Basics of ILL: Best Practices for Setting Up and Using WorldCat Resource Sharing for TKN Borrowing

Joe Ellison
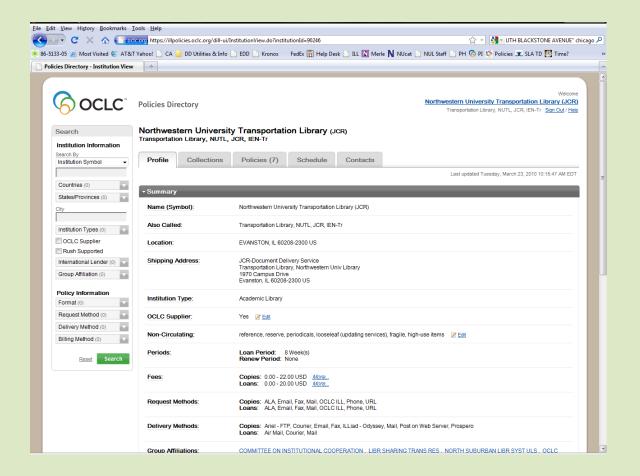Transportation Library
Northwestern University

Focus of this presentation

Working more efficiently in WorldCat Resource Sharing (WCRS) by:

- Editing your information in the OCLC Policies Directory
- Setting up Constant Data records in WorldCat Administration
- Creating Custom Holdings groups and paths
- Using Custom Holdings & Constant Data when placing requests
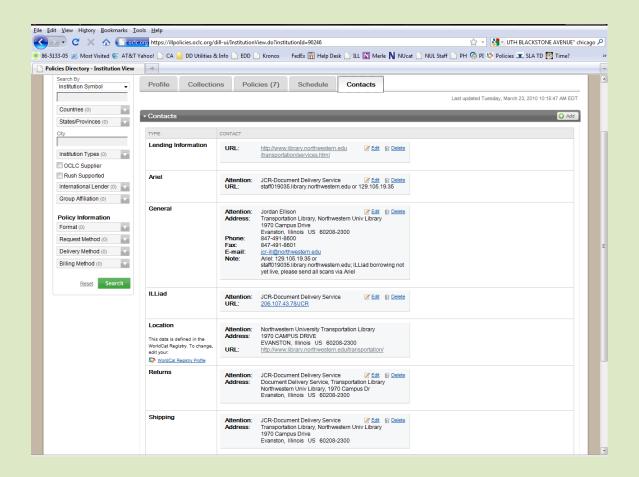- A few other ways to save time & money

OCLC Policies Directory

- URL: https://illpolicies.oclc.org/
- Making sure your record is clear and current will help others borrow from you
- Log in using ILL Authorization number & password
- Look over information on all tabs, suggest you start editing on Contacts, then Schedule, Collections, Policies, then scan main Profile tab and finish editing there
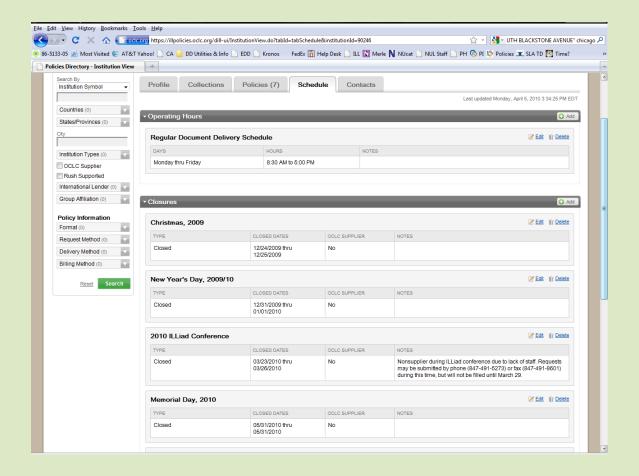
OCLC Policies Directory

