

# Sharing Breakthroughs

2017 OCLC RESOURCE SHARING  
CONFERENCE

**What are you waiting for? The greatest  
summer time library project EVER!!**

**TONY MELVYN**  
**OCLC**



# Tony Melvyn

Product Manager - OCLC Delivery  
Services

# Deflection many libraries create

▼ Deflections

Add

Deflect all E

EditDelete

SERVICE	FEES	BORROWERS	ITEMS
<div>Requests: Copy or Loan</div> <div>Deflection Type: Enable Real Time Deflection</div>			<div>Formats:</div> <div><div>✓ Archival/Mixed Material</div><div>✓ Computer File</div><div>✓ E-Audio Book</div><div>✓ E-Serial</div><div>✓ E-Text</div><div>✓ Internet Resource</div></div>
Note:			

# Deflections many libraries create

▼ Deflections ➕ Add

**Deflect all E** ✎ Edit 🗑 Delete

SERVICE	FEES	BORROWERS	ITEMS
<b>Requests:</b> Copy or Loan <b>Deflection Type:</b> Enable Real Time Deflection			<b>Formats:</b> <ul style="list-style-type: none"><li>✓ Archival/Mixed Material</li><li>✓ Computer File</li><li>✓ E-Audio Book</li><li>✓ E-Serial</li><li>✓ E-Text</li><li>✓ Internet Resource</li></ul>
<b>Note:</b>			

Respond

- I didn't think I could lend E
- I don't know if my license allows me to lend E
- How could I lend E

# WorldCat knowledge base and OCLC ILL

## Components of article sharing solution

1. WorldShare ILL/Tipasa/ILLiad
2. WorldCat knowledge base
3. License management tool

# WorldCat knowledge base

- Combines data about your library's electronic content with links to the content
- Included in your OCLC Cataloging subscription at no additional charge
- Contains:
  - Licensed e-content (both journal and monograph)
  - Open access e-content
  - Print journal content

# OCCLC License management tool

- In WorldCat knowledge base, indicate which collections and titles are licensed for ILL:
  - Yes
  - No
- Provide any instructions/restrictions for lending your licensed content
  - Print and Send
  - Print and Scan
  - In Country
  - Profit/Not for Profit

# Two things to remember:

How the services affects OCLC ILL

1. As a lender you will receive links
2. Revamped Direct Request for articles



# As a lender you will receive links

- **Add your library's knowledge base to the WorldCat knowledge base to benefit from efficiencies as a lender of e-articles**
- **Lending requests with OCLC numbers are processed against the WorldCat knowledge base**
- **When your library holds the requested item electronically and can supply that item the service provides a link to the document in the ILLiad collection tab or on the request in Tipasa**

# It is all about those links

- If a picture is worth a thousand words...
- Take a look at this Tipasa lending request...

# It is all about those links

- If a picture is worth a thousand words...
- Take a look at this Tipasa lending request...

# Lender view from Tipasa

WorldShare®

Need Help? ▼ Super NDOAG ▼

User support info

Metadata

Interlibrary Loan

Admin

Interlibrary Loan+ Home

Discover Items

Find Patrons

Borrowing Requests

Document Delivery

Lending Requests

Can You Supply? (5)

Considering - Copies (1)

Considering - Loans (4)

Supplied (46)

Shipped/In Transit (23)

Not Received (6)

Overdue (14)

Renewal Requested (9)

Received/In Use (8)

Returned (4)

Returned/In Transit (4)

Returned/Complete?

172542099: Therapeutic advances in respiratory disease.

