

Colorado Resource Sharing Pre-conference • April 27, 2022

Basic automations

Alena Miller

Product Manager, Resource Sharing

Jenny Rosenfeld

Sr Product Analyst, Resource Sharing

You'll be able to...

Basic automations

- Describe some examples and benefits
- Understand the key components
- Create your own



[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

Examples of basic automations

- Send requests directly to lenders for books that are 2+ years old and available for free
- Send requests directly to lenders for articles that are available at low cost

Goal: Automate routine requests, so you have more time for the requests that require your attention.

Provide better service to your users!

Automations in every-day life



Benefits of basic automations

Borrowing

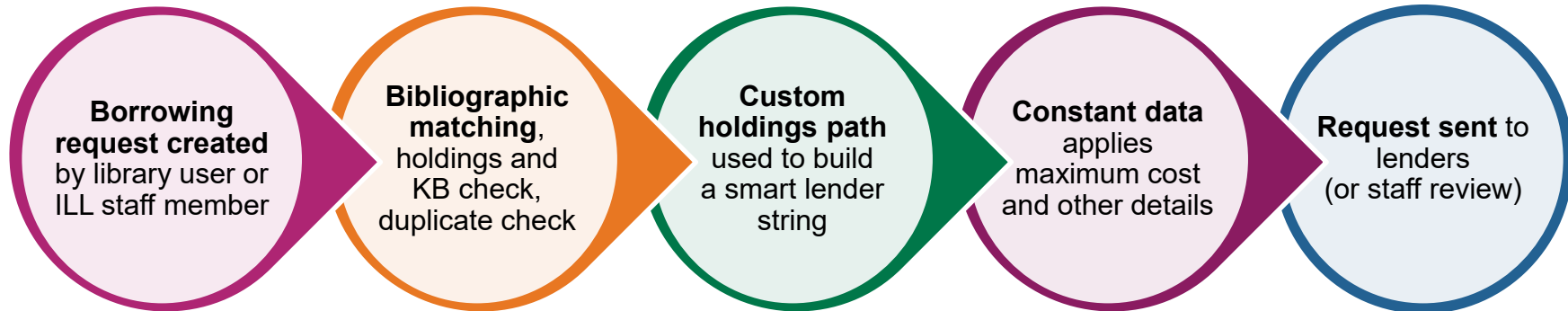
- Speeds borrowing turnaround time
- Selects the best WorldCat record
- Gets the request to your best potential lenders most quickly
- Considers deflections, licenses, and serial holdings
- Allows you to send directly to lenders or to staff review first
- Ensures accuracy of information in the request, e.g., max cost

Lending

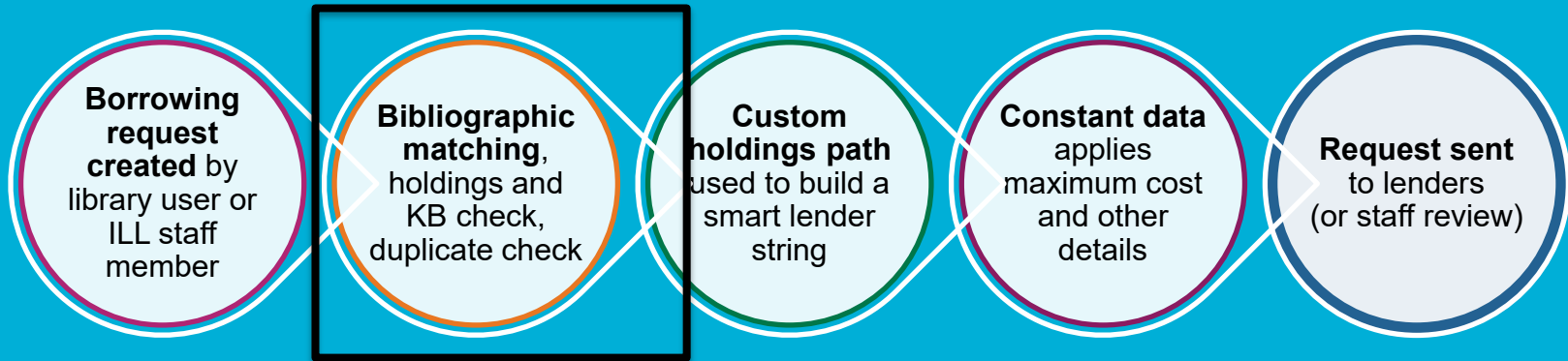
- Speeds lending turnaround time
- Load balances requests across libraries
- Considers each library's typical queue size to avoid sending too many requests at once
- Ensures requests are sent to libraries most likely to fill them

