

# WorldCat Resource Sharing migration

Information for current users of OCLC Interlibrary Loan

## Quick Start: Enabling user-initiated ILL requests

Thank you for downloading this Quick Start tutorial. This document covers the following:

- **Activating OCLC ILL within the FirstSearch reference service**
- **Customizing your ILL request form**
- **Customizing your ILL access to various WorldCat resource formats**
- **Setting up Direct Request** (including constant data, custom holdings and Direct Request profiles)
- **Finalizing user-initiated ILL requests** (setting the review process for each FirstSearch database)
- **How to review requests handled by Direct Request**

Remember that you may have to consult or work with your library's FirstSearch administrator, who holds your library's FirstSearch authorization and password, to complete this process.

**Also available** on the OCLC Web site:

- A detailed technical [planning guide for Direct Request](#)
- Complete [OCLC ILL support documentation](#)

## Activating OCLC ILL within FirstSearch

When you turn on ILL access within FirstSearch, your library's users can click a text link on a resource citation and go directly to a Web form that lets them request the resource themselves. Turning on ILL access is easy.

1. **Log on to the FirstSearch Administrative Module** at <http://firstsearch.oclc.org/admin/> using your library's FirstSearch authorization and password.



2. Click the **Resource Sharing** tab and then the **Patron ILL Settings** link on the Resource Sharing tab bar. The ILL Processing screen will display.

Usage Statistics FirstSearch Service FirstSearch Admin ILL Web ILL Policies Directory

OC LC FirstSearch Administrative Module

Comments Help Site Map/Print Exit

Account Information Authentication/Access **Resource Sharing** Linking Interface Display

**Patron ILL Settings** Staff ILL Settings | Per-Article Purchase | OpenURL Links

Authorization: 100273104 | Symbol: OCL

### ILL Processing

ILL Processing WorldCat ILL Access Patron ILL Request Form ILL via E-mail

ILL Access: Save Changes

ILL Access:  On

ILL Request Form Link Text: Borrow this item from another library

3. Click the **ILL Access “On”** checkbox. Then customize the **ILL Request Form Link Text**, if you desire. (This is text of the link your users will click to request an item. The link text defaults to Borrow this item from another library if you do not change it.) You must click the **Save Changes** button when you are finished for your changes to be activated.

ILL Access:  On Save Changes

ILL Request Form Link Text: Borrow this item from another library

Your ILL access within FirstSearch has been enabled! There are now some further steps you may take to customize ILL even more. The first is to customize the Web request form your users will fill out.

## Customizing your ILL request form

1. Click the **Patron ILL Request Form** tab (on the lower row of navigation tabs). The Patron ILL Request Form customization screen will appear.

### Patron ILL Request Form

ILL Processing WorldCat ILL Access **Patron ILL Request Form** ILL via E-mail ILL Request Management

Patron ILL Request Form Save Changes

Persistence:  On

Send name to OCLC ILL: Last Name First

Display name to patron: First Name First

Library note to patrons:

(screen shot continued next page)

Field	Field Label	Library-Supplied Data	Required by Library	Displayed to patron	Modifiable by patron
First Name:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State/Region/Prov.:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Postal Code:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fax:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Field	Field Label	Library-Supplied Data	Required by Library	Displayed to patron	Modifiable by patron
Patron ID:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Max Cost:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Needed:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dept or Branch:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Status:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save Changes](#)

