



# OCLC FirstSearch/ILL Direct Request Link Quick Reference

## Overview

This quick reference describes how to create and use an optional link between the OCLC FirstSearch® service and WorldCat Resource Sharing. The link lets patrons generate requests for materials cited in FirstSearch databases.

To use the link, your library must use both FirstSearch and WorldCat Resource Sharing (WCRS) and turn on ILL Access (step 4 below).

If your library creates Direct Request profiles, patron-generated requests transferred to WCRS by FirstSearch are processed and automatically sent to the first Lender according to the conditions of the profiles.

If your library does not create profiles, requests appear in your library's Review category in the WCRS Request Manager where your library decides which requests to submit.

For information about **Direct Request for articles**, go to <http://www.oclc.org/info/knowledgebase/default.htm>.

## Creating the Direct Request Link

### Summary of steps

Step	Action
1	<b>Create constant data.</b> Your institution probably has at least one constant data record that contains <b>Ship To</b> and <b>Maximum Cost</b> . If your system completes these fields when you create a workform, go to step 2.
2	<b>Create custom holdings.</b> The link requires custom holdings information for processing the patron request. If you skip this step, all patron-generated requests from FirstSearch go to your Review category in Request Manager.
3	<b>Create Direct Request Profiles.</b> If you skip this step, all patron-generated requests from FirstSearch go to your Review category in Request Manager.
4	<b>Set Patron ILL Settings.</b> Turn ILL Access On. Set ILL Settings for Databases. Select specific formats for WorldCat ILL Access. Customize the Patron ILL Request Form.

### Where to do these steps

Do these steps in the Resource Sharing tab of the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin>.

### Active upon completion

When you complete these steps, patron-generated requests from FirstSearch are immediately processed through Direct Request.

## Support

E-mail: [support@oclc.org](mailto:support@oclc.org)

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682 (7:00 am to 9:00 pm, U.S. Eastern time, Monday–Friday)

## Step 1: Create Constant Data

Create constant data to provide information that the Lender needs to process your patron's request. Data transferred from the FirstSearch request takes precedence over data from the constant data record.

To create a basic constant data record:

Step	Action
1	In the <b>Resource Sharing</b> tab, choose <b>Constant Data Records</b> from the <b>Staff ILL Settings</b> drop-down list.
2	Click <b>New Blank Record</b> .
3	Enter the desired data in each field. <b>Note:</b> The <b>CD Name</b> field is required.
4	In the <b>Ship To</b> field, use a slash (/) to separate each line of the address. Substitute a hyphen for slashes in a library's name or address. When possible, format the address as 5 lines of address, 27 characters on each line, including spaces. If you use a delivery service, type a slash before the delivery service address.  <b>Example:</b> ILL Dept Library Name/P.O. Box nnnn/City, ST 00000/For UPS:nnnn Street/City, ST 00001
5	In the <b>Maximum Cost</b> field, enter the dollar amount your library is willing to pay for interlibrary loans. If you will not pay, type \$0 or free. This reflects the total cost, not the cost per page. <b>Note:</b> If you do not provide a value, you are responsible for whatever the Lender charges.
6	Enter other data, if desired.
7	Click <b>Save Changes</b> .

### Constant Data for Copy Requests

The **Copyright Compliance** field indicates your compliance for photocopy requests.

- **CCG** Conforms to CONTU Guidelines
- **CCL** Conforms to U.S. Copyright law

## Step 2: Create Custom Holdings

Custom Holdings automatically selects Lenders for those requests that match your Direct Request profiles. You must define Custom Holdings Groups and Paths in order to use the profiles.

### Custom Holdings Groups

The following sample procedure creates three sample groups of libraries that supply loans for free:

- FREELOC Libraries in your local area
- FREEREG Libraries in your region
- FREEOTH All other libraries

The following steps create the group FREELOC. Repeat them to create the groups FREEREG and FREEOTH.

