



Knowledge Check

WorldShare ILL Borrowing

Test Your Knowledge

- 1) How do you log in to WorldShare ILL?
- 2) Where do you set up Constant Data for WorldShare ILL?
- 3) Name a new feature you've encountered in WorldShare ILL.
- 4) When do you have to switch to WorldShare ILL?
- 5) Can you return more than one item at once in WorldShare?

Test Your Skills

- 1) Create a WorldShare account
- 2) Conduct an advanced search for an article request.
- 3) Print a Request from your Received/In Use queue.
- 4) Establish "Loan" and "Copy" Constant Data records in Service Config
- 5) Apply a Constant Data record to a request in WorldShare ILL.

See next page for answers

Answers

Test Your Knowledge

- 1) With a new User Name, Password, and Custom Web Address that can be set up by registering at this page: <http://www.oclc.org/en-US/worldshare-ill/getting-started.html>
- 2) In the OCLC Service Configuration (Service Config) module, accessible from a link on ILL Home Screen in WorldShare ILL. Until December 31, 2013, Constant Data can also be edited and maintained in the WorldCat Services Administrative Module (<http://firstsearch.oclc.org/admin>), by logging in with your 9-digit authorization number and password from Resource Sharing.
- 3) Possible answers include:
 - a. display of lender cost summary from policies directory;
 - b. Lender String can now accommodate up to 15 lenders;
 - c. Buy It option for purchasing items;
 - d. can request any edition of an item;
 - e. streamlined Batch processing functionality;
 - f. Printing queue no longer automatically purges items upon logging out, etc.
- 4) By the end of December 2013. The ability to create new requests in WorldCat Resource Sharing ends in November 2013. It is recommended you set up your new account info and begin using WorldShare ILL as soon as you can.
- 5) Yes, by using Batch functionality for processing items.

In WorldShare ILL, click the sub-category marked "Received" in the expanded Borrowing Requests section in the left-hand panel.

Just above the list of titles in Received category, click on the link that reads "Batch return "Received" items". This link will open a Batch section above the list of items in the queue. Next to the list of items in the queue, you'll see a Green circle with a plus sign. Clicking on this plus sign for an item will add that item to the Batch section above the list. Alternatively, if you have a barcode, you may scan the barcode in to the Batch section to add an item that way.

To remove an item from the Batch section, click on the Red X next to it. Make sure you check the box for Print Return Labels, so that you may have the Return Labels for each item about to be processed waiting for you in the Print Queue.

Click the Return Items button at the bottom of the Batch section.

A confirmation message will display for each item.

The items that have been processed will move to the Returned category.

Test Your Skills

- 1) Watch the video posted on this page:

http://www.oclc.org/support/worldwide/en_us/training/portfolios/resource-sharing/worldshare-ill/tutorials/creating-your-wsill-account.html

Set up new User Name & Password, obtain Custom Web Address here:

<https://share.worldcat.org/myaccount>.

- 2) Click Discover Items heading from left-hand panel in WorldShare ILL.

Then click the Advanced Search link in the Discover Items panel.

If you need a citation, use this one: Journal of interlibrary loan, document delivery & information supply: "Frequently Asked Questions From ILL Practitioners" Vol 21 No 3 Jul 2011 pp 157-163.

Note: since article titles are rarely cataloged in WorldCat, you'll want to search on the journal title first, then add the article citation info on request workflow

When you get your search results, select the appropriate format for the record (print or electronic), as well as the item that has the most number of holdings to request.

- 3) To Print a request, click the Borrowing Requests heading from the left-hand panel in WorldShare ILL.

Click on the Received category.

Click on the title or ID number for an item, to look at the workflow for the request.

Click on the Print button located on the right hand side of the page above the workflow for the request.

A confirmation message will appear, confirming item has been added to Print queue.

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Collapse the Borrowing Requests section in the left hand panel by clicking on Borrowing Requests text.

Click on Print Queue section in left-hand panel to expand it; then click on the Borrowing sub-heading.

Expand the Print Requests section of Borrowing Print Queue.

Check the box for the item you'd like to print; then click the Print button below the list of items.

Print Preview will display.

Scroll down and locate the Print icon in the lower right-hand corner of Print Preview. Click on it to open Printer dialog box for your local printer.

Send item to local printer.

- 4) Constant Data records store the information about your library that gets added to ILL requests- information that doesn't change, and would be tedious to add over and over again to requests (for example, your library's shipping address).

It is recommended that your library have separate Constant Data records for your Borrowing requests for Loan (returnable) items and Copy (non-returnable items). But it is up to you how many and what type of Constant Data records you'll want to set up.

The subtle differences between the two would be:

Loan Constant Data	Copy Constant Data
Request Type: Loan	Request Type: Copy
Electronic Delivery info: optional	Electronic Delivery Info: Ariel, Odyssey, FTP Address, etc.
Max Cost willing to pay for Loan items	Max Cost willing to pay for Copy items
Copyright Compliance: CCL suggested	Copyright Compliance: CCG suggested
Unique shipping address for loans (if applicable)	Unique shipping address for copies (if applicable)

Knowledge Check WorldShare ILL Borrowing

To access Constant Data, click on link for 'OCLC Service Configuration' on ILL Home Screen in WorldShare ILL.

Then click WorldShare ILL link from left hand panel in Service Config. Then select Borrower Data from left hand panel.

Constant data form mimics the request form you send for a request in WorldShare ILL. Go through form and make appropriate selections. Save your records when complete.

- 5) Search for an item from Discover items, select Holdings display, populate lender string, then click Create Request button to see request workflow.

Once Constant Data records are created/saved in Service Config (or the Admin Module), they should be available in the Apply Constant Data button above the Request Details section of the workflow, on the right.

Click the dropdown arrow within that button to select the Constant Data record you'd like to apply to the request.

Verify info added by Constant Data to Request Details section (Needed By date) and Borrowing Library section (Shipping and Billing Address, IFM/Max Cost, etc) of the workflow.



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