

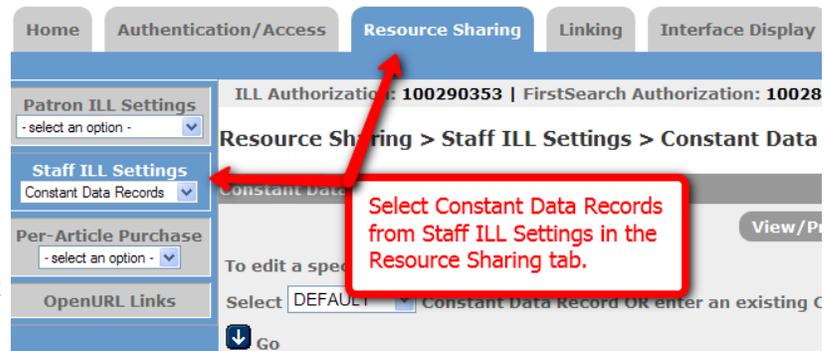
Advanced Interlibrary Loan Features

Constant Data Records

Constant Data Records may be used to save time that would otherwise be spent entering information that is repeated from transaction to transaction. Information such as shipping addresses, contact information, and affiliations may not change, so the library may set up some information so that it is automatically populated in the request record. In addition to a general constant data record, libraries may choose to set up records for patrons that use the service frequently, photocopy requests, or for use when lending to a member of a consortium for which you have special lending policies. To create a constant data record:

1. Log in to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin> using your Resource Sharing authorization and password.

2. In the module, select the Resource Sharing tab, then select “Constant Data Records” from the drop-down box under Staff ILL Settings in the left sidebar.



3. Confirm the constant data record to be edited. DEFAULT is the most commonly used record for everyday transactions. To create a special record for a frequent patron or special situations, click NEW BLANK RECORD.



5. Enter any information that should be automatically populated during a transaction:

- **Need Before:** Use a number relative to the current date. That is, +30 will automatically populate the record with a date 30 days from the date a record is created.
- **Request Type:** Determine whether the constant data record will be used for loans of materials or for photocopies.
- **Ship To:** Enter the address to which an item should be shipped. Use “/” to indicate new lines, for example Interlibrary Loan Department / Public Library / 123 Elm Street / Anytown, ID 12345
- **Bill to:** If the billing address is the same as shipping, enter “same.”
- **Ship Via:** Indicate the preferred method of shipping (library rate, UPS, courier, etc.)
- **ILL Fee Management:** Check this box only if the library participates in OCLC’s ILL Fee Management service.
- **Maximum Cost:** Identify the maximum cost the library is willing to pay to receive a loan. “0.00” is an acceptable entry.
- **Copyright Compliance:** If the record is used for loaning items other than photocopies, check “None.”
- **Fax:** Enter the library’s fax number
- **Email:** Enter the library’s email address
- **Billing Notes:** Leave blank unless the library has a note that is common for ILL requests.
- **Borrowing Notes:** Leave blank unless the library has a note that is common for ILL requests.
- **Affiliation:** Enter the library’s affiliations such as “LiLI.”
- **Patron Information:** Complete the patron information if the library is creating a constant data record for a patron who frequently requests items through interlibrary loan.
- **Lending Information:** Enter lending information to use the constant data record for lending situations.
- **Due date:** enter a due date relative to the current date of a transaction (e.g. +30)
- **Shipped:** enter a date relative to the current date an item is marked as shipped. Some libraries may not update a record until the day after an item is shipped, or they may update the record then package the item for shipping the following day. Situations vary depending upon mailing departments and procedures.
- **Return to:** Enter the address to which loaned items should be returned. Remember to use a “/” to indicate line breaks as done in the borrowing information.
- **Return Via:** Indicate the preferred method of receiving returned items such as USPS, Library Rate, UPS, courier, etc.

