Improve your users’ experience with the new WorldCat.org and the new WorldShare ILL request form

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Product Manager, WorldCat.org

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Product Manager, Resource Sharing
## Today’s program

<table>
<thead>
<tr>
<th>WorldCat.org</th>
<th>WS ILL request form</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understanding features and subscriptions</td>
<td>• Benefits of using the WorldShare ILL request form</td>
</tr>
<tr>
<td>• Tour features in WorldCat.org</td>
<td>• End-to-end workflow</td>
</tr>
<tr>
<td>• Setting up features to enhance your library’s visibility on WorldCat.org</td>
<td>• Setting up the form</td>
</tr>
<tr>
<td>• Q&amp;A</td>
<td>• Q&amp;A</td>
</tr>
</tbody>
</table>
Poll #1 – Discovery layers

1. Which discovery service(s) does your library offer its patrons? (Multiple Choice) *
   - Bibliocommons
   - EBSCO Discovery Services
   - FirstSearch (OCLC)
   - Primo (Ex Libris)
   - Summon (Serial Solutions)
   - Wise (OCLC)
   - WorldCat.org (OCLC)
   - WorldCat Discovery (OCLC)
   - Not sure
   - Other
Poll #2 – WorldCat.org

1. If you answered yes for WorldCat.org, what are your main uses? (Multiple Choice)

- To find information about a particular topic (e.g., to find information about cats or voting rights)
- To search for browse for unknown items
- To find a location (library or open access link) for a particular item
- To find more information about a particular item (e.g., to check bibliographic metadata like publication date, table of contents, or classification number)
- To place an interlibrary loan request
- Other
Explore the new WorldCat.org

Find items in libraries near you

Search for books, articles, and more
WorldCat.org connects people to libraries

Reaches more people with a mobile-friendly and accessible experience

Connects more people to your library with tools to promote your collections

Provides users more ways to engage including easier list creation and sharing

Improves fulfillment with access to local library e-resources
Embedding libraries in a user’s research journey
Working together to reach more users on the web

**WorldCat.org**
Average 700,000 clicks to libraries each month: Desktop 62% and mobile 38%

**ILL links from WorldCat.org to libraries**
50,040 requests sent to ILL services since August 22, 2022
## Subscription features

<table>
<thead>
<tr>
<th>Library Feature</th>
<th>OCLC ILL only</th>
<th>OCLC ILL + Cataloging</th>
<th>ANY ILL + Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display link to OCLC ILL request form when IP authenticated on WorldCat.org</td>
<td>√</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Ability to update holdings in WorldCat database</td>
<td>X</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Display local full text links on WorldCat.org</td>
<td>X</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Create institutions lists on WorldCat.org</td>
<td>X</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Display library holdings on WorldCat.org All Libraries tab</td>
<td>X</td>
<td>√</td>
<td>√</td>
</tr>
<tr>
<td>Display + link to library holdings on WorldCat.org Featured Libraries tab</td>
<td>X</td>
<td>X</td>
<td>√</td>
</tr>
<tr>
<td>Allow users to favorite + filtered by your library holdings in WorldCat.org</td>
<td>X</td>
<td>X</td>
<td>√</td>
</tr>
<tr>
<td>Library page on WorldCat.org</td>
<td>X</td>
<td>X</td>
<td>√</td>
</tr>
<tr>
<td>Syndication of library materials on partner platforms like Google search results in knowledge panel links</td>
<td>X</td>
<td>X</td>
<td>√</td>
</tr>
</tbody>
</table>
Resource Sharing (ILL) displays when...

- OCLC ILL product subscription present
- Service configuration set up for ILL and IP recognition
- User is IP authenticated OR
- User is logged in with a favorite library*

*Unique to visibility subscriptions
Resource Sharing (ILL) configuration

Place Hold/Request Buttons module

IP Addresses module

OpenURL Resolvers module

oc.lc/help
Recent WorldCat.org enhancements

- IIIF viewer
- Streamlined library lists
- RIS export for citations
- Social sharing of item details
Improving engagement

Update your library’s WorldCat holdings for the best view of your collections

Use WorldCat.org staff accounts on WorldCat.org to curate lists highlighting your library’s resources

Review and Update your Service Configuration to ensure correct ILL forms, IP ranges, and links into your local OPAC

oc.lc/holdings-request
Benefits of using the WorldShare ILL form
WorldShare ILL request form

https://<yourregistryid>.account.worldcat.org/account/route/wsill/workform
10,000+
libraries in OCLC’s resource sharing network, the largest in the world.

Expand your collection with materials from thousands of libraries worldwide.
How does it benefit your ILL staff?

- **Save time**
  - Create requests without having to rekey bibliographic and patron information
  - No need to search for items due to bibliographic matching
  - Automatically create the lender string and/or send requests to lenders

- **Gain accuracy**
  - Be confident of the exact item being requested
  - Automatically apply constant data
How does it benefit your library users?

• **More options and control**
  • Request any item: “If you can find it, you can request it”
  • Available from any discovery system or remote database
  • Bibliographic information is pre-populated
  • Request details are editable – include additional information or notes
End-to-end workflow
WorldShare ILL request form

Exactly where will I save time?

