

# OCLC WORLDCAT RESOURCE SHARING

## Staff View Interface:

Logon at <http://firstsearch.oclc.org/>

Logon to the FirstSearch Administrative Module at <http://firstsearch.oclc.org/admin>

## Staff View resources:

Staff View Help

OCLC WorldCat Resource Sharing Tutorials – Guided tour and demonstration of the Staff View features and functions. <http://www.oclc.org/support/training/firstsearch/tutorial/>

## Online and print resources:

NEBASE Web pages: <http://www.nlc.state.ne.us/netserv/nebase/resourcesharing.html>

- Services & Software
- Support – Free Online Tutorials
- Libraries Very Interested in Sharing (LVIS)

OCLC Web pages: <http://www.oclc.org/services/sharing/>

- Information for individual services
- Software
- Technical Bulletins

## Human resources:

NEBASE - (800) 307-2665:

Christa Burns, OCLC Member Services Coordinator, [cburns@nlc.state.ne.us](mailto:cburns@nlc.state.ne.us)

OCLC Help Desk - (800) 848-5800, [support@oclc.org](mailto:support@oclc.org)

## **ILL-L**

Discussion forum for anyone with a professional interest in interlibrary loan, document delivery and resource sharing.

To subscribe, go to <http://lists.webjunction.org/mailman/listinfo/ill-l>

## **OCLC SHARING-L**

OCLC's Resource Sharing broadcast-only mailing list

To subscribe, go to <https://www3.oclc.org/app/listserv/sharingl/>

For other mailing lists of interest to librarians, see NLC's web page at: <http://www.nlc.state.ne.us/lists/>

## **WHAT IS INTERLIBRARY LOAN?**

One library sends another library an item that must be returned within a certain length of time, or a copy of an item that may be kept by the patron. The lending library may, or may not, charge a fee for this service. The request may be placed in many ways, such as by telephone, fax, e-mail, shared local system, ALA form, ARIEL, or the OCLC ILL subsystem.

### **Information about ILL**

#### **Rules and Regulations**

Copyright law relating to photocopies:

- United States Copyright Office  
<http://www.copyright.gov>
- CONTU (National Commission on New Technological Uses of Copyright Works)  
<http://www.cni.org/docs/infopols/CONTU.html>

Up to five articles copied from the same periodical title that have been published within the past five years may be requested without copyright fees being required. Copyright fees must be paid for the sixth and additional articles.

- Copyright Clearance Center  
<http://www.copyright.com>
- Nebraska Library Commission Best of the Web: Copyright  
<http://www.nlc.state.ne.us/nsf/copyright.html>
- Document suppliers

ILL records retention: borrowing libraries must keep records for the current calendar year plus the three previous calendar years.

Interlibrary loan codes:

- Interlibrary Loan Code of Nebraska  
<http://www.nlc.state.ne.us/ref/tnebill.html>
- National Interlibrary Loan Code for the United States - 1994, revised 2001  
<http://www.ala.org/ala/rusa/rusaprotocols/referenceguide/interlibrary.htm>

The borrowing library is responsible for an item from the moment it leaves the lending library until the moment it is returned to the lending library.

## WHO ARE YOU AND WHAT ARE YOUR POLICIES?

### OCLC ILL Policies Directory

The OCLC ILL Policies Directory provides users of OCLC ILL with a web-based, central source for entering and retrieving policies, billing, system, and contact information for member libraries worldwide.

You may access the Policies Directory from within the Staff View interface. Click the **Policies Directory link** located near the top of every Staff View screen. The Policies Directory can also be accessed directly at <http://illpolicies.oclc.org>

*The ILL Policies Directory replaced the Name-Address Directory(NAD) for ILL use only on August 24, 2003.* The red question marks on holdings displays in the Staff View point to the Policies Directory instead of the NAD. No information was migrated from the NAD to the Policies Directory. Basic institution information has been provided in the Policies Directory for every member library which means there is a high-level record available for every member library. Policies, contacts, and additional site information will need to be added by ILL users.