The directory always opens to the Profile tab. This is a summary of information drawn from the other tabs.
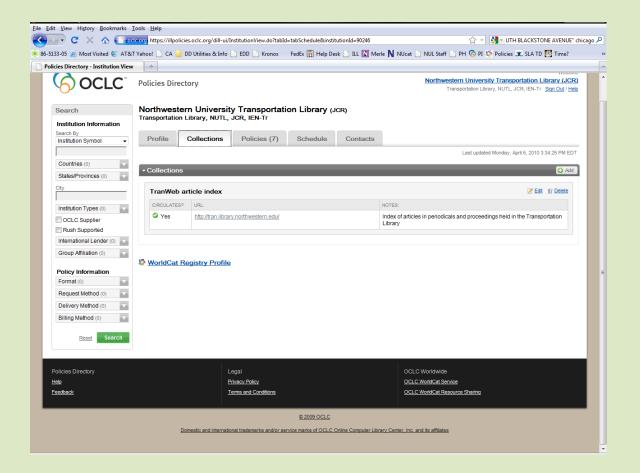
Contacts tab

Click Add to create a new contact. Click Edit to enter information in each area. An editing box will open. Enter appropriate information, scroll to bottom of box, click Save. Contact Types available are: Borrowing, Lending, Ariel, Billing, General, ILLiad, Returns, and Shipping.
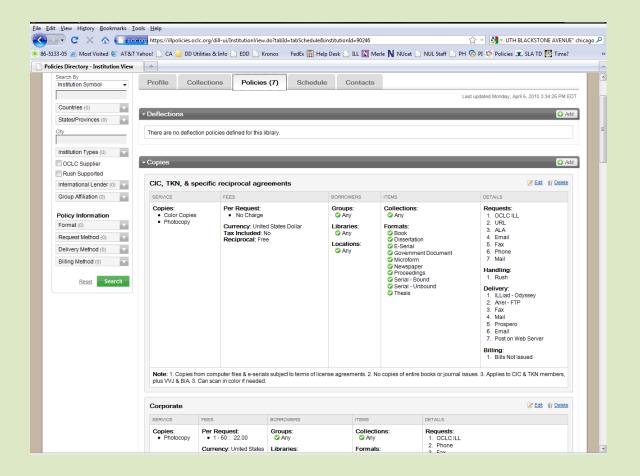
Schedule tab

Enter Operating Hours and Closures, as appropriate. This is one area in which you can set your lender status to non-supplier on a temporary basis. Doing so allows potential borrowers to see when they will be able to request material from you through WCRS. You may also enter a note such as "No WCRS. Call or email for urgent requests"
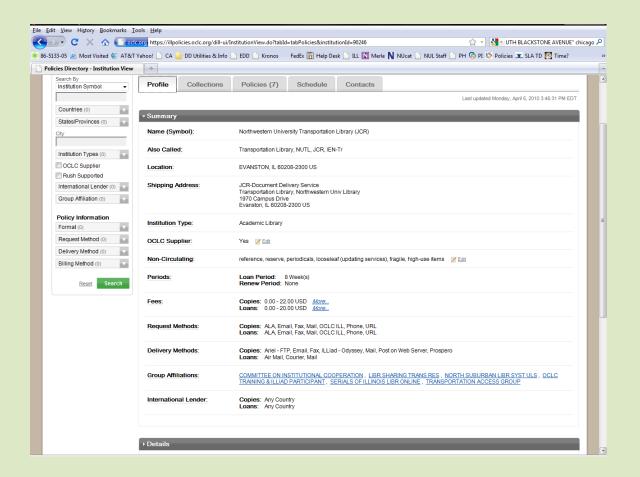
Collections tab

