OCLC WorldCat Resource Sharing: The Basics

Introduction

Whether you want to borrow a book or other library resource, or lend an item from your collection to another library, OCLC WorldCat Resource Sharing enables you to accomplish your interlibrary loan (ILL) tasks with a minimum of staff time. This reference guide provides the basic information you need to use WorldCat Resource Sharing.

OCLC's Resource Sharing network combines the resources of over 7,000 libraries and more than 61 million records from the WorldCat database. These records represent both physical and digital resources owned by libraries. When you use the WorldCat Resource Sharing system, your library and your patrons have access to this vast storehouse of materials.

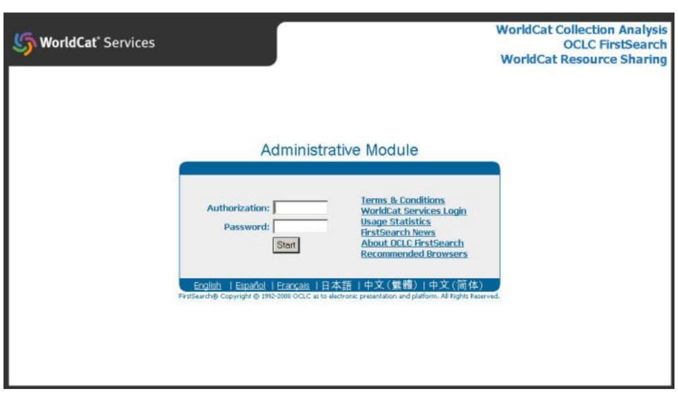
The OCLC FirstSearch Service

OCLC’s FirstSearch service provides one web-based interface for you to create ILL requests and fulfill them. In addition to interlibrary loans, FirstSearch provides you with a rich collection of reference databases. When you use FirstSearch to search for information, materials that are held by your library are highlighted in the search results.

Setup: The WorldCat Services Administrative Module

The administrative module is found at:
http://firstsearch.oclc.org/admin

Use the administrative module to establish your interlibrary loan settings before using WorldCat Resource Sharing. You may use your FirstSearch authorization and password or your ILL authorization and password to access the WorldCat Services Administrative Module.



Linking a WorldCat Resource Sharing Authorization to a FirstSearch Authorization

Linking your ILL authorization to a FirstSearch authorization gives you access to additional features, including customization of the interface used by patrons and staff. Linked authorizations also allow you to access any databases available on your FirstSearch account.

A resource sharing administrator must work with your library's FirstSearch administrator to link the authorizations. This task is completed in the WorldCat Services Administrative Module.

Step	Action
1	In the **WorldCat Services Administrative Module**, click the **Resource Sharing** tab, then choose **Authorizations** from the drop-down list under **Staff ILL Settings** in the sidebar menu.
2	In the **Staff ILL Authorization** field, enter an ILL authorization for your institution, then click **Add**.
3	Click **Save Changes**.

ILL Setup: Patron ILL Settings

Step	Action
1	After logging on to the administrative module, click the **Resource Sharing** tab. Use the online Help for assistance, or see the ***WorldCat Resource Sharing Quick Reference*** for more detailed instructions.
2	Under **Patron ILL Settings**, click **ILL Processing**.
3	In the **ILL Access** field, click **On**. This will enable your library patrons to submit ILL requests while using FirstSearch.
4	In the **ILL Button Display Options** field, select: • **Display always** to always display the ILL button to users • **Do not display when held by your library** to hide the ILL button for items held by your library.
5	The **Database ILL Settings** section lists the databases included in your FirstSearch account that are suitable for ILL requests. For each database, choose which optionyou wish for ILL processing. Use the online Help for further assistance.
6	In the field labeled **ILL Request Form Link Text**, type the text that should display next to potential interlibrary loan items, e.g., "Borrow this item from another library."
7	Under **Patron ILL Settings**, click **WorldCat ILL Access** to select document types that your users can request through ILL for WorldCat requests.
8	Click the corresponding box next to each document type (archival materials, articles, books, etc.) that your library users can request via ILL.