English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map/Print | Exit

2. Customize your ILL request form with the following settings on this screen:

- The **Persistence** setting determines whether or not a user submitting multiple ILL requests during the same FirstSearch session must completely fill out the form for each request. If the box is checked, data about the user entered in the first ILL request of a session is automatically redisplayed in subsequent requests and can be edited as needed by the user. Leave the box unchecked to require reentry of all data for each request.
- The **Send Name to OCLC ILL** and **Display Name to Patron** settings control how a user's name is displayed within OCLC ILL and on the request form, e.g. either as "John Smith" or "Smith, John."
- Text typed in the **Library Note to Patrons** setting displays as a note to users on the request form. (The default setting is no note.) Use the note to state library policies or a timely message. Include only essential information to limit the space used by the note. Note that the entire note is displayed to users in a single paragraph even if you include line breaks here.
- Remaining settings on this screen let you customize **the types of information that will:**
  - **Be required by your library for an ILL request.** If this box is checked, FirstSearch will not send a submitted request to OCLC ILL unless the given data is supplied by the user. If the box is not checked, FirstSearch will send the request to OCLC ILL whether or not the field contains data. (Default: All fields required.)
  - **Be displayed to the patron.** If this box is checked, FirstSearch will include the given field when it displays the ILL request form to a user. If the box is not checked, FirstSearch will not include the given field when it displays the ILL request form to a user. (Default: All fields displayed.)
  - **Be modifiable by the patron.** If this box is checked, users can type data in the given field (or in the case of Dept-or-Branch or Status rows, select options from the dropdown menu). If the box is not checked, users cannot type data in the field (or select the Dept-or-Branch or Status options). (Default: All fields modifiable.)

- You may also modify the **Field Label** and enter any **Library-Supplied Data** for any given field on your customized ILL request form. Text entered in any Library-Supplied Data field (up to 40 characters) is sent to OCLC ILL as data in ILL requests, unless users replace the text in any modifiable fields. (Note that the Comments field is designed for user-input comments, and should not require library-supplied data.)

More contextual help for using this screen to customize your ILL request form is available within the FirstSearch Administrative Module's online help. Simply click the **Help** link or icon at the top right of the screen.

- When you are finished customizing your ILL request form, be sure to click the **Save Changes** button to save your work and enable your settings. A confirmation message will show that this has occurred.

The next step you may take to customize ILL is controlling user access to various WorldCat resource formats.

## Customizing your WorldCat ILL access

- Click the **WorldCat ILL Access** tab (on the lower row of navigation tabs). The WorldCat ILL Access customization screen will appear.

**WorldCat ILL Access**

Navigation tabs: ILL Processing | **WorldCat ILL Access** | Patron ILL Request Form | ILL via E-mail | ILL Request Management

WorldCat ILL Access Save Changes

Enable ILL Access		Document Type
Select all	Clear all	
<input type="checkbox"/>		Archival Materials
<input type="checkbox"/>		Articles
<input type="checkbox"/>		Books
<input type="checkbox"/>		Computer Files
<input type="checkbox"/>		Electronic Serials
<input type="checkbox"/>		Internet Resources
<input type="checkbox"/>		Maps
<input type="checkbox"/>		Musical Scores
<input type="checkbox"/>		Serial Publications
<input type="checkbox"/>		Sound Recordings
<input type="checkbox"/>		Visual Materials

Save Changes

Footer: English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map/Print | Exit

This screen lets you control the document types that your library's FirstSearch users can request through ILL.

- Check the box next to each document type that you want your FirstSearch users to be able to request through ILL (use **Select All** to check all boxes simultaneously). Click **Help** for detailed information on WorldCat document types.
- Click the **Save Changes** button to save your work and enable your selections. A confirmation message will show that this has occurred.

## Setting up Direct Request

When you activate the Direct Request feature of OCLC ILL, users requests submitted via the ILL request form in FirstSearch are sent automatically into the OCLC ILL system without staff intervention. Profiles let you designate which kinds of requests are automatically handled and which are moved to your ILL review file.

1. **Create constant data.** Constant data is stored information that your institution's ILL staff can optionally use to save keystrokes and ensure consistency. In the case of ILL requests coming from FirstSearch, constant data can be used to indicate, at a basic level, your shipping address and a maximum cost your library will pay for loan of an item.

To create constant data, click on **Staff ILL Settings** on the Resource Sharing tab bar, then click the **Constant Data** tab on the lower row of navigation tabs.



