

OCLC Resource Sharing Webinar · May 5, 2020

Part 3: Automate your request process

Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users

Today's presenters



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Product Manager,
Resource Sharing



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Product Analyst,
Resource Sharing



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Customer Support
Analyst III



WORKSHOP SERIES

Series topics

Topic	Webinar Date	Office Hours Date
<i>Part 1: Policies and Deflections</i>	<i>Jan 30</i>	<i>Feb 7</i>
<i>Part 2: Custom Holdings</i>	<i>Feb 27</i>	<i>Mar 6</i>
Part 3: Automation (Direct Request)	May 5	May 15
Part 4: Constant Data	June 23	June 30
Part 5: Usage Statistics	July (TBD)	July (TBD)

Our continuous efforts to improve turnaround times and fill rates

Virtual Workshop Series



New Automation Request Manager



Identify fastest lenders (oclc.org/rsgifts)



Reasons for No Task Force



Availability/Requestability Pilot



Removing non-responsive suppliers



Service Configuration – WorldShare ILL

WorldShare ILL

Interlibrary Loan
Options

Borrower Data

Lender Data

Custom Holdings
Groups

Custom Holdings
Paths

Automated
Request Manager

Purchase Options

Patron Request

Automated Request Manager

worldcat.org/config

We want to hear your thoughts on the new Automated Request Manager.

Borrowing New Request

These standard actions are done for all Borrowing New Requests, regardless of profile:

Bibliographic record

Best matching bibliographic record applied to request

WorldCat holdings check

Available when holdings set in WorldCat

Knowledge base holdings check

Available when OCLC knowledge base holdings set in WorldCat

Custom Holdings Group check

Available when Custom Holdings Group holdings set in WorldCat

US Copyright Management

Configurable under [Advanced Workflows](#)

OPAC holdings check

Configurable under [Advanced Workflows](#)

Patron approval check

Configurable under [Patron Settings](#)

RapidILL holdings check

Configurable under [External System Settings](#)

Notifications

Configurable under [Notifications](#)

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)

OCLC Support

Welcome to OCLC Support

How can we help you?

Search

Select a category

- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing
- Librarians' Toolbox

help.oclc.org

Documentation

[Home](#) » [Resource Sharing](#) » [WorldShare Interlibrary Loan](#) » [Configuration](#)

Automated Request Manager (formerly Direct Request)

Last updated: Mar 6, 2020

Use this screen to configure Automations in Automated Request Manager (ARM) to automate ILL workflows. Automations are composed of match criteria you define along with actions you want the system to perform on matched requests.

Note: Previously configured Direct Request Profiles will appear in the Automated Request Manager as Automations.

Automations allow you to determine how patron-generated requests are processed. First, you can configure match criteria based on details in the request:

- Age of material requested
- Format of material

– Table of contents

1. Standard Actions
2. Configure Main Automations
3. Main Automation fields
 - 3.1. Automation Match criteria
 - 3.2. Automation Actions
 - 3.3. Automation Exceptions
4. Using automations with WorldShare Interlibrary Loan
 - 4.1. Basic automations
 - 4.2. Advanced automations

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Today's topics

- What is Automation and why is it important?
 - Definitions and example
 - Common uses for Automation
 - Making the case for Automation
- Reading Automations
- Creating and editing Automations
- Additional uses in Tipasa
- Assessing Automations
- Takeaways and getting assistance

WHY AUTOMATION?

OCLC Resource Sharing

A young man with a backpack is looking at his phone at night. The background is a blurred city street with blue and white lights, suggesting a library or a public space at night.

7,531

borrowing libraries
worldwide

7,540

lending libraries worldwide

57

countries

12.7

requests created per minute

What do we mean by Automation?