9	Under **Patron ILL Settings**, click **Patron ILL Request Form**. Use the **Patron ILL Request Form** screen to indicate how the request form should appear to your patrons.
10	Under **Patron ILL Settings**, click **ILL via E-mail**. This page will enable you to designate one or two e-mail addresses at your library to which ILL requests should be directed. This page also enables you to indicate information to be included in ILL requests (e.g., **Ship To** address, **Maximum Cost**) when your library is the borrower. **Note:** Even if your library does not use the OCLC ILL service, you can use the ILL via E-mail features in the administrative module to let your users submit requests to borrow items.
11	Under **Patron ILL Settings**, click **ILL Request Management**. This page enables you to determine if the cancel and renew options display for your patrons. Use this page also to indicate if the **Due Date** for borrowed materials displays to your patrons.

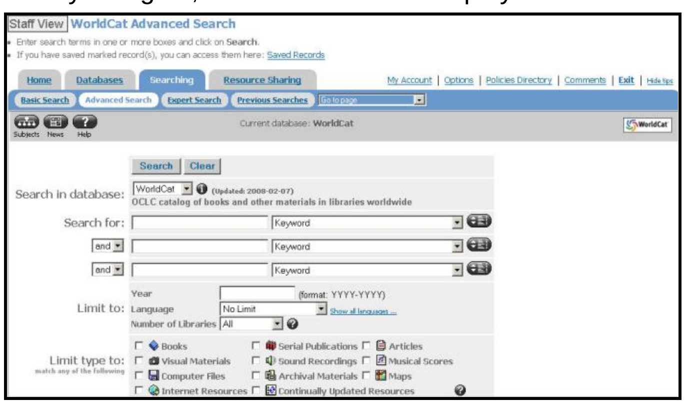
ILL Setup: Staff ILL Settings

Step	Action
1	After logging on to the administrative module, click the **Resource Sharing** tab. Use the online Help for further assistance, or see the ***WorldCat Resource Sharing Quick Reference*** for more detailed instructions.
2	Under **Staff ILL Settings**, click **Authorizations**. Use this screen to enter one or more current ILL authorizations for your library.
3	Under **Staff ILL Settings**, click **Constant Data Records**. Enter the **Constant Data (CD) Name** for the new constant data record, and any other desired data in each field. Set **Persistence** and **Electronic Delivery Options** on the Constant Data Options screen. • Constant data is stored information that your staff can use to save keystrokes, reduce errors, and ensure consistency when they initiate or respond to requests. • Constant data allows you to create standard workforms that include recurring information, such as the requesting library's name, address, etc., and any notes you want to appear on all requests. • Using constant data is optional, but it allows you to automatically transfer data that re-occurs often on ILL requests (such as addresses) to ILL workforms and requests.
4	Under **Staff ILL Settings**, click **Saved Notes**. Use this screen to set any conditions for borrowing or lending, such as special library hours, library lending practices or general information about your library. Enter a **Conditional Note Name**, and any information to identify the note in the **Conditional Note Text** field.
5	**Under Staff ILL Settings, click Custom Holdings Groups. Use this screen to set up custom holding groups. Enter the name and description for any group you wish to create.** • **Custom holdings groups are groups of libraries that are preferred Lenders. To create custom holdings, you should gather the OCLC symbols of libraries that meet the criteria of the custom holdings group you are creating, e.g., public libraries within your state.** • **Custom holdings enable you to speed up the process of selecting Lender strings for requests.**
6	Under **Staff ILL Settings**, click **Custom Holdings Paths**. Custom Holdings Paths are records that contain the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference.
7	Under **Staff ILL Settings**, click **Direct Request Profiles**. Use this screen to set up direct request profiles. Enter the **Profile Name**, and any other desired data in each field. • Direct request automates your request process; it automatically sends patron-generated requests created in your system to OCLC for processing without intervention by your staff. • Direct request profiles define acceptable requests for direct processing. Any requests that do not meet the profile are sent to a review file for your staff to review. • Direct request profiles are based on the borrowing criteria that are most important to your library, e.g., Borrower status, type of material to be borrowed.

Log on to WorldCat Resource Sharing

To begin a search, log on to **WorldCat Resource Sharing**. You may use either your FirstSearch authorization and password or your resource sharing authorization and password. However, a resource sharing authorization is required to complete requests using WorldCat Resource Sharing.