Enter data about special collections that may be of interest to potential borrowers
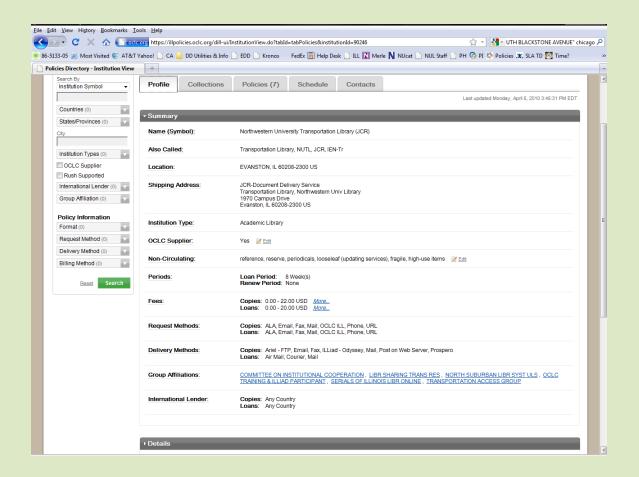
Policies tab

Create at least one policy each for copies and loans. Specify what material is supplied, any charges, to what categories of borrowers, by what requesting method, delivery method, any other notes or restrictions

Profile tab

Finally, scan your profile tab. Make sure everything is correct. If not, go back to the appropriate tab to correct the entry.
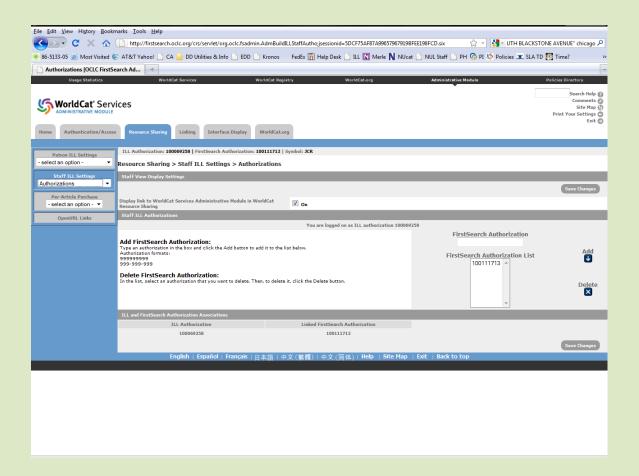
Searching the directory

Search using drop-down menus on the left. Basic and advanced search are now combined here. We will use the search functions when setting up custom holdings.
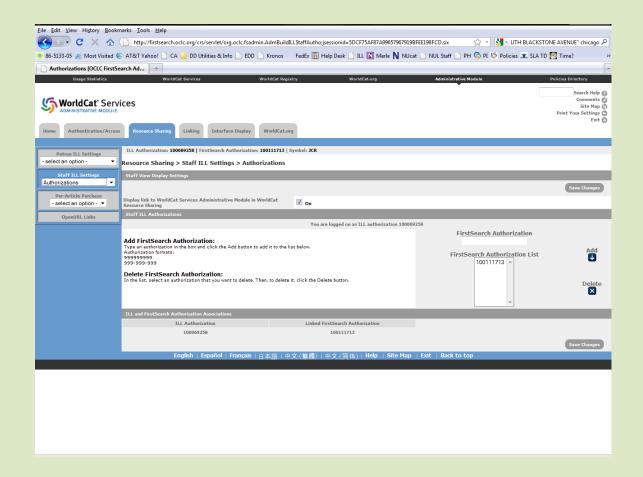
WorldCat Administration

- URL: http://firstsearch.oclc.org/admin
- Enter general ILL settings, create constant data records, custom holdings groups & paths
- Log in using ILL Authorization number & password
- You will be on the Resource Sharing tab
- There are other administrative settings on the other tabs which you may want or need to set. If time permits we can review these at the end of today's session.
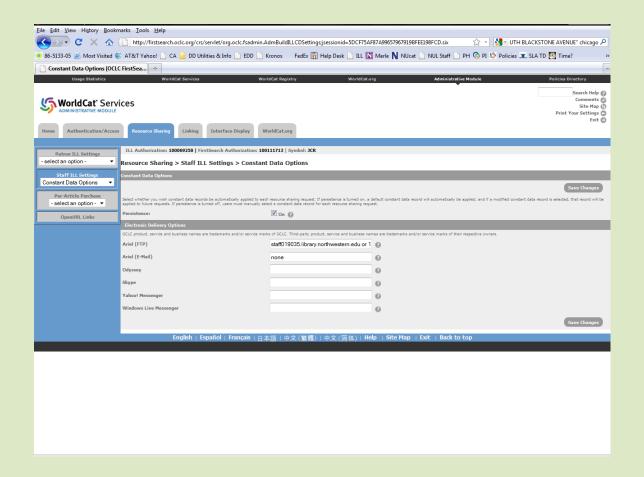
Resource Sharing tab