Step	Action
1	In the <b>Resource Sharing</b> tab, choose <b>Custom Holdings Groups</b> from the <b>Staff ILL Settings</b> drop-down list.
2	Click <b>New Blank Record</b> .
3	Enter the <b>Group Name</b> for the custom holdings group you want to create (example: <b>FREELOC</b> ).
4	In the <b>Group Description</b> field, type <b>libraries in my local area that supply loans for free</b> .
5	In the <b>Symbols to be added or removed</b> field, type the OCLC institution symbols for institutions to be included in the custom holdings group. Separate each with a space or a comma. <b>Example:</b> aaa bbb ccc ddd OR aaa,bbb,ccc,ddd
6	When finished, click <b>Add Symbols</b> .
7	Check your list, then click <b>Save Changes</b> .

### Custom Holdings Paths

This sample procedure creates the custom holdings path BOOKS.

Step	Action
1	In the <b>Resource Sharing</b> tab, choose <b>Custom Holdings Paths</b> from the <b>Staff ILL Settings</b> drop-down list.
2	Click <b>New Blank Record</b> .
3	Enter the <b>Path Name</b> for the custom holdings path you want to create (example: <b>BOOKS</b> ).
4	In the <b>Path Description</b> field, type <b>for book loans</b> .
5	From the <b>Groups available to be included in the path</b> list, select <b>FREELOC</b> , <b>FREEREG</b> , and <b>FREEOTH</b> and click the <b>Add</b> button.
6	In the <b>Groups chosen to be included in the path</b> list, change the order of the groups if needed by selecting a group and clicking the <b>Up</b> or <b>Down</b> button.
7	Click <b>Save Changes</b> .

## Step 3: Create Direct Request Profiles

Direct Request profiles act as filters for requests sent by your patrons using FirstSearch. When creating your profiles, consider the limits you place on patrons' resource sharing requests. Most libraries create profiles that are not complex.

Profiles check the requests for data that your library considers mandatory. If data is missing, Direct Request sends the request to the Review category in Request Manager.

If the data matches a profile, Direct Request selects Lenders (see **Create Custom Holdings**), supplies critical borrowing information (see **Create Constant Data**), and submits the request, which sends it to the first Lender.

To create a Direct Request profile:

Step	Action
1	In the <b>Resource Sharing</b> tab, choose <b>Direct Request Profiles</b> from the <b>Staff ILL Settings</b> drop-down list.
2	Click <b>New Blank Record</b> .
3	Enter the desired data in each field. Leave a field blank if you do not require its information from your patron. <b>Note:</b> The <b>Profile Name</b> field is required.
4	Click <b>Save Changes</b> when finished.

**Note:** Options that you specify in profiles must exactly match the FirstSearch request form settings that you define (see **Set Patron ILL Settings**). For example, if a profile specifies a Patron Department called "Chemistry," the FirstSearch request form must present that option as "Chemistry," not "Chem," or any other variation.

### Sample Basic Loan Profile

For this Profile Element	Type this Data
Profile Name	ILLDIR
Description	This profile limits requests for recent imprints
Patron Statuses	Resident
Patron Departments	South branch
Age of Material	100
Route to Review File Options If Held by Your Institution	Yes
Constant Data Record	BOOKS
Minimum Number in Lender String	1
Custom Holdings Path	BOOKS
Produce the Request	Yes

**Sample Loan Profile for Books in English**

For this Profile Element	Type this Data
Profile Name	ILLDIR
Description	This profile limits requests for English books
Patron Statuses	Undergrad
Bibliographic Formats	Books
Language	English
Route to Review File Options If Held by Your Institution	Yes
Constant Data Record	BOOKS
Minimum Number in Lender String	1
Custom Holdings Path	BOOKS
Produce the Request	Yes

**Profiles for Copies**

If a record contains an Article Title and/or an Article Author, FirstSearch forwards a COPY request. If the record does not contain these specific Article elements, FirstSearch forwards a LOAN request.

CCG is a code provided by the Borrower that indicates the request conforms to CONTU Guidelines.

CCL is a code supplied by the Borrower that indicates the request conforms to U.S. Copyright Law.