Instructions on searching and updating the ILL Policies Directory can be found at:

- *OCLC ILL Policies Directory Quick Start Tutorial*
  - [http://www.oclc.org/resourcesharing/support/quickstart\\_policies.pdf](http://www.oclc.org/resourcesharing/support/quickstart_policies.pdf)
- *OCLC ILL Policies Directory Quick Reference*
  - <http://www.oclc.org/support/documentation/resourcesharing/libpolicies/getstart/>

## WHERE SHOULD ITEMS BE SENT AND RETURNED? WHEN SHOULD LOANED ITEMS BE RETURNED?

### Constant Data Records

Constant Data Records store information you use routinely when creating or responding to ILL requests. To save on rekeying fields and chancing typing errors, a Constant Data Record allows you to enter generic information once. You can create up to 1,000 Constant Data Records and modify them at any time to allow for various situations.

Using Constant Data ensures consistency and increases efficiency by letting you:

- Automatically transfer repetitive data to workforms and requests
- Add to or modify this data when processing groups of requests or responses

You create Constant Data Records to fill routine borrowing or lending situations. To start, you should have one BOOK Constant Data Record and one ARTICLE Constant Data Record.

The fields that should absolutely be filled in are *Ship To* and *Return To*. For the borrowing end you also need the *Bill To* (if different from *Ship To*), *Maximum Cost*, *Copyright Compliance Fax*, *Email*, and *Affiliation* fields. For the lending side *Due Date*, *Lending Charges*, and *Shipped* should be completed.

### Constant Data Setup

In the **FirstSearch Administrative Module** (<http://firstsearch.oclc.org/admin>), click the **Resource Sharing** tab, then in the **Staff ILL Settings** menu on the left side of the screen, choose **Constant Data** from the pull-down menu.

#### **Edit** a Constant Data Record

You can either select the Constant Data Record you want to edit from the drop-down list or type the name of the record in the text box. Then click the **GO** button.

Fill in the fields you need to change, clicking on the grey question marks at the end of the fields for information.

Proofread the information you have typed. Click the **Save Changes** button to save your changes.

#### **Create** new records

To reduce keying, the most efficient method of adding a new record is to edit an existing one. With a record on the screen, type a new name in **CD Name** field.

Fill in the fields you need to change, clicking on the grey question marks at the end of the fields for information. Proofread the

information you have typed. Click the **Save Changes** button to save the new Constant Data Record.

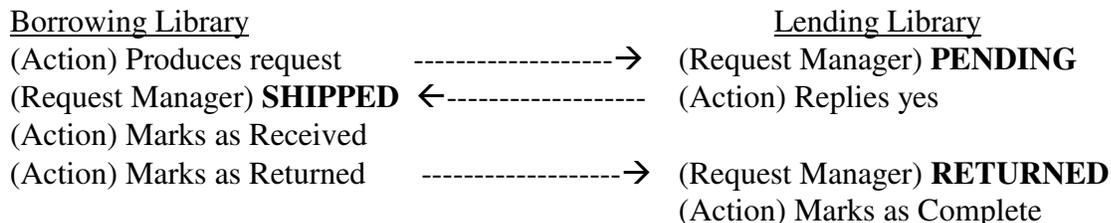
### **Deleting** records

You can either select the Constant Data Record you want to delete from the drop-down list or type the name of the record in the text box. Then click the **GO** button. After the record appears, click the **Delete Record** button.

## CREATING AND PRODUCING AN INTERLIBRARY LOAN REQUEST

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### Simple Interlibrary Loan Transaction Process



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To create a request, you must:

- 1) find a bibliographic record for the item
- 2) determine which libraries own it
- 3) determine which libraries you want to borrow from
- 4) create an ILL workform to submit the ILL request

#### *Finding a bibliographic record:*

This may be done through the OCLC ILL system or through FirstSearch.

#### *Finding library holdings:*

##### **Libraries Worldwide**

This command will display the OCLC symbols of libraries who hold this item based on location. If there are holdings for more than twenty libraries and at least ten of them are Nebraska libraries, only Nebraska libraries' symbols will be listed. If less than ten Nebraska libraries have cataloged the item but ten or more libraries in our region have, holding symbols will be displayed for our region. If fewer than twenty libraries or no libraries in our region hold the item, all the holding symbols will display.

