

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

OCCLC 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

File Edit View History Bookmarks Tools Help
 oclc.org https://ilpolicies.oclc.org/dill-ui/InstitutionView.do?institutionId=90246
 UTH BLACKSTONE AVENUE® chicago

Policies Directory - Institution View

OCLC Policies Directory Welcome
[Northwestern University Transportation Library \(JCR\)](#)
 Transportation Library, NUTL, JCR, IEN-Tr [Sign Out](#) / [Help](#)

Northwestern University Transportation Library (JCR)
 Transportation Library, NUTL, JCR, IEN-Tr

Profile Collections Policies (7) Schedule Contacts

Last updated Tuesday, March 23, 2010 10:15:47 AM EDT

Summary

Name (Symbol): Northwestern University Transportation Library (JCR)

Also Called: Transportation Library, NUTL, JCR, IEN-Tr

Location: EVANSTON, IL 60208-2300 US

Shipping Address: JCR-Document Delivery Service
 Transportation Library, Northwestern Univ Library
 1970 Campus Drive
 Evanston, IL 60208-2300 US

Institution Type: Academic Library

OCLC Supplier: Yes [Edit](#)

Non-Circulating: reference, reserve, periodicals, looseleaf (updating services), fragile, high-use items [Edit](#)

Periods: **Loan Period:** 8 Week(s)
Renew Period: None

Fees: **Copies:** 0.00 - 22.00 USD [More...](#)
Loans: 0.00 - 20.00 USD [More...](#)

Request Methods: **Copies:** ALA, Email, Fax, Mail, OCLC ILL, Phone, URL
Loans: ALA, Email, Fax, Mail, OCLC ILL, Phone, URL

Delivery Methods: **Copies:** Ariel - FTP, Courier, Email, Fax, ILLiad - Odyssey, Mail, Post on Web Server, Prospero
Loans: Air Mail, Courier, Mail

Group Affiliations: [COMMITTEE ON INSTITUTIONAL COOPERATION](#) [LIBR SHARING TRANS RES](#) [NORTH SUBURBAN LIBR SYST ULS](#) [OCLC](#)

Institution Information
 Search By
 Institution Symbol
 Countries (0)
 States/Provinces (0)
 City
 Institution Types (0)
 OCLC Supplier
 Rush Supported
 International Lender (0)
 Group Affiliation (0)
Policy Information
 Format (0)
 Request Method (0)
 Delivery Method (0)
 Billing Method (0)
 Reset Search

OCLC Policies Directory

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

Search By:
 Institution Symbol
 Countries (0)
 States/Provinces (0)
 City
 Institution Types (0)
 OCLC Supplier
 Rush Supported
 International Lender (0)
 Group Affiliation (0)
 Policy Information
 Format (0)
 Request Method (0)
 Delivery Method (0)
 Billing Method (0)
 Reset Search

Profile Collections Policies (7) Schedule **Contacts**

Last updated Tuesday, March 23, 2010 10:15:47 AM EDT

▼ Contacts Add

TYPE	CONTACT
Lending information	URL: http://www.library.northwestern.edu/transportation/services.html Edit Delete
Ariel	Attention: JCR-Document Delivery Service URL: staff019035.library.northwestern.edu or 129.105.19.35 Edit Delete
General	Attention: Jordan Ellison Address: Transportation Library, Northwestern Univ Library 1970 Campus Drive Evanston, Illinois US 60208-2300 Phone: 847-491-8600 Fax: 847-491-8601 E-mail: jcr-ill@northwestern.edu Note: Ariel: 129.105.19.35 or staff019035.library.northwestern.edu; ILLiad borrowing not yet live, please send all scans via Ariel Edit Delete
ILLiad	Attention: JCR-Document Delivery Service URL: 206.107.43.78/JCR Edit Delete
Location	Attention: Northwestern University Transportation Library Address: 1970 CAMPUS DRIVE EVANSTON, Illinois US 60208-2300 URL: http://www.library.northwestern.edu/transportation/
Returns	Attention: JCR-Document Delivery Service Address: Document Delivery Service, Transportation Library Northwestern Univ Library, 1970 Campus Dr Evanston, Illinois US 60208-2300 Edit Delete
Shipping	Attention: JCR-Document Delivery Service Address: Transportation Library, Northwestern Univ Library 1970 Campus Drive Evanston, Illinois US 60208-2300 Edit Delete

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.

Search By
Institution Symbol
Countries (0)
States/Provinces (0)
City
Institution Types (0)
 OCLC Supplier
 Rush Supported
International Lender (0)
Group Affiliation (0)
Policy Information
Format (0)
Request Method (0)
Delivery Method (0)
Billing Method (0)
Reset Search

Profile Collections Policies (7) **Schedule** Contacts
Last updated Monday, April 5, 2010 3:34:25 PM EDT

Operating Hours Add

Regular Document Delivery Schedule Edit Delete

DAYS	HOURS	NOTES
Monday thru Friday	8:30 AM to 5:00 PM	

Closures Add

Christmas, 2009 Edit Delete

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	12/24/2009 thru 12/26/2009	No	

New Year's Day, 2009/10 Edit Delete

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	12/31/2009 thru 01/01/2010	No	

2010 ILLiad Conference Edit Delete

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	03/23/2010 thru 03/26/2010	No	Nonsupplier during ILLiad conference due to lack of staff. Requests may be submitted by phone (847-491-5273) or fax (847-491-8601) during this time, but will not be filled until March 29.

Memorial Day, 2010 Edit Delete

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Closed	05/31/2010 thru 06/01/2010	No	

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"

The screenshot shows a web browser window displaying the OCLC Policies Directory for Northwestern University Transportation Library (JCR). The browser's address bar shows the URL: <https://ilpolicies.oclc.org/dill-ui/InstitutionView.do?tabId=tabSchedule&institutionId=90246>. The page title is "Policies Directory - Institution View".

The main content area is titled "Northwestern University Transportation Library (JCR)" and "Transportation Library, NUTL, JCR, IEN-Tr". It features a navigation bar with tabs: "Profile", "Collections" (which is selected), "Policies (7)", "Schedule", and "Contacts". A timestamp indicates the page was last updated on Monday, April 5, 2010, at 3:34:25 PM EDT.

The "Collections" tab displays a table with the following data:

TranWeb article index		
CIRCULATES?	URL:	NOTES:
Yes	http://tran.library.northwestern.edu/	Index of articles in periodicals and proceedings held in the Transportation Library

Below the table, there is a link to the "WorldCat Registry Profile".

The left sidebar contains a search interface with the following sections:

- Search:** Search By: Institution Symbol
- Institution Information:** Countries (0), States/Provinces (0), City, Institution Types (0), OCLC Supplier, Rush Supported, International Lender (0), Group Affiliation (0)
- Policy Information:** Format (0), Request Method (0), Delivery Method (0), Billing Method (0)

Buttons for "Reset" and "Search" are located at the bottom of the sidebar.

The footer contains navigation links: Policies Directory, Help, Feedback, Legal, Privacy Policy, Terms and Conditions, OCLC Worldwide, OCLC WorldCat Service, and OCLC WorldCat Resource Sharing. Copyright information for 2009 OCLC and a disclaimer about trademarks are also present.

Collections tab

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

File Edit View History Bookmarks Tools Help

oclc.org https://illpolicies.oclc.org/ill-ui/InstitutionView.do?tabId=tabSchedule&institutionId=90246

86-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUCat NUL Staff PH PI Policies SLA TD Time?

Policies Directory - Institution View

Search By: Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

Reset Search

Profile Collections **Policies (7)** Schedule Contacts

Last updated Monday, April 5, 2010 3:34:25 PM EDT

Defections Add

There are no deflection policies defined for this library.

Copies Add

CIC, TKN, & specific reciprocal agreements Edit Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies: <ul style="list-style-type: none"> Color Copies Photocopy 	Per Request: <ul style="list-style-type: none"> No Charge Currency: United States Dollar Tax Included: No Reciprocal: Free	Groups: <ul style="list-style-type: none"> Any Libraries: <ul style="list-style-type: none"> Any Locations: <ul style="list-style-type: none"> Any 	Collections: <ul style="list-style-type: none"> Any Formats: <ul style="list-style-type: none"> Book Dissertation E-Serial Government Document Microform Newspaper Proceedings Serial - Bound Serial - Unbound Thesis 	Requests: <ol style="list-style-type: none"> OCLC ILL URL ALA Email Fax Phone Mail Handling: <ol style="list-style-type: none"> Rush Delivery: <ol style="list-style-type: none"> ILLiad - Odyssey Ariel - FTP Fax Mail Prospero Email Post on Web Server Billing: <ol style="list-style-type: none"> Bills Not Issued

Note: 1. Copies from computer files & e-serials subject to terms of license agreements. 2. No copies of entire books or journal issues. 3. Applies to CIC & TKN members, plus VVJ & BIA. 3. Can scan in color if needed.