The Constant Data settings panel will appear. To create a basic Constant Data record for books, for example, enter:

- “Books” in the **CD Name** field
- Your library’s shipping address in the **Ship To** field (use a forward slash / to separate each line of the address, e.g. ILL Dept Northern University/PO Box 100/Northern, OH 43448/For UPS: 1515 Main St./Northern OH 44446)
- A dollar figure (e.g. \$10.00) in the **Maximum Cost** field
- Check “Apply” in the **ILL Fee Management (IFM)** field to enable the easy transfer of funds from your library to other institutions

Enter additional data as desired. (For more general information on use of constant data or specific information about fields on this settings panel, click **Help**.)

Click **Save Changes** to save your constant data record. A confirmation message will show that this has occurred. Click **New Blank Record** to create another record, if desired.

2. **Set your Custom Holdings.** Custom holdings are essentially your list of lenders that will be used to fulfill ILL requests handled by Direct Request. You determine how custom holdings are structured—library users have no control over where their request is sent—but you must define custom holdings in order to use the Direct Request feature.

Your custom holdings are comprised of a holdings “group”—a record that contains the OCLC symbols of preferred lenders for a particular type of borrowing—and a holdings “path”—a record that contains the names of holdings groups appropriate to a set of requests, listed in order of borrowing preference.

Example **holdings groups** you might create are :

- Local libraries that supply loans for free
- Regional libraries that supply loans for free
- All other libraries that supply loans for free

Example **holdings paths** you might create are :

- Books
- Videos
- Serials

Remember, *paths contain groups* (in the order you want them used), and *groups contain library symbols*.

## Custom Holdings Groups

Click the **Custom Holdings Groups** tab. The Custom Holdings Group panel that lets you view, print, create, edit, and delete custom holdings group records appears.

The screenshot shows the 'Custom Holdings Groups' interface. At the top, there are tabs for 'Authorizations', 'Constant Data', 'Saved Notes', 'Custom Holdings Groups' (selected), 'Custom Holdings Paths', and 'Direct Request Profiles'. Below the tabs are buttons for 'View/Print', 'New Blank Record' (highlighted with a red box), 'Delete Record', 'Look Up Symbols', and 'Save Changes'. A section for editing a group is visible, with a dropdown for '-Group Name-' and a text input for 'Custom Holdings Group'. Below this is a 'GO' button. The 'General Record Information' section contains a required field for 'Group Name' (containing 'BOOKCHRG'), a 'Group Description' field (containing 'institutions that charge for book loans'), and a 'Symbols to be added or removed' field (containing 'cup, aml'). The 'Add Symbols' and 'Remove Symbols' buttons are highlighted with red boxes. A legend indicates that an asterisk (\*) denotes a required field. Below this is a section titled 'Symbols currently in your group (5)' listing 'ACQ', 'DEL', 'OSU', 'SER', and 'wis', each with a question mark icon. At the bottom, there are buttons for 'View/Print', 'New Blank Record', 'Delete Record', 'Look Up Symbols', and 'Save Changes', along with a footer containing language options and navigation links.

Click the **New Blank Record** link. Enter a **Group Name** (up to eight alphanumeric characters) and optionally a **Group Description** (up to 140 characters). Enter one or more OCLC institution symbols for lenders in the **Symbols to be added or removed** field, and click the **Add Symbols** button. Added symbols will appear in the **Symbols currently in your Group** panel; click a symbol's question-mark icon to view that institution's ILL policies in a new window.

You may remove symbols by entering them in the **Symbols to be added or removed** field and clicking the **Remove Symbols** button.

For more information on creating a Custom Holdings Group, click **Help**. When you are finished, click the **Save Changes** button to save your work and create the group. A confirmation message will show that this has occurred. Click on **New Blank Record** to create another group.

## Custom Holdings Paths

Once you have created all of your custom holdings groups, click the **Custom Holdings Paths** tab. The Custom Holdings Paths panel that lets you view, print, create, edit, and delete custom holdings path records appears.