oclc.org/sf-get-started

Key components of automated requesting



BIBLIOGRAPHIC MATCHING



Submitting the request for **bib matching**

- Requests submitted via a patron request form (Tipasa or WorldCat Discovery) go through standard automations.
 - Bibliographic record matching
 - WorldCat holdings check
 - Knowledge base holdings check
- WorldShare ILL users should manually submit requests to automation.
- ILLiad users need a routing rule for “Direct Request.”

Automation depends on **bib matching**

- If the system doesn't find a match, the request goes to your review queue.
- To help the system find a match:
 - Include ISSN/ISBN and/or OCLC number on your request forms.
 - Use basic automations as a “first cut,” and trust the identifier provided by the patron.

Goal: Only review requests that weren't matched by your automation.

Manual

WorldShare®

◀ 0 Metadata Acquisitions Licenses Circulation Interlibrary Loan Analytics Admin

Tipasa® Home

▶ Discover Items

▶ Find Patrons

▼ Borrowing Requests

AE Alert (1)

Copyright (15) 📄➡

New For Review (76)

211235660: Indian journal of gastroenterology : official journal of the Indian Society of Gastroenterology.

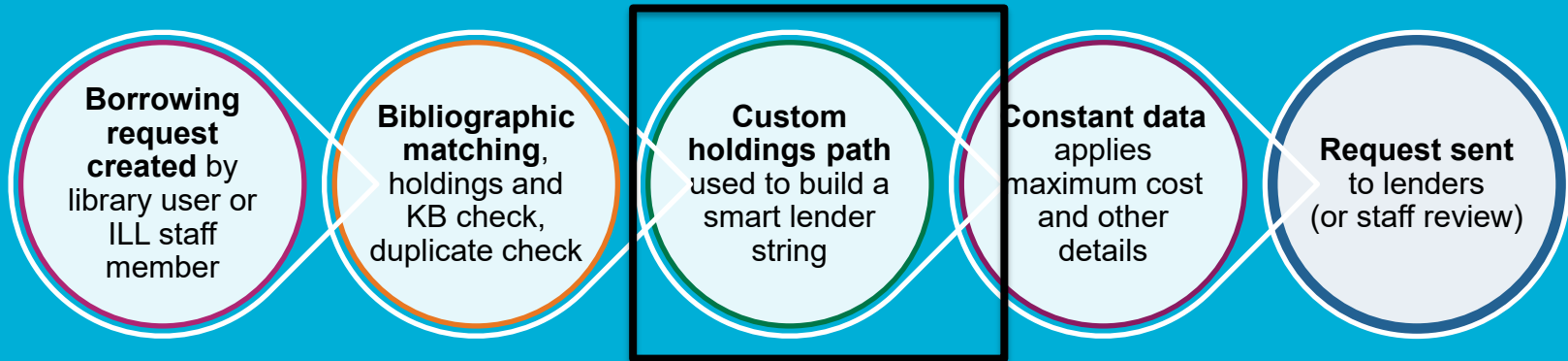
Send Request ▼ Change Fulfillment Type ▼ Cancel Request

Send to Automation

Request Purchase Staff Notes 0

▼ Request Details (Request ID 211235660)

CUSTOM HOLDINGS PATH



Use a **path** of “best” lenders

- Things to consider when picking best lenders
 - Free or reciprocal
 - Fast turnaround, good fill rate
 - Geographically close (for loans)
- Order the groups in your paths to match your library's needs.