- Formerly referred to as Direct Request
- Consists of match criteria + actions
- Happens when a patron places a new borrowing request
- Most actions happen based on rules you provide
- Other actions happen automatically

ILL system	How is request created?	Does Automation occur?	Can I manually send to Automation?
WorldShare ILL	By patron from FirstSearch or WorldCat Discovery	Yes	Yes
WorldShare ILL	Blank forms on library website, emails to library staff	No	Yes
Tipasa	OpenURL from any database or discovery layer	Yes	Yes
Tipasa	Blank forms in Tipasa patron interface	Yes	Yes
ILLiad	Any patron request when a routing rule for Awaiting Direct Request Sending queue is enabled and DirectRequestEnabled set to Yes	Yes	Yes
ILLiad	Patron requests with DirectRequestEnabled set to No and no routing rule for Awaiting Direct Request Sending	No	Yes
WorldShare ILL and Tipasa	Manually by staff in staff interface	No	Yes

Automated Request Manager

Automated Request Manager

[Help on this screen](#)

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Configurable under [Patron Settings](#)

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Configurable under [External System Settings](#)

Notifications

Configurable under [Notifications](#)

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)

EXAMPLE: BIBLIOGRAPHIC RECORD MATCHING

Actions performed automatically

Automated Request Manager

We want to hear your thoughts on the new Automated Request Manager. [🗨](#)

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Configurable under [Patron Settings](#)

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Configurable under [External System Settings](#)

Notifications

Configurable under [Notifications](#)

Example: Patron-submitted request

Submit an Interlibrary Loan Request





Request Type:

* Required field

About my item

Title: *	Author: *	Publisher:
<input type="text" value="Attachment theory and close relationships"/>	<input type="text" value="Simpson"/>	<input type="text"/>
Place of Publication:	Date:	ISBN:
<input type="text"/>	<input type="text"/>	<input type="text" value="9781572301023"/>
Title of chapter:	OCLC#:	Format: *
<input type="text"/>	<input type="text"/>	<input type="text" value="Book"/>

Example: After bibliographic matching

Source	PATRON
Status	Not Reviewed
Title / Journal	<input type="text" value="Attachment theory and close relationships /"/> 
Uniform Title	<input type="text"/>
Author	<input type="text" value="Jeffry A Simpson; W Steven Rholes"/> 
Publisher	<input type="text" value="New York : Guilford Press, 1998"/>
ISBN	<input type="text" value="9781572301023"/> 
ISSN	<input type="text"/>
OCLC	<input type="text" value="37631184"/>  View Holdings

Actions performed automatically

Automated Request Manager

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Borrowing New Request

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Notifications

Configurable under [Notifications](#)

Manually route to Automation


Quackenstein Hatches a Family



Send Request  Save For Review

Send to Automation

Multiple Requests

Request Details (Request ID NEW)

 Patron Summary

Title / Journal	<u>Quackenstein</u> Hatches a Family 
Uniform Title	
Author	
Publisher	
ISBN	9780810989733 
ISSN	
OCLC	

Manually route to Automation

Create Request

✔ Request sent to Automation.

Send Request ▼ Save For Review

Request	Purchase	Staff Notes	0
Patron Summary			
Source	WSILL		
Status	Not Reviewed		
Title / Journal	<input type="text" value="Quackenstein hatches a family /"/>		
Uniform Title	<input type="text"/>		
Author	<input type="text" value="Sudipta Bardhan-Quallen; Brian T Jones"/>		
Publisher	<input type="text" value="New York : Abrams Books for Young Readers, 2010"/>		
ISBN	<input type="text" value="9780810989733"/>		
ISSN	<input type="text"/>		
OCLC	<input type="text" value="463306807"/>		

[View Holdings](#)

COMMON USES FOR AUTOMATION

What can you automate?

- Apply Constant Data
- Build a lender string (you don't have to send it to lenders)
- Send directly to lenders you define
- Move the request to Review
- Move the request to Review for Purchase
- Move the request to Document Delivery (Tipasa only)
- Move the request to WorldShare Acquisitions (Tipasa + WMS only)

Defining Automations

- You have control!
- When setting up Automations, you get to define:
 - **Match Criteria** (information about the request, patron, combination)
 - **Actions the system should take**
 - **Any exceptions** (e.g., perform a different action if you own the item your patron is requesting)
 - **Priority** (the order you want the system to process your automations when looking for a match)

Defining match criteria

What should the request look like that you want to automate?

- Should it be from a designated patron type?
- Should it be for a designated material format?
- Should it be based on the patron's need before date?
Max cost?
- Should it be based on the language of publication?
- Should it be based on the presence of a patron note?