NDOAG Reg ID: 148456

Previous Request Next Request

Can you supply? ☐ Yes ☐ Print Shipping Labels ☐ Print Book Straps/Stickers ☐ No - No reason given  Group Affiliations: ILLD, TEST

Apply constant data: Actions:

Request Details (Request ID 172542099)

Status

Type

Source

OCLC

Lenders

URL Type

URL

Considering

Copy

PATRON

225470254

\*NDOAG

Article Exchange

[OCLC Article Exchange](#)

Borrower

Max Cost

Need Before

Requested on

Referral Date

Shipped Date

NDOSU

None Specified

03/01/2017

01/30/2017

01/30/2017

02/01/2017

Request Tags

Title

ISSN

Publisher

Format

Article Title

Article Author

Volume

Issue/No

Issue Date

Pages

Verification

Therapeutic advances in respiratory disease.

1753-4658

London, UK : SAGE Publications, 2007

Periodical/Article

Effectiveness of pharmacotherapy and behavioral interventions for smoking cessation in actual clinical practice.

N Rovina

3

6

2009

279-87

source=ndosu.worldcat.org/worldcat; User:n/a

Local ID

Open Access

No links found

Library's Holdings Information

Collection

ILL OK?

Yes

Print then mail or fax

# Lender view from ILLiad

System 42 - Lending Request

Lending Processing OCLC

Cancel Request Conditionalize Request Finished Searching Yes Yes With Due Date No Route Policies Directory Resend Request Billing View Send E-Mail Print Request Add to Print Queue Print and Empty Queue Pending Updates System

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number 42 Article Loan

Username Lending Service Type

Transaction Date 9/28/2011 11:23 AM Not Wanted After 10/28/2011

Delivery Method Site

Service Level Regular Shipping Options Mail

Billing Account Doc Type

OCLC Information

ILL Number 10004340

OCLC Number 225470254

Lending String \*OCL,IUL

Borrower OZY 1

System ID OCLC 0

OCLC Status IN\_PROCESS

Article Info Loan Info Collections Local Holdings Imported Request Copyright In

Collection	ILL Terms	Instructions	URL
SAGE Health Science Package	Yes	Print then se...	<a href="http://kbwcap01xdu.dev.oclc.org:22340/">http://kbwcap01xdu.dev.oclc.org:22340/</a>
SAGE STM Package	Yes	Scan	<a href="http://kbwcap01xdu.dev.oclc.org:22340/">http://kbwcap01xdu.dev.oclc.org:22340/</a>

Accept Alternate Edition

Accept Non English

Allow Copies?

Copyright Already Paid?

Allow Renewal?

Library Use Only?

Replacement Pages?

Priority Shipping

Ariel

Odyssey (Missing OdysseyIP)

