

April 2023

Colorado Resource Sharing Pre-conference

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

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# Today's program

## WorldCat.org

- Understanding features and subscriptions
- Tour features in WorldCat.org
- Setting up features to enhance your library's visibility on WorldCat.org
- Q&A

## WS ILL request form

- Benefits of using the WorldShare ILL request form
- End-to-end workflow
- Setting up the form
- Q&A

# 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



[Create account](#) | [Sign in](#)

[Home](#) [Libraries](#) [Topics](#) [Lists](#) [About](#) [For Librarians](#)

Find items in libraries near you

Items ▾

Search for books, articles, and more

Search



# WorldCat.org connects people to libraries

Reaches more people with a mobile-friendly and accessible experience

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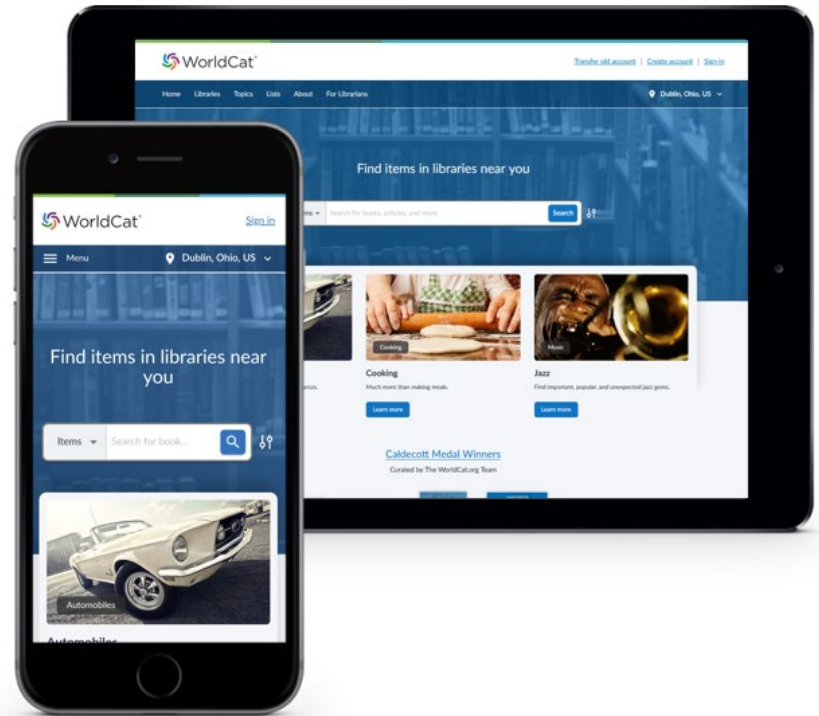
Connects more people to your library with tools to promote your collections

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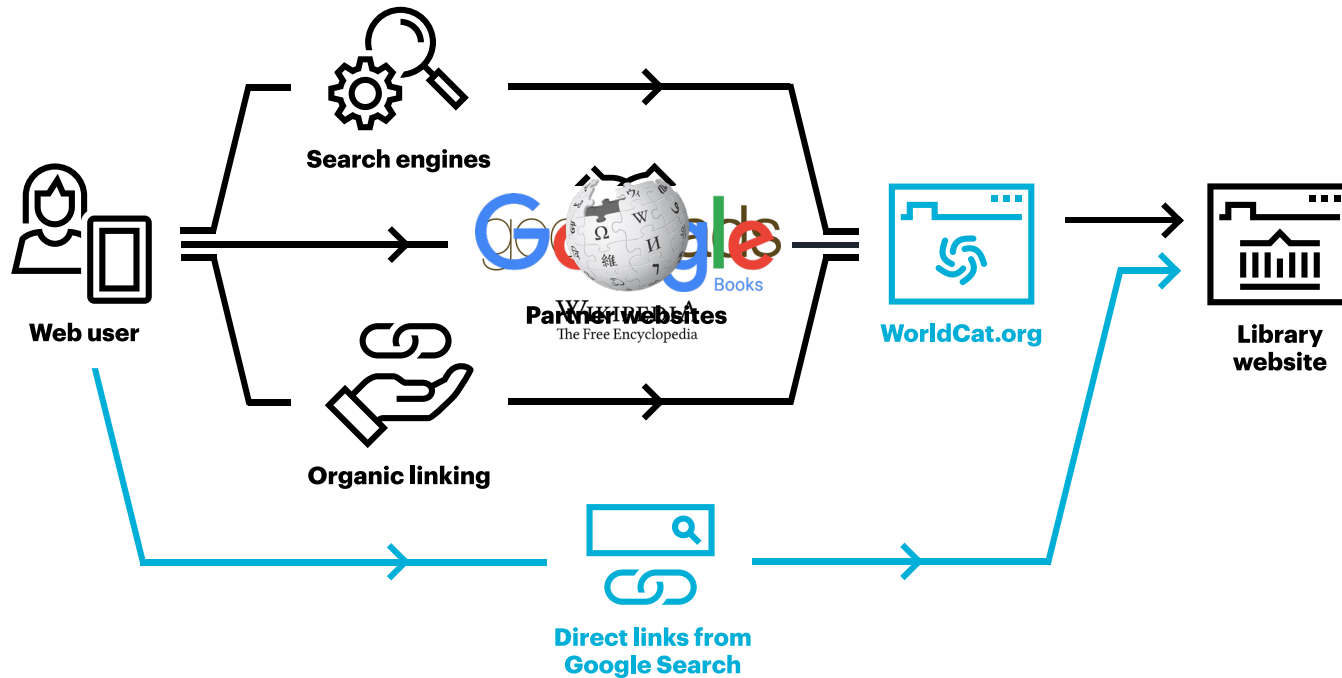
Provides users more ways to engage including easier list creation and sharing