Defining automated actions

What actions do you want the system to take on matching requests?

- Apply specified Constant Data record?
- Build a lender string from a specified Custom Holdings Path?
- Send the request directly to lenders in a Custom Holdings Path?
- Move the request to Review? Document Delivery (Tipasa only)
- Move the request to Review for Purchase?
- Move the request to WS Acquisitions (Tipasa + WMS only)

Defining exceptions

What exceptions do you want to make to these automated actions?

- Move to Review (or Document Delivery) if my patron requests an item that our library owns
- Move to Review if my patron requests an item owned by a library in a specified Custom Holdings Group
- Move to Review if my patron makes a duplicate request

MAKING THE CASE FOR AUTOMATION

Reasons to automate

- **Saves time.** Filter off a percentage of your more basic requests
- **Improves turnaround time as a borrower**
 - Request can go out to lenders as soon as it is placed by your patron
 - Sent to the Custom Holdings Groups and Paths you have been maintaining for likely and fast fulfillment by one of the first lenders in the string

Automation speeds turnaround time

Type of requesting	Number of borrowing libraries	Average borrower turnaround time
No automation	6,293	Slowest
Some automation with mediation	806	23% faster than no automation
Some unmediated requesting (direct to lenders)	421	31% faster than no automation

Turnaround time is defined here as the time from the request first being sent to a lender to the time the borrower marks it as Received

Addressing common concerns

**“I like to provide a high-touch service.
Wouldn’t automation diminish that experience?”**

- You don’t need to automate the processing of all requests
- Automate the “easy” stuff; focus on the challenges
- No one is going to complain about getting items faster

Addressing common concerns

“I want to know exactly what is happening to my requests.”


- You set up the match criteria and actions
- You can see requests that went out unmediated in your Automation Produced queue
- Request History tells you how an automation acted on each request

Tipasa® Home

▶ Discover Items

▶ Find Patrons

▼ Borrowing Requests

Copyright (1) 

New For Review (8)

Not Reviewed (7)

Reviewed (1)


Produced (3)

Automation Produced
(1)

In Transit (1) 

Received? (1)

Expired (1)

Received (8) 

Viewing request history

▼ Request History

Automation History

Date	Note
------	------

2020-05-03 19:53:02	1. Request matched profile SENDBOOKS.
---------------------	---------------------------------------

Supplier History

Date	Supplier	Response
------	----------	----------

2020-05-03 19:53:03	NDOSU	Submitted
---------------------	-------	-----------

ILL Fee Management (IFM) History

No history exists.

Addressing common concerns

“Our volume is too low to need automation.”

- No matter how low your ILL volume is, you can optimize your processes with some automation
- What could you spend more time on if you weren't doing the basic steps of applying Constant Data and manually constructing lender strings?

Addressing common concerns

“I don't want my patrons' requests to go out to lenders without checking them first. What if they request the wrong item?”

- You don't need to have automation send to lenders unmediated; start with building the lender string
- Once you feel comfortable with how automation is working, then send requests to lenders unmediated

Example of Constant Data being applied...

Tipasa® Home

NDHCO Reg ID: 148755

Borrowing Requests: [New For Review \(10\)](#)

Discover Items

Find Patrons

Borrowing Requests

Copyright (1)

New For Review (10)


Not Reviewed (9)

Reviewed (1)

Export All

Results 1 - 10 of 10

Rows 20



ID	Status	Media Type	Title	Patron	Date Requested	Need Before	Tags
202937123	Not Reviewed		Attachment across the lifecourse : a brief introduction /	Rosenfeld, Jenny	05/04/2020	05/31/2020	

...and lender string being built

Lending Libraries (CEF)

Lender String

CEF

Lender	Days To Respond	Cost	Find in the Library
Carleton University, Ottawa, CA-ON  CEF	Copies: 4 days Loans: 20 days	Copies: 20.00 CAD Loans: 30.00 CAD	 Library Catalog