Use the drop-down menu under Staff ILL Settings to create & edit constant data records, custom holdings, etc.
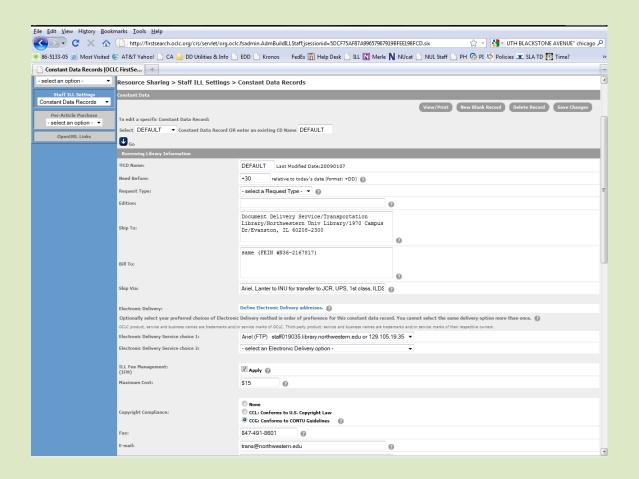
Authorizations

If you have a separate ILL authorization number, you must link it to your other FirstSearch authorization. In the section titled "Staff ILL Authorizations" type your other FirstSearch Authorization number in the top box & click add, then click Save Changes in that section. This will associate the two accounts so you can access the staff ILL functions while logged into FirstSearch using the other account number. To be able to access the Administrative Module directly from WCRS, click the check box under "Staff View Display Settings" to On & click Save Changes in that section.
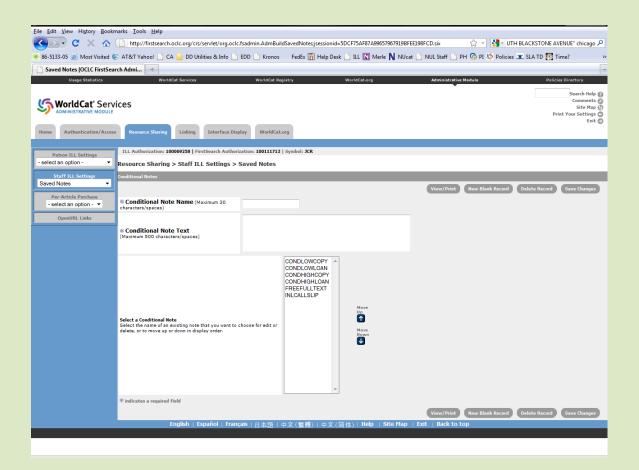
Constant Data Options

Constant data records provide boilerplate text to insert into each request you make or fill. The constant data options affect the electronic delivery field in your constant data records. If you use an electronic delivery system, set Persistence to On, and enter appropriate IP & email addresses. It is easier if these values are set prior to creating constant data records.
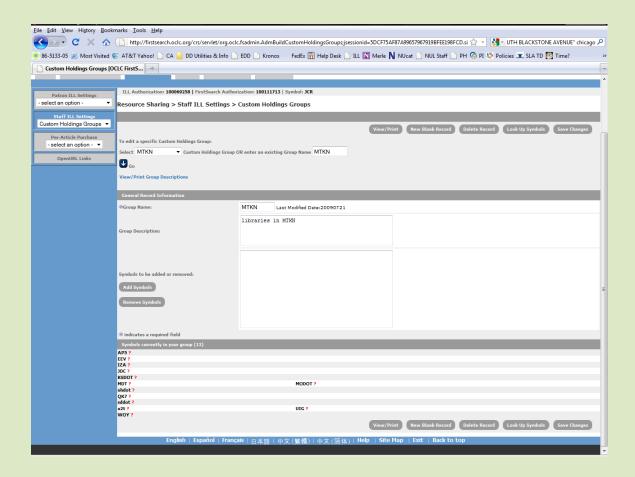
Constant Data Records