Corporate Edit Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies: <ul style="list-style-type: none"> Photocopy 	Per Request: <ul style="list-style-type: none"> 1 - 50 : 22.00 Currency: United States	Groups: <ul style="list-style-type: none"> Any Libraries:	Collections: <ul style="list-style-type: none"> Any Formats:	Requests: <ol style="list-style-type: none"> OCLC ILL Phone Fax

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

File Edit View History Bookmarks Tools Help

oclc.org https://ilpolicies.oclc.org/dill-ui/InstitutionView.do?tabId=tabPolicies&institutionId=90246 UTH BLACKSTONE AVENUE® chicago

86-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUcat NUL Staff PH PI Policies SLA TD Time?

Policies Directory - Institution View

Search By: Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

Reset Search

Profile Collections Policies (7) Schedule Contacts

Last updated Monday, April 5, 2010 3:45:31 PM EDT

Summary

Name (Symbol): Northwestern University Transportation Library (JCR)

Also Called: Transportation Library, NUTL, JCR, IEN-Tr

Location: EVANSTON, IL 60208-2300 US

Shipping Address: JCR-Document Delivery Service
Transportation Library, Northwestern Univ Library
1970 Campus Drive
Evanston, IL 60208-2300 US

Institution Type: Academic Library

OCLC Supplier: Yes [Edit](#)

Non-Circulating: reference, reserve, periodicals, looseleaf (updating services), fragile, high-use items [Edit](#)

Periods: **Loan Period:** 8 Week(s)
Renew Period: None

Fees: **Copies:** 0.00 - 22.00 USD [More...](#)
Loans: 0.00 - 20.00 USD [More...](#)

Request Methods: **Copies:** ALA, Email, Fax, Mail, OCLC ILL, Phone, URL
Loans: ALA, Email, Fax, Mail, OCLC ILL, Phone, URL

Delivery Methods: **Copies:** Ariel - FTP, Email, Fax, ILLiad - Odyssey, Mail, Post on Web Server, Prospero
Loans: Air Mail, Courier, Mail

Group Affiliations: [COMMITTEE ON INSTITUTIONAL COOPERATION](#), [LIBR SHARING TRANS RES](#), [NORTH SUBURBAN LIBR SYST ULS](#), [OCLC TRAINING & ILLIAD PARTICIPANT](#), [SERIALS OF ILLINOIS LIBR ONLINE](#), [TRANSPORTATION ACCESS GROUP](#)

International Lender: **Copies:** Any Country
Loans: Any Country

Details

Profile tab

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

The screenshot displays the OCLC Policies Directory - Institution View page. The browser address bar shows the URL: <https://ilpolicies.oclc.org/dill-ui/InstitutionView.do?tabId=tabPolicies&institutionId=90246>. The page title is "Policies Directory - Institution View".

The left sidebar contains search filters:

- Search By: Institution Symbol
- Countries (0)
- States/Provinces (0)
- City
- Institution Types (0)
- OCLC Supplier
- Rush Supported
- International Lender (0)
- Group Affiliation (0)
- Policy Information:
 - Format (0)
 - Request Method (0)
 - Delivery Method (0)
 - Billing Method (0)
- Buttons: Reset, Search

The main content area shows the profile for Northwestern University Transportation Library (JCR). The tabs are Profile, Collections, Policies (7), Schedule, and Contacts. The last updated date is Monday, April 5, 2010 3:46:31 PM EDT.

Summary

- Name (Symbol):** Northwestern University Transportation Library (JCR)
- Also Called:** Transportation Library, NUTL, JCR, IEN-Tr
- Location:** EVANSTON, IL 60208-2300 US
- Shipping Address:** JCR-Document Delivery Service
Transportation Library, Northwestern Univ Library
1970 Campus Drive
Evanston, IL 60208-2300 US
- Institution Type:** Academic Library
- OCLC Supplier:** Yes [Edit](#)
- Non-Circulating:** reference, reserve, periodicals, looseleaf (updating services), fragile, high-use items [Edit](#)
- Periods:**
 - Loan Period:** 8 Week(s)
 - Renew Period:** None
- Fees:**
 - Copies:** 0.00 - 22.00 USD [More...](#)
 - Loans:** 0.00 - 20.00 USD [More...](#)
- Request Methods:**
 - Copies:** ALA, Email, Fax, Mail, OCLC ILL, Phone, URL
 - Loans:** ALA, Email, Fax, Mail, OCLC ILL, Phone, URL
- Delivery Methods:**
 - Copies:** Ariel - FTP, Email, Fax, ILLiad - Odyssey, Mail, Post on Web Server, Prospero
 - Loans:** Air Mail, Courier, Mail
- Group Affiliations:** [COMMITTEE ON INSTITUTIONAL COOPERATION](#), [LIBR SHARING TRANS RES](#), [NORTH SUBURBAN LIBR SYST ULS](#), [OCLC TRAINING & ILLIAD PARTICIPANT](#), [SERIALS OF ILLINOIS LIBR ONLINE](#), [TRANSPORTATION ACCESS GROUP](#)
- International Lender:**
 - Copies:** Any Country
 - Loans:** Any Country

At the bottom, there is a "Details" link.

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.

The screenshot shows the WorldCat Services Administrative Module interface. The top navigation bar includes 'Home', 'Authentication/Access', 'Resource Sharing', 'Linking', 'Interface Display', and 'WorldCat.org'. The 'Resource Sharing' tab is active, and the 'Authorizations' sub-tab is selected. The main content area displays 'Resource Sharing > Staff ILL Settings > Authorizations'. On the left, there are dropdown menus for 'Patron ILL Settings', 'Staff ILL Settings', and 'Per-Article Purchase'. The main area shows 'Staff ILL Authorizations' with a table listing ILL and FirstSearch authorization records. A 'FirstSearch Authorization List' is also visible, showing a list of authorization numbers with 'Add' and 'Delete' buttons. The bottom of the page features a language selection bar with options for English, Español, Français, 日本語, 中文(繁體), and 中文(简体), along with links for Help, Site Map, Exit, and Back to top.

Resource Sharing tab

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

WorldCat Services ADMINISTRATIVE MODULE

Home Authentication/Access Resource Sharing Linking Interface Display WorldCat.org

Patron ILL Settings
- select an option -

Staff ILL Settings
Authorizations

Per-Article Purchase
- select an option -

OpenURL Links

ILL Authorization: 100069258 | FirstSearch Authorizations: 100111713 | Symbol: JCR

Resource Sharing > Staff ILL Settings > Authorizations

Staff View Display Settings

Display link to WorldCat Services Administrative Module in WorldCat Resource Sharing On

Staff ILL Authorizations

You are logged on as ILL authorization 100069258

Add FirstSearch Authorization:
Type an authorization in the box and click the Add button to add it to the list below.
Authorization formats:
999999999
999-999-999

Delete FirstSearch Authorization:
In the list, select an authorization that you want to delete. Then, to delete it, click the Delete button.

FirstSearch Authorization

FirstSearch Authorization List

100111713

Save Changes

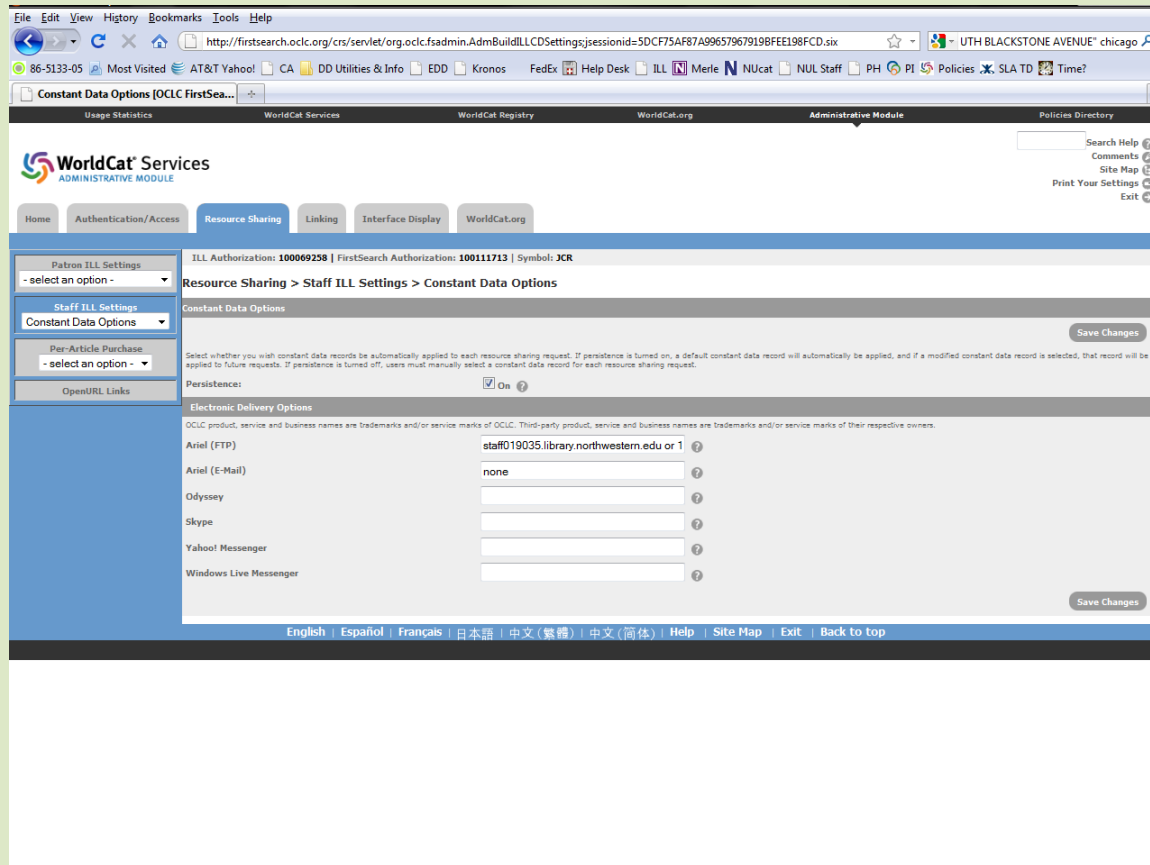
ILL and FirstSearch Authorization Associations	
ILL Authorization	Linked FirstSearch Authorization
100069258	100111713

Save Changes

English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map | Exit | Back to top

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.