After you log on, the Search screen displays:



Searching with FirstSearch

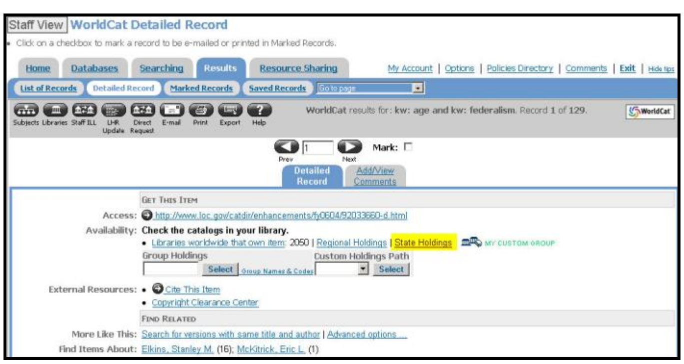
Use the FirstSearch reference system to find library materials in a variety of formats (books, Internet resources, articles) from a variety of databases (WorldCat, MEDLINE, Electronic Collections Online). Please refer to the **FirstSearch documentation web site** for further information.

After you locate an item in FirstSearch, start the interlibrary loan process by clicking the link See more details for locating this item.

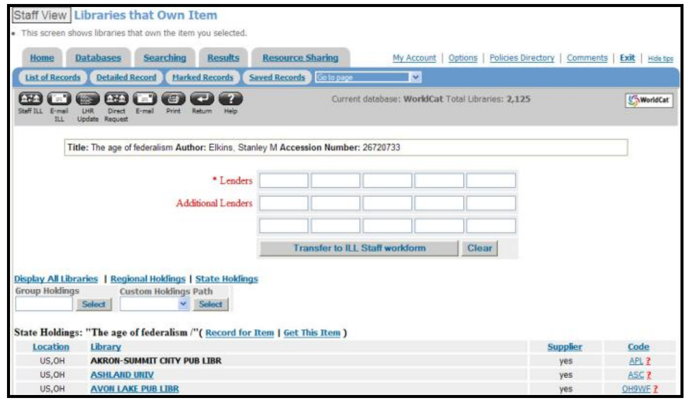
Borrowing

By clicking the link See more details for locating this item, you can determine if your institution owns the item. If your library has the item, that will be indicated in the **Availability** field.

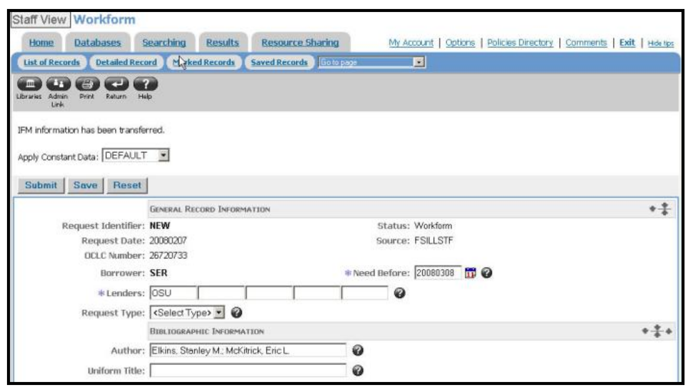
If your library does not own the item, you can initiate an interlibrary loan. In the **Availability** field, click the State Holdings link.



When the Libraries that Own Item screen displays, you can click on the name of any library that is linked to see more information about that library's copy of the item (e.g., whether it is currently available or checked out). Click **?** in the **Code** column to access the library's Lender policies in the **Policies Directory**. After checking the policies, you can choose potential Lenders whose policies best match your borrowing needs.



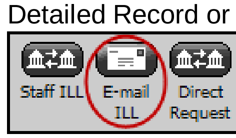
To borrow the item from any of the libraries on the list, click the library's OCLC symbol in the **Code** column. This action transfers the symbol to the **Lenders** list. When your list of potential lenders is complete, click **Transfer to ILL Staff workform**. When the ILL Staff Workform appears, edit the form then click **Submit** to initiate the borrowing process.