Create at least a default constant data record. This will automatically insert information into your borrowing & lending requests in WCRS. Work through the form, entering values as required. Addresses can be no more than 5 lines, with each line separated by a forward slash. Click Save Changes to save the record. Creating separate loan & copy records allows you to enter differential information (e,.g., due date or n/a) automatically.
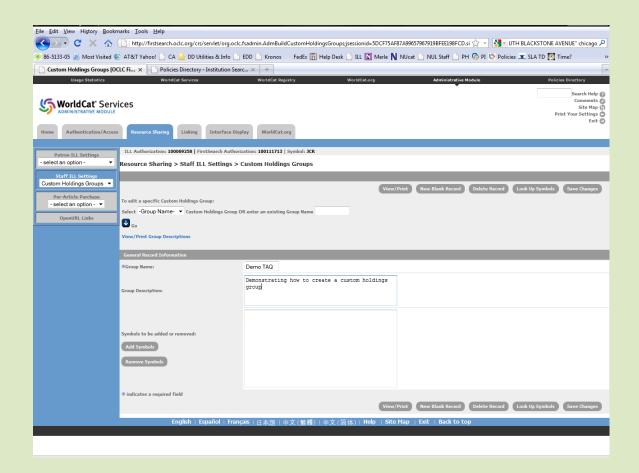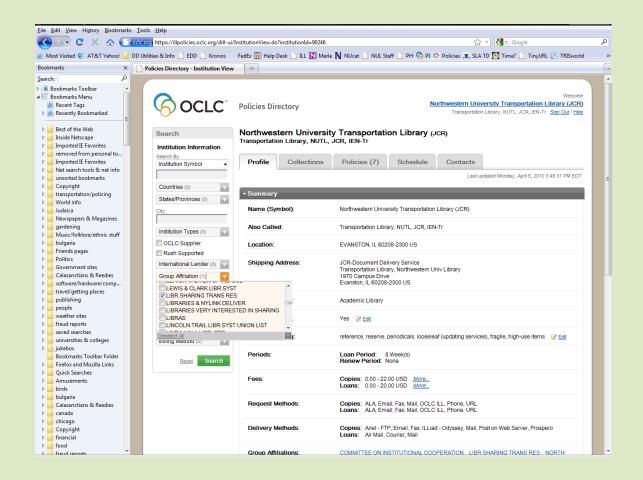
Saved Notes

Save notes to use for creating conditional replies to lending requests. These are used only by the lender.
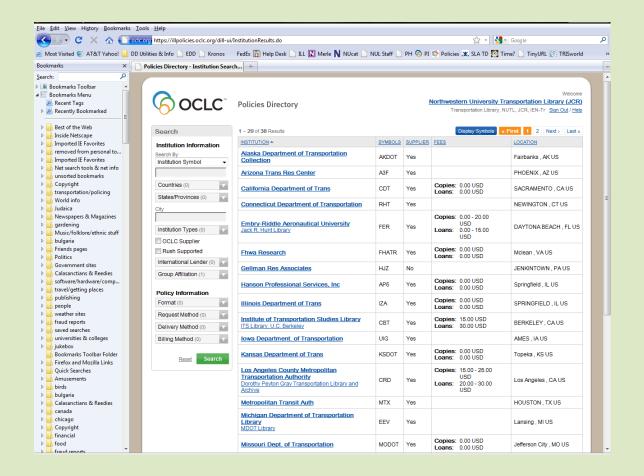
Custom Holdings Groups