Automation History

Date	Note
2020-05-04 09:12:00	<ol style="list-style-type: none">1. Request matched profile BUILDBOOKS.2. UPM deflected due to Request Type.3. TXA deflected due to Request Type.4. DXU deflected due to Request Type.5. KKU deflected due to Format Type.6. LVT deflected due to Request Type.7. SYB deflected due to Format Type.8. NOC deflected due to Request Type.9. UOH deflected due to Request Type.10. VT2 deflected due to Request Type.11. CUZ deflected due to Request Type.12. FTU deflected due to Request Type.13. TXH deflected due to Format Type.14. LGG deflected due to Format Type.15. EMU deflected due to Request Type.16. EQF deflected due to Request Type.17. MEU deflected due to Request Type.18. UMC deflected due to Request Type.19. NHM deflected due to Request Type.20. IUL deflected due to Request Type.21. U3W deflected due to Format Type.22. VYF deflected due to Format Type.23. CNMTR deflected due to Request Type.24. EUM deflected due to Request Type.25. CDN deflected due to Format Type.26. Produce option off

Addressing common concerns

“Undergrads would request too much if they realized requests were just going out automatically.”

- You not only define the actions the system takes but also which requests get automated
- Set up an automation for faculty to send to lenders; for undergrads, build a lender string and move to Review

Addressing common concerns

“What if my patron adds a note? I don’t want those requests to go out to lenders without reading the note first because the request may need special processing.”

- The presence of a patron note is a match criterion
- Move requests with notes (or notes with specific words) to review
- *Coming in June for Tipasa*: Auto-tag these requests

READING AUTOMATIONS

Automated Request Manager

The screenshot displays the Automated Request Manager interface. On the left is a sidebar menu with the following items: Interlibrary Loan Options, Borrower Data, Lender Data, Custom Holdings Groups, Custom Holdings Paths, **Automated Request Manager** (highlighted in blue), Purchase Options, Patron Request Workforms, Print Settings, Advanced Workflows, and Patron Settings. The main content area is titled "Automated Request Manager" and includes a "Help on this screen" link. Below the title is a feedback prompt: "We want to hear your thoughts on the new Automated Request Manager." The main section is titled "Borrowing New Request" and contains the text: "These standard actions are done for all Borrowing New Requests, regardless of profile:". It lists several automation checks in two columns:

- Bibliographic record**: Best matching bibliographic record applied to request
- WorldCat holdings check**: Available when holdings set in WorldCat
- Knowledge base holdings check**: Available when OCLC knowledge base holdings set in WorldCat
- Custom Holdings Group check**: Available when Custom Holdings Group holdings set in WorldCat
- US Copyright Management**: Configurable under [Advanced Workflows](#)
- OPAC holdings check**: Configurable under [Advanced Workflows](#)
- Patron approval check**: Configurable under [Patron Settings](#)
- RapidILL holdings check**: Configurable under [External System Settings](#)
- Notifications**: Configurable under [Notifications](#)

At the bottom, a box titled "Main Automations" contains the text: "Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request."

Reading automations

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)


Name	Matches	Actions	Priority i	
SENDBOOKS	Format(s): Book Age of Material between 2 and 99 years	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item. Apply Constant Data: LOANNOIFM.	1	Edit Delete

Reading Automations

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)


Name	Matches	Actions	Priority 
SENDBOOKS	Format(s): Book Age of Material between 2 and 99 years	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item. Apply Constant Data: LOANNOIFM.	1 Edit Delete

Reading Automations

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

[+ Add New](#)



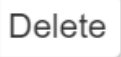
Name	Matches	Actions	Priority 
SENDBOOKS	Format(s): Book Age of Material between 2 and 99 years	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item. Apply Constant Data: LOANNOIFM.	1 Edit Delete

What other Automations make sense?