## Custom Holdings Paths

Authorizations Constant Data Saved Notes Custom Holdings Groups Custom Holdings Paths Direct Request Profiles

View/Print **New Blank Record** Delete Record Save Changes

To edit a specific Custom Holdings Path:

Select  Custom Holdings Path  View Path Descriptions

Go

**General Record Information**

\*Path Name:

Path Description:

Groups available to be included in the path:      Add Remove

Groups chosen to be included in the path:  Up Down

View Group Descriptions

\* indicates a required field

View/Print **New Blank Record** Delete Record Save Changes

English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map/Print | Exit

Click the **New Blank Record** link. Enter a **Path Name** (up to eight alphanumeric characters) and optionally a **Path Description** (up to 140 characters).

The **Groups available to be included in path** window will display the groups you have created. Highlight each you want to include in this path and click the **Add** button. The group will be added to the **Groups chosen to be included in path** window. (To delete groups from this window, highlight the group name and click the **Remove** button.)

For more information on creating a Custom Holdings Path, click **Help**. When you are finished, click the **Save Changes** button to save your work and create the path. A confirmation message will show that this has occurred. Click on **New Blank Record** to create another path.

3. **Create your Direct Request profiles.** These profiles act as filters for the ILL requests sent by your users through FirstSearch, determining if they're valid and where they'll go.

Direct Request profiles also tie together all the information you've provided in previous settings panels. They check for data in requests that your library has indicated is mandatory (on your customized ILL request form). If any data is missing, the request is sent to your ILL review file. If the data matches a profile, Direct Request selects lenders (using your Custom Holdings settings) and supplies important borrowing information (from your Constant Data) and produces the request, sending it to the first lender.

Click the **Direct Request Profiles** tab. The Direct Request Profiles panel that lets you view, print, create, edit, and delete profiles appears.

## Direct Request Profiles

Authorizations   Constant Data   Saved Notes   Custom Holdings Groups   Custom Holdings Paths   **Direct Request Profiles**

[View/Print](#)   [New Blank Record](#)   [Delete Record](#)   [Save Changes](#)

To edit a specific Direct Request Profile:  
Select  Direct Request Profile OR enter an existing Profile Name   
[go](#)

### Profile Information

\* Profile Name:

Description:

Request Sources:

Request Types:

Patron Statuses:

Patron Departments:

Patron Will Pay Up To:

Need At Earliest:

But No Later Than:

Bibliographic Formats:

Age of Material:

But No Older Than:

Language:

### Route to Review File Options

If Potential Duplicate Request:

If Held By Your Institution:

If Held By Custom Holdings Group:

### Additional Profile Options

Constant Data Record:

Minimum Number in Lender String:

\* Custom Holdings Path:

Produce The Request:

\* indicates a required field

[View/Print](#)   [New Blank Record](#)   [Delete Record](#)   [Save Changes](#)

English | Español | Français | 日本語 | 中文(繁體) | 中文(简体) | Help | Site Map/Print | Edit

Click the **New Blank Record** link and enter a **Profile Name** (up to eight alphanumeric characters) and optionally a **Profile Description** (up to 140 characters). Only the Profile Name and Custom Holdings Path are required as part of your profile; the remaining information and options can be completed or left blank as needed depending on the profile you are building. For help defining or using any field within the profile, click on the question mark **Help icon** to its immediate right.

Every library has different criteria for creating Direct Request profiles. You are likely to group eligible requests and create your profiles based on the criteria most important to you. For example, based on your lending policies, your most important criterion may be whether an item is a loan or a photocopy. You may consider the patron's status to be the most important element and create profiles based on each patron status. Another perspective might be to focus on potential lenders, building profiles based on holdings paths. [Sample profiles](#) are available on the OCLC Web site.

For more information on creating a Direct Request profile, click **Help**. When you are finished, click the **Save Changes** button to save your work and create the profile. A confirmation message will show that this has occurred. Click on **New Blank Record** to create another profile.

