then Mark return item.

Timestamp

1:03:15

Uh, before I mark return item, if you forgot to print the book straps, you can find here on this status.

Timestamp

1:03:25

Received in use, so you can add the book strap to your print queue. If you forgot to do that.

Timestamp

1:03:32

Mark return item your request is now under returned.

Timestamp

1:03:41

And at this point, there is nothing you can do because loan requests start with the borrowing library and they're closed when the lending library receives that item back and updates the system.

Timestamp

1:03:59

The book straps and the shipping labels, you can find here on the left side panel and print queue.

Timestamp

1:04:09

The book straps you can print multiple at a time.

Timestamp

1:04:18

And, uh, then you click print if you no longer need anything here you can mark to remove.

Timestamp

1:04:34

They will stay here until you remove them. So if if you have a long list, you can clean this up, uh, to not have to go through a long list to find the ones you need to print the same thing with return labels. You can print multiple.

Timestamp

1:04:53

At a time the paper size comes from that print configuration, the print settings in the service configuration you can include any information that you find useful here and you can define the start position to print the label. If you.

Timestamp

1:05:13

Are reusing paper you can change the position, for example, then mark print.

Timestamp

1:05:19

And, uh, you have your.

Timestamp

1:05:22

return labels printed. So this is for the physical item,

Timestamp

1:05:32

for the book in this example, let's see how you can work with the electronic.

Timestamp

1:05:40

The articles, for example, for the copy requests.

Timestamp

1:05:43

Let me clear everything here.

Timestamp

1:05:47

For the article, for example, you can start with an advanced search and search at article level.

Timestamp

1:05:56

And you can find your article, but because many libraries, they catalog at Journal level, you are limiting your results or you might not find the article when many libraries they own that article. But it's cataloged at a journal level.

Timestamp

1:06:16

So, I will search at the journal level with a basic search

Timestamp

1:06:22

by ISSN, and it's the same thing, the relevance, the largest number of libraries you still have that

Timestamp

1:06:39

I icon and the search for versions with the same title in author.

Timestamp

1:06:45

If you have configured

Timestamp

1:06:49

Automation for your library, you start with the create request bottom.

Timestamp

1:06:57

And if you don't have automation configured, you have to do all this research library by library to populate your lender string.

Timestamp

1:07:08

Uh, because you haven't created your custom holdings path.

Timestamp

1:07:12

Apply constant data. I will

Timestamp

1:07:16

Select free copy.

Timestamp

1:07:19

This is for the copy and now, because I'm creating at the journal level, I need to provide more information. So.

Timestamp

1:07:28

The other library can understand which part of the

Timestamp

1:07:32

journal I need I need for my patron. So I have

Timestamp

1:07:38

The title as much information.

Timestamp

1:07:43

As you have available that might help the other

Timestamp

1:07:47

The library the author.

Timestamp

1:07:51

And I have the date.

Timestamp

1:07:58

The need before date. You can change that as well.

Timestamp

1:08:03

I'll put this earlier, however, think coming from the console data.

Timestamp

1:08:10

I need to enter my patron information.

Timestamp

1:08:18

Name ID and email.

Timestamp

1:08:24

And then everything is completed, I click the send request.

Timestamp

1:08:31

The same way, uh, the system creates the.

Timestamp

1:08:36

Request ID, I can start to manage that.

Timestamp

1:08:43

I can edit or add anything here. I can add a note or I can cancel this request. My request would be here. Let me close everything.

Timestamp

1:08:56

under borrowing requests awaiting response.

Timestamp

1:09:01

The same thing if the library answers no, my request moves automatically to the next lender in the lender string.

Timestamp

1:09:10

If the library answers conditional it will be under the conditional status.

Timestamp

1:09:16

And if the library answers yes, my request will be here in transit.

Timestamp

1:09:23

And if the library answers yes using article exchange my request will be also under the article exchange alert here on the top.

Timestamp

1:09:34

When I open that request, you can see that article exchange creates this unique URL and password to protect the document. I can preview that.

Timestamp

1:09:45

And if it's the correct 1, I can email this information to my patron. So I click this email doc to patron button on the right.

Timestamp

1:09:55

So, you see all the information about the request goes on the body of the message on the top of the message you have the unique URL and password.