The workform is now a request and immediately goes to the first Lender in the Lender string.

E-mailing requests to nonsuppliers

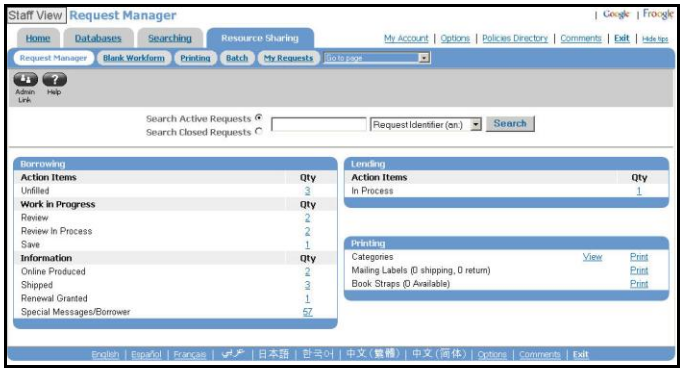
You can e-mail ILL requests for hard-to-find items owned only by libraries that are not suppliers through WorldCat Resource Sharing but will accept e-mail requests. To send a request, click the **E-mail ILL** button on the Detailed Record or Libraries that Own Item screen.



A form appears containing full bibliographic information. Enter the e-mail address of the potential lender, your library's interlibrary loan e-mail address, and any other information you wish, and click the **Send** button.

Lending

When your ILL authorization is linked to FirstSearch, you will see **Staff View** displayed at the top left of your screen when you log in to FirstSearch. Click the **Resource Sharing** tab to display the Request Manager screen.



Request Manager contains messages and requests you receive from other libraries or system-generated messages regarding the status of your requests.

The Request Manager screen has three sections:

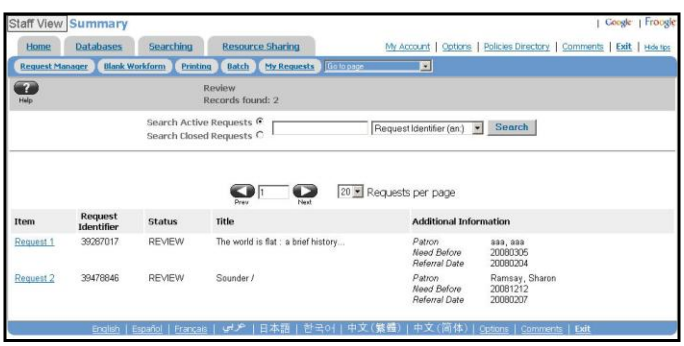
- **Borrowing** (you are acting as the borrowing library)
- **Lending** (you are acting as the lending library)
- **Printing**

You may view and print all records in any category in Request Manager, and may print up to 100 records at a time.

To view records in a particular category, click on the number indicated in the **Qty** column. At the top of the Request Manager screen, there is a search box that allows you to search for and display requests based on different criteria (e.g., author, title).

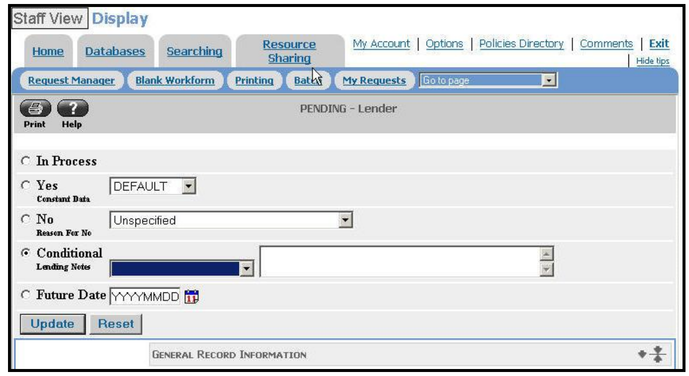
Basic Lending Activities

If you have more than one request in a category, a list of requests will be displayed on the Summary screen when you click the number in the **Qty** column on the Request Manager screen.



The Request Identifier number, current Status, Title and any Additional Information are listed on the Summary screen. Click the **Next** arrow to go to the next page of records, or the **Prev** arrow to go back to the previous page.