Custom Holdings will speed up your borrowing. Create groups of institutions based on affiliation, relationship to your library, fee levels, geographic distribution, or any other useful characteristic. This is my MTKN group. Here's how to create a new group by searching the Policies Directory.
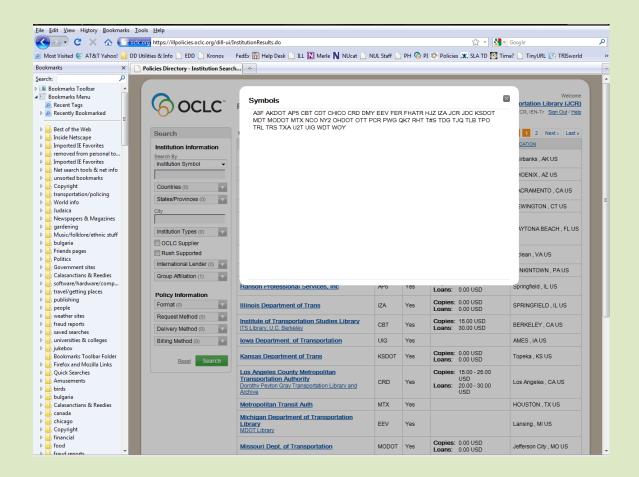
Custom Holdings Groups

Click on New Blank Record. Enter a name and description for the group. Leave the window open, and open the Policies Directory in a second window or tab.

Custom Holdings Groups

In the Policies Directory, search according to the criteria that will define your group. I'm going to select Libraries Sharing Transportation Resources, LSTR. If you know the abbreviation for a particular group, change the Institution Symbol drop-down to Group Symbol, and enter the symbol in the search box below the drop-down.

Custom Holdings Groups

Click Search, and all information for the group is displayed. Custom Holdings Groups use only the list of symbols, so click Display Symbols.

Custom Holdings Groups
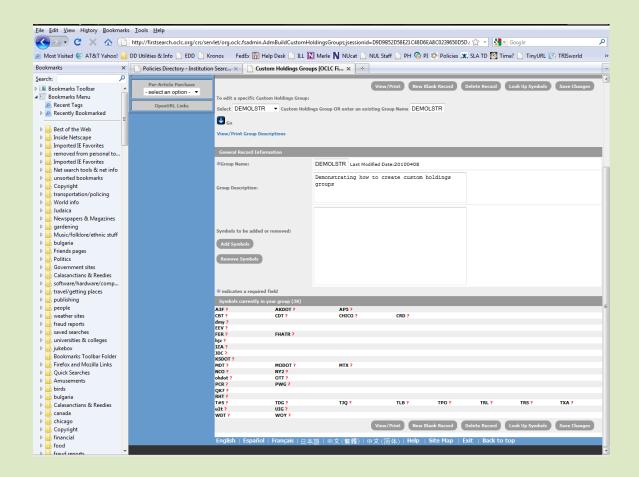
Selection all the symbols displayed in the pop-up, and copy them to the clipboard.

Custom Holdings Groups

Paste the copied symbols into the large box. Delete your own symbol if it's included in the group! Click Add Symbols. You can also create groups by simply typing a list of symbols into the box, or by a mix of cut-and-paste and direct typing. Many people make their lists arranged by fee available via listservs or on the ShareILL wiki.

Custom Holdings Groups

Click on Save Changes to save the group.

