



NEBASE Hour: Streamline Your OCLC ILL with Custom Holdings & Direct Request

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ILL Custom Holdings & Direct Request

- Use them together to save time processing ILL requests
- Must set up Custom Holdings before you can use Direct Request



OCLC ILL Custom Holdings

- Specify preferred lenders in advance
 - Saves time
 - Increases efficiency
 - Reduces data entry errors



OCLC ILL Custom Holdings

- Holdings Groups
 - OCLC symbols for your preferred lending libraries
- Holdings Paths
 - Holdings Groups in order of borrowing preference



How do I choose lenders to include in my Custom Holdings Groups?

- Analyze the past borrowing patterns of your library
 - Types and quantity of borrowing requests
 - The lenders for each type of request



Create a Custom Holdings Group

- FirstSearch Administrative Module
 - <http://firstsearch.oclc.org/admin>
 - Resource Sharing →
Staff ILL Settings →
Custom Holdings Groups



Create a Custom Holdings Group

- Type a group name in the **Group Name** box
- Type a group description in the **Group Description** box (optional)
- In the **Symbols to be added or removed** box, enter the symbols of the institutions you want to add. To add multiple symbols, separate them with a space or comma. Click the **Add Symbols** button
- When all symbols have been added correctly, click the **Save Changes** button



Create a Custom Holdings Path

- FirstSearch Administrative Module
 - <http://firstsearch.oclc.org/admin>
 - Resource Sharing →
Staff ILL Settings →
Custom Holdings Paths



Create a Custom Holdings Path

- Type a group name in the **Path Name** box
- Type a group description in the **Path Description** box (optional)
- Select the groups you want to add from the **Groups available to be included in the path** box by highlighting them. Click the **Add** button. This will move that group to the **Groups chosen to be included in the path** box
- When you are finished adding groups, click the **Save Changes** button



Turn on ILL in FirstSearch

- Patrons - Fast, convenient self-service
 - Creates a button on FirstSearch citations, patron uses web form to place request
- Staff - saves time
 - Receive accurate citation information directly from FirstSearch
 - No handwritten forms to interpret



Turn on ILL in FirstSearch

- FirstSearch Administrative Module
 - <http://firstsearch.oclc.org/admin>
 - Resource Sharing →
Patron ILL Settings →
ILL Processing
 - Click the **ILL Access “On”** checkbox
 - Click the **Save Changes** button for your changes to be activated



Customize Patron ILL Request Form

- FirstSearch Administrative Module
 - <http://firstsearch.oclc.org/admin>
 - Resource Sharing →
Patron ILL Settings →
Patron ILL Request Form
 - Customize the Patron ILL Request Form
 - When you are finished, be sure to click the **Save Changes** button to save your changes and enable your settings. You will receive a confirmation message.



Direct Request

- Sends requests 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



Create Direct Request Profiles

- FirstSearch Administrative Module
 - <http://firstsearch.oclc.org/admin>
- Resource Sharing →
Staff ILL Settings →
Direct Request Profiles



Create Direct Request Profiles

- Click the **New Blank Record** button
- Required Fields -
 - Type a profile name in the **Profile Name** box
 - Choose a **Custom Holdings Path**
- Enter information in other fields as needed
- When you are finished, click the **Save Changes** button to create the profile. You will receive a confirmation message.



Useful URLs –

Custom Holdings & Direct Request

■ NEBASE OCLC ILL Custom Holdings

➤ <http://www.nlc.state.ne.us/netserv/nebase/customholdings.html>

■ NEBASE ILL Direct Request links

➤ <http://www.nlc.state.ne.us/netserv/nebase/resourcesharing.html#DirectRequest>



Questions and Answers

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