The screenshot shows a web browser window with the URL <http://firstsearch.oclc.org/crs/servelet/org.oclc.fsdadmin.AdmBuildILLStaff?sessionid=5DCF75AF87A996579679198FEE198FCD.six>. The page title is "Constant Data Records [OCLC FirstSe...". The breadcrumb navigation is "Resource Sharing > Staff ILL Settings > Constant Data Records".

The form is titled "Constant Data" and includes the following fields and options:

- Navigation:** "View/Print", "New Blank Record", "Delete Record", "Save Changes".
- Instructions:** "To edit a specific Constant Data Record: Select: DEFAULT Constant Data Record OR enter an existing CD Name: DEFAULT".
- Buttons:** "Go".
- Borrowing Library Information:**
 - CD Name: DEFAULT (Last Modified Date: 20090107)
 - Need Before: +30 (relative to today's date (format: +DD))
 - Request Type: - select a Request Type -
 - Edition: [empty field]
 - Ship To: Document Delivery Service/Transportation Library/Northwestern Univ Library/1970 Campus Dr/Evanston, IL 60208-2300
 - Bill To: same (FEIN #N36-2167817)
 - Ship Via: Ariel. Lanter to INU for transfer to JCR, UPS, 1st class, ILDS
- Electronic Delivery:**
 - Define Electronic Delivery addresses.
 - Optionally select your preferred choices of Electronic Delivery method in order of preference for this constant data record. You cannot select the same delivery option more than once.
 - Electronic Delivery Service choice 1: Ariel (FTP) staff019035.library.northwestern.edu or 129.105.19.35
 - Electronic Delivery Service choice 2: - select an Electronic Delivery option -
- ILL Fee Management (IFM):**
 - Apply (checked)
 - Maximum Cost: \$15
- Copyright Compliance:**
 - None
 - CCL: Conforms to U.S. Copyright Law
 - CCG: Conforms to CONTU Guidelines (selected)
- Contact Information:**
 - Fax: 847-491-8601
 - E-mail: trans@northwestern.edu

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.

WorldCat Services ADMINISTRATIVE MODULE

Home Authentication/Access Resource Sharing Linking Interface Display WorldCat.org

ILL Authorization: 100069258 | FirstSearch Authorization: 100111713 | Symbol: JCR

Resource Sharing > Staff ILL Settings > Saved Notes

Conditional Notes

View/Print New Blank Record Delete Record Save Changes

* Conditional Note Name (Maximum 30 characters/spaces)

* Conditional Note Text (Maximum 500 characters/spaces)

CONDLOWCOPY
CONDLOWLOAN
CONDHIGHCOPY
CONDHIGHLOAN
FREEFULLTEXT
INCALLSLIP

Move Up
Move Down

Select a Conditional Note
Select the name of an existing note that you want to choose for edit or delete, or to move up or down in display order.

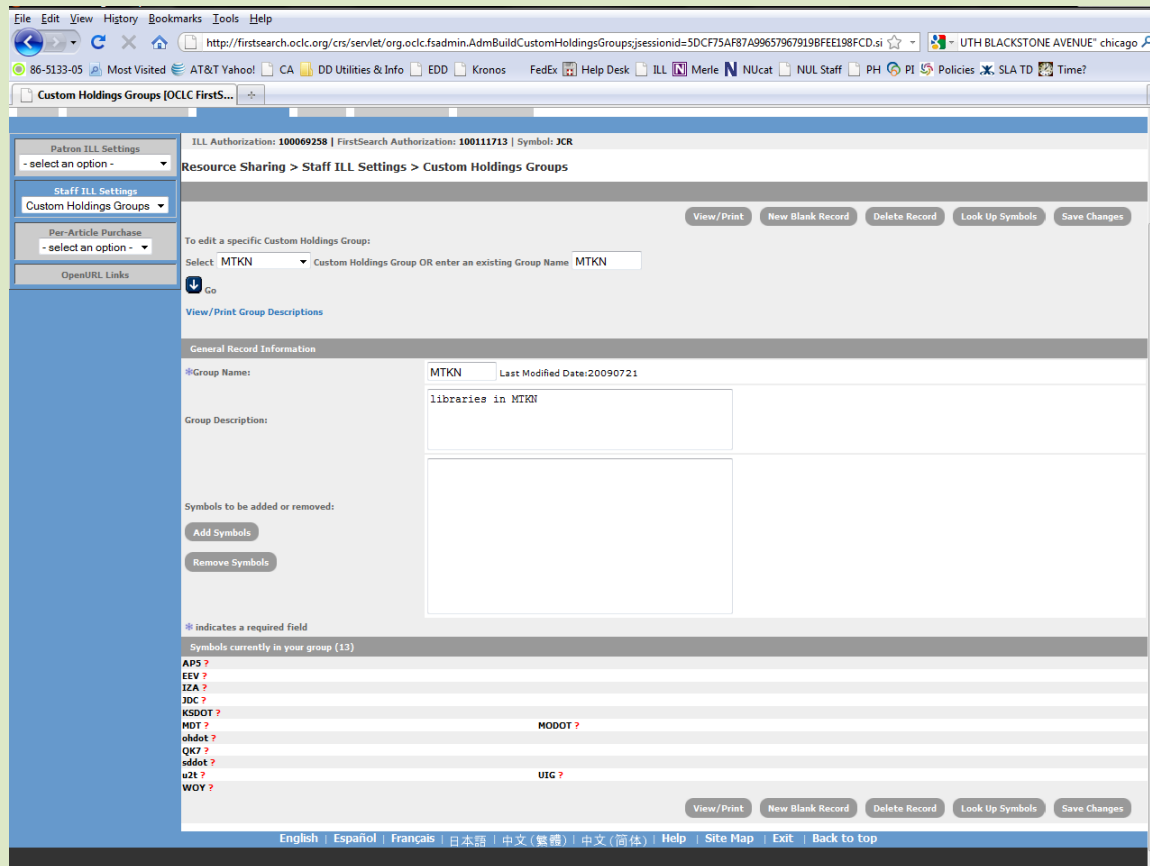
* indicates a required field

View/Print New Blank Record Delete Record Save Changes

English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map | Exit | Back to top

