

OCLC Training Session

# WorldShare ILL Lending

Sam Sayre

Senior Training Coordinator  
OCLC



## Agenda

- Welcome to WorldShare ILL!
- Helpful Info (Web browsers, modules, stats)
- Managing Requests as a Lender
- Constant Data now in Service Configuration



## Create Your New WorldShare ILL Account

WorldShare ILL is the updated version of OCLC's ILL service

To use it, you'll need to:

- Establish a new **User Name**
- Establish a new **Password**
- Obtain your library's **custom Web address** for the service
  - Washington libraries register to migrate here:  
[http://registration.oclc.org/reg/?pc=WorldShare\\_ILL\\_Washington](http://registration.oclc.org/reg/?pc=WorldShare_ILL_Washington)  
this web address was sent to you from State Library
  - you will receive your custom Web address  
via email from OCLC



## Welcome to WorldShare ILL!

If migrating for WorldCat Resource Sharing:

- Compare WCRS and WorldShare ILL features -  
<http://oc.lc/zGzCvB>
- All current requests waiting for you in WorldShare;  
so will Constant Data, Custom Holdings, etc.
- Must switch to WorldShare by end of 2013; can switch  
back and forth between two systems until then



### What do ILLiad users need to know?

- If you check your OCLC requests in WorldCat Resource Sharing/FirstSearch, you will need to create new WorldShare User Name & Password
- Version 8.4, released in May, incorporates new WorldShare ILL features:  
<http://www.oclc.org/en-US/illiad/latest-version.html>
- ILLiad users should NOT check their requests in WorldShare ILL at this time



- Builds relationships
- Creates reciprocal opportunities
- Charges and tools like IFM can help offset your own subscription costs



## How do Borrowers find you?

### •Holdings in WorldCat

| All Holdings   | State Holdings | Regional Holdings |
|--|----------------|-------------------|
| Show 40 rows per page. Results 1-40 of 112           |                |                   |
| Library  | Supplier       | Location          |
| <a href="#">PETERS TOWNSHIP PUB LIBR</a>             | Yes            | US, PA            |
| <a href="#">NEW CASTLE PUB LIBR</a>                  | Yes            | US, PA            |
| <a href="#">MONTGOMERY CNTY. NORRISTOWN PUB LIBR</a> | Yes            | US, PA            |
| <a href="#">MARTIN MEM LIBR</a>                      | Yes            | US, PA            |

### •Availability in local catalog/OPAC

| LOCATION                                    | CALL #            | STATUS             |
|---|-------------------|--------------------|
| <a href="#">Avalon Library Paperbacks</a>   | PB FIC MAR        | Checked Out        |
| <a href="#">Bethel Park Fiction</a>         | FIC MARTIN George | IN TRANSIT         |
| <a href="#">Braddock Fiction</a>            | PB F MAR          | IN TRANSIT +1 HOLD |
| <a href="#">Brentwood Fiction</a>           | FICTION Martin #3 | IN TRANSIT         |
| <a href="#">Bridgeville Science Fiction</a> | SF MAR            | IN TRANSIT +1 HOLD |

### •ILL Policies Directory

OCLC Training: TPU (BETA) (WSTPU)

Profile

Collections

Policies (3)

Schedule

Contacts

## Recommended Browsers



**Chrome**

v27.0.1453.94 m  
(recommended)



**Firefox**

v21.0  
(preferred)



**IE9**

**IE8**

IE7 – Not supported

If you are not sure what browser or version you are using,  
go to <http://thismachine.info>

## Helpful Info- WorldShare ILL & associated modules

In WorldShare ILL, there are 3 main modules:

WorldShare ILL  
Custom Web Address!!!



OCLC Service Configuration  
<http://worldcat.org/config/>



ILL Policies Directory-  
<http://illpolicies.oclc.org/>



## Helpful Info- WorldShare ILL & associated modules

WorldShare ILL  
Custom Web Address!!!



WorldShare ILL is where you will:

- Search for items in WorldCat
- Create and Manage both Borrowing and Lending Requests
  - Can apply Custom Holdings & Constant Data as needed to requests in WorldShare ILL
- Custom Web Address *replaces* <http://firstsearch.oclc.org>

OCLC Service Configuration  
<http://worldcat.org/config/>



Service Config is where you will:

- Create and Manage advanced features
  - Custom Holdings Groups & Paths
  - Constant Data
  - Direct Request Profiles
- Service Config *replaces* Admin Module:  
<http://firstsearch.oclc.org/admin>