Goal: Save time by no longer manual building lender strings.
And get requests to the best potential lenders quickly.

An example custom holdings path

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Custom Holdings Path

* Custom Holdings Path Name

FREEBOOK

Create New Custom Holdings Path

Description:

Reciprocal, LVIS, and other free lenders - used for loan automation (created Dec 2021)

Add and remove groups between these lists to configure your custom holdings path. Drag and drop to order your custom holdings path.

Choose from available Custom Holdings Groups (25)

ALISDEMOTEST

CCOV

EXPRESS

FASTCOPIES


Add

Groups chosen for this path (3)

✚ TRISTATE

✚ LVIS (profiled groups)

✚ FREE

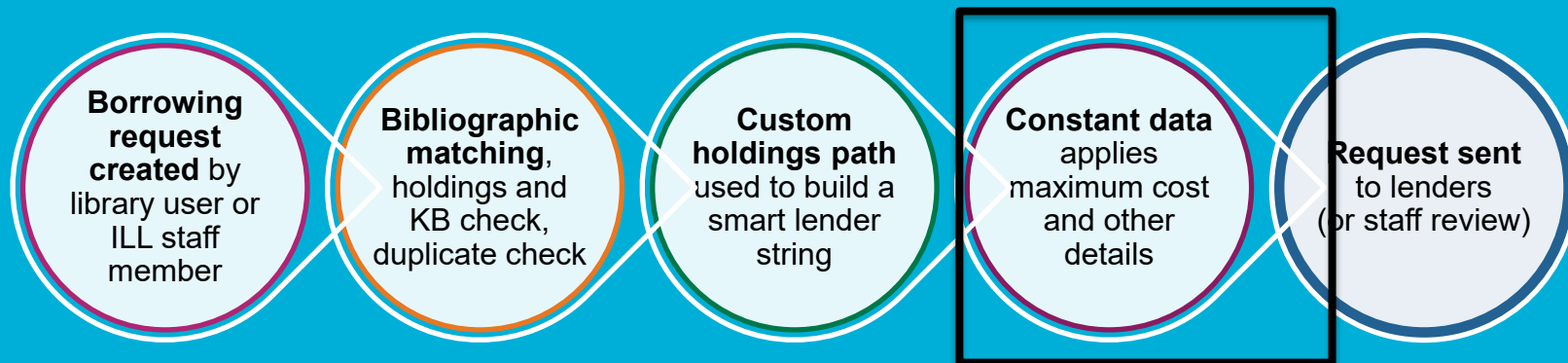
 OCLC

Custom holdings path

Loan examples		Copy examples	
FREEBOOK <ol style="list-style-type: none">1. Your free/reciprocal lenders (in-state)2. LVIS* (in-state)3. LVIS (all states)4. Your free/reciprocal lenders (other states)	FAVORITELENDERS <ol style="list-style-type: none">1. Your free/reciprocal lenders (in-state)2. Your low-cost lenders (in-state)3. Your low-cost lenders (other states)4. Your other reliable lenders	FREECOPY <ol style="list-style-type: none">1. LVIS2. Your free/reciprocal lenders	SUPERFAST <ol style="list-style-type: none">1. Your most reliable/fast lenders (e.g., Express libraries**)2. Your next most reliable/fast lenders

* Members commit to share with other LVIS members at no charge. **Members commit to 18-hour average turnaround time.

CONSTANT DATA



Ensure accuracy with constant data

- To ensure you are not charged:
 - Specify Maximum Cost = 0.00
 - Deselect IFM
- To enforce a max cost:
 - Specify Maximum Cost = 20.00 (for example)
 - Select IFM
- For loans, consistently apply other important data:
 - Shipping and billing addresses
 - Preferred shipping methods
 - Borrowing notes

Ensure accuracy with constant data

(continued from previous slide)

- Typically use one constant data records for loans and another for copies.
 - However, DEFAULT can be used for both if your max cost is the same for loans and copies.