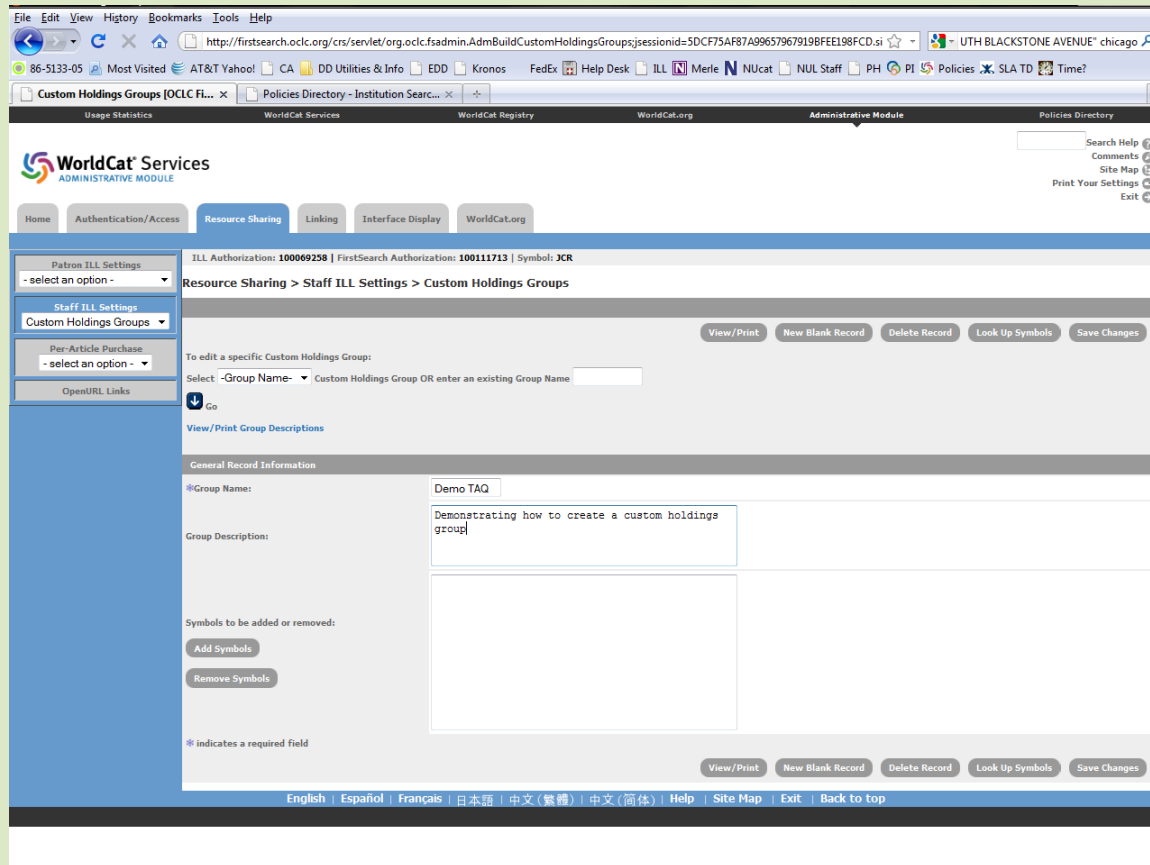
Saved Notes

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.

The screenshot shows the OCLC Policies Directory interface. The search criteria are set to 'Group Affiliation' with 'LIBR SHARING TRANS RES' selected. The profile details for Northwestern University Transportation Library (JCR) are as follows:

Field	Value
Name (Symbol):	Northwestern University Transportation Library (JCR)
Also Called:	Transportation Library, NUTL, JCR, IEN-Tr
Location:	EVANSTON, IL 60208-2300 US
Shipping Address:	JCR-Document Delivery Service Transportation Library, Northwestern Univ Library 1970 Campus Drive Evanston, IL 60208-2300 US
Academic Library:	Yes Edit
Reference/Reserve/Periodicals/Looseleaf/Updating Services/Fragile/High-use Items:	reference, reserve, periodicals, looseleaf (updating services), fragile, high-use items Edit
Periods:	Loan Period: 8 Week(s) Renew Period: None
Fees:	Copies: 0.00 - 22.00 USD More... Loans: 0.00 - 20.00 USD More...
Request Methods:	Copies: ALA, Email, Fax, Mail, OCLC ILL, Phone, URL Loans: ALA, Email, Fax, Mail, OCLC ILL, Phone, URL
Delivery Methods:	Copies: Ariel - FTP, Email, Fax, ILLiad - Odyssey, Mail, Post on Web Server, Prospero Loans: Air Mail, Courier, Mail
Group Affiliations:	COMMITTEE ON INSTITUTIONAL COOPERATION LIBR SHARING TRANS RES NORTH

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.

The screenshot shows a web browser window displaying the OCLC Policies Directory. The search results are filtered to show 20 of 38 results. The search criteria include 'Institution Symbol' and 'Group Affiliation (1)'. The results table lists various transportation libraries with their symbols, suppliers, fees, and locations.

INSTITUTION	SYMBOLS	SUPPLIER	FEES	LOCATION
Alaska Department of Transportation Collection	AKDOT	Yes		Fairbanks , AK US
Arizona Trans Res Center	A3F	Yes		PHOENIX , AZ US
California Department of Trans	CDT	Yes	Copies: 0.00 USD Loans: 0.00 USD	SACRAMENTO , CA US
Connecticut Department of Transportation	RHT	Yes		NEWINGTON , CT US
Embry-Riddle Aeronautical University Jack R. Hunt Library	FER	Yes	Copies: 0.00 - 20.00 USD Loans: 0.00 - 15.00 USD	DAYTONA BEACH , FL US
Fhwa Research	FHATR	Yes	Copies: 0.00 USD Loans: 0.00 USD	Mclean , VA US
Gellman Res Associates	HJZ	No		JENKINTOWN , PA US
Hanson Professional Services, Inc	AP6	Yes	Copies: 0.00 USD Loans: 0.00 USD	Springfield , IL US
Illinois Department of Trans	IZA	Yes	Copies: 0.00 USD Loans: 0.00 USD	SPRINGFIELD , IL US
Institute of Transportation Studies Library ITS Library, U.C. Berkeley	CBT	Yes	Copies: 15.00 USD Loans: 30.00 USD	BERKELEY , CA US
Iowa Department of Transportation	UIG	Yes		AMES , IA US
Kansas Department of Trans	KSDOT	Yes	Copies: 0.00 USD Loans: 0.00 USD	Topeka , KS US
Los Angeles County Metropolitan Transportation Authority Dorothy Pevton Gray Transportation Library and Archive	CRD	Yes	Copies: 15.00 - 25.00 USD Loans: 20.00 - 30.00 USD	Los Angeles , CA US
Metropolitan Transit Auth	MTX	Yes		HOUSTON , TX US
Michigan Department of Transportation Library MDOT Library	EEV	Yes		Lansing , MI US
Missouri Dept. of Transportation	MODOT	Yes	Copies: 0.00 USD Loans: 0.00 USD	Jefferson City , MO US

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.

The screenshot shows the OCLC Policies Directory website. A search interface is visible on the left, and a pop-up window titled "Symbols" is overlaid on the main content area. The pop-up window contains a list of alphanumeric symbols used for library holdings groups.

Symbols

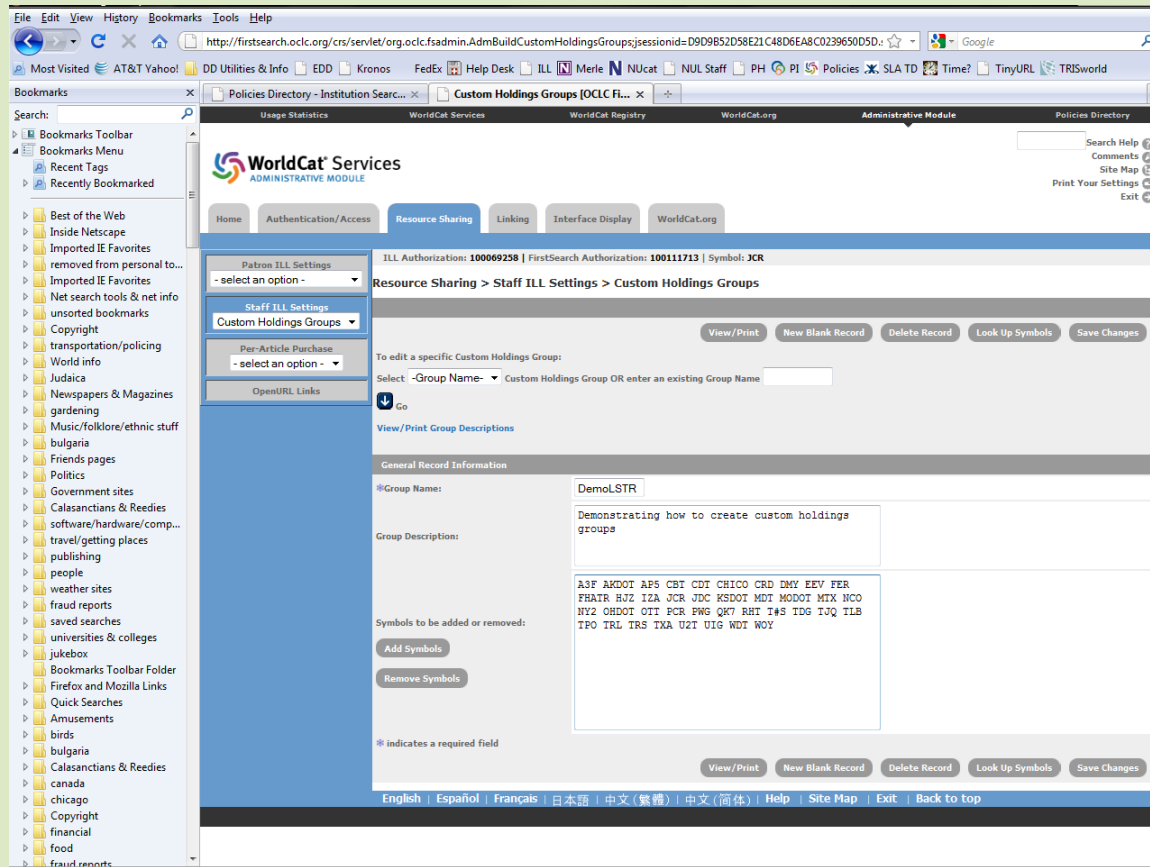
ASF AKDOT AP5 CBT CDT CHICO CRD DMY EEV FER FHATR HJZ IZA JCR JDC KSDOT
 MDT MODOT MTX NCO NY2 OHDOT OTT PCR PWG QK7 RHT T#S TDG TJQ TLB TPO
 TRL TRS TXA U2T UIG WDT WOY

The background website shows a search form with fields for "Institution Symbol", "Countries", "States/Provinces", "City", "Institution Types", "OCLC Supplier", "Rush Supported", "International Lender", and "Group Affiliation". Below the search form is a table of results with columns for institution name, symbol, status, and loan/copy information.