6. When done entering the constant data, click SAVE CHANGES to save the record.

7. To leave the Administrative Module, click Exit at the top, right of the window.

Custom Holdings

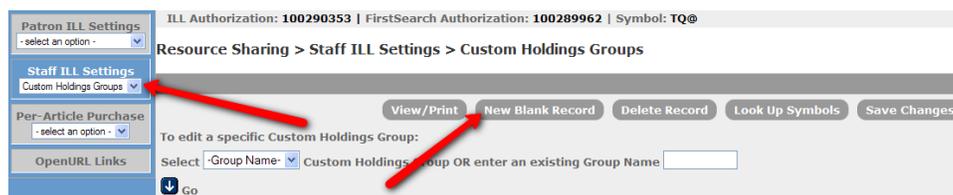
Custom Holdings is used to specify groups of preferred lenders to save time in the requesting process. Groups are generally driven by analysis of borrowing patterns.

A library may often borrow A/V materials through the interlibrary loan system and know, from experience, which libraries loan those types of materials and which charge fees for the service. In another situation, a library may be a member of one or more consortia that may or may not have access to courier services. Knowing this information can help a library to establish groups of potential lenders and create strings of lending groups.

It is necessary to establish the lending groups, then to create paths consisting of groups. With a path, the system will check the first group in the path, then the next, then the next, and so on. The process sets up lending tiers starting with the first tier, then moving on widening the selection of lenders.

Setting up the groups:

1. Log in to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin> using your Resource Sharing authorization and password.
2. In the module, select the Resource Sharing tab, select “Custom Holdings Groups” from the drop-down box under Staff ILL Settings in the left sidebar.



3. Click NEW BLANK RECORD to set up a new group. A new blank record may already be showing on the screen. If so, it is not necessary to click the NEW BLANK RECORD button.

4. Enter a name for the group. Group names are limited to 8 characters.

5. Enter a description of the group

6. Enter the symbols for group members separating each with a space.

A screenshot of the 'Custom Holdings Group' form. The form has several fields: '*Group Name:' with the value 'CONSORT', 'Group Description:' with the value 'Libraries in my local consortium', and 'Symbols to be added or removed:' with the value 'pqr stu'. There are 'Add Symbols' and 'Remove Symbols' buttons. At the bottom, there is a section for 'Symbols currently in your group (3)' with the values 'abc ?', 'def ?', and 'ghi ?'. A note indicates '* indicates a required field'.

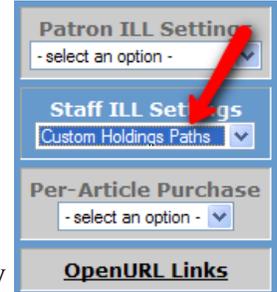
To look up symbols for libraries, use the Policies Directory by clicking LOOK UP SYMBOLS. Refer to the Policies Directory instructions in Section 9 for details on its use.

7. Click ADD SYMBOLS to add the libraries' symbols to the group.

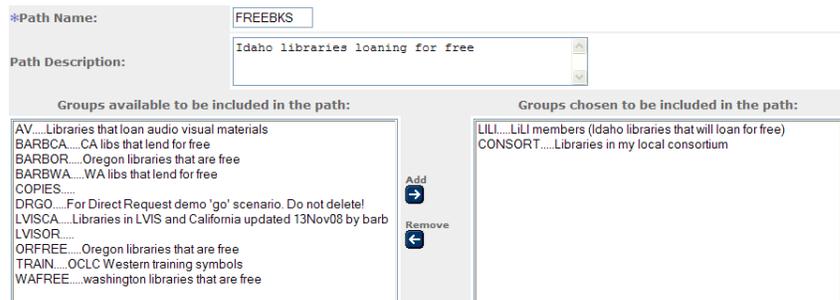
8. Click SAVE CHANGES to save the group.

Setting up a Custom Holdings Path

1. In the WorldCat Services Administrative Module, select “Custom Holdings Path” in the drop-down box under “Staff ILL Settings.”



2. Click NEW BLANK RECORD to set up a new path. (A new blank record may already be showing on the screen. If so, it is not necessary to click the NEW BLANK RECORD button.)



3. Enter a name for the custom holding path. Path names are limited to 8 characters.

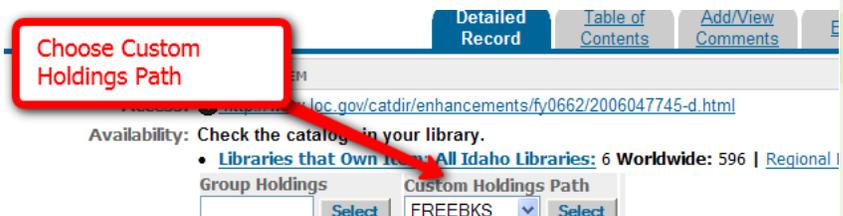
4. Select a custom holdings group from the box on the left by clicking on it, then click ADD to add it to the path. Repeat for each custom holding group to add to the current path.