**Sample Copy Profile for CCG Copy Requests**

For this Profile Element	Type this Data
Profile Name	CCG
Description	This profile applies to copy requests within CCG requirements
Request Types	Copy
Patron Statuses	Manager
Patron Departments	Marketing
Age of Material	5
Route to Review File Options If Held by Your Institution	Yes
Constant Data Record	CCG
Minimum Number in Lender String	1
Custom Holdings Path	FASTCOPY
Produce the Request	Yes

**Sample Copy Profile for CCL Copy Requests**

For this Profile Element	Type this Data
Profile Name	CCL
Description	This profile applies to copy requests within CCL requirements
Request Types	Copy
Patron Statuses	Faculty
Patron Departments	Computer Science
Age of Material	5
But No Older Than	100
Route to Review File Options If Held by Your Institution	Yes
Constant Data Record	CCL
Minimum Number in Lender String	1
Custom Holdings Path	FASTCOPY
Produce the Request	Yes

**Step 4: Set Patron ILL Settings**

Access these settings through the **Patron ILL Settings** drop-down list in the **Resource Sharing** tab.

**ILL Processing**

Check the **ILL Access** box to let users submit ILL requests while using FirstSearch.

Select one of the **ILL Button Display Options** to designate when the ILL button will appear to patrons: **Display always** or **Do not display when held by your library**.

Enter the **ILL Request Form Link Text**.

For each FirstSearch database listed under **ILL Settings for Databases**, select one of the following options:

Option	Effect on a Patron-Generated Request
OCLC ILL Review File	Sends it to Review category in Request Manager for review by library staff
OCLC ILL Direct Request Profile	Submits it for Direct Request profile processing
ILL via E-mail	Sends it in an e-mail form to the designated addresses
ILL Access off	Does not allow requests

Click **Save Changes**.

**WorldCat ILL Access**

Check the box for each WorldCat Document Type (books, maps, sound recordings, etc.) that you let patrons request.

Click **Save Changes**.

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### Patron ILL Request Form

Customizing the form is optional. Remember to click **Save Changes** if you make any changes.

You can control these aspects of the ILL request form:

Aspect	Description
Persistence	Check the box if you want data about the user entered in the first ILL request of a FirstSearch session to automatically redisplay in subsequent ILL requests during the session so the patron can accept or edit the data as needed.
Send name to OCLC ILL	Select the order in which patron's first and last names are sent to the Patron field in WCRS. <b>Recommended:</b> <i>[Last Name First]</i> .
Display name to patron	Select the order in which FirstSearch Patron ILL Request form prompts for patron's first and last names. <b>Recommended:</b> <i>[First Name First]</i> .
Library note to patrons	Provide information for your patrons. <b>Recommended:</b> Note library charges and pickup procedures.

You can control whether each user information field:

- Carries a Field Label that you specify
- Displays Library-Supplied Data
- Is required or optional
- Displays to patrons (Always display required fields.)  
**Recommended:** Do not display **Max Cost** or **Date Needed**.
- Can be modified by patrons

FirstSearch ILL fields map to WorldCat Resource Sharing fields as follows:

FirstSearch fields	WCRS fields
First Name, Last Name	Patron
Address, City, State/Region/Prov., Postal Code, Country	Address
Telephone	Phone
Fax	Fax
Email	Email
Patron ID	ID
Max Cost	Maximum Cost
Date Needed	Need Before
Dept or Branch	Department
Status	Status
Pick-up Location	Pickup Location
Comments	Notes

### Reviewing Direct Requests

Requests that your patrons generate using the FirstSearch/Direct Request link are processed against the Direct Request profiles that you create.

**Successful:** Requests that match one of your profiles are forwarded to the first potential Lender, and appear in the **Direct Produced** category on the WCRS Request Manager screen.

**Unsuccessful:** Requests that do not match any profile appear in the **Review** category on the WCRS Request Manager screen. The Request History and the Borrowing Notes field provide information about why a request was unsuccessful.



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