Institution	Symbol	Status	Copies	Loans	Location
Hanson Professional Services, Inc	AP5	Yes		0.00 USD	Springfield, IL US
Illinois Department of Trans	IZA	Yes	0.00 USD	0.00 USD	SPRINGFIELD, IL US
Institute of Transportation Studies Library ITS Library, U.C. Berkeley	CBT	Yes	15.00 USD	30.00 USD	BERKELEY, CA US
Iowa Department of Transportation	UIG	Yes			AMES, IA US
Kansas Department of Trans	KSDOT	Yes	0.00 USD	0.00 USD	Topeka, KS US
Los Angeles County Metropolitan Transportation Authority Dorothy Pevton Gray Transportation Library and Archive	CRD	Yes	15.00 - 25.00 USD	20.00 - 30.00 USD	Los Angeles, CA US
Metropolitan Transit Auth	MTX	Yes			HOUSTON, TX US
Michigan Department of Transportation Library MDOT Library	EEV	Yes			Lansing, MI US
Missouri Dept. of Transportation	MODOT	Yes	0.00 USD	0.00 USD	Jefferson City, MO US

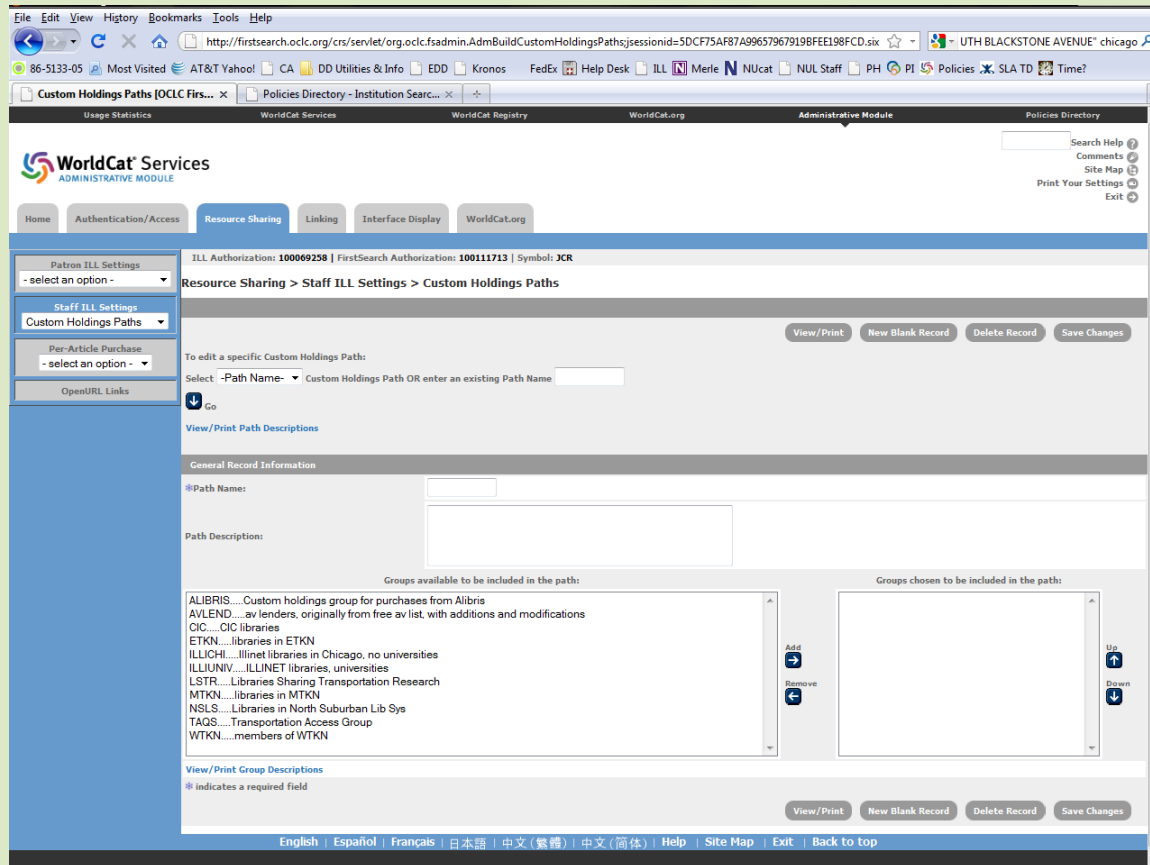
Custom Holdings Groups

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



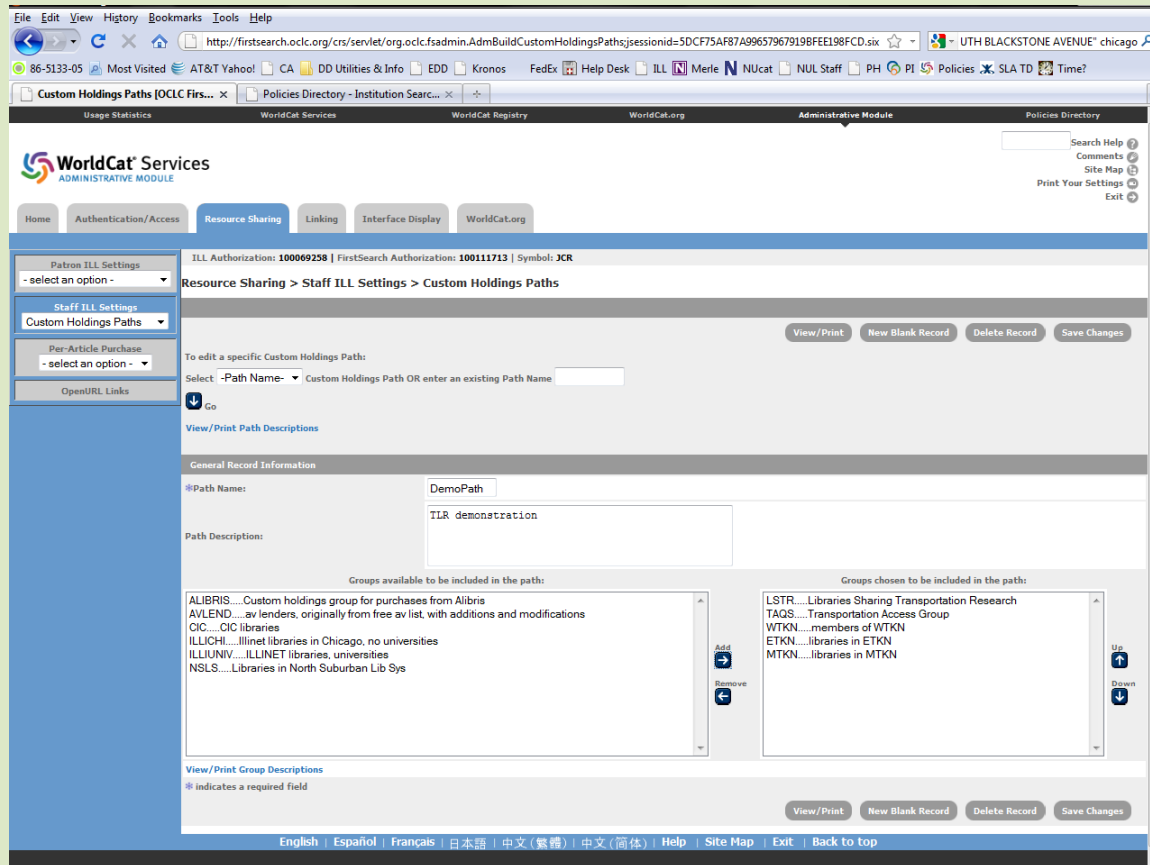
Custom Holdings Groups

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.