Item Information

Call Number

Location

Due Date

Reason For Cancellation

Item Num/Ref Num

ISxN 1753-4658

Special Instructions

Max Cost/Pieces

Citation Information

Cited In London, UK ; SAGE Publicat

Title

Date

Volume/Pages

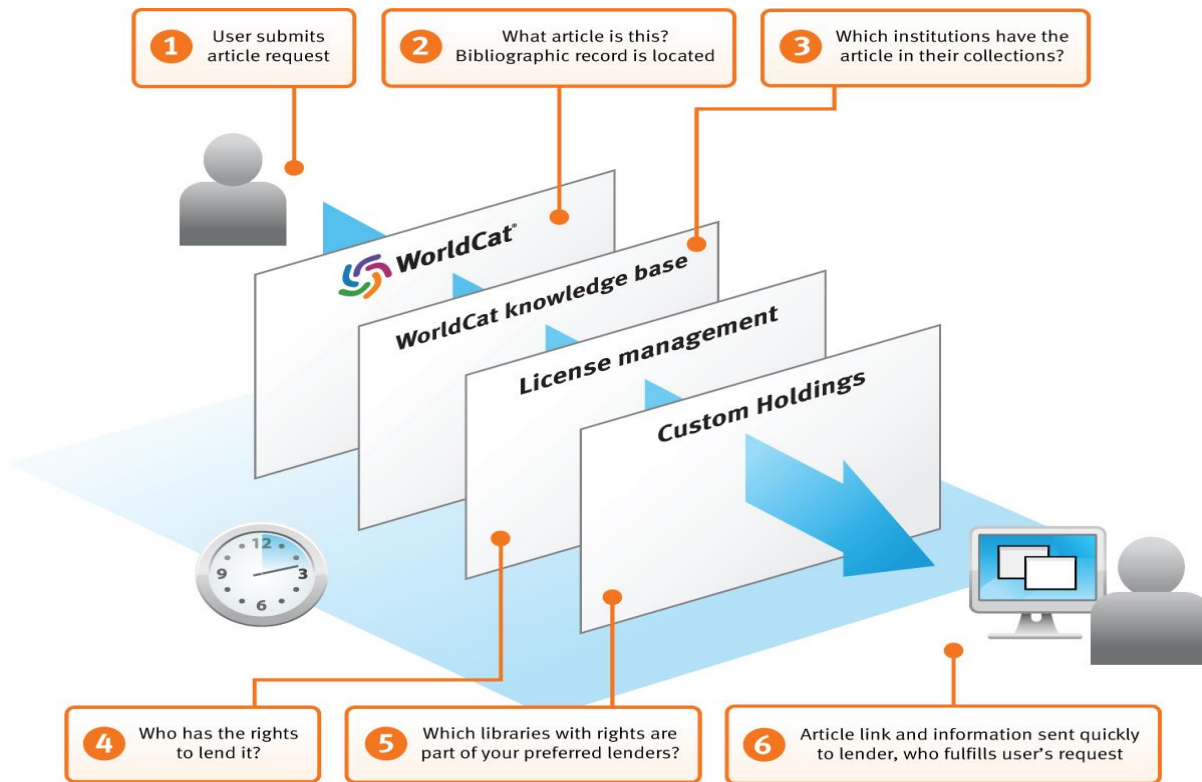
Awaiting Lending Request Processing

Lending

# Direct Request for articles

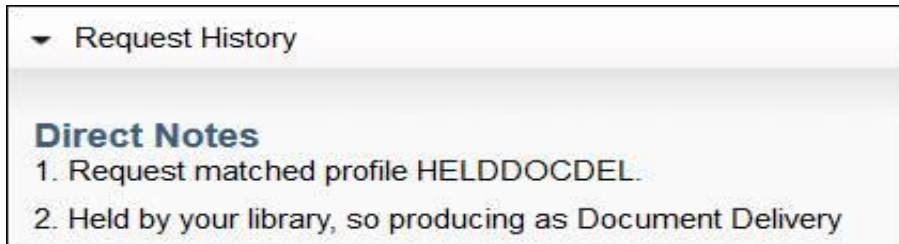
- Articles processing is complex:
- Need to know: which library owns the article, year, date, volume, etc.
- The WorldCat knowledge base provides Direct Request with the detailed article-level information
- Direct Request for articles uses new license management tools to determine which lenders have the OK from publishers to lend the material

# Direct Request for articles



# Direct Request for articles in Tipasa

1. When using Direct Request and your library owns the title. Fulfillment type automatically changed to Doc Del
2. Two ways to deliver the document to the patron
  - Article Exchange
  - KB Link





# Via Article Exchange

WorldShare

Need Help? ▼ Super NDOAG ▼  
User support info

Metadata

Interlibrary Loan

Admin

Tipasa™ Home

Discover Items

Find Patrons

Borrowing Requests

Document Delivery

New (1)

New - Copies (1)

Therapeutic advances in respiratory disease

Create Request

Lending Requests

Purchasing Requests

Print Queue (12)

Manage Copyright

Lending Priorities:

A WS ILL Test P... (0)

Ohio BESTIES (0)

Next Best Group... (0)

172541137: Therapeutic advances in respiratory disease.