Select a request from the list of *Pending* requests on the Request Manager screen, then choose your response on the Display screen.



Responding to Requests

Step	Action	Result
1	If you need to investigate before deciding whether or not to fill a request, click **In Process** on the Display screen. Then click **Update**.	The system responds with a message confirming that the record was updated. The status of the request changes to *In Process*.
2	If you can fill the request immediately, click **Yes** to fill the request. Choose a Constant Data record, then click **Update**. (See "ILL Setup: Staff ILL Settings" on page 2 for more on Constant Data.)	The status changes to *Shipped*. The system tells you which Constant Data record was applied, and transfers constant data information to the **Lending Information** fields.
3	Edit the request, if necessary, then click **Update** again.	The system responds with a message confirming that the record was updated. The request displays as *Shipped* in the Borrower's list.
4	If you cannot fill the request, click **No**, and choose a Reason for No (see the list on the next page). Then click **Update**.	The system responds with a confirmation message that the record was updated. The system forwards the request to the next Lender in the Lender list. If no other Lenders are in the list, the request is returned to the Borrower with the status of *Unfilled*.

5	If you want to stipulate conditions before agreeing to supply the item, or if you need more information from the Borrower, click **Conditional**. Describe any conditions in **Lending Notes**. Then click **Update**.	The system responds with a message confirming that the record was updated. It is returned to the Borrower with the status of *Conditional*.
6	Click **Update**.	The system responds with a message confirming that the record was updated. The request goes to the next Lender in the Lender list to see if another Lender can fill the request earlier.

Reasons for Saying No

Your library's local policies determine which Reason for No is appropriate in each individual case.

Code	Text
1	in use on loan
2	in process
3	lost
4	non circulating
5	not owned
6	on order
7	volume issue not yet available
8	at bindery
9	lacking
10	not on shelf
11	on reserve
12	poor condition
13	cost exceeds limit
14	charges
15	prepayment required
16	lacks copyright compliance
17	not found as cited
18	locations not found
19	on hold
20	policy problem
23	requested delivery services not supported
24	preferred delivery time not possible
27	other

Completing the Loan Cycle

When a borrowed item is returned, the Lender must complete the loan cycle, as shown in the table below.

Note: Photocopies are not returned to the Lender; **Due Date** should be N/A. A request for a photocopy automatically terminates and is purged from the Resource Sharing system when the Borrower updates the record to *Received*.

Step	Action	Result
1	Select a request with the status of *Returned*, *Received*, *Renewal Denied*, *Renewal Granted*, *Renewal Request*, *Recalled*, *Not Received*, or *Complete?* from Request Manager.	
2	Click the **Complete** check box.	The status changes to *Shipped*. The system tells you which Constant Data record was applied, and transfers constant data information to the **Lending Information** fields.
3	Click **Update**.	The system responds with a confirmation message that the record was updated. The request is deleted.

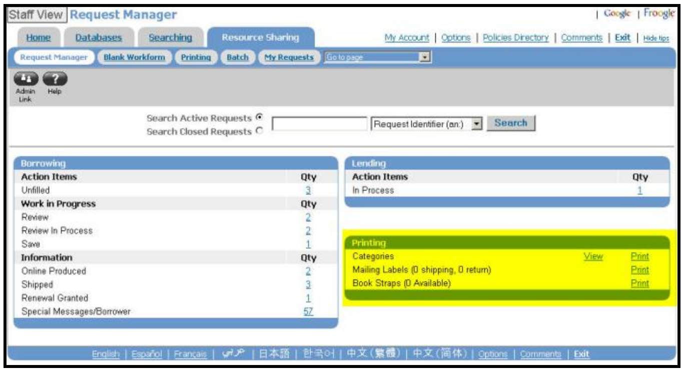
Request Aging

Every time your symbol appears in the Lender string, you have up to four working days from the time a request appears in your Pending file (**not** from the time you first look at it) to update as **Yes, No** or **Conditional**.