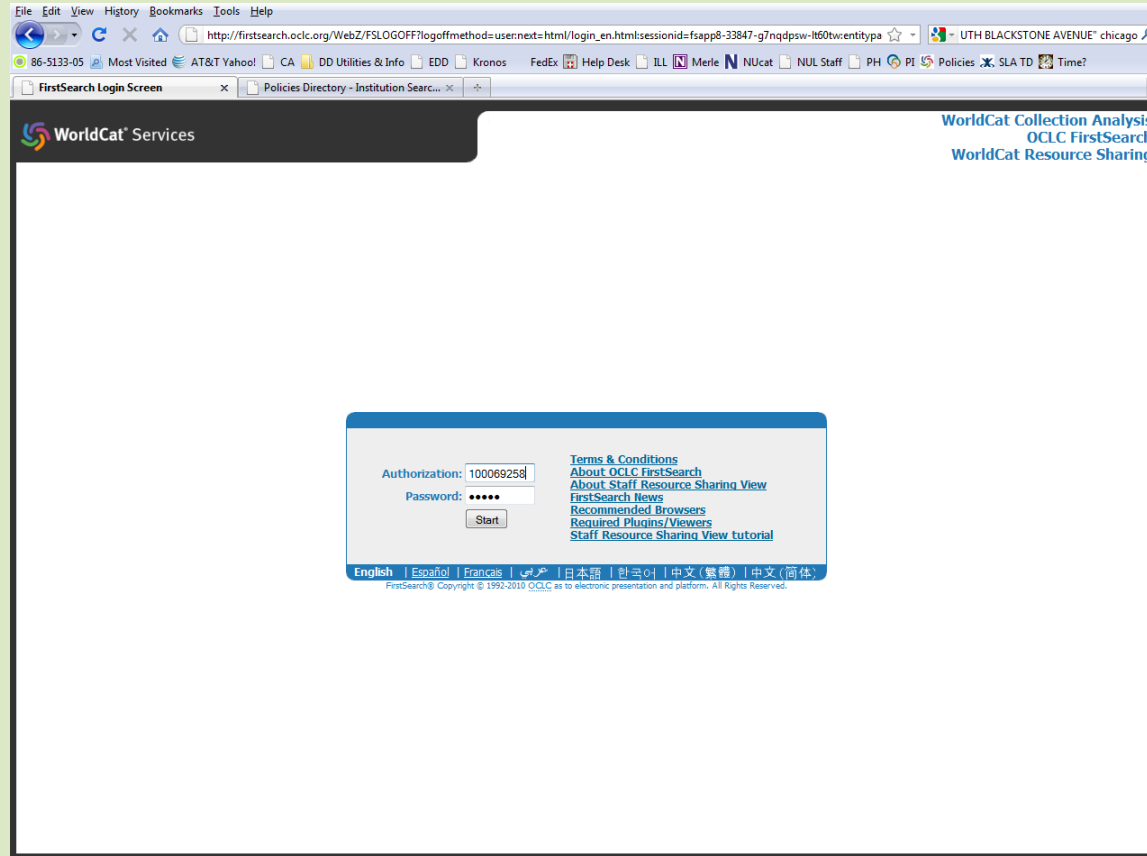
Custom Holdings Paths

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.



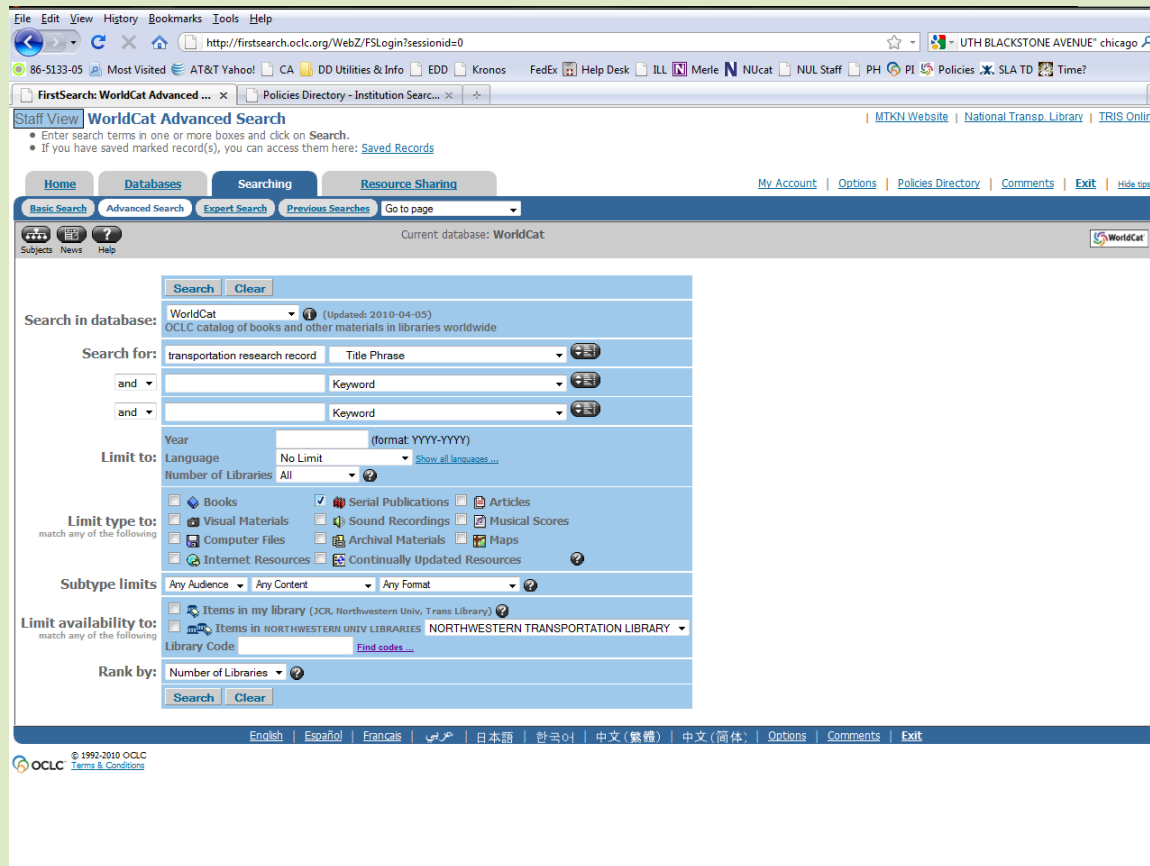
Custom Holdings Paths

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.

The screenshot shows a web browser window displaying the WorldCat search results for the query "transportation research record". The page is titled "WorldCat List of Records" and shows 10 results. The first result is "Transportation research record" with 345 worldwide libraries. The second result is "Transportation research records" with 116 worldwide libraries. The third result is "Transportation research record : TRR /" with 7 worldwide libraries. The fourth result is "Transportation research record" with 2 worldwide libraries. Each result includes publication information, document type, and links for "Libraries Worldwide", "Regional Holdings", and "State Holdings". There are also buttons for "Group Holdings", "Custom Holdings Path", "Year of Article", and "Volume of Article".

WorldCat results for: ti= "transportation research record" and dt= "ser" . (Save Search)
Records found: 10 Rank by: Number of Libraries

Limit results: Any Subtype Search

- Transportation research record.**
 Publication: Washington, Transportation Research Board, Commission on Sociotechnical Systems, National Research Council, National Academy of Sciences, 1974-
 Document: English : Serial Publication : Monographic series : Internet Resource
 Libraries Worldwide: 345 | Regional Holdings | State Holdings | Northwestern Univ, Trans Library | NORTHWESTERN UNIV LIBRARIES
 Group Holdings Custom Holdings Path Year of Article Volume of Article
 Select Select
 Accession No: OCLC: 1259379 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Advanced options...](#)
 See more details for locating this item
- Transportation research records**
 Publication: Washington, D.C. : Transportation Research Board, National Research Council 1995-
 Document: English : Serial Publication : Annual : Computer File
 Libraries Worldwide: 116 | Regional Holdings | State Holdings | Northwestern Univ, Trans Library | NORTHWESTERN UNIV LIBRARIES
 Group Holdings Custom Holdings Path Year of Article Volume of Article
 Select Select
 Accession No: OCLC: 3800156 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Advanced options...](#)
 See more details for locating this item
- Transportation research record : TRR /**
 Publication: Washington, DC, 1974-
 Document: English : Serial Publication : Periodical
 Libraries Worldwide: 7 | Regional Holdings | State Holdings
 Group Holdings Custom Holdings Path Year of Article Volume of Article
 Select Select
 Accession No: OCLC: 311086416
 More Like This: [Advanced options...](#)
 See more details for locating this item
- Transportation research record**
 Publication: Washington, D.C. : Transportation Research Board, Commission of Sociotechnical Systems, National Research Council, National Academy of Sciences, 1974-
 Document: English : Serial Publication : Microform
 Libraries Worldwide: 2 | Regional Holdings | State Holdings
 Group Holdings Custom Holdings Path Year of Article Volume of Article
 Select Select
 Accession No: OCLC: 29656549
 More Like This: [Advanced options...](#)
 See more details for locating this item

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.

The screenshot shows a web browser window displaying search results on the WorldCat website. The search criteria are: `ti= "transportation research record" and dt= "ser"`. The results are sorted by the number of libraries, showing 10 records. The first four records are visible, each with detailed information including publication details, document type, and library holdings. Each record includes a 'Group Holdings' section with a table for 'Custom Holdings Path', 'Year of Article', and 'Volume of Article'. A 'Select' button is present next to the 'Custom Holdings Path' column for each record.

