

Checklist: Automate your request process

Part 3 of the OCLC Resource Sharing Workshop Series

Review basic uses of Automation

Actions that happen automatically to patron-initiated requests

- Bibliographic matching
- Holdings checks: WorldCat, OCLC knowledge base, libraries in your Custom Holdings Groups
- If staff create all requests in staff interface, you can **Route To Automation** for similar processing

Actions you define

- You define the Matches
 - Patron's department, status
 - Patron's maximum cost or need before date
 - Bibliographic data in the request: age, format, language
 - Presence of a patron note or specific content of a patron note
- You define the Actions
 - Apply Constant Data
 - Build a lender string from a designated Custom Holdings Path
 - Send to lenders in a designated Custom Holdings Path
 - Move the request to Review, Review for Purchase, Document Delivery, or WorldShare Acquisitions
- You define the Exceptions
 - Do these actions unless my library holds the item
 - Do these actions unless a library in a designated Custom Holdings Group holds the item
 - Do these actions unless the request is a duplicate

Create Automations by using Automated Request Manager

- Make sure to review any existing Automations (that migrated from Direct Request)
- Review priorities and adjust as necessary
- Review documentation for recommended automations
 - [Tipasa](#)
 - [ILLiad and WorldShare ILL](#)

Assess Automations

OCLC Usage Statistics (www.stats.oclc.org)

- Review the **Borrower Resource Sharing Stats Report** to Review
 - The percentage of requests you are sending out unmediated
 - The average position in the lender string of the lender that fills the request; if unmediated requests are not filled by an earlier lender, this is a sign you should review your Custom Holdings Groups and Paths