NDOAG Reg ID: 148456

Previous Request

Next Request ▶

Mark as Complete

Change Fulfillment Type ▼

Cancel Request

Actions:

Mark as Verifying ▼

Save

Reset

Email

Print Now ▼

Request Details (Request ID 172541137)

Source

PATRON

Status

Delivering

Open Access

No links found

Library's Holding Information

Collection: [SAGE Premier Health Sciences 2008](#)

Fulfillment Type

Document Delivery

URL Type

Article Exchange ▼

URL

http://oc.lc/WzFjYr

[OCLC Article Exchange](#)

Preview

Cancel

Password

M6FQxVhu

Title / Journal

Therapeutic advances in respiratory disease.

Uniform Title

Author

Publisher

London, UK : SAGE Publications, 2007

ISBN

ISSN

1753-4658

OCLC

225470254

DOI

PMID

Dissertation

Sharing Breakthroughs

2017 OCLC RESOURCE SHARING CONFERENCE

# Via the OCLC kb

WorldShare® Need Help? ▾ Elizabeth Schlueter ▾  
*User support info*

Metadata **Interlibrary Loan** Admin

Tipasa™ Home

Discover Items

Find Patrons

Borrowing Requests

**Document Delivery**

New (3) 📄

New - Copies (3)

X Biological psychology.

Create Request

Lending Requests

Purchasing Requests

Print Queue (2)

Manage Copyright

Lending Priorities:

My Buddies (0)

173509747: Biological psychology. NDRCP Reg ID: 148481  
Previous Request Next Request

Mark as Complete Change Fulfillment Type ▾ Cancel Request

Actions:  
Mark as Verifying ▾ Save Reset Email Print Now ▾


Request Details (Request ID 173509747)

Source	PATRON
Status	Delivering
Fulfillment Type	Document Delivery
URL Type	KB Link ▾
URL	
Title / Journal	Biological psychology.
Uniform Title	
Author	
Publisher	Amsterdam : North-Holland Pub. 1973
ISBN	
ISSN	0301-0511
OCLC	932509

**Open Access**  
No links found

**Library's Holding Information**  
Collection: [ScienceDirect Journals - Elsevier](#)  
Collection: [OhioLINK Electronic Journal Center](#)

# What the patron sees




Account Details - Elizabeth

⌵ Account Details

⌵ Communication Preferences

⌵ Interlibrary Loan Requests

Create Request

Request ID	Title	Status
<a href="#">173509747</a>	<b>Biological psychology.</b> Glucose improves attention and reaction to frustration in children. by Benton D Periodical/Article	Available to view 

# Print Holdings

- Your library's print holdings data can be added in two ways:
- Manually via the user interface
- Uploading a spreadsheet with the data in KBART format (a simple spreadsheet-based format that can be created in Excel or other similar tools)

# Print Holdings

## Collection: Print Test

1 of 1 Titles Selected

UTF-8

Download available

Go

Titles




Properties



Share

[Search within](#) ▼

Titles 1 - 1 of 1

Title	Identifiers	Coverage Information	Action
<a href="#">Free radical research</a>	 ISSN:1071-5762 <a href="#">Journal Homepage</a>	<b>Content availability:</b> print: 2000 -	<a href="#">DELETE</a>

[Add a new title](#)

[Upload title list](#)

[Refresh](#)

Titles 1 - 1 of 1

# Synchronization

- All knowledge base records (including local holdings) are matched to WorldCat on a nightly basis.
- Any records with OCLC numbers (this is visible from the user interface) will have holdings synchronized out to WorldCat on a nightly basis as well.
- Changes to holdings in the knowledge base should be seen in WorldCat in less than 24 hours.
- The knowledge base will either set a new holding or delete an existing holding where appropriate. It will not alter the contents of any LHRs on the record.