Record 1: Transportation research record.
 Publication: Washington, Transportation Research Board, Commission on Sociotechnical Systems, National Research Council, National Academy of Sciences, 1974-
 Document: English : Serial Publication : Monographic series : Internet Resource
 Libraries Worldwide: 345 | Regional Holdings | State Holdings | **Northwestern Univ, Trans Library** | NORTHWESTERN UNIV LIBRARIES
 Group Holdings

Custom Holdings Path	Year of Article	Volume of Article
TRANLIBS	1990	

 Accession No: OCLC: 1259379 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Advanced options...](#)
[See more details for locating this item](#)

Record 2: Transportation research records
 Publication: Washington, D.C. : Transportation Research Board, National Research Council 1995-
 Document: English : Serial Publication : Annual : Computer File
 Libraries Worldwide: 116 | Regional Holdings | State Holdings | **Northwestern Univ, Trans Library** | NORTHWESTERN UNIV LIBRARIES
 Group Holdings

Custom Holdings Path	Year of Article	Volume of Article

 Accession No: OCLC: 38000156 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Advanced options...](#)
[See more details for locating this item](#)

Record 3: Transportation research record : TRR /
 Publication: Washington, DC, 1974-
 Document: English : Serial Publication : Periodical
 Libraries Worldwide: 7 | Regional Holdings | State Holdings
 Group Holdings

Custom Holdings Path	Year of Article	Volume of Article

 Accession No: OCLC: 311086416
 More Like This: [Advanced options...](#)
[See more details for locating this item](#)

Record 4: Transportation research record
 Publication: Washington, D.C. : Transportation Research Board, Commission of Sociotechnical Systems, National Research Council, National Academy of Sciences, 1974-
 Document: English : Serial Publication : Microform
 Libraries Worldwide: 2 | Regional Holdings | State Holdings
 Group Holdings

Custom Holdings Path	Year of Article	Volume of Article

 Accession No: OCLC: 29656549
 More Like This: [Advanced options...](#)
[See more details for locating this item](#)

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.

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/FSFETCH?fetchtype=holdings&holdinglimitype=illpath&holdings:entityholdingsortpage=normal:sessionid=1 UTH BLACKSTONE AVENUE chicago

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUCat NUL Staff PH PI Policies SLA TD Time?

FirstSearch: Libraries that Own It... Policies Directory - Institution Search... MTKN Website | National Transp. Library | TRIS Online

Staff View Libraries that Own Item

• This screen shows libraries that own the item you selected.

Home Databases Searching Results Resource Sharing My Account Options Policies Directory Comments Exit Hide Site

List of Records Detailed Record Marked Records Saved Records Go to page

Staff ILL LHR Direct E-mail Print Return Help Current database: WorldCat Total Libraries: 345 WorldCat

Title: Transportation research record Author: National Research Council (U.S.) Accession Number: 1259379

* Suggested Custom Lenders IZA UIG TPO

* Lenders IZA UIG TPO

Transfer to ILL Staff workform Clear

Display All Libraries | Regional Holdings | State Holdings

Group Holdings Custom Holdings Path Year of Article Volume of Article

Select Select

Custom Holdings Path TRANLIBS yr: 1990 for: "Transportation research r..." (Record for Item | Get This Item)

Group	Library	Local Holdings	Supplier	Code
MTKN	ILLINOIS DEPT OF TRANS	480-(1974-)	yes	IZA ?
MTKN	IOWA DEPT OF TRANS LIBR	480-(1974-)	yes	UIG ?
ETKN	TRANSPORTATION RES BRD LIBR	Local holdings availa...	yes	TPO ?
TAQS	NORTHWESTERN UNIV. TRANS LIBR	480-(1974-)	yes	JCR ?
MTKN	KANSAS DEPT OF TRANS		yes	KSDOT ?
MTKN	MINNESOTA DEPT OF TRANS LIBR		yes	MDT ?
MTKN	PORTLAND CEMENT ASN		yes	OK7 ?
ETKN	FHWA RESEARCH		yes	FHATR ?
ETKN	CONNECTICUT DEPT OF TRANS		yes	RHT ?
ETKN	US DEPT OF TRANS LIBR		yes	TRL ?
ETKN	US DEPT OF TRANS, TRANS SYST CTR		yes	TRS ?
WTKN	ALASKA DEPT OF TRANSPORTATION COLLECTION		yes	AKDOT ?
WTKN	UNIV OF CALIFORNIA, INST OF TRANS		yes	CBT ?
WTKN	CALIFORNIA DEPT OF TRANS		yes	CDT ?
WTKN	LOS ANGELES CNTY METROP TRANS AUTH LIBR		yes	CRD ?
WTKN	TEXAS A&M UNIV		yes	TXA ?
WTKN	WASHINGTON STATE DEPT OF TRANS LIBR		yes	WDT ?
TAQS	DOWLING COL		yes	VXZ ?

Record for Item: "Transportation research r..." (Libraries with Item)

GET THIS ITEM

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.

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/FSSetLenders?pagename=sageworkform:entityprinting=false:sessionId=fsapp8-54496-g7nr2d0w-r9ci0f:entity UTH BLACKSTONE AVENUE chicago

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUcat NUL Staff PH Policies SLA TD Time?

FirstSearch: Workform (Staff View) x Policies Directory - Institution Searc...

Apply Constant Data: DEFAULT

Submit Submit

ALIBRIS
CICCOPY
CICLOAN
DEFAULT
GALTER
GZMLOAN
HIGHCOPY
HIGHLOAN
LOWCOPY
LOWLOAN
NOCHARGE
OVERSEAS
WITHDRAW

GENERAL RECORD INFORMATION

Identifiers: NEW Status: Workform
 Request Date: 20100405 Source: FSILLSTF
 LC Numbers: 1259379
 Borrowers: JCR * Need Before: 20100505
 Lenders: IZA UIG TPO CBT CRD
 Request Type: <Select Type>

BIBLIOGRAPHIC INFORMATION

Search the Northwestern University Transportation Library catalog

Authors: ?
 Uniform Title: ?
 Title: Transportation research record. ?
 ISBN: ?
 ISSN: 0361-1981 ?
 Edition: ?
 Imprint: Washington, Transportation Research Board. ?
 Series: ?
 Dissertation: ?
 Article: ?
 Volume: ?
 Number: ?
 Date: ?
 Pages: ?
 Verified: WorldCat CODEN: TRREDM Desc: v. Type: Serial, Internet Resource ?

BORROWING INFORMATION

Patron: ?
 Document Delivery Service/Transportation

WorldCat Resource Sharing

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

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/SageUpdateRequest?next=sessionid=fsapp8-54496-g7nr2d0-w-r9c0f:enttypagenum=7.0

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUcat NUL Staff PH PI Policies SLA TD Time?

FirstSearch: Workform (Staff View) x Policies Directory - Institution Sear... x TRANweb Long View

Submit Save Reset

GENERAL RECORD INFORMATION

Request Identifiers: NEW Status: Workform
 Request Dates: 20100405 Sources: FSILLSTF
 OCLC Numbers: 1259379
 Borrowers: JCR * Need Before: 20100505
 * Lenders: IZA UIG TPO CBT CRD
 Request Type: Copy

BIBLIOGRAPHIC INFORMATION

Search the Northwestern University Transportation Library catalog

Authors:
 Uniform Title:
 Title: Transportation research record.
 ISBN:
 ISSN: 0361-1981
 Editions:
 Imprint: Washington, Transportation Research Board.
 Series:
 Dissertation:
 Article: ance office locations by the p-median model*
 Volume: 1268
 Numbers:
 Date: 1990
 Pages: 156-163
 * Verified: WorldCat CODEN: TRREIM Desc: v. Type: Serial, Internet Resource

BORROWING INFORMATION

Patron:
 Ship To: Document Delivery/Transportation Library/Northwestern Univ Library/1970 Campus Dr/Evanston IL 60208-2300

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,

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/SageUpdateRequest?next=sessionid=fsapp8-54496-g7nr20w-r9c0f:entitypagenum=7.0

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUcat NUL Staff PH PI Policies SLA TD Time?

FirstSearch: Workform (Staff View) x Policies Directory - Institution Search... x TRANweb Long View

WorldCat CODEN: TRREEM Desc: v. Type: Serial, Internet Resource

* Verified: [?]

Borrowing Information

Patron: [?]

* Ship To: Document Delivery/Transportation Library/Northwestern Univ Library/1970 Campus Dr/Evanston IL 60208-2300 [?]

* Bill To: same [?]

Ship Via: ARIEL or fax [?]

Ariel (FTP) [?] staff019035.library.northwesterr

Electronic Delivery: [?]

ILL Fee Management (IFM): [?]

Maximum Cost: see borrowing [?]

Copyright Compliance: CCG: Conforms to CONTU Guidelines [?]

Billing Notes: [?]

Fax: 847-491-8601 [?]

Email: trans@northwestern.edu [?]

Affiliation: CIC ILLINET NSLS MTKN LSTR [?]

Locations: [?]

Borrowing Notes: JCR is now participating in the CIC lending agreement. Please cond or use reasons for no if not filling. [?]

PATRON INFORMATION

ID: [?]

Department: [?]

Status: [?]

Address: [?]

WorldCat Resource Sharing

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

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/SageUpdateRequest?next=sessionid=fsapp8-54496-g7nr20w-r9c0f:entitypagenum=7.0

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle N Ucat NUL Staff PH PI Policies SLA TD Time?