COPIES	Request Type: Copy Patron Status(es): Faculty, Graduate Student	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path NEWPATH hold(s) the item. Apply Constant Data: COPYNOIFM.	7	Edit	Delete
COPIESUNDERGR ADS	Request Type: Copy Patron Status(es): Undergraduate	If Held By Your Institution, Route to Document Delivery. (else) Route Request to Review. Build Lender String if at least 1 lender(s) from Custom Holdings Path NEWPATH hold(s) the item. Apply Constant Data: COPYNOIFM.	8	Edit	Delete
WEOWNTHIS	All Requests	If Held By Your Institution, Route to Document Delivery. (else) Route Request to Review.	10	Edit	Delete

CREATING AND EDITING AUTOMATIONS

Editing an existing Automation

Name	Matches	Actions	Priority 	 
SENDBOOKS	Format(s): Book Age of Material between 2 and 99 years	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item. Apply Constant Data: LOANNOIFM.	1	

Edit an existing Automation

Required fields are marked with an asterisk *

***Name**

SENDBOOKS

***Priority** ⓘ

1

Matches

Formats ▾

Archival/Mixed Material
Book
Computer File
Dissertation
Electronic Book

Age of Material ▾

2 but no older than 99 years

➕ Add a Match

Actions

Send Request to Lenders ▾

Minimum Lenders 1 ▾ Custom Holdings Path

TESTINSTITUTIONS ⓘ

Apply Constant Data ▾

LOANNOIFM

➕ Add an Action

Exceptions

If Held By My Institution, Route t ▾

➕ Add an Exception

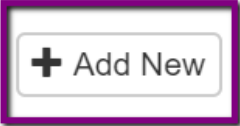
Save Cancel

Setting up a new Automation

1. Click Add New

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.



+ Add New

Setting up a new Automation

2. Get blank form

Required fields are marked with an asterisk *

***Name**

***Priority** 

Matches





 [Add a Match](#)

Setting up a new Automation

3. Enter a Name and Priority

Required fields are marked with an asterisk *

***Name**

***Priority** 

Setting up a new Automation

4. Select type of Match

Matches

--- select --- ▼

+ Add a Match

Actions

--- select --- ▼

+ Add an Action



Matches

--- select --- ▼

- select ---
- Age of Material
- Formats
- Languages
- Need at Earliest
- Patron Departments
- Patron Note**
- Patron Statuses
- Patron Will Pay Up To
- Request Sources
- Request Type

+ Add an Exception

Setting up a new Automation

5. Specify what to Match

Matches

--- select --- ▼

- select ---
- Age of Material
- Formats
- Languages
- Need at Earliest
- Patron Departments
- Patron Note**
- Patron Statuses
- Patron Will Pay Up To
- Request Sources
- Request Type

[Add an Exception](#)

Matches

Patron Note ▼

Any words

Comma separated values. [i](#)

Setting up a new Automation

Any words vs. specific keywords/phrases

Matches

Patron Note ▼

Any words

Comma separated values. [i](#)

OR

Matches

Patron Note ▼

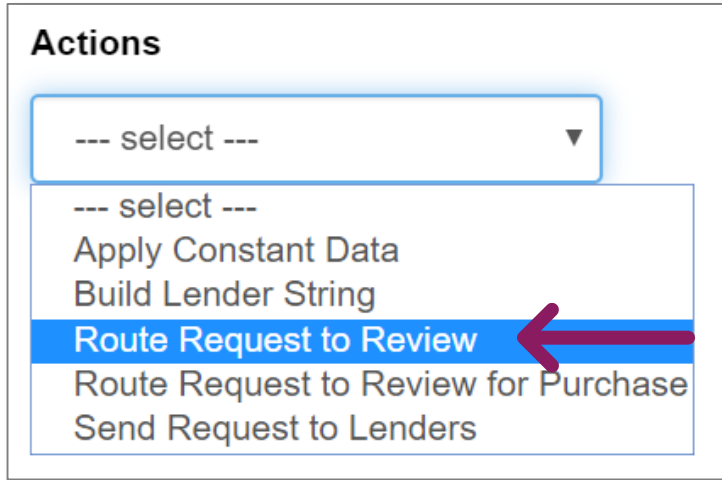
Any words

rush, need it now, today

Comma separated values. [i](#)


Setting up a new Automation

6. Select an Action and click Save



Setting up a new Automation

View the new automation

Name	Matches	Actions	Priority 	
PATRONNOTES	If any patron note exists	Route Request to Review.	1	Edit Delete
SENDBOOKS	Format(s): Book Age of Material between 2 and 99 years	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item. Apply Constant Data: LOANNOIFM.	2	Edit Delete

ADDITIONAL USES IN TIPASA

Additional uses in Tipasa

- Document Delivery (route items you own)
- Copyright Clearance
- Proven Senders
- **Coming soon: Auto-tagging**

ASSESSING AUTOMATIONS

OCLC Usage Statistics



Please enter your OCLC authorization and password

Note to FirstSearch users:
Enter your FirstSearch authorization and Administrative or Statistics password.

