



OCLC FirstSearch/ILL Direct Request Link Quick Reference

Overview

An optional link between the OCLC FirstSearch® service and WorldCat Resource Sharing (WCRS) allows patrons to generate requests for materials cited in FirstSearch databases.

This link is only possible if:

- Your library uses both FirstSearch and WorldCat Resource Sharing.
- Your FirstSearch administrator turns ILL Access On in the WorldCat Services Administrative Module.

If your library has created Direct Request profiles, patron-generated workforms transferred to OCLC by FirstSearch are processed and automatically sent to the first Lender according to the conditions of the profile.

If you use Direct Request but do not create profiles, the workforms appear in the **Review** category on the WCRS Request Manager screen. You review the request and determine whether it should be submitted.

Creating the Direct Request Link

Step	Use this system	To take this action
1	WorldCat Services Administrative Module	Create constant data. Your institution probably has at least one constant data record that contains Ship To and Maximum Cost . If your system completes these fields when you create a workform, go to step 2.
2	WorldCat Services Administrative Module	Create custom holdings. 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 File in Request Manager. If you have already created custom holdings, go to step 3.
3	WorldCat Services Administrative Module	Create Direct Request Profiles. If you skip this step, all patron-generated requests from FirstSearch go to your Review File in Request Manager.

4	WorldCat Services Administrative Module	Set Patron ILL Settings <ul style="list-style-type: none"> • Turn ILL Access On • Set ILL Settings for Databases • Select the specific formats for WorldCat ILL Access • Customize the Patron ILL Request Form
5	WorldCat Resource Sharing	Review results.

Constant Data

Create constant data to provide information the Lender needs to process your patron's request.

To create a simple constant data record, log on to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin> and follow these steps:

Step	Action
1	Go to the Resource Sharing tab.
2	Choose Constant Data Records from the drop-down list under Staff ILL Settings in the sidebar menu.
3	Click New Blank Record .
4	Enter the desired data in each field. Note: The CD Name field must be populated.
5	In the Ship To 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. Example: ILL Dept Library Name/P.O. Box nnnn/City, ST 00000/For UPS:nnnn Street/City, ST 00001
6	In the Maximum Cost 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. Note: If you do not provide a value, you are responsible for whatever the Lender charges.
7	Choose Constant Data Options from the drop-down list under Staff ILL Settings in the sidebar menu to set Persistence and Electronic Delivery Options .
8	Enter other data, if desired.
9	Click Save Changes .

Note: Any data transferred from FirstSearch takes precedence over data from the constant data record.

Constant Data for Copy Requests

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

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

Custom Holdings

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

Custom Holdings Groups

In this sample procedure, log on to the WorldCat Services Administrative Module to create three sample groups of libraries you identify that supply loans for free:

FREELC Libraries in your local area

FREEREG Libraries in your region

FREEOTH All other libraries

The following procedure creates the group FREELC. Repeat it to create the groups FREEREG and FREEOTH.

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

Custom Holdings Paths

This procedure creates the custom holdings path BOOKS.

Step	Action
1	Go to the Resource Sharing tab.
2	Choose Custom Holdings Paths from the drop-down list under Staff ILL Settings in the sidebar menu.
3	Click New Blank Record .
4	Enter the Path Name for the custom holdings path you want to create (example: BOOKS).
5	In the Path Description field, type for book loans .
6	From the Groups available to be included in the path list, select FREELC .
7	Click the Add button.
8	Click Save Changes .

Direct Request Profiles

Direct Request profiles act as filters for requests sent by your patron using FirstSearch. Profiles check for data in the patron requests that your library considers mandatory. If data is missing, Direct Request sends the patron request to the Review File in Request Manager.

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

To create and maintain your Direct Request profiles, log on to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin> and follow these steps:

Step	Action
1	Go to the Resource Sharing tab.
2	Choose Direct Request Profiles from the drop-down list under Staff ILL Settings in the sidebar menu.
3	Click New Blank Record .
4	Enter the desired data in each field. Note: The Profile Name field must be populated.
5	When finished, click Save Changes .

Note: Options you specify in your profiles must exactly match the FirstSearch workflow settings you define. For example, if a profile specifies a Patron Department called "Chemistry," the FirstSearch workflow must present that option as "Chemistry," not "Chem," or any other variation.

Loan Profile for Books in English

Consider the limits you place on patrons' resource sharing requests. Here is a sample profile that allows patrons to request books in English.

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

For this sample, all the other elements in the profile are blank. When creating a profile, leave the field blank if you do not require the information from your patron.

Simple Loan Profile

Most Direct Request users create simple profiles. Here is a sample of an easy 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

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.

Profile for CCG Copy Requests

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

Profile for CCL Copy Requests

CCL is a code supplied by the Borrower that indicates the request conforms to U.S. Copyright Law. Here is a sample profile for CCL requests:

For this Profile Element	Type this Data
Profile Nme	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

Patron ILL Settings

Log on to the WorldCat Services Administrative Module at <http://firstsearch.oclc.org/admin>. Click the Resource Sharing tab to access **Patron ILL Settings** to:

- Turn **ILL Access On**
- Set the **ILL Settings for Databases** option to **OCCL ILL Direct Request Profile** for each database for which you will allow patron-generated requests
- Select the specific formats for **WorldCat ILL Access**
- Customize the **Patron ILL Request Form**

Once these tasks are completed, patron-generated workforms from FirstSearch are immediately processed through Direct Request.

ILL Access

Choose **ILL Processing** from the drop-down list under **Patron ILL Settings** to let users submit ILL requests while using FirstSearch and designate when the ILL button will appear to users.

ILL Settings for Databases

For each FirstSearch database, specify one of the following options:

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

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WorldCat ILL Access

Select the specific WorldCat Document Types (books, maps, sound recordings, etc.) that you will allow patrons to request.

Choose **WorldCat ILL Access** from the drop-down list under **Patron ILL Settings**.

Customize the Patron ILL Request Form

Choose **Patron ILL Request Form** from the drop-down list under **Patron ILL Settings**.

Customizing the form is optional. You can control these aspects of the ILL request form:

Aspect	Description
Persistence	Lets you control whether data about the user entered in the first ILL request of a FirstSearch session is automatically redisplayed in subsequent ILL requests during the session and can be edited as needed by the user.
Send name to OCLC ILL	Lets you control the order in which the patron's first and last names are sent to Patron field of the FirstSearch workflow. OCLC recommends [<i>Last Name First</i>].
Display name to patron	Lets you control the order in which the FirstSearch Patron ILL Request form prompts for the patron's first and last names. OCLC recommends [<i>First Name First</i>].
Library note to patrons	Lets you provide information to your patrons. OCLC recommends noting any library-assessed charges or fees, or procedures for pickup.
User information fields	Lets you control whether each of the specified fields: <ul style="list-style-type: none"> • Carries a Field Label you specify • Displays Library-Supplied Data • Is required or optional • Displays to patrons (Note: Always display required fields to patrons.) • Can be modified by patrons OCLC recommends that you not display Max Cost or Date Needed in the workflow.

FirstSearch ILL Fields

FirstSearch ILL fields map to WorldCat Resource Sharing as follows:

These Fields in FirstSearch	Correspond to these WorldCat Resource Sharing 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

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.

Support

OCLC support staff:

E-mail: 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)

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