FirstSearch: Workform (Staff View) x Policies Directory - Institution Search... x TRANweb Long View

WorldCat CODEN: TRREDM Desc: v. Type: Serial, Internet Resource

* Verified: [?]

Borrowing Information

Patron: [?]

* Ship To: Document Delivery/Transportation Library/Northwestern Univ Library/1970 Campus Dr/Evanston IL 60208-2300 [?]

* Bill To: same [?]

Ship Via: ARIEL or fax [?]

Ariel (FTP) [?] staff019035.library.northwesterr

Electronic Delivery: [?]

ILL Fee Management (IFM): [?]

Maximum Cost: see borrowing [?]

Copyright Compliance: CCG: Conforms to CONTU Guidelines [?]

Billing Notes: [?]

Fax: 847-491-8601 [?]

Email: trans@northwestern.edu [?]

Affiliation: CIC ILLINET NSLS MTKN LSTR [?]

Locations: [?]

Borrowing Notes: JCR is now participating in the CIC lending agreement. Please cond or use reasons for no if not filling. [?]

Patron Information

ID: [?]

Department: [?]

Status: [?]

Address: [?]

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 workform. To submit it immediately, click submit.

The screenshot shows the FirstSearch Request Manager interface. The browser address bar displays the URL: <http://firstsearch.oclc.org/WebZ/FSPage?pagename=sagepage;sessionid=fsapp8-54496-g7nr2d0w-r9ci0f;entitypagenum=9.0>. The page title is "Request Manager".

The interface includes a navigation menu with tabs: Home, Databases, Searching, Results, and Resource Sharing. The "Resource Sharing" tab is active. Below the navigation menu, there are links for "My Account", "Options", "Policies Directory", "Comments", and "Exit".

The main content area is divided into several sections:

- Request Manager:** Includes a search bar for "Request Identifier (an.)" and a "Search" button. There are also radio buttons for "Search Active Requests" and "Search Closed Requests".
- Borrowing Information:** A table showing borrowing statistics.

Information	Qty
Online Produced	1
Shipped	1
Received	13
Returned	24
Renewal Granted	
- Lending Information:** A table showing lending statistics.

Action Items	Qty
In Process	1
Information	
Returned	13
Shipped	24
- Printing:** A section with "Categories" and "Mailing Labels (0 shipping, 0 return)". There are "View", "Print", and "Print" links for each category.

At the bottom of the page, there is a footer with the OCLC logo and copyright information: "© 1992-2010 OCLC Terms & Conditions".

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.

The screenshot displays the 'WCRS Category Selection: Printing' interface. At the top, there are navigation tabs: Home, Databases, Searching, Results, and Resource Sharing. Below these are sub-tabs: Request Manager, Blank Workform, Printing, Batch, and My Requests. The main content area is divided into several sections:

- Borrowing:** Includes Action Items (Conditional, Renewal Denied, Recalled, Expired, Un-filed) and Work in Progress (Review, Review In Process, Save).
- Information:** Includes Direct Produced, Online Produced (2), Shipped (2), Will Supply, Retry, Renewal Granted (1), and Special Messages/Borrower (0).
- Lending:** Includes Action Items (Pending, In Process, Conditional/Pending, Retry/Pending, Renewal Request) and Information (Returned, Special Messages/Lender).
- Select Printing Format:** Options include Full Request, One Request Per Page (default), and Two Requests Per Page.

At the bottom, a search bar contains the text 'rail' and navigation controls like 'Next', 'Previous', 'Highlight all', 'Match case', and 'Reached end of page, continued from top'.

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.

File Edit View History Bookmarks Tools Help

http://firstsearch.oclc.org/WebZ/SageRetrieveMarkedCategories?sessionId=fsapp8-54496-g7nr2d0w-r9c0f:entitypagenum=17:0

96-5133-05 Most Visited AT&T Yahoo! CA DD Utilities & Info EDD Kronos FedEx Help Desk ILL Merle NUcat NUL Staff PH PI Policies SLA TD Time?


FirstSearch: Marked Categories Policies Directory - Sign In

OCLC FirstSearch: Marked Categories
 OCLC Your requested information from your library Northwestern Univ, Trans Library

FirstSearch® Copyright © 1992-2010 OCLC as to electronic presentation and platform. All Rights Reserved.
 E-mail address: FirstSearch@oclc.org Location: http://FirstSearch.oclc.org

Requests Printed: 2
 Online Produced: 2
 Requests Printed in This Set: 2
 Total Requests Printed: 2

SHIPPED - Borrower



GENERAL RECORD INFORMATION	
Request Identifier: 64413695	Status: SHIPPED
Request Date: 20100331	Source: ILLiad
OCLC Number: 793523	
Borrower: JCR	Need Before: 20100430
Receive Date:	Renewal Request:
Due Date: N/A	New Due Date:
Lenders: *ALBRS, ALBRS, ALBRS	
Request Type: Loan or Copy	
BIBLIOGRAPHIC INFORMATION	
Title: Traffic science.	
ISBN: 9780471294801	
Imprint: New York, Wiley [1974]	
Verified: <TN:110055><ODYSSEY:206.107.43.78/JCR> OCLC/ALBRIS web site shows BWB has 2 copies	
BORROWING INFORMATION	
Patron: Ellison, Joe	
Ship To: Document Delivery Service/Transportation Library/Northwestern Univ Library/1970 Campus Dr/Evanston, IL 60208-2300	
Bill To: same (FEIN #N36-2107817)	
Ship Via: UPS or 1st class	
Electronic Delivery: Odyssey - 206.107.43.78/JCR	
Maximum Cost: IFM - \$100.00	
Copyright Compliance: None	
Fax: 847-491-8001	
Email: jcr-ill@northwestern.edu	
Affiliation: CIC ILLINET NLSL MTKN LSTR	
Borrowing Notes: CIC members-JCR is now participating in the CIC agreement. Please cond if maxcost is too low. Cond or use reasons for no if not filling.	
LENDING INFORMATION	
Lending Charges: IFM - \$91.45	
Shipped: 20100401	
Lending Notes: Thank You! **KEEP THIS ITEM** This is a purchase and should not be returned. PLEASE update request record to 'RECEIVED' when your item arrives. Questions? Contact:ill@albris.com	
Return To: DO NOT RETURN***KEEP THIS ITEM*** This is a purchase and should not be returned.	
Return Via: DO NOT RETURN***Contact ill@albris with any questions	
PATRON INFORMATION	

x Find: rail Next Previous Highlight all Match case Reached end of page, continued from top

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.

The screenshot shows the WorldCat Request Manager interface. At the top, there is a navigation bar with tabs for Home, Databases, Searching, Results, and Resource Sharing. Below this, there are search filters for 'Request Manager', 'Blank Workform', 'Printing', 'Batch', and 'My Requests'. A search bar is present with options to search for active or closed requests. The main content area is divided into three sections: Borrowing Information, Lending Action Items, and Printing. The Borrowing Information table shows items produced, shipped, received, returned, and renewed/granted. The Lending Action Items table shows items in process, returned, and shipped. The Printing section offers options to print mailing labels and book straps.

Borrowing Information		Qty
Online Produced		1
Shipped		1
Received		13
Returned		24
Renewed/Granted		

Lending Action Items		Qty
In Process		1
Returned		13
Shipped		24

Printing		View	Print
Mailing Labels (0 shipping, 0 return)			Print
Book Straps (0 Available)			Print

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.

The screenshot displays the FirstSearch Request Manager interface. At the top, there are navigation tabs: Home, Databases, Searching, Results, and Resource Sharing. Below these are sub-tabs: Request Manager, Blank Workform, Printing, Batch, and My Requests. A search bar is present with options for 'Search Active Requests' and 'Search Closed Requests', and a 'Request Identifier (an.)' dropdown. The main content area is divided into three sections:

- Borrowing Information:** A table with columns for 'Information' and 'Qty'.

Information	Qty
Online Produced	1
Shipped	1
Received	13
Returned	24
Renewal Granted	
- Lending Action Items:** A table with columns for 'Action Items' and 'Qty'.

Action Items	Qty
In Process	1
Information	
Returned	13
Shipped	24
- Printing:** A table with columns for 'Categories', 'View', and 'Print'.

Categories	View	Print
Mailing Labels (0 shipping, 0 return)		Print
Book Straps (0 Available)		Print

The footer includes language options (English, Español, Français, العربية, 日本語, 한국어, 中文(繁體), 中文(简体)), OCLC copyright information (© 1992-2010 OCLC), and a 'Terms & Conditions' link. The bottom of the page shows a search bar with 'Find: rail' and navigation controls like 'Next', 'Previous', 'Highlight all', 'Match case', and 'Reached end of page, continued from top'.

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

Joe Ellison

Document Delivery & Digital Initiatives Assistant

Transportation Library

Northwestern University

1970 Campus Drive

Evanston, IL 60208-2300

Ph: 847-491-8600, Fax: 847-491-8601

j-ellison@northwestern.edu