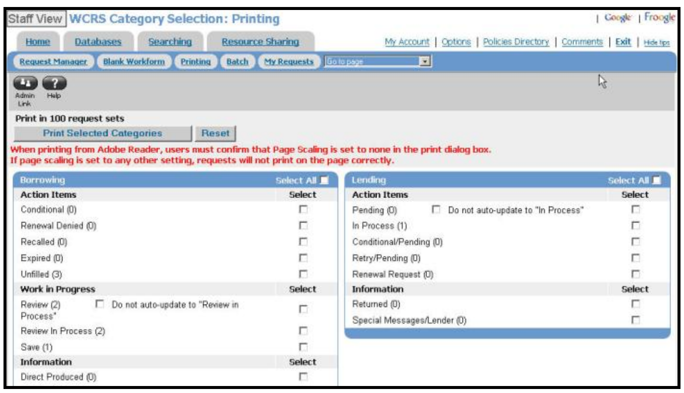
If you don't act on a request in that time, the system will automatically send it on to the next library in the string or, if there aren't other libraries, it will become an *Unfilled* request. Sending a *Conditional* response resets the clock and gives the requesting library four days to respond to your *Conditional* or *Conditional/Pending* message.

Printing Requests

You can print requests from one or more Request Manager categories, up to 100 requests at a time. Links to viewing or printing requests are located on the Request Manager screen.



Click View in the **Printing** area at the bottom of the Request Manager screen to go to the Category Selection screen.



Printing Requests

Step	Action	Result
1	From the Category Selection screen, check the **Select** check box for each category you want to print, or choose **Select All**. **Note:** Once printed, Pending requests update to *In Process*.	
2	Under **Select Printing Format**, choose to print the **Full Request, One Request Per Page** (default) or **Two Requests Per Page**.	
3	To print later, use your browser's **Back** button.	Your selections will be saved until you log off this session.
4	To print now, click **Print Selected Categories**.	A dialog box appears, asking if you'd like to Open or Save your file.
5	Click **Open** to generate a PDF file, or **Save** to save the file.	A new page is started for each category printed. The barcode is always printed at the top left of the page with the request identifier under it enclosed by asterisks. Any data cut off should have ellipses at the end. Labels are displayed in capital letters followed by a colon. **Request History, Imprint, Series,** and **Dissertation** are not displayed or printed. When printing two requests per page, the browser will create a page break between every two requests.
6	Print to your selected printer.	
7	You may also print from the individual record's Display screen by clicking **Print.**	The file is displayed, overlaid by your browser's Print window. Click the browser **Print** button.

Batch Updating

The Batch Update function allows you to process multiple WorldCat Resource Sharing requests (up to 50 at one time) or multiple sets of requests by:

- Choosing a Resource Sharing action
- Choosing one or more requests to be assigned to that action
- Updating requests

The Batch screen allows you to choose an action, to which you can then assign one or more requests. Each action has its own screen with relevant associated functions. Use the Batch screen to select actions.

Completing a Batch Request

Step	Action	Result
1	From the Batch screen, click the borrowing or lending category to which you want to assign requests.	The Batch Processing screen for the category is displayed.
2	Type Request Identifiers and any other information in the spaces/boxes provided.	
3	Click **Add**.	
4	Click the **Update All Categories** button to send all responses to their respective categories.	The Batch Processing Results Summary screen is displayed with a number associated with each category. The **Yes** column shows successful batch updates; the **No** column shows unsuccessful batch updates. The system updates requests in all categories for which you have chosen requests since your last update, not just the category whose Batch Processing screen is currently displayed.
5	Click **Print Report** to receive a printout of actions taken.	The system generates a **Batch Processing Results Report.** Click the browser **Print** button.
6	Cick **Return** to return to the Batch Processing Results Summary screen. You may also click **Export Results** to export results into a text file.	
7	Once you have viewed your results, click **Clear Successfully Processed Items** to clear the screen.	

Other Information

OCLC Non-Referral Days

OCLC does not count Saturdays, Sundays and the following as working days for aging requests:

- New Year's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve
- Christmas Day
- New Year's Eve

OCLC Usage Statistics

Log on to **OCLC Usage Statistics** with any of your institution's OCLC authorizations to access reports for your institution. OCLC Usage Statistics gives you access to all available reports for your institution. If you do not have access to a product, you will not be able to select the reports tab for that product.

