OLS Borrower Off System ILL transcripts

Welcome to Borrower off system ILL requests

off system ILL requests are those requests

initiated outside of

WorldShare ILL that you can bring into the

system to take

advantage of managing all your ILL requests

in one place and making those requests part

of the supported usage reports.

The first step is to configure your ILL Partners

in the OCLC Service configuration under WorldShare

ILL category then Address book for you to

refer to them when adding off system requests

to WorldShare ILL.

Let's see how you can configure your partners

and then add those requests to the system

for you to manage them.

This is the WorldShare ILL homepage the easiest

way to access the OCLC Service configuration

to configure your partners is clicking the

respective link in the middle section under

Other.

Now you are in the OCLC Service configuration

you need admin role in your WorldShare ILL

account to be able to use this piece of the

service because you are configuring for your

library and not for your account only to configure

your partner on the left side panel click

WorldShare ILL then Address book select Partners

tab.

To add a new partner click the Add Partner

button located on the upper right side keep

the active box checked then complete the form

with your partner information the symbol field

can be completed using the institution well-known

symbol or you can create one with three to

20 characters in length and using valid characters

this symbol cannot be changed after creation

symbol is a required field the ILL email is

a required field as well enter this information

define the role borrower and lender, borrower,

or lender then select the Days to respond

for copy and Days to respond for loan.

The online catalog link field is optional

continue completing the form with the information

about your partner such as locale, shipping

address, billing address, return address,

contact address, add any notes you find useful

then click the create button located on the

lower right side of the screen and your partner

is then added to the system

you can click your partner's name to open

the record in case you need to update any

information

Now that you have your partners configured

you can add the requests created outside of

WorldShare ILL into the system

to add a request first search for the item

on the left side panel under Discover items

you can perform a basic search selecting one

of the available indexes options and entering

the term or an advanced search where you can

find more indexes options and can combine

the indexes using the Boolean operators and

or or not

For this example let's search using basic

search and using a unique information such

as ISBN and entering the

term and click search then you select the

appropriated bibliographic record and click

the create request button located on the right

now you click the save for review button your

request is on the left side panel under borrowing

requests in the category of new for review

with the reviewed status click the ID or the

title to open your request apply your constant

data complete any information such as your

Patron information then click the change fulfillment

type to off system request select your partner

from your configured Partners all the information

comes from the configuration confirm the need

before date you can change using the calendar

icon click save button and now your request

is added to the off system and you can find

your request when you need to manage your

request you find it on the left side panel

under off system request borrowing

You click to open your request and you can

use the drop down arrow next to change status

button to update your request accordingly

and now your request is part of the supported

ILL usage reports as well you can find more

documentation on this topic and contact OCLC

support at help.oclc.org.

Thanks for watching!