# OCCLC WorldCat knowledge base

- Benefits to WS ILL, Tipasa and ILLiad subscribers now:
  - More efficient [request for articles](#)
  - Filters requests for items available from your library
  - Helps staff more efficiently process incoming requests for e-articles you own
- Included in WS ILL, Tipasa and ILLiad subscriptions at no additional charge

# Your summer project

- Meet with your e-resource librarian to discuss adding e-holdings in the OCLC kb
- Determine ILL license rights
- Modify deflections to allow lending of some e-content
- Set deflections to deflect any content where license = NO
- Activate link in OCLC Service Configuration to turn on ILL e-content processing



[Metadata](#)[Interlibrary Loan](#)[Admin](#)

© 2017 OCLC. Domestic and international trademarks and/or service marks  
of OCLC Online Computer Library Center, Inc. and its affiliates.

[Metadata](#)[Interlibrary Loan](#)[Admin](#)[▶ Record Manager](#)[▼ Collection Manager](#)☒ My Selected Collections[Activity History](#)[Approve Changes to  
Global Collections](#)[View Recent Collections](#)[Create a Collection](#)[Settings](#)[▶ My Files](#)

## Record Manager

## Collection Manager

Collection

Electronic Journals Servi ?

☐ My Selected Collections

Search

☒ Search Collections with  
"Electronic Journals Service"

## Activity History

Approve Changes to  
Global Collections

View Recent Collections

Create a Collection

Settings

## My Files

## Search Collections with "Electronic Journals Service"

Collection Actions

Filter by Select Reset

Results 1 - 1 of 1

Rows 25 1

	Collection	Provider	Account Number	Created	In My Holdings	Shared	Shared by
<input type="checkbox"/>	<a href="#">EBSCOhost Electronic Journals Service (EJS)</a> Customizable	EBSCOhost EJS		7/24/2012, 12:39:17 AM	<div>Not Held by my library ( 0 / 32,276 ) Titles</div> <div>Select Collection</div>		

Results 1 - 1 of 1


Rows 25 1

## Record Manager


## Collection Manager

Collection ▾

Electronic Journals Servi ?

 My Selected Collections

Search

 Search Collections with  
"Electronic Journals S... Collection: EBSCOhost  
Electronic Journals Service...

Activity History

Approve Changes to  
Global Collections

View Recent Collections

Create a Collection

Settings

## My Files

## Collection: EBSCOhost Electronic Journals Service (EJS)

Save

Contribute Changes to Global Collection ▾

 This collection is currently locked for re-indexing. Changes to the selections inside of it cannot be made until the previous action is complete. Visit Activity History to check the current status.

## Properties

## Linking

## Holdings and MARC Records

Maintain WorldCat Holdings

- ☒ Use institution setting  
☐ Disable for this collection

Data Sources

- ☒ All approved data sources  
☐ Selected data sources only  
☐ Manual upload only

ILL allowed

- ☐ Yes  
☒ No

ILL Requirement

Choose... ▾

## Record Manager

## Collection Manager

Collection ▾

Electronic Journals Servic ?

☐ My Selected Collections

Search

☒ Search Collections with  
"Electronic Journals S..."☒ Collection: EBSCOhost  
Electronic Journals Service...

## Activity History

Approve Changes to  
Global CollectionsView Recent  
Collections

Create a Collection

Settings

## My Files

## Collection: EBSCOhost Electronic Journals Service (EJS)

Save

Contribute Changes to Global Collection ▾

**i** This collection is currently locked for re-indexing. Changes to the selections inside of it cannot be made until the previous action is complete. Visit Activity History to check the current status.

## Properties

## Linking

## Holdings and MARC Records

Maintain WorldCat Holdings

- ☒ Use institution setting  
☐ Disable for this collection

Data Sources

- ☒ All approved data sources  
☐ Selected data sources only  
☐ Manual upload only

ILL allowed

- ☒ Yes  
☐ No

ILL Requirement

Export to Google Scholar

Enable MARC Record Delivery

Print then mail or fax  
Print then send secure electronic  
Send electronic copy  
Same country only  
Non-Profit only  
Record keeping required  
Loansome doc required  
eBook chapter lending only  
Use institution setting

## Record Manager

## Collection Manager

Collection

Electronic Journals Service ?

