Requesting Items from SWAN Libraries
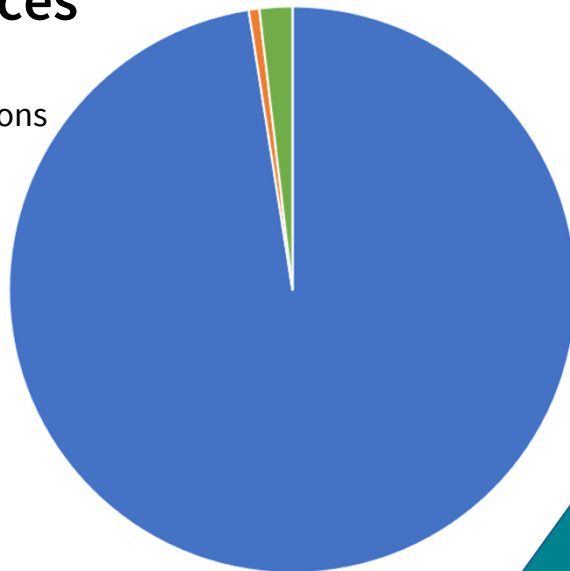
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How We Share Resources

FY19 – 3,078,944 transits (ILL transactions - material travels to another library)

- Within SWAN
  3,000,954 (97.5%)
- Borrow outside of SWAN
  20,304 (0.6%)
- Lend outside of SWAN
  57,686 (1.9%)
- Missing in Transit
  1,518 (<0.05%)
  or less than 1 in every 2,000 items

2

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SHARE Illinois

https://shareillinois.info/

3

So how can you request items from SWAN libraries?

OCLC WorldShare ILL

1. Create Custom Holdings Group of SWAN Libraries (and other consortia)
2. Create Custom Holdings Path
3. Use Custom Holdings Path when making ILL request

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To build Custom Holding Groups by consortium

Search		Library Type	Catalog	County	
		- Any - ▾	CCS ▾	- Any - ▾	Apply

Delivery route, ILDS stop/hub, etc.

FM0 GK5 GK5 GK7 GK8 GK9 GL4 GL7 GL9 GO 4 GO6 GO8 GP5 IHE IHY ILE INO IWE JAH JAI JAO JAR JAS JX7

- Choose catalog under dropdown
- Click Apply
- Then copy and paste codes into OCLC Create Custom Holding Groups interface

> Verify that your OCLC symbol is correctly identified in your library's L2 information.

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Building OCLC Custom Holding Group for SWAN Libraries

Use RAILS OCLC Custom Holdings Group Generator and search by catalog https://www.railslibraries.info/services/oclc_groups

1. Select Catalog = SWAN
2. Apply for list of SWAN Libraries
3. Copy the returned list of OCLC symbols

③ AAO BCI BFI BGI BQI BQJ BVI BXI CF0 CFO CJO CKI DFO DIO DJI DZI DZZ FJO FQI FUI FUO FVI FWI FXO GFO GIO GOY GYI HAO HDI HHO HLI HMO HPO HRO HUO I#G I@J IDP IUO IVJ JCF JCW JCX JDA JFE JFI JNG JOV JOW JOY JOZ JPK JSF JST JSU JSV JSY JSZ JVJ JVM JVX JVZ JZD JZE KGI NX0 PX0 THY TJ7 TK4 TL4 TL7 TL9 TM3 TM5 TM8 TO2 TO5 TO7 TO9 TP4 TP7 TQ6 TQ7 TR9 TS6 TS8 TT5 TT6 TT9 TU2 TU5 TU6 TU7 TV3 TV7 TW3 TW7 TW9 TYV TZ8

✓ Note: Libraries that do not have OCLC codes in their Library Learning (L2) profiles are not included.

