OCLC Training Session

# WorldShare ILL Borrowing

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## Agenda

- Welcome to WorldShare ILL!

- Helpful Info (Web browsers, modules, stats)

- Borrower Request workflow & exercises

- Managing Requests as a Borrower

- 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:
- Obtain your library's **custom Web address** for the service
  - Contact

| | |
|---|---|
| OCLC Asia Pacific | T: 614-764-6099 |
| 6565 Kilgour Place | F: 614-764-4331 |
| Dublin 43017-3395 | E: AsiaPacific@oclc.org |
| OH | |
| US | |

- Establish a new **User Name**
- Establish a new **Password**

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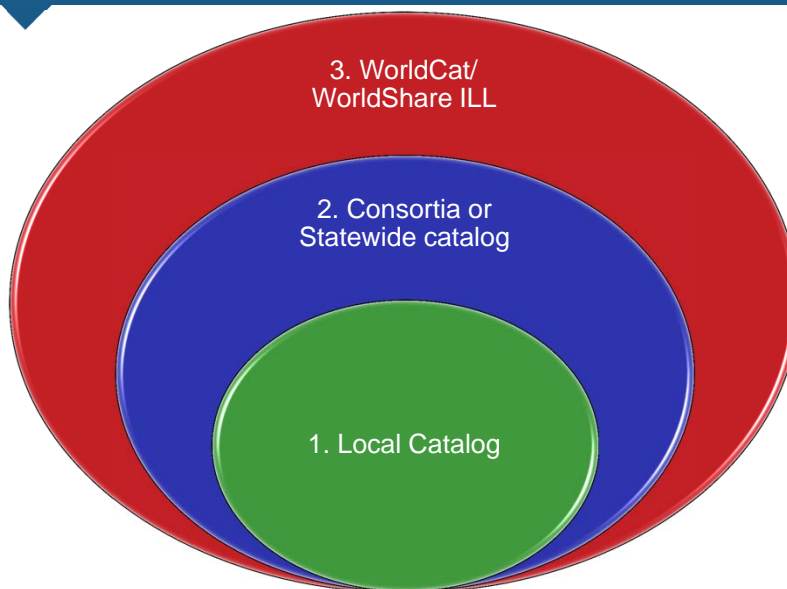WorldShare™

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## 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

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## ILLiad & WorldShare ILL

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

**OCLC WorldShare**

## Why use WorldShare ILL?

3. WorldCat/ WorldShare ILL

2. Consortia or Statewide catalog

1. Local Catalog

## Why use WorldShare ILL?

- Find potential lenders among the 10,000+ ILL users
- 80% fill rate overall (85% of filled requests are filled by the 1st or 2nd lender)
- View +1.6 billion library holdings records
- Commercial document delivery suppliers, booksellers, and full-text vendors also participate
- ISO ILL 10160/10161 compliant

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## 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**

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## Slide 1

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/

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## Slide 2

**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

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## 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
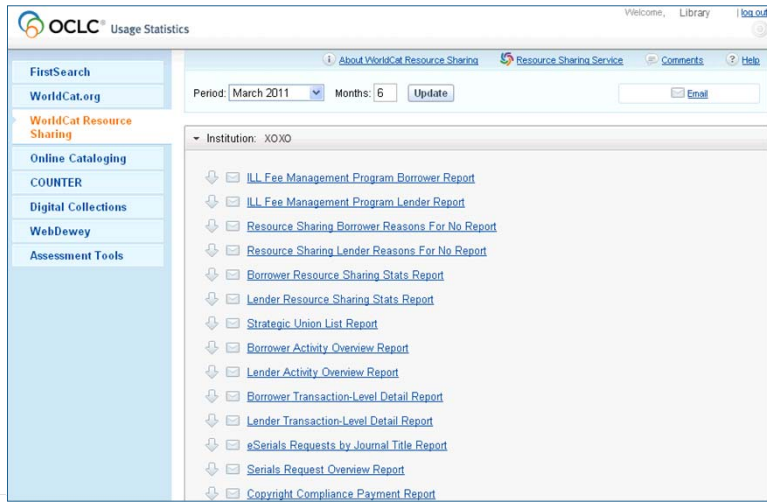- Service Config *replaces* Admin Module:
  http://firstsearch.oclc.org/admin

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Helpful Info- WorldShare ILL & associated modules

## ILL Policies Directory-
http://illpolicies.oclc.org/

The Policies Directory will stay the same:

- No major changes
- Can access Policies Directory from WorldShare ILL

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## Helpful Info- WorldShare ILL & associated modules

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



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## 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 |

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## Helpful Info-WorldShare ILL Training & Documentation

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 ✅

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## How we will be using WorldShare ILL

We will be submitting requests on behalf of patrons:

- Staff Initiated, Staff-Mediated requests from the WorldShare ILL interface

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## Borrower Request Workflow and Exercises

Borrower workflow- Copy and Loan Requests:

1. Search for Item
2. Select appropriate bibliographic record
3. View Holdings Display
4. Display potential lender's policies
5. Select potential lenders for lender string
6. Apply Constant Data
7. Complete request form
8. Submit request

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## Managing Requests as a Borrower

Outline of managing requests workflow

- Receive with batch
- Return with batch
- Request Renewal
- Respond to conditional
- Unfilled items
- Print Requests

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## Manage Constant Data in Service Configuration

Constant Data is maintained in Service Config.

Find link to Service Config from ILL Home Screen

**Interlibrary Loan Home**

**Search for requests**

Request ID ▼ [                              ] Go

☑ Active Requests   ☐ Closed Requests

**Quick Links**

| Borrowing: | Lending: | Other: |
|---|---|---|
| **New For Review (2)** | **Supplied** | Policies Directory |
| Reviewed (2) | **Returned** | OCLC Service Configuration |
| **Produced (10)** | Returned/In Transit (1) | OCLC Usage Statistics |
| In Transit (9) | Returned/Complete? (1) | OCLC Article Exchange |

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## Manage Constant Data in Service Configuration

Ⓞ **OCLC**® Service Configuration

Welcome **TPU tester** ( Help | Sign out)

OCLC Training: TPU (BETA) (128802) ▼ Go

**WorldShare ILL**

📝 Interlibrary Loan Options

📝 **Borrower Data**

📝 Lender Data

📝 Custom Holdings Groups

📝 Custom Holdings Paths

📝 Direct Request Profiles

**Configure Borrower Constant Data**

Required fields are marked with an asterisk *

Print Record

Constant Data Record    | COPY ▼ |
                         | COPY |
                         | DEFAULT |
                         | LOAN |

**Borrowing Library Information**                    –

Create New CD record

* Constant Data Record Name:
COPY

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In conclusion…

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

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Any Final Questions?

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