Goal: Ensure your max cost and other borrowing data are consistently applied to requests.

An example constant data

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings

Configure Borrower Constant Data [Help on this screen](#)

Required fields are marked with an asterisk *

Constant Data Record

FREE

Borrowing Library Information

* Constant Data Record Name:

FREE

[Create New CD record](#)

Description:

Used for automation - max cost 0.00, no IFM (created Dec 2021)

•
•
•

Borrower Data

Lender Data

Custom Holdings

☐ ILL Fee Management (IFM):

Maximum Cost:

0.00

 Currency:

USD

If you only want items that are free, enter 0.00

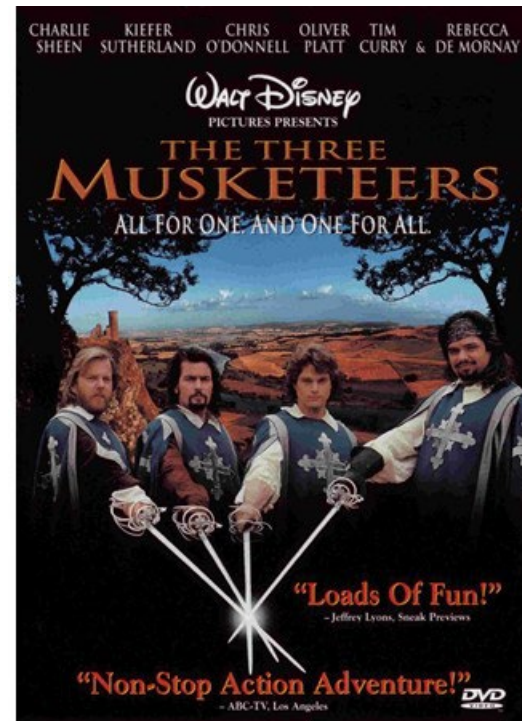
If you do not enter an amount, you will be responsible for whatever the lender charges.

CREATE YOUR AUTOMATION

All for one, and one for all

Matches	Actions
Request Type: Loan	<p>If Held By Your Institution, Route to Review. (or) If Duplicate Request, Route to Review. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path FAVORITELENDERS hold(s) the item. Apply Constant Data: LOANS.</p>
Request Type: Copy	<p>If Held By Your Institution, Route to Review. (or) If Duplicate Request, Route to Review. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path SUPERFAST hold(s) the item. Apply Constant Data: COPIES.</p>

[oclc/basic-automations](https://oclc.org/basic-automations)



This Photo by Unknown Author is licensed under [CC BY-SA](https://creativecommons.org/licenses/by-sa/4.0/)

Create your automation

1. In OCLC Service Configuration (worldcat.org/config/), navigate to WorldShare ILL > Automated Request Manager.
2. Click either **Add New** or **Edit** (for an existing automation).
3. Name your automation.
4. Specify **Matches**, **Actions**, and **Exceptions**.
5. Click **Save**.

Open the automated request manager

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Patron Request Workflows

Print Settings

Advanced Workflows

Patron Settings

Automated Request Manager

[Help on this screen](#)

[worldcat.org/config/](#)

Borrowing

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

Name	Matches	Actions	Priority ?	
COPIES	Request Type: Copy	<div>If Held By Your Institution, Route to Document Delivery. (or) If Duplicate Request, Route to Review. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TONYTEST10892 hold(s) the item. Apply Constant Data: DEFAULT.</div>	1	<div>EditDelete</div>








Create a new automation

Required fields are marked with an asterisk *

*Name	*Priority ⓘ
<input type="text"/>	<input type="text"/>
Matches	
<div>--- select --- ▼</div>	⊖
+ Add a Match	
Actions	
<div>--- select --- ▼</div>	⊖
+ Add an Action	
Exceptions	
+ Add an Exception	