Authorization:

Password:

[Sign In](#)



WorldCat.org

OCLC WorldShare Interlibrary Loan

Cataloging

COUNTER

Digital Collections

Link Resolver

WebDewey

Assessment Tools

Institution: OMB

- WorldShare ILL Purchase Request
- Resource Sharing Borrower Reasons For No Report
- Resource Sharing Lender Reasons For No Report
- Borrower Resource Sharing Stats Report**
- Lender Resource Sharing Stats Report
- Strategic Union List Report
- Borrower Activity Overview Report
- Lender Activity Overview Report
- Borrower Transaction-Level Detail Report
- Lender Transaction-Level Detail Report
- eSerials Requests by Journal Title Report
- Serials Request Overview Report
- Copyright Compliance Payment Report
- Daily Article Exchange Lending Report
- Institution Article Exchange Monthly Uploads

www.stats.oclc.org

Borrower Resource Sharing Stats

Borrower Resource Sharing Stats Report

- Contains one month of data at a time
- Can export to Excel and add individual months' data into one Excel file

Borrower Resource Sharing Stats Report							
REPORTING PERIOD: April 2020		INSTITUTION: ND HENNEPIN CNTY LIBR			SYMBOL: NDHCO		
Lender Symbol	Lender Full Name	Lender State	ILL Record Number	Illiad TN	Direct Request: Unmediated	Direct Request: Mediated	Title

Assessing your Automations

Request Initiated Date	Source	Borrower Filled Date	Borrower Cancelled Date	Borrower Unfilled Date	Lender Received Date	Lender Filled Date	Request From Review	Copyright Compliance	Library Type	Borrower Completed Date	Position in Lender String
------------------------	--------	----------------------	-------------------------	------------------------	----------------------	--------------------	---------------------	----------------------	--------------	-------------------------	---------------------------

- **Source** provides information about how/where the request was submitted
- **Lender Received Date** allows you to filter out unfilled/cancelled requests
- **Position in Lender String** helps assess how your Custom Holdings Path is performing via Automation

Assessing Automations: Percentage of unmediated, mediated, and manual requesting

F	G
Direct Request: Unmediated <input checked="" type="checkbox"/>	Direct Request: Mediated <input type="checkbox"/>
Y	N
Y	N
Y	N
Y	N
Y	N
Y	N
Y	N
Y	N
Y	N

- Filter first to Unmediated = Y; get a count
- Then filter to Mediated = Y; get a count
- Finally, filter to Unmediated = N **and** Mediated = N; get a count

Assessing Automations: Position in lender string

F	AT
Direct Request: Unmediated	Position in Lender String
Y	1
Y	3
Y	5
Y	3
Y	1
Y	2
Y	6
Y	2
Y	3
Y	3
Y	2
Y	3
Y	2
Y	1
Y	3
Y	2
Y	1
Y	1
Y	1
Y	1
Y	1
Y	1
Y	1
Y	1
Y	1

- In Excel, filter by Unmediated request = Y
- Calculate the average value for **position in the lender string** for these requests
- Compare to average value for **position in the lender string** for requests that are **Mediated** as well as requests that are totally manual

TAKEAWAYS AND GETTING ASSISTANCE

Suggested to-do list

- **Review the checklist**
 - Uses for Automations
 - Creating Automations
 - Assessing Automations
- **Attend next Friday's Office Hour**