ILL Policies Directory-  
<http://illpolicies.oclc.org/>

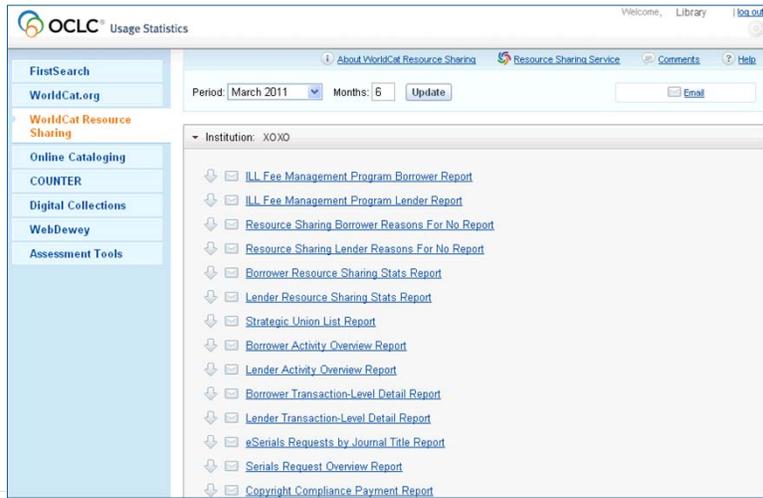


The Policies Directory will stay the same:

- No major changes
- Can access Policies Directory from WorldShare ILL
- Make sure your policies are up to date!

Helpful Info- WorldShare ILL & associated modules

OCLC Statistics Portal: <http://www.stats.oclc.org>



Helpful Info- WorldShare ILL & associated modules

OCLC Statistics Portal: <http://www.stats.oclc.org>

For now, use your 9-digit Authorization Number and Password from WorldCat Resource Sharing to log in to the Usage Statistics Portal

| Authorization |
|---------------|
| 100047147     |
| 100047147     |
| 100047149     |
| 100047150     |
| 100047150     |
| 100047150     |
| 100047150     |
| 100047150     |



Tutorials for WorldShare ILL are available at this site:

<http://oc.lc/illtraining>

Quick Exercise:

- Click on documentation link in Chat Window
- Find tutorial “Creating Your WorldShare ILL Account”
- Give Green Check in Participants Panel when done 



We will be responding to requests as a Lender:

- Staff-Mediated requests processed directly from the WorldShare ILL interface



## Managing Requests as a Lender- Demo & Exercises

### Lender request management:

1. Printing entire queue, Can You Supply?
2. Responding Yes to loans, using batch
3. Responding Yes to copies
4. Responding No, using batch
5. Responding conditional
6. Respond to Renewals
7. Checking in items
8. Printing items



## Manage Constant Data in Service Configuration

Constant Data is maintained in Service Config.

Find link to Service Config from ILL Home Screen

A screenshot of the "Interlibrary Loan Home" interface. It features a search bar for requests, a "Quick Links" section with three columns: "Borrowing", "Lending", and "Other". The "Other" column contains a link to "OCLC Service Configuration" which is circled in orange. Other links include "Policies Directory", "OCLC Usage Statistics", and "OCLC Article Exchange".

| Borrowing:                         | Lending:                                | Other:                                     |
|------------------------------------|---|--|
| <a href="#">New For Review (2)</a> | <b>Supplied</b>                         | <a href="#">Policies Directory</a>         |
| <a href="#">Reviewed (2)</a>       | <b>Returned</b>                         | <a href="#">OCLC Service Configuration</a> |
| <a href="#">Produced (10)</a>      | <a href="#">Returned/In Transit (1)</a> | <a href="#">OCLC Usage Statistics</a>      |
| <a href="#">In Transit (9)</a>     | <a href="#">Returned/Complete? (1)</a>  | <a href="#">OCLC Article Exchange</a>      |

## Manage Constant Data in Service Configuration

The screenshot shows the OCLC Service Configuration interface. At the top, it says 'OCLC Service Configuration' and 'Welcome TPV tester (Help | Sign out)'. Below that is a search bar with 'OCLC Training: WSTPV (OCLC WorldShare ILL Beta) (128803)' and a 'Go' button. On the left is a navigation menu with items: 'WorldShare ILL', 'Interlibrary Loan Options', 'Borrower Data', 'Lender Data', 'Custom Holdings Groups', 'Custom Holdings Paths', and 'Direct Request Profiles'. The 'Lender Data' item is highlighted. The main content area is titled 'Configure Lender Constant Data' with a 'Help on this screen' link. Below the title, it says 'Required fields are marked with an asterisk \*'. There is a 'Constant Data Record' dropdown menu set to 'DEFAULT'. Below that is a 'Lending Library Information' section with a 'Create New CD record' link. The footer contains the OCLC logo and 'The world's libraries. Connected.' on the left, and the number '19' on the right.

## In conclusion...

- Create Your New WorldShare ILL Account!
- What web browsers to use, where to find documentation
- Managing Requests as a Lender
- Constant Data now in Service Configuration



Any Final  
Questions?



 OCLC The world's libraries. Connected.

Thank You!

Please remember to fill out the evaluation for this class

Class name: WorldShare ILL Borrowing  
Instructor: Sam Sayre

For help contact OCLC Customer Support:  
[support@oclc.org](mailto:support@oclc.org) / 1-800-848-5800

For training questions contact OCLC Training:  
[training@oclc.org/](mailto:training@oclc.org)



 OCLC The world's libraries. Connected.

22