SaveCancel

Add a name and priority

Name	Matches	Actions	Priority 
Required fields are marked with an asterisk *			
*Name <input type="text" value="BASICLOAN"/>			*Priority  <input type="text" value="10"/>
Matches			
<input type="text" value="Request Type"/>	<input type="text" value="Loan"/>		
 Add a Match			
Actions			
<input type="text" value="--- select ---"/>			
 Add an Action			
Exceptions			
 Add an Exception			

Add match criteria




Matches


<div>Request Type</div> <div>Age of Material</div> <div>Age of Material</div> <div>Languages</div> <div>Need at Earliest</div> <div>Patron Departments</div> <div>Patron Note</div> <div>Patron Statuses</div> <div>Patron Will Pay Up To</div> <div>Formats</div> <div>Request Sources</div>	<div>Loan</div> <div>2</div> <div>but no older than</div> <div></div> <div>years</div>	<div>-</div> <div>-</div> <div>-</div>
---	--	--

Exceptions


Add actions


Actions

Send Request to Lenders  Minimum Lenders 1  Custom Holdings Path FAVORITELENDERS  ⓘ -

 Add an Action

Actions

--- select --- 

- select ---
- Add Request Tags
- Apply Constant Data
- Build Lender String 
- Route Request to Review
- Route Request to Review for Purchase
- Route Request to WMS Acquisitions
- Send Request to Lenders

Add actions

Actions

--- select ---

- select ---
- Add Request Tags
- Apply Constant Data
- Build Lender String
- Route Request to Review
- Route Request to Review for Purchase
- Route Request to WMS Acquisitions
- Send Request to Lenders

Actions

Send Request to Lenders Minimum Lenders 1 Custom Holdings Path FAVORITELENDERS

Apply Constant Data LOANS

+ Add an Action

Add exceptions

Exceptions

--- select ---

- select ---
- If Duplicate Request, Route to Review
- If Held By Custom Holdings Group, Route to Review
- If Held By My Institution, Route to Document Delivery
- If Held By My Institution, Route to Review**

Exceptions

If Held By My Institution, Route to Review

If Duplicate Request, Route to Review

+ Add an Exception



Save your automation

Required fields are marked with an asterisk *

***Name** ***Priority** ⓘ

BASICLOAN 10

Matches

Request Type ▼ Loan ▼ -

[+ Add a Match](#)

Actions

Send Request to Lenders ▼ Minimum Lenders 1 ▼ Custom Holdings Path FAVORITELENDERS ⓘ -

Apply Constant Data ▼ LOANS ▼ -

[+ Add an Action](#)

Exceptions

If Held By My Institution, Route to Review ▼ -

If Duplicate Request, Route to Review ▼ -

[+ Add an Exception](#)

Save Cancel

Review

Basic automations

- Describe some examples and benefits
- Understand the key components
- Create your own

**Provide better service
to your users!**



[This Photo](#) by Unknown Author is licensed under [CC BY-SA-NC](#)

Resources

Resource	URL
Smart fulfillment <ul style="list-style-type: none">• Automated request manager• Smart lender strings	oc.lc/sf-get-started
Basic automations (examples and tips)	oc.lc/basic-automations oc.lc/basic-automations-Tipasa
Virtual Workshop Series: Learn how to fine-tune your ILL setup <ul style="list-style-type: none">• Custom holdings paths• Constant data	tinyurl.com/oclcfinetune
OCLC Support	oc.lc/support

Please share your feedback


Questions

Responses

OCLC Virtual Workshop: Basic automations

Please provide comments about the basic automations workshop.

1. Date of workshop *

Please input date (M/d/yyyy) 

2. Please rate this statement: This webinar was useful. *

☐ Strongly agree

☐ Agree


☐ Don't know

☐ Disagree

☐ Strongly disagree

3. What part of the session did you find most useful?

Enter your answer

 Estimated time to complete: 4 mins

To increase response rate, give people a heads up about how long it will take to complete the survey. We suggest adding this information to your subtitle.

[Got it](#) [Add](#)

forms.office.com/r/CzjGSdeuuy

Thank you!

Alena Miller and Jenny Rosenfeld

oclcresourcesharing@oclc.org

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