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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

[oc.lc/visibility-subscriptions](https://oc.lc/visibility-subscriptions)

Library Feature	OCLC ILL only	OCLC ILL + Cataloging	ANY ILL + Visibility
Display link to OCLC ILL request form when IP authenticated on WorldCat.org	√	√	√
Ability to update holdings in WorldCat database	×	√	√
Display local full text links on WorldCat.org	×	√	√
Create institutions lists on WorldCat.org	×	√	√
Display library holdings on WorldCat.org All Libraries tab	×	√	√
Display + link to library holdings on WorldCat.org Featured Libraries tab	×	×	√
Allow users to favorite + filtered by your library holdings in WorldCat.org	×	×	√
Library page on WorldCat.org	×	×	√
Syndication of library materials on partner platforms like Google search results in knowledge panel links	×	×	√

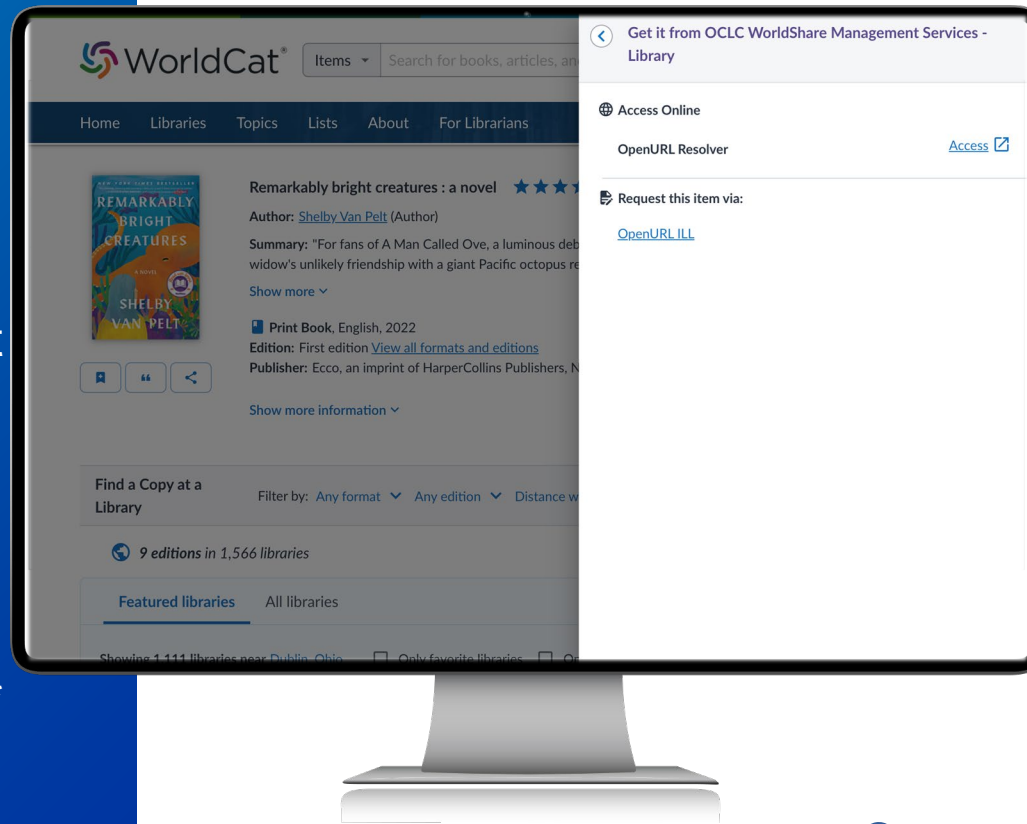
# Resource Sharing (ILL) displays when...