Support

OCLC support staff:
E-mail: **support@oclc.org**
Telephone: 1-800-848-5800 (USA) or +1-614-793-8682 (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Ordering copies of this publication

Step	Action
1	**To order additional copies of this publication, send an e-mail request to orders@oclc.org. Include the product code (REF1105).**
2	**You may also use the OCLC Index of Documentation at** https://www3.oclc.org/documentation/**. If the** **Order hard copy** **link is available, you may use it to request a printed copy.**

Request Manager Categories

Current Status	Displays to Borrower or Lender	Notes	L: Lender Action(s) B: Borrower Action(s)
Alert	B	The lender added an alert to a request to provide information that needs immediate attention by the Borrower.	**B:** Actions depend upon the information in the alert.
Conditional	B	Lender has stated conditions for lending in **Lending Notes**.	**B:** Yes, No, Delete, Save, Edit, New
Conditional/Pending	L	The Borrower can comply with the condition stipulated.	**L:** In Process, Yes, No, Conditional, Future Date **B:** Delete, Edit, New
Direct Produced	B	These requests have been successfully forwarded through Direct Request for Direct-to-Profile processing during the past 4 system days.	Actions depend upon an individual request's status.
Expired	B	No Lender could supply the item prior to the **Need Before** date.	**B:** New, Save, Delete
In Process	L	These are requests that you have already reviewed. This category has two parts: In Process - Loans and In Process – Copies. If a request does not contain a request type, it is included in In Process - Loans.	**L:** Yes, No, Conditional, Future Date **B:** Delete
Lost	L	The Lender reports the item as Lost.	**L:**
New	B	New ILL workform.	**B:** Save
Online Produced	B	Requests created using WorldCat Resource Sharing during the past 4 system days.	Actions depend upon an individual request's status.
Pending	L	These requests were created when a Borrower submitted a completed workform, and move through the Lender string sequentially. This category has two parts: Pending - Loans and Pending – Copies. If a request does not contain a request type, it is included in Pending - Loans.	**L:** In Process, Yes, No, Conditional, Future Date **B:** Delete, Edit, New
Recalled	B	The Lender wants the item returned immediately, or the Lender has sent you an erroneous **Yes**.	**B:** Return, Edit **L:** Complete, Edit
Received	B	Borrower received item from Lender.	**B:** Return, Renewal Request, Edit **L:** Recall, Complete, Edit, Lost
Renewal Denied	B	The Lender did not renew the loan.	**B:** Return **L:** Recall, Complete
Renewal Granted	B	The Lender agreed to renew a loan.	**B:** Return, Renewal Request, Edit **L:** Recall, Complete, Edit, Lost
Renewal Request	L	The Borrower wants to renew the loan.	**L:** Renewal OK, No Renewal, Recall, Complete, Edit **B:** Return, Renewal Request, Edit
Returned	L	The Borrower has returned the item.	**L:** Complete, Edit
Review	B	Electronically-generated requests that are waiting for evaluation or further processing, or have already been processed by Direct Request.	**B:** Review in Process, Delete
Review in Process	B	Borrower has already looked at or printed this request.	**B:** Submit, Update, Reset
Save	B	These requests have been set aside for further review.	**B:** Delete
Shipped	B L	The Lender has sent the item.	**B:** Receive, Edit **L:** Recall, Edit, Lost
Unfilled	B	No Lender could supply the item.	**B:** Save, Delete, New
Special Messages/ Borrower OVERDUE	B	**Due Date** or **New Due Date** is 14 or more system days overdue.	**B:** Return item, Renewal Request, Edit **L:** Recall, Edit
Special Messages/ Borrower RECEIVED?	B	Request has not been updated to *Received* within 7 days of **Shipped date** for copies, and 14 days for loans.	**B:** Yes, No, Edit **L:** Recall, Edit
Special Messages/ Lender COMPLETE?	L	Request has shown a status of *Returned* for 30 system days or longer.	**L:** Complete, Edit **B:** Edit
Special Messages/ Lender NOT RECEIVED	L	Borrower has not received an item sent by Lender and responded **No** to *Received?*.	**L:** Complete, Edit **B:** Receive, Edit

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