Timestamp

1:10:07

You can add a note.

Timestamp

1:10:10

That the files expires in.

Timestamp

1:10:14

30 days or.

Timestamp

1:10:17

After 5 views, and because I have added the.

Timestamp

1:10:25

Patron email address to the request the system automatically populates that. And then I can send this information to my patron.

Timestamp

1:10:33

After I send this information to my patron, then I can mark this as received.

Timestamp

1:10:42

When I mark this as received, the system automatically closes this request. So if I search for this request, this request will be here under closed requests.

Timestamp

1:10:58

Because copy requests, they are automatically closed when the library marks as received because there's nothing to be returned to the lender. So this is how you create and manage copy requests.

Timestamp

1:11:15

Do you have any questions.

Timestamp

1:11:35

Okay.

Timestamp

1:11:43

So, now let's move to our last topic to see how you can generate reports to support your ILL activities.

Timestamp

1:11:52

You need your nine-digits authorization and password. If you don't have that, you can contact OCLC support to retrieve that information to retrieve your credentials. So now, let's go live to see the reports. Let me share

Timestamp

1:12:12

My browser, so from the homepage, the easiest way to access the reports is in the middle section under Other.

Timestamp

1:12:32

OCLC usage statistics you need your nine-digits authorization, you enter without spacing.

Timestamp

1:12:42

And then your password, there are several options.

Timestamp

1:12:55

Reports here, I'll highlight a couple of, uh, reports.

Timestamp

1:13:07

Maybe, let's try this again.

Timestamp

1:13:25

Let me try this again. Just give me a second, something here.

Timestamp

1:13:35

It's not working.

Timestamp

1:13:50

Close the options here try again. Just let me try something here. Just give me a second.

Timestamp

1:14:18

Let me see if it can access it can.

Timestamp

1:14:21

It's not opening.

Timestamp

1:14:37

Let me show you the, the slides then.

Timestamp

1:14:40

So, uh.

Timestamp

1:14:48

The reports you have several options available. The two that's more important are the resource sharing borrower

Timestamp

1:14:58

Reasons for no report this report will list the libraries that they have answered no to your requests and why they have answered no.

Timestamp

1:15:09

So you can, uh.

Timestamp

1:15:12

See, that those libraries that are constantly answering no to your requests, you should remove that symbol from your custom holdings groups, because they don't respond to your requests

Timestamp

1:15:26

anyways. And the other 1 is the borrow resource sharing status report. This report provides a full information about your request and all the details, including the costs involved. The type of request the title, all the information.

Timestamp

1:15:46

Who supplied and, uh, you can use that

Timestamp

1:15:51

Report, for example, to manage your request with cost transactions so you can.

Timestamp

1:16:01

Have those reports automatically sent to, you.

Timestamp

1:16:07

So, let me show you the next slide. So what you can do you select the email.

Timestamp

1:16:13

So you can generate the reports so, here, this is an example of reasons for no report.

Timestamp

1:16:20

With the reasons, so you can use that symbol and eliminate from your custom holdings groups. You can export this to an Excel format, for example, or you can mark to send an email.

Timestamp

1:16:40

And, uh, if you mark to, uh, send the email, you select the option to send it monthly save it. And then you can receive automatically every month, uh, on an your email address.

Timestamp

1:16:55

Instead of generating your reports.

Timestamp

1:16:58

Manually going to the system and trying to select your reports manually.

Timestamp

1:17:06

So, that's how you can, uh.

Timestamp

1:17:09

Retrieve your reports.

Timestamp

1:17:20

Any questions.

Timestamp

1:17:40

I have

Timestamp

1:17:48

I have a final question for you. Let me just open the questions and send it to you

Timestamp

1:17:54

So, if you look at this screenshot, this is a screenshot of a request.

Timestamp

1:18:02

A loan request for a book, and when I mark this request as received. What happens to this loan request after you click the Mark as received for this book?

Timestamp

1:18:21

The request is automatically closed, the request moves to received in use status, the request moves to awaiting response status or the request moves to returned status.

Timestamp

1:18:40

Thanks for participating by the way I can see that most of you have answered the request moves to received in use status.

Timestamp

1:18:54

Let's confirm the answer. That's the correct answer. Once you Mark as received for a loan request for physical item that request moves to received in use. Only when it's copy requests that the request is closed.