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Finding the Custom Holdings Group interface – Service Configuration

WorldShare®
Need Help?
User support info

Metadata | **Interlibrary Loan** | Analytics | Admin

Interlibrary Loan Home

Interlibrary Loan Home

▶ Discover Items
▶ Borrowing Requests
▶ Lending Requests
▶ Purchasing Requests
▶ Print Queue (0)

Search for requests

Request ID ▼ [   ] Go
● Active Requests ○ Closed Requests

Quick Links

Borrowing:	Lending:	Other:
Produced (37)	**Can You Supply? (1)**	OCLC Policies Directory
In Transit (21)	New - Loans (1)	OCLC Service Configuration
Unfilled (2)	**Supplied**	OCLC Usage Statistics
Received	**Returned**	OCLC Article Exchange
Renewal Approved (4)	Returned/In Transit (13)	Resource Sharing News
Overdue (5)		WS ILL Training Resources
Returned		OCLC Community Center

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Create New Custom Holdings Group

WorldCat Discovery and WorldCat Local

Third-Party Integrations

Metasearch Content

WorldCat Registry

IP Addresses

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

System Wide Automated Network (73937)   [Change]

Configure Custom Holdings Groups   Help on this screen

Required fields are marked with an asterisk *
Display groups: by group name | by symbol

Custom Holdings Groups
[CCS ▾]

Custom Holdings Groups

* Custom Holdings Groups Name: Create New Custom Holdings Group
CCS

Description:
List of CCS libraries for use in WorldShare ILL Custom Holdings - these are preferred lenders

dt/05-18-20

OCLC Symbol(s)
Symbols currently in the group: 26

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Create a group

1. Enter Custom Holdings Group Name
2. Enter Description, include data added/edited and person
3. Add/Edit symbols (copied from RAILS OCLC lookup tool)
4. Paste in symbols
5. Update Symbols
6. Save As New or Save (if editing existing)

Custom Holdings Groups

* Custom Holdings Groups Name: Create New Custom Holdings Group
SWAN   (1)

Description:
SWAN Libraries
Created 9/29/2021 by DT   (2)

OCLC Symbol(s)
Symbols currently in the group: 0
Select All Clear All

Add/Edit OCLC symbols

Enter the OCLC institution codes of the libraries you want in this group below. Use spaces to separate the symbols. You can highlight and delete codes as well. Click here to open the policies directory in a separate window.

FWI FXO GFO GIO GOY GYI HAO HDI HHO HLI HMO HPO HRO HUO I#G I@J IDP IUO IVJ JCF JCW JCX JDA JFE JFI JNG JOV JOW JOY JOZ JPK JSF JST JSU JSV JSY JSZ JVJ JVM JVX JVZ JZD JZE KGI NX0 PX0 THY TJ7 TK4 TL4 TL7 TL9 TM3 TM5 TM8 TO2 TO5 TO7 TO9 TP4 TP7 TQ6 TQ7 TR9 TS6 TS8 TT5 TT6 TT9 TU2 TU5 TU6 TU7 TV3 TV7 TW3 TW7 TW9 TYV TZ8 NOTE: LIBRARIES THAT DO NOT HAVE OCLC CODES   (4)

(5) [Update Symbols] [Cancel]

Clear selected symbols   Add/Edit symbol(s)   (3)

(6)
Delete Custom Holdings Record   Save As New Save Cancel

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Symbol/Library List in Group

Once added,
symbols expand
to show libraries
for additional
reference and
checking.

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Create multiple groups

- Create a group for all the shared catalogs in Illinois
  - CCS
  - Pinnacle
  - PrairieCat
  - RSA
  - I-Share/CARLI
  - SHARE – Heartland
- Create state-wide groups
- Subject focused
- Preferred Lenders
- Delinquent Borrowing Libraries

Libraries can be defined in multiple groups. For example, National University of Health Sciences OCLC symbol might be added to all these groups:
- SWAN
- Illinois
- Academic
- Health

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Using OCLC Policies Directory for Library Search

Libraries in Illinois:

1. State/Province – select US – Illinois
2. Search
3. Display Symbols

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Copy/Paste Symbols between Tools

Copy all symbols (these will be used to create the custom group – Illinois)

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Creating Illinois Group ~3,000