5. Groups may be moved to the order of preference by using the UP and DOWN arrows to the right of the path box. Select a group, then click UP or DOWN to move it within the list.

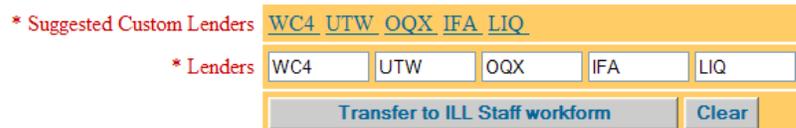
6. Click SAVE CHANGES to save the path.

Using Custom Holdings Paths

1. When viewing the record for an item to borrow, select the preferred Custom Holdings Path from the drop-down box, then click SELECT.



2. By doing this, the system will populate the lender string in the request record with suggested lenders based upon the preferred lenders identified in the custom holdings groups.



Patron Initiated ILL

A library patron searching WorldCat or the LiLI Unlimited statewide catalog through OCLC's FirstSearch may submit an interlibrary loan request for an item without leaving the FirstSearch system. This is possible through a link between FirstSearch and the WorldCat Resource Sharing systems.

Patron-initiated ILL can be mediated or not. Mediated requests are sent to the Request Manager in the resource sharing system to be verified and sent to lenders selected by the ILL staff. Unmediated requests utilize the library's custom holdings paths to submit requests to lenders without the intervention of the borrowing library's ILL staff. Libraries have a choice to set up the access in whichever manner best suits the library's needs.

Enabling Patron-Initiated ILL

ILL Authorization: 100290353 | FirstSearch Authorization: 100289962 | Symbol: TQ@

Patron ILL Settings

ILL Processing

Staff ILL Settings

Per-Article Purchase

OpenURL Links

Resource Sharing > Patron ILL Settings

ILL Access

ILL Access: On

ILL Button Display Options:

Display always

Do not display when held by your library

ILL Request Form Link Text:

Borrow this item from another library

ILL Settings for Databases

Database	OCLC ILL Review File	OCLC ILL Direct Request Profile	ILL via E-mail	ILL Access off
LiLI_Unlimited	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
WorldCat	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

1. Log in to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin> using your ILL authorization and password.
2. Viewing the Resource Sharing tab, from the drop-down box under “Patron ILL Settings,” select “ILL Processing.”
3. Select the box by “On” next to ILL Access. With the option turned “On” the ILL button will display in the FirstSearch system.
4. Choose either “Display always” or “Do not display when held by your library.” Choosing “do not display” will keep the ILL option from appearing when a patron views records for items already available in their home library. This option reduces the opportunity for receiving ILL requests for items available locally.
5. Choose the text that will be displayed in the record. The text is a hyperlink to the patron request form and serves as a notice that the item may be available through interlibrary loan.

6. For each database, select one of the four options for mediating the patron-initiated ILL:
 - OCLC ILL Review File – sends the electronic request to the ILL Request Manager as a “review request” to be processed by ILL staff.
 - OCLC ILL Direct Request Profile – Use this option to have requests processed automatically using settings created by the library.
 - ILL via E-mail – This option allows requests to be sent to the library staff via email. If this option is selected, the library will also need to specify email addresses to which the requests will be directed.*
 - ILL Access Off – Select this to remove the electronic request option for patrons.
7. Click SAVE CHANGES to store the preferences.

* NOTE: If ILL via E-mail was selected, enter an email address before moving on. From the Patron ILL Settings drop-down box in the left side bar, select “ILL via E-mail.” Enter an email address in the space provide, then click SAVE CHANGE.

8. Still in the Administrative Module, select “Patron ILL Request Form” to edit the form that patrons will fill out when submitting their request to staff. Libraries have the option to specify which fields will be provided to patrons to complete, select fields that are required in order to submit a request, and customize field labels as appropriate to local users. After making changes to the Patron ILL Request Form, click SAVE CHANGES.

9. To exit the Administrative Module, click EXIT at the top, right of the window.