Discovery
Library user finds item in catalog

Request form
Library user submits request

Automation
OCLC system applies automations

Staff review (as needed)
Library staff processes request

Lenders
OCLC system sends request to lenders
Setting up the form
WorldShare ILL request form

Request workflow

Catalog or database ➔ Request form ➔ Staff interface
## WorldShare ILL request form

<table>
<thead>
<tr>
<th>Steps</th>
<th>WS ILL</th>
<th>With WMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Customize the form fields and labels. (See WorldShare ILL Request Form.)</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>2. Set your IP range. (See Manage IP Addresses.)</td>
<td>✔</td>
<td>N/A</td>
</tr>
<tr>
<td>3. Create an OpenURL resolver. (See Manage Resolvers.)</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>4. Provide ILL buttons in your discovery service(s). (See Configure OpenURL.)</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>5. Further customize the form page. (See User Interface Options and Display Settings.)</td>
<td>✔</td>
<td>N/A</td>
</tr>
<tr>
<td>6. Recommended: Create basic automations for smart lender strings. (See Automated Request Manager.)</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
# WorldShare ILL request form

## Recipe

### Ingredients

<table>
<thead>
<tr>
<th>For the cookie:</th>
<th>Directions</th>
</tr>
</thead>
</table>
| • WorldShare username & password (admin role)  
• Form sections, fields, and labels | 1. Customize the form fields and labels. See [WorldShare ILL Request Form](oc.lc/ill-form). |
| • Library’s IP range(s) for your library  
• Library’s EZproxy “prefix” (if applicable) | 2. Set your IP range. See [Manage IP Addresses](#). |
| • Library’s registry ID | 3. Create an OpenURL resolver. See [Add an OpenURL resolver](#). |
| • For services other than WorldCat Discovery: admin access for configuration; documentation for OpenURL buttons | 4. Provide ILL buttons in your discovery service(s). See [Configure OpenURL](#). |

### For the frosting:

<table>
<thead>
<tr>
<th></th>
<th>Directions</th>
</tr>
</thead>
</table>
| • Library’s brand color (hex code) and logo image URL  
• URLs for library resources | 5. Further customize the form page. See [User Interface Options](#) and [Display Settings](#). |
| • Custom holdings paths (copies, loans)  
• Constant data (copies, loans) | 6. Create basic automations. See [Automated Request Manager](#). |
# WorldShare ILL request form

## Recipe for WMS users

### Ingredients

<table>
<thead>
<tr>
<th>For the cookie</th>
<th>For the frosting</th>
</tr>
</thead>
</table>
| • Your WorldShare username & password (admin role)  
  • Form sections, fields, and labels | • For other discovery services: admin access and documentation for OpenURL buttons  
  • Custom holdings paths (copies, loans)  
  • Constant data (copies, loans) |
| 2. Create an OpenURL 1.0 resolver. See [Add an OpenURL resolver](https://oclc.org/illform-wms). | 5. Create basic automations. See [Automated Request Manager](https://oclc.org/illform-wms). |
1. Customize the form fields and labels

OCLC Service Configuration (worldcat.org/config)

WorldShare ILL > Patron Request Workforms > WorldShare ILL Request Form

• Add or remove fields
• Provide custom field labels
• Specify whether a field is required and/or editable

A single form is used for all ILL requests, but the system pre-selects the Service Type (loan or copy) based on the type of item requested (e.g., book, article).
1. Customize the form fields and labels

**OCLC Service Configuration** (worldcat.org/config)
1. Customize the form fields and labels

Default form

WorldShare ILL request form

* Required field

About my item

**Title:**

**Author:**

**Publisher:**

**Place of Publication:**

**Date:**

**Volume:**

**Issue Number:**

**Page Numbers:**

**Author of chapter/section/paper:**

**OCLC:**

About my request

**Service Type:**

**Needed before (yyyy-mm-dd):**

**Amount Willing to Pay:**

**Comments:**

My address and contact information

**First Name:**

**Last Name:**

**Polar ID:**

**Email Address:**

**Mobile Phone:**

Submit request
2. Set your IP range (for non-WMS libraries only)

OCLC Service Configuration (worldcat.org/config)

IP Addresses > Manage IP Addresses
3. Create an OpenURL resolver

OCLC Service Configuration (worldcat.org/config)

OpenURL Resolvers > Manage Resolvers > Create Resolver
3. Create an OpenURL resolver

**OCLC Service Configuration** ([worldcat.org/config](http://worldcat.org/config))

OpenURL Resolvers > Manage Resolvers > Create Resolver

<table>
<thead>
<tr>
<th>Field</th>
<th>Example value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base URL</td>
<td>https://&lt;yourregistryid&gt;.account.worldcat.org/account/route/wsill/openurl?</td>
</tr>
<tr>
<td>Resolver Name</td>
<td>Request with WorldShare ILL form</td>
</tr>
</tbody>
</table>
4. Provide ILL buttons in your discovery service(s)