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

Office Hour: Friday, May 15

1:00-2:00 pm Eastern Time

 Cisco Webex For OCLC

Register for Office Hours: Automate your Request Process

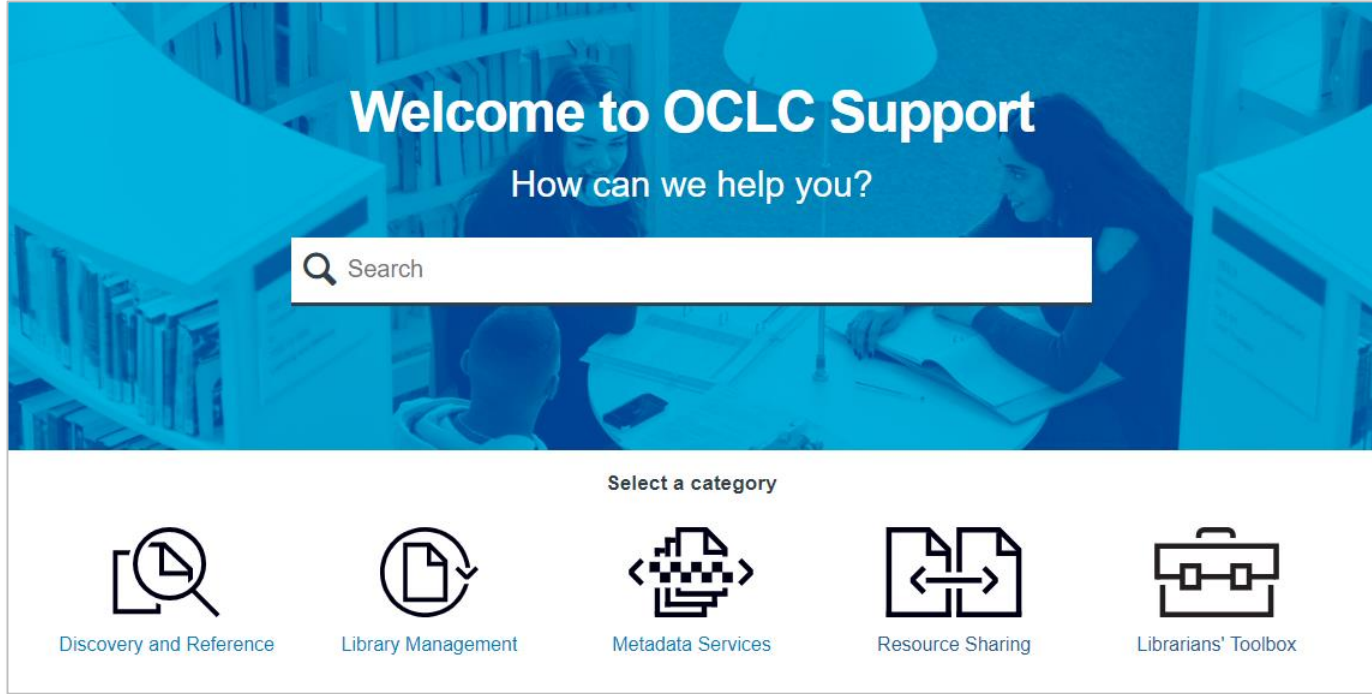
[English : New York Tim](#)

Please provide the following information to register for this training session. You will receive an email confirmation of your registration.

Session Information

Topic:	Office Hours: Automate your Request Process
Session status:	Not Started
Session dates:	Friday, May 15, 2020
Starting time:	1:00 pm, Eastern Daylight Time (New York, GMT-04:00)
Duration:	1 hour
Presenters:	Alena Miller,Audrey Heisel,Jenny Rosenfeld,Laura Kreis,Heather Black

OCLC Support

The banner features a blue-tinted photograph of three people in a library setting. A woman in the foreground is looking at a laptop, while another woman and a child are visible in the background. The text 'Welcome to OCLC Support' and 'How can we help you?' is overlaid in white. A search bar with a magnifying glass icon and the text 'Search' is positioned below the text. At the bottom, there is a white bar with the heading 'Select a category' and five icons representing different service areas: Discovery and Reference, Library Management, Metadata Services, Resource Sharing, and Librarians' Toolbox.

Welcome to OCLC Support

How can we help you?

Search

Select a category

- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing
- Librarians' Toolbox

oclc.org/support

help.oclc.org

OCLC Resource Sharing team



Q&A

OCLC Support

support@oclc.org

Atlas Systems Support

support@atlas-sys.com

**Because
what is
known must
be shared.®**