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



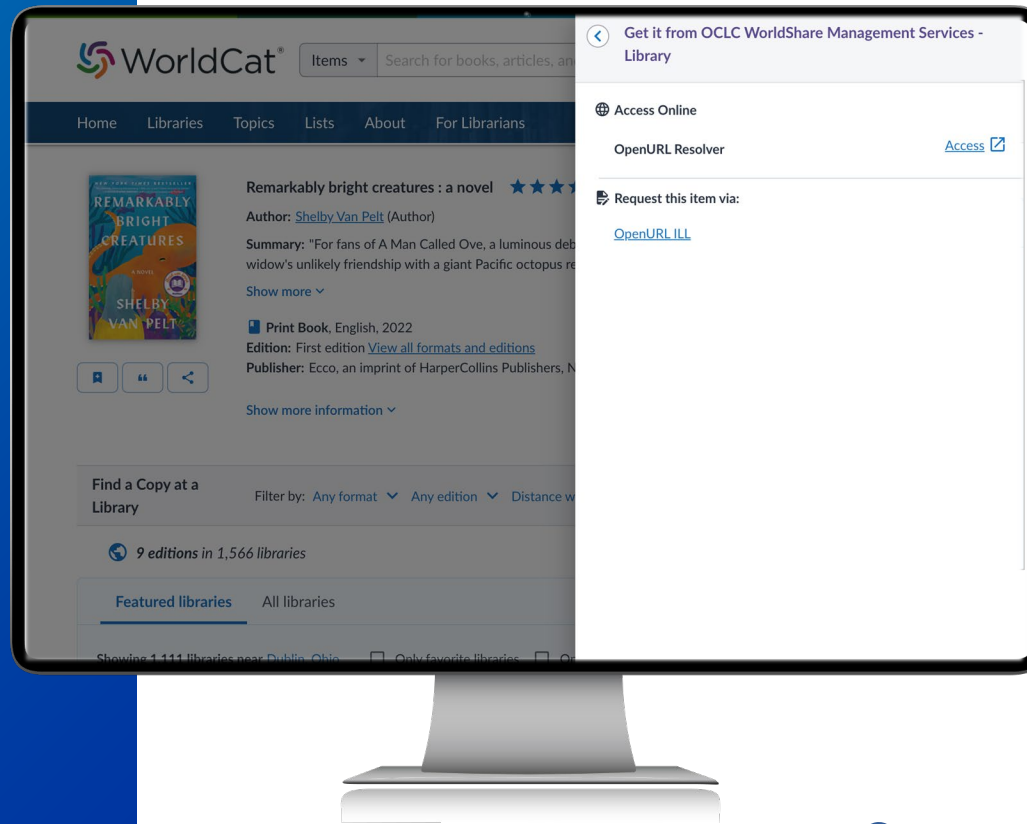
# Resource Sharing (ILL) configuration

Place Hold/Request Buttons module

IP Addresses module

OpenURL Resolvers module

[oclc.org/help](https://oclc.org/help)