For all discovery services

- Use the OpenURL resolver you created in step 3.
- Consult your provider’s documentation or customer support for details on how enable ILL buttons in your discovery layer or database.
4. Provide ILL buttons in your discovery service(s)

For WorldCat.org or WorldCat Discovery

<table>
<thead>
<tr>
<th>For this field…</th>
<th>Do this…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Sharing Button Label</td>
<td>Enter text to display on the ILL button (e.g., Request from libraries worldwide).</td>
</tr>
<tr>
<td>Type of button configuration</td>
<td>Select OpenURL 1.0. Then, select the OpenURL resolver created in step 3.</td>
</tr>
<tr>
<td>For items owned by WorldCat Libraries</td>
<td>Specify which item types display the ILL button.</td>
</tr>
</tbody>
</table>
4. Provide ILL buttons in your discovery service(s)

For WorldCat.org or WorldCat Discovery

Resource Sharing Button Label:

Request with WorldShare ILL

Open in a new tab or window

Add Translation

Type of button configuration:

OpenURL 1.0

Choose an OpenURL Resolver from the OpenURL Resolvers you have already registered with OCLC:

https://148455 account.worldcat.oclc.org/acc

View registered OpenURL Resolvers

For items owned by WorldCat Libraries

Specify when to display each fulfillment button.

Display WorldCat Libraries fulfillment button:

- Monograph (default type)
- Serial
- Article
- E-Serial
- Mass digitized electronic content
- All other electronic content

OpenURL 1.0 - Request with WorldShare ILL
5. Further customize the form page

OCLC Service Configuration (worldcat.org/config)

WorldCat Discovery and WorldCat Local
5. Further customize the form page

OCLC Service Configuration (worldcat.org/config)

WorldCat Discovery and WorldCat Local > User Interface

Options

Branding & Customization

Modernized WorldCat Discovery options

- Header and footer color: #F60505
- Navigational bar color: #DF6298

Match this to your logo background color to mimic a screen-width header.

Logo Settings

Logo image should not be greater than 80 pixels tall and 275 pixels wide. Larger images will be resized. Image URL must be on a secure server.

- Logo Image URL: https://www.oclc.org/content/dam/ext-ref/logo_oclc_demo_library.png
- Test URL
- Home page URL: http://www.wclcs.org/
- Logo alternative text: Find in a Library
5. Further customize the form page

OCLC Service Configuration (worldcat.org/config)

WorldCat Discovery and WorldCat Local > Display Settings

Custom Notification

Notify your library users with a custom message.

- Display customized notification

Notification Message

We recommend a summary message with a link to the entire documentation. Type ${Link}where you want the Notification Link Display Text to appear in your custom notification. 500 character limit.

The library will be closed December 20 through January 2. Please return books prior to that date. ${Link}
OCLC Service Configuration (worldcat.org/config)

WorldShare ILL > Automated Request Manager

Standard actions are performed automatically…

• Match bibliographic record
• Check WorldCat and knowledge base holdings

You’ll want to add basic automations to…

• Create the lender string – OR – send request to lenders
• Apply constant data
6. Create basic automations

**OCLC Service Configuration** ([worldcat.org/config])

**WorldShare ILL > Automated Request Manager**

<table>
<thead>
<tr>
<th>Name</th>
<th>Matches</th>
<th>Actions</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>SENDLOANS</td>
<td>Request Type: Loan</td>
<td>If Held By Your Institution, Route to Review. (or) If Duplicate Request, Route to Review.</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path FAVORITELENDERS hold(s) the item. Apply Constant Data: LOANS.</td>
<td></td>
</tr>
<tr>
<td>SENDCOPIES</td>
<td>Request Type: Copy</td>
<td>If Held By Your Institution, Route to Review. (or) If Duplicate Request, Route to Review.</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path SUPERFAST hold(s) the item. Apply Constant Data: COPIES.</td>
<td></td>
</tr>
</tbody>
</table>
Next steps
**WorldShare ILL request form**

## More information

<table>
<thead>
<tr>
<th>Resource</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipe for non-WMS libraries</td>
<td><a href="oc.lc/ill-form">oc.lc/ill-form</a></td>
</tr>
<tr>
<td>Recipe for WMS libraries</td>
<td><a href="oc.lc/illform-wms">oc.lc/illform-wms</a></td>
</tr>
<tr>
<td>December 2022 release notes (with links to documentation)</td>
<td><a href="oc.lc/releasenotes">oc.lc/releasenotes</a></td>
</tr>
<tr>
<td>Assistance with setup</td>
<td><a href="oc.lc/support">oc.lc/support</a></td>
</tr>
</tbody>
</table>
# WorldShare ILL request form

We’d ❤️ your feedback

<table>
<thead>
<tr>
<th>To…</th>
<th>Use…</th>
</tr>
</thead>
</table>
| Let us know how it’s going:  
  • How’s are the communications and documentation around the form?  
| Submit an enhancement request | Community Center: [oc.lc/community](http://oc.lc/community) |
April 2023

WorldShare ILL request form

Questions?

OCLC Support

support@oclc.org