Timestamp

1:19:14

Thanks for participating. I can see a question here. I'm currently not lender but borrower.

Timestamp

1:19:23

I don't see any reports to show my borrowing activity. Uh, you are supposed to see you have to select the month. If you don't have any activity

Timestamp

1:19:36

In in a certain month, you don't have any report.

Timestamp

1:19:40

Displaying there, so you need to have a borrowing activity to have your request, uh, reports

Timestamp

1:19:48

Displaying. So if you have activity in that month, and your report is not displaying, you can contact OCLC support to check what's happening to that. And by the way, we are working on the reports.

Timestamp

1:20:08

They will change a little bit, how you retrieve reports in the near future, but you are supposed to see your reports there.

Timestamp

1:20:18

I couldn't see mine either today so.

Timestamp

1:20:22

You need to contact OCLC support okay, to check what's happening to your reports.

Timestamp

1:20:31

It shows 6 months there, the question here it says 6 months, but reflect on how much data will be in the report not which reports have a data. It shows some of the reports they're monthly based.

Timestamp

1:20:50

Some of the reports are

Timestamp

1:20:54 up to 12 months so you can select 6 months or 12 months. I believe there's only one report that provides that. Most of the reports are monthly based. And, you see the

Timestamp

1:21:08

Previous month from where you're searching, for example, we're in May so the last report you have available is April. So you're gonna see the April. You don't see 6 months behind you only see April. So you need to select the previous month to see

Timestamp

1:21:28

Your report there.

Timestamp

1:21:31

Okay, not all the reports are 6 months.

Timestamp

1:21:38

There no the reason for no and the stats they are monthly basis.

Timestamp

1:21:44

The two main ones.

Timestamp

1:21:57

If you have any other questions, you can type it in.

Timestamp

1:22:00

in the chat, so we have walked through the 4 topics for this session. You have learned about the basic concepts of WorldShare ILL

Timestamp

1:22:12

The configuration options to save you time, such as custom holdings and automation.

Timestamp

1:22:21

You saw how you can easily create loan and copy requests and update those requests.

Timestamp

1:22:29

Process those requests and how can generate your ILL reports.

Timestamp

1:22:38

Do you have any additional questions on anything we saw here today?

Timestamp

1:22:43

Yes, there's a question about the recording. You will receive a follow up email message with the link to the recording and the copy of the presentation in PDF with, I have all the screenshots as you saw in the presentation for you to use as a reference.

Timestamp

1:23:09

So that's another question here. So, if some activities sporadic, I have to find remember, which month I had activity to find a report on it? For those reports that are monthly basis, you have to click on those options you have monthly and check on that

Timestamp

1:23:29

Report as I mentioned, we are working on the reports, this might change in the near future, how you are able to select your reports but currently you need to, those that are mostly based, you need to click on those months

Timestamp

1:23:49

to find the ones that you have activity on.

Timestamp

1:23:53

Okay, and the, there are a couple of reports that you can pull at 6 months from or more.

Timestamp

1:24:05

For everything you saw here today you have our portal so when you start using the service, you can use the support portal as reference. You can find more training materials, contact support at help.oclc.org or you can go directly

Timestamp

1:24:25

from WorldShare ILL instance on the upper right side of the screen, as you saw at the beginning of the session. Let me briefly show you.

Timestamp

1:24:38

The support portal, so here on the support portal.

Timestamp

1:24:43

Resource sharing, WorldShare interlibrary loan.

Timestamp

1:24:52

Everything is divided into categories and, the learner guide that I provide as a

Timestamp

1:25:00

handout, you can easily find the links to the topics but here everything is divided into categories, including where you can find the other

Timestamp

1:25:13

Classes like this one and the recording as well.

Timestamp

1:25:26

So, if you don't have any additional questions, this concludes our session. I'd like to thank you for participating. When you leave the session, a window will pop up on your screen. Click, continue to answer a few questions on the evaluation form. The information about this

Timestamp

1:25:46

Session is on this slide, we value your contribution. You will receive a follow up email message with the link to the recording and the handouts for your reference as I mentioned before and for any training questions please contact us at training@oclc.org.

Timestamp

1:26:06

thanks again and enjoy the rest of your day.