Custom Holdings Paths

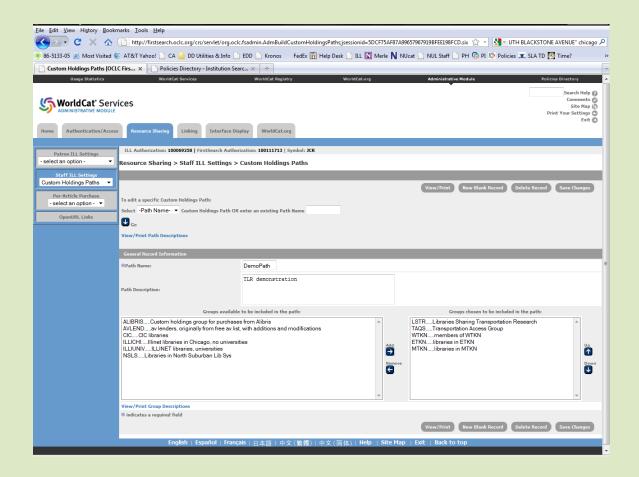Once you've created your Custom Holdings Groups, use them to create Custom Holdings Paths. This will determine the order in which OCLC automatically creates lender strings for your borrowing requests. This is the opening screen for Custom Holdings Paths, showing all the Groups I have available.

Custom Holdings Paths

Select the group or groups to be included, and click Add to add them to the path. Use the up & down arrows to arrange them in the order in which you want OCLC to apply them. Click Save Changes to create the path. Let's go to WorldCat Resource Sharing to see how these tools work.

WorldCat Resource Sharing

Once you've got the supporting material set up, creating borrowing requests and responding to lending requests will be much easier. Go to the FirstSearch Login Screen, http://firstsearch.oclc.org and log in using your ILL authorization and password.

WorldCat Resource Sharing

I have FirstSearch set to open into the Advanced Search screen. This speeds up searching by allowing limits. This is one of those other settings available in FirstSearch Administration, on the Interface Display tab. Let's search for Transportation Research Record as a title phrase, limited to serial publications.

WorldCat Resource Sharing

The first entry has 345 possible locations. I can click through the Libraries Worldwide link to see who has it, or apply my custom holdings right here on the results list. I generally look at the record first to see who has the issues I need. In this case though, I'm just going to create my request here, using a Custom Holdings Path, and specifying a publication year.

WorldCat Resource Sharing

Use the drop-down below Custom Holdings Path to select the path. TRANLIBS contains all my transportation-related groups, such as WTKN, ETKN, MTKN. I've specified 1990 as the year of publication, so OCLC will only enter symbols of libraries that include that year in their holdings. Click Select next to the path name to select a lender string.

WorldCat Resource Sharing

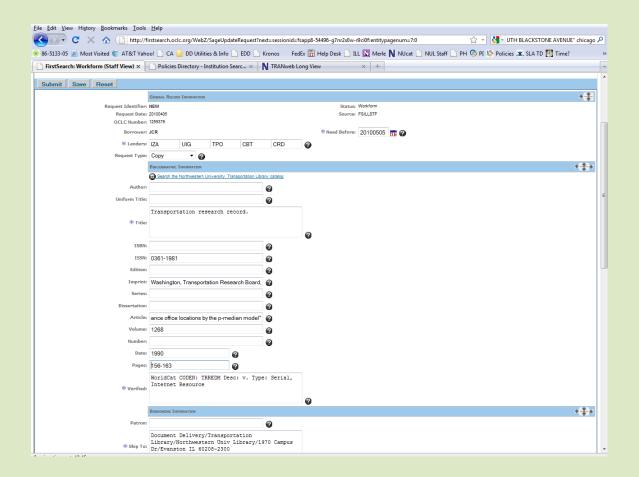OCLC has created a lender string based on my criteria. In this case, most of the transportation libraries in my groups don't list local holdings in their records, so the selection was made based only on those that do. Click through the links on the individual institution names to check holdings in their catalogs. If you identify other locations that hold the year you want, click their symbol to add it to the string. Click Transfer to ILL Staff workform when your string is complete.

WorldCat Resource Sharing

At the top of the workform, select the constant data record to use.

WorldCat Resource Sharing

I've selected one that applies to no-charge copy requests. It enters the Request Type as copy, the Ship To address,

WorldCat Resource Sharing

Bill To address, Ship Via instructions, Copyright Compliance information, etc.