## Finalizing user-initiated ILL requests

You're almost finished creating the preferences that will automate your routine ILL requests, giving your staff more time to work on other tasks or more difficult requests. The final step is to return to the **ILL Processing** screen to set the ILL option to Direct Request (or other review methods) for each FirstSearch database for which you will allow user-initiated requests.

1. Click the **Resource Sharing** tab and then the **Patron ILL Settings** link on the Resource Sharing tab bar. The ILL Processing screen will display. If you activated ILL Access earlier in this process, that box should be checked.

The screenshot displays the FirstSearch Administrative Module interface. At the top, there is a navigation bar with tabs for Usage Statistics, FirstSearch Service, FirstSearch Admin, ILL Web, and ILL Policies Directory. Below this, the OCLC logo and 'FirstSearch Administrative Module' are visible. A secondary navigation bar contains tabs for Account Information, Authentication/Access, Resource Sharing, Linking, and Interface Display. The 'Resource Sharing' tab is active, and a sub-menu is open with 'Patron ILL Settings' highlighted. Below the sub-menu, the authorization information '100273104 | Symbol: OCL' is shown. The main content area is titled 'ILL Processing' and features a sub-tab bar with 'ILL Processing', 'WorldCat ILL Access', 'Patron ILL Request Form', and 'ILL via E-mail'. The 'ILL Processing' sub-tab is active, showing a form with an 'ILL Access:' section containing a checked 'On' checkbox and a 'Save Changes' button. Below this is an 'ILL Request Form Link Text:' field with the value 'Borrow this item from another library'.

2. Scroll down to the **Database ILL Settings** panel. You should see a complete list of all FirstSearch databases to which your library subscribes and that are suitable for ILL requests. (Databases for Z39.50-compatible library catalogs will also appear here if you have configured them for "individual display.")

## ILL Processing

**ILL Processing** | WorldCat ILL Access | Patron ILL Request Form | ILL via E-mail | ILL Request Management

ILL Access:  On Save Changes

ILL Button Display Options:  
 Display always  
 Do not display when held by your library

ILL Request Form Link Text:

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**Database ILL Settings**

Database	OCLC ILL Review File	OCLC ILL Direct Request Profile	ILL via E-mail	ILL Access off
ABI_INFORM	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AGRICOLA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
AHSearch	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ASTA	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ATLAReligion	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ATLAS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ATLA_FT	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

For each database, specify one of the following options by clicking on the corresponding radio button:

- **ILL Review File (default):** Sends user-initiated requests from this database to your review file.
- **ILL Direct Request Profile:** Submits user-initiated requests from this database to Direct Request for processing.
- **ILL via E-mail:** Sends user-initiated requests from this database to e-mail addresses designated on the **ILL via E-mail** settings panel. (This method does not use the OCLC ILL service. Your library may use this method whether it has or does not have access to the OCLC ILL service.)
- **ILL Access Off:** User-initiated requests from this database are not permitted.

Your ILL Access must be turned on for these settings to be usable. If access is not turned on, these settings remain saved but are not active.

For more information on using the Database ILL Settings panel or the ILL Processing screen, click **Help**. When you are finished, click the **Save Changes** button to save your work and activate your database settings. A confirmation message will show that this has occurred.

**You have completed the steps necessary for activation of user-initiated ILL requests. Congratulations!**

## How to review requests handled by Direct Request

Requests that your users generate using Direct Request are processed against your profiles and are forwarded to the first potential lender. Requests that do not match any profile are sent to your ILL review file. The **request history** and the field **:DIRECT NOTES:** provide information about why a request was unsuccessful.

To find out which requests were forwarded, log on to the FirstSearch staff view and click the **Request Manager** tab.

The screenshot shows the OCLC FirstSearch Staff View interface. At the top, there is a navigation bar with tabs for Home, Databases, Searching, and Request Manager (highlighted with a red box). Below the navigation bar, there is a search area with a search bar, a dropdown menu for selecting a topic or database, and Search and Clear buttons. At the bottom, there is a footer with the OCLC logo, copyright information (© 1992-2004 OCLC), and a link to Terms & Conditions.