- Verify at least once per year
- A group this large will take a few seconds to save – look for success message
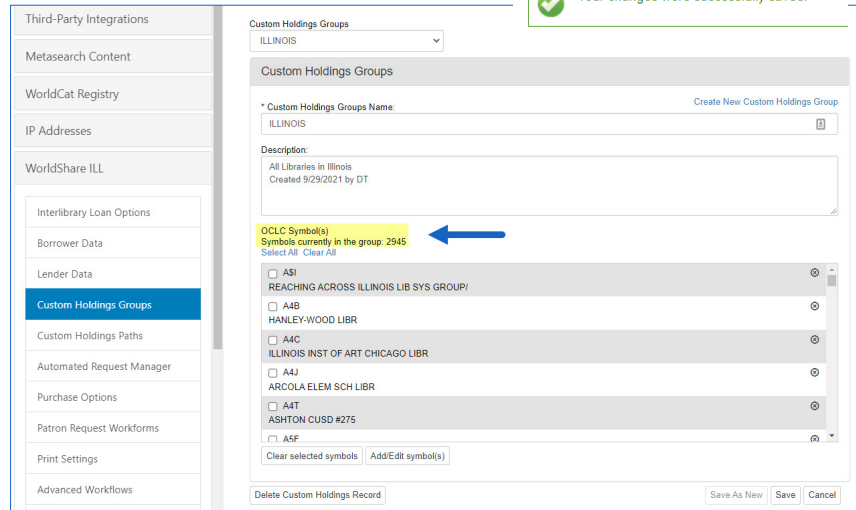
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Create Custom Holdings Path (priority list of your groups)

1. Service Configuration – Custom Holdings Paths
2. Create New
3. Name the Path
4. Description (remember date/initials)
5. Move groups into priority order
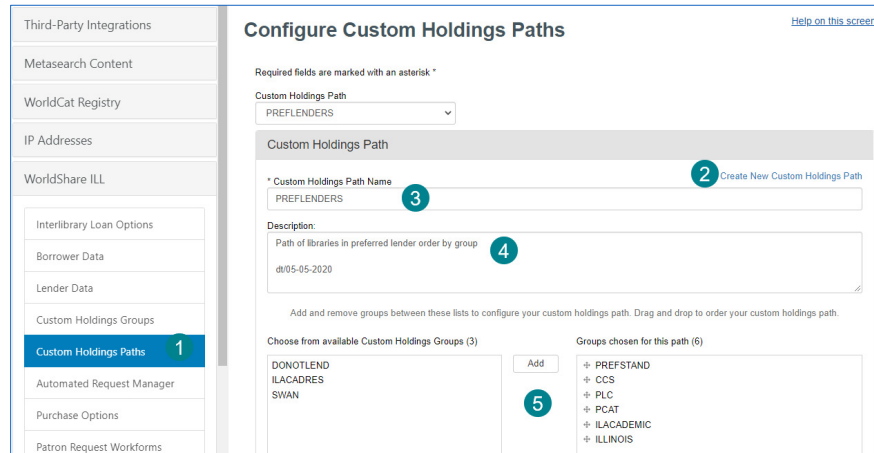
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Custom Holdings Path –Profiled Groups

6. Save

Note: in the case of SWAN, you can use our profiled group BUT IT IS **SWNG**, NOT SWAN.
Not all consortia have been profiled.

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Search for Group Affiliation in Policies Directory

While Group Affiliation is a great shortcut, not all consortia or groups in Illinois have maintained their membership. Beware!

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Create Request in WorldShare ILL

1. Filter by: Custom Holdings Path
2. Select the desired path
3. Create Request

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Send Request

By the way – Did you know you can request multiple copies to facilitate book club requests? It will set up multiple lender strings.

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Resources from OCLC

- WorldShare Interlibrary Loan Documentation
  https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan?sl=en
- Custom Holdings Groups
  https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Service_Configuration_Settings/040Custom_Holdings_Groups
- Custom Holdings Paths
  https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Service_Configuration_Settings/050Custom_Holdings_Paths
- Create and edit requests
  https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Borrowing_Requests/Create_and_edit_requests

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Questions?

- We will provide a recording of this session to our consortium colleagues and attendees
- Find a colleague in another Illinois consortium to help test your holdings groups/paths
- Our ILL Boot Camp Training series is available to all, although tailored to SWAN libraries
  https://support.swanlibraries.net/training/87282

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