Lender Off System transcripts

Welcome to Lender 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, located on the right, 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 twenty characters in length and using valid characters.

This symbol cannot be changed after creation.

Symbol is a required information.

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 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, click the Create button located here 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, on the left side panel click Off-System Requests accordion, to expand, then Create Lending Request button.
Select the type of request - loan or copy, then enter the ILL ID you have with your partner for this request.

Select your partner.

The information comes from the configuration.

Complete the need before date using the calendar icon.

Then complete one of the fields with the item information.

For this example let's complete the title field with part of the title. Then when you click the next field this magnifying glass icon appears you click on that.

This magnifying glass icon takes you to the
search result page in WorldCat

Select the appropriate bibliographic record, clicking on the

title
then click Apply data to request

New button.

And all the information transfers to your form.

Apply your constant data
All the information about your library goes in the form from the constant data

Complete the form
And when you are ready click the Create button located on the upper right side of the screen under actions.

Your request is now part of the Off-System
requests.

And the system creates the unique ID for this request.

When you need to update your request, you can find it on the left side panel under Off-System Requests queue open to expand under Lending.

You can click the ID or the title to open the request and then you can manually update the status of your request.

In case of copy request click on your copy request, apply the constant data for copy request, and you can use Article Exchange to supply the item.

Click the OCLC Article Exchange link, select your
file, 
Click the drop the file button

Article Exchange creates 
a unique url and password to protect the document

the document automatically expires after 30
days or after

five views.

It does not count staff preview.

You can preview your file to see if this is
the correct one

and then you can use this Email doc to patron 
button

to send this information to your partner
all the information about

the request goes on the body of the message
including the unique url and

password to access the file
and the information that the file is available for 30 days or five views.

You can enter your email address and the email address of your partner then send this information to supply this item to your partner and then you can change the status of this request to shipped.

Now your request becomes part of the supported ILL usage reports.

You can find more documentation on this topic and contact OCLC Support at help.oclc.org.

Thanks for watching!