☐ My Selected Collections

Search

☒ Search Collections with  
"Electronic Journals S...☒ Collection: EBSCOhost  
Electronic Journals Service...

## Activity History

Approve Changes to  
Global CollectionsView Recent  
Collections

Create a Collection

Settings

## My Files

## Collection: EBSCOhost Electronic Journals Service (EJS)

Save

Contribute Changes to Global Collection ▼



Successful

Collection "EBSCOhost Electronic Journals Service (EJS)" saved successfully.

## Properties

## Linking

## Holdings and MARC Records

Maintain WorldCat Holdings

- ☒ Use institution setting  
☐ Disable for this collection

Data Sources

- ☒ All approved data sources  
☐ Selected data sources only  
☐ Manual upload only

ILL allowed

- ☒ Yes  
☐ No

ILL Requirement

Send electronic copy ✕

Interlibrary Loan Home

Discover Items

Borrowing Requests

Lending Requests

Can You Supply? (13)

Acta geodaetica et geophysica Hungarica.

New - Copies (3)

New - Loans (10)

Supplied (76)

Shipped/In Transit (28)

Not Received (1)

Recalled (1)

Overdue (25)

Renewal Requested (1)

Received/In Use (45)

Returned (21)

Returned/In Transit (21)

Returned/Complete? (20)

Purchasing Requests

174250901: Acta geodaetica et geophysica Hungarica.

NDT7P Reg ID: 116419

Previous Request Next Request

Can you supply?

Yes ☐ Print Shipping Labels  
☐ Print Book Straps/Stickers

No - No reason given

Conditional - Additional info needed

Group Affiliations: TEST, POST

Apply constant data: Actions:

Mark as Considering Save Email Print Now

Request Details (Request ID 174250901)

Status	Submitted	Borrower	NDCLV
Type	Copy	Max Cost	None Specified
Source	WSILL	Need Before	03/31/2017
OCLC	60628198	Requested on	03/01/2017
Lenders	*NDT7P	Referral Date	03/01/2017
URL Type	Article Exchange	Shipped Date	03/01/2017
URL	<input type="text"/>		

[OCLC Article Exchange](#)

Title	Acta geodaetica et geophysica Hungarica.
Uniform Title	Acta geodaetica et geophysica Hungarica (Online)
Author	Magyar Tudományos Akadémia
ISSN	1217-8977
Publisher	Budapest : Akadémiai Kiadó
Format	ePeriodical
Language	English
Article Title	Historical maps of Ljubljana for GIS applications
Article Author	Tomaž Podobnikar
Volume	45
Issue/No	1
Issue Date	2010
Pages	80-88
Verification	WorldCat (60628198) Physical Description: volumes : illustrations : 24 cm

[Search my library's online catalog](#)

Local ID

Open Access

No links found

Library's Holdings Information

Collection	<a href="#">EBSCOhost Electronic Journals Service (EJS)</a>	
ILL OK?	Yes	Send electronic copy

# Your summer project

- Too many titles 😞
- I don't know what my ILL license terms are 😞
- I can't get help adding my e-holdings 😞



# Your summer project

- Too many titles 😞
  - Just add titles from those titles most frequently requested
  - Use the data from your Lender Reason for No Report
- I don't know what my ILL license terms are 😞.
  - Do a simple google search for the publisher and license rights
- I can't get help adding my e-holdings 😞
  - Do it yourself it is easy peasy

# What are you waiting for?

- Next fall when ILL lending ramps up you will be ready to take on more requests and improve your turnaround time to hours versus days
- You will be able to catch those requests from your patrons where you own the material

**Finally what are you waiting for?**

# Sharing Breakthroughs

2017 OCLC RESOURCE SHARING  
CONFERENCE

thank you