##### **Regional Holdings**

This command will retrieve all the symbols of the libraries in our region – the states bordering Nebraska - who have cataloged this item. Use this command if Libraries Worldwide retrieves only Nebraska libraries, and you cannot find five from whom you want to borrow the item.

##### **State Holdings**

This command will display the OCLC symbols of Nebraska libraries who have cataloged this item.

<b>Display All Holdings</b>	This command will display the OCLC symbols for <b>ALL</b> OCLC libraries who have cataloged this item.
<b>Group Holdings</b>	This command will display the OCLC symbols of Nebraska libraries who have cataloged this item. Type <b>NE\$A</b> into the Group Holdings box. Then click the <b>Select</b> button.
<b>Local Holdings</b>	This column displays the periodical holdings of libraries who have entered this information.

***Deciding whom to borrow the item from:***

The decision of which library to borrow from may be based on cost, loan period, renewal policies, response time, interlibrary agreements, or other factors. ILL policies may be checked in a variety of places: the ILL Policies Directory or lists you have created. Just remember not to put a burden on any one library. By creating Custom Holdings groups and paths, you may skip this step in many cases.

***Creating a workform and producing a request:***

Once you have decided which five libraries you want to ask first,

- Click on an underlined symbol in the **Code** column to add it to your lender string *or* type the symbols into the **Lenders** boxes at the top of the record. Then click the **Transfer to ILL Staff Workform** button. This will bring up an ILL Workform with the bibliographic and constant data information in the proper fields.
- determine if the proper constant data record is set. Use the **Apply Constant Data** pull-down menu at the top of the record to select the record you want to use.

Information can be typed directly into the fields on the screen. The instructions in the borrowing portion of this handout cover typing directly in the fields; see the *WorldCat Resource Sharing Quick Reference* for further instruction.

Your library decides whether or not to enter patron information. The Patron field does appear at the lender's end but none of the other patron fields do. Data entry for the Patron field is free text, so any type of identifying characters or numbers can be typed in.

**For non-periodical requests,**

- check and make changes as needed in the Maximum Cost, Need Before date, and any other fields
- proofread and repeat process as necessary.
- when all the fields are filled in accurately, click the **Submit** button at the top of the ILL Workform. This will forward the request to the first Lender in the string.
- depending on your library's workflow, you may want to print a copy of the request at this time. Use the dark grey **Print** button at the top of the request to bring up the request reformatted for printing. Then print out the cleaned up record.

**For periodical requests via WorldCat,**

- in the Article field, type in the author's last name, first name followed by the title of the article in quotes. Example: Endicott, Benjamin "Practice What I Preach"
- fill in the Volume, Number, Date, and Pages fields as completely as possible
- in the Copyright Compliance field, choose CCG from the pull-down menu if the item is 5 years or less in age, choose CCL from the pull-down menu if the item is more than 5 years old
- check and make changes as needed in the Maximum Cost, Need Before date, and any other fields
- proofread and repeat process as necessary.
- when all the fields are filled in accurately, click the **Submit** button at the top of the ILL Workform. This will forward the request to the first Lender in the string.
- depending on your library's workflow, you may want to print a copy of the request at this time. Use the dark grey **Print** button at the top of the request to bring up the request reformatted for printing. Then print out the cleaned up record.

**For periodical requests via ArticleFirst,**

- in the Copyright Compliance field, choose CCG from the pull-down menu if the item is 5 years or less in age, choose CCL from the pull-down menu if the item is more than 5 years old
- check and make changes as needed in the Maximum Cost, Need Before date, and any other fields
- proofread and repeat process as necessary.
- when all the fields are filled in accurately, click the **Submit** button at the top of the ILL Workform. This will forward the request to the first Lender in the string.
- depending on your library's workflow, you may want to print a copy of the request at this time. Use the dark grey **Print** button at the top of the request to bring up the request reformatted for printing. Then print out the cleaned up record.