WorldCat Resource Sharing

Bill To address, Ship Via instructions, Copyright Compliance information, etc. Enter the article and patron information. If you don't want to submit the request right away, click the save button at the top of the workfrom. To submit it immediately, click submit.

WorldCat Resource Sharing

To look at your submitted requests and print copies, click the Resource Sharing tab within FirstSearch. Borrowing requests are shown on the left, Lending on the right, Printing options below them. To print, click View next to Categories within the Printing options.

WorldCat Resource Sharing

Select the requests you want to print. I've selected Online Produced, the category for new requests. Select Printing Format: Full Request (generally one per page with browser set to print at 80%, displayed within your browser), One Request Per Page (displayed as a pdf file), or Two Requests Per Page (truncates some information, displayed as a pdf file), and click Print Selected Categories.

WorldCat Resource Sharing

This is the display for Full Request. When printing from this display, set the page range to print from 2 through the final page to avoid printing the summary band at the top. After printing, click Return and Clear to return to the print selection screen, then click Request Manager to return to the list of requests.

WorldCat Resource Sharing

If you're borrowing through WCRS, you are most likely also lending. If you're not using ILL management software such as Clio or ILLiad, use the printing techniques to print pull slips after updating pending lending requests to in process. Use the available options to print mailing labels and book straps. Explore these options by clicking Print next to each one.

WorldCat Resource Sharing

Speed up and standardize your lending processing by using your Constant Data Records to fill in lending requests when you update to Shipped. Use Saved Notes for Conditional responses. Use OCLC's Reasons for No when denying a request. Edit your various lists and records on the fly by clicking through to FirstSearch Administration using the Admin Link in the upper left-hand corner.

Some Other Useful Tools

- Join [LSTR, the Libraries Sharing Transportation Resources](), if you're not already a member

- Consider joining [LVIS, Libraries Very Interested in Sharing](). The roughly 2600 members of this consortium provide loans and copies (up to 30 pages) to each other at no charge.

- Download the free Odyssey standalone, [http://www.atlas-sys.com/products/odyssey/](), for receipt and delivery of scanned articles (great FAQ at [https://osu.illiad.oclc.org/illiad/osu/lending/odysseyfaq.html]())

- NLM DocMorph, free file conversion utility [http://docmorph.nlm.nih.gov/docmorph/]()

Information Resources

Links

- FirstSearch http://firstsearch.oclc.org
- OCLC Policies Directory https://illpolicies.oclc.org/
- WorldCat Administration http://firstsearch.oclc.org/admin
- OCLC WCRS pages http://www.oclc.org/resourcesharing/default.htm
- WorldCat Registry http://www.worldcat.org/registry/Institutions
- Webinars from OCLC and your regional network
- Training on WebJunction Central http://www.webjunction.org/catalog
- ShareILL, the ILL wiki http://www.shareill.org/index.php?title=ShareILL:About

Information Resources

Discussion Lists and Groups

- ILL-L, general discussion of ILL issues, subscribe at https://lists.webjunction.org/mailman/listinfo/ill-l
- Resource Sharing groups (OCLC System Alerts, Best Practices, ILLiad Libraries Discussion) at WebJunction Resource Sharing and Document Delivery http://resourcesharing.webjunction.org/1
- OCLC-Sharing-L and other announcement lists, subscribe at https://www3.oclc.org/app/listserv/
- ARIE-L, specific to issues related to Ariel software, subscribe at https://mailman2.u.washington.edu/mailman/listinfo/arie-l
- Odyssey-L, specific to standalone Odyssey, with some discussion of Odyssey within ILLiad, send subscribe message to Odyssey-L-join@iris.atlas-sys.com
- Workformtoolkit-l, general discussion of ILLiad ILL management software and best practices, subscribe at http://mail.geneseo.edu/mailman/listinfo/workflowtoolkit-l
- Clio, discussion of Clio ILL management software, send subscribe message to listserv@listserv.uconn.edu

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