# Recent WorldCat.org enhancements

IIIF viewer

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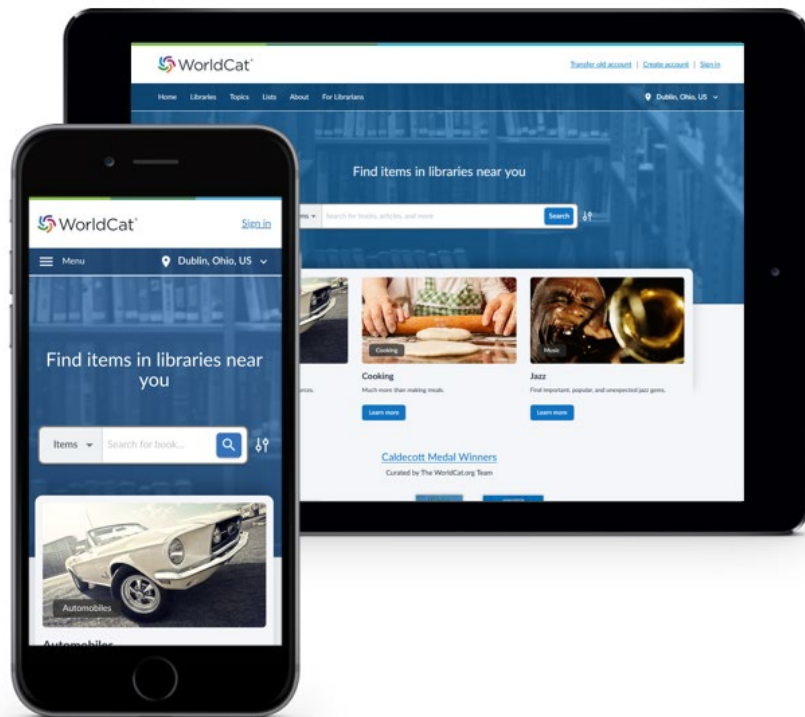
Streamlined library lists

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RIS export for citations

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Social sharing of item details



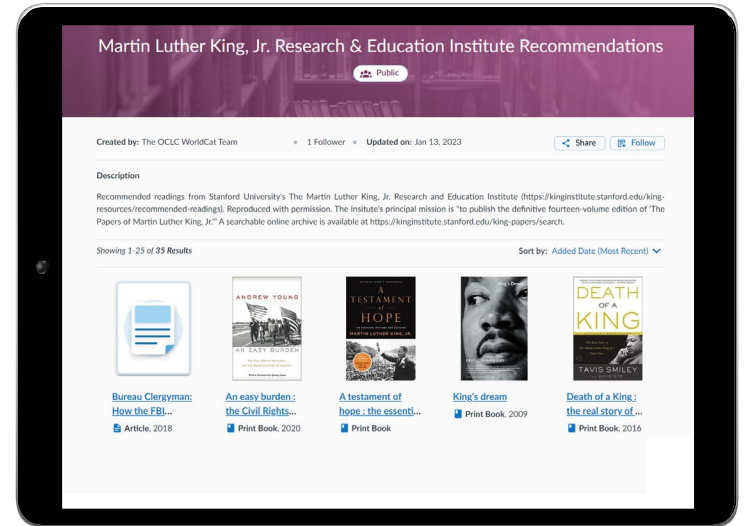
# Improving engagement

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

[oclc.org/holdings-request](https://oclc.org/holdings-request)

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



# Benefits of using the WorldShare ILL form

# WorldShare ILL request form

OCLC Demo Library

Search

Hello A  
My account

Advanced search Course reserves Resources

Search history

A Miller

### WorldShare ILL request form

\*Required field

About my item

Title: \*  0/500

Author: \*  0/500

Publisher:  0/100

Place of Publication:  0/100

Date:  0/100

ISBN:  0/100

Volume:  0/100

Issue/Number:  0/100

Page Numbers:  0/100

Title of chapter/section/paper:  0/500

Author of chapter/section/paper:  0/500

ISSN:  0/100

OCLC#:  0/100

About my request

Service Type: \*

Needed before: \*

Amount Willing to Pay:  0/100

Comments:  0/500

### My address and contact information

First Name: \*  0/100

Last Name: \*  0/100

Patron ID: \*  0/100

E-mail Address: \*  0/100

Mobile Phone:  0/100

<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.*

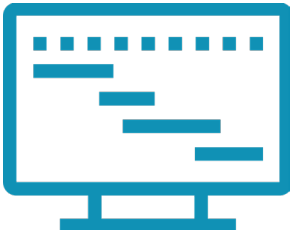


## How does it benefit your ILL staff?



- **Save time**

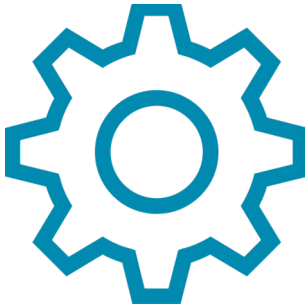
- Create requests without having to rekey bibliographic and patron information
- No need to search for items due to bibliographic matching
- Automatically create the lender string and/or send requests to lenders



- **Gain accuracy**

- Be confident of the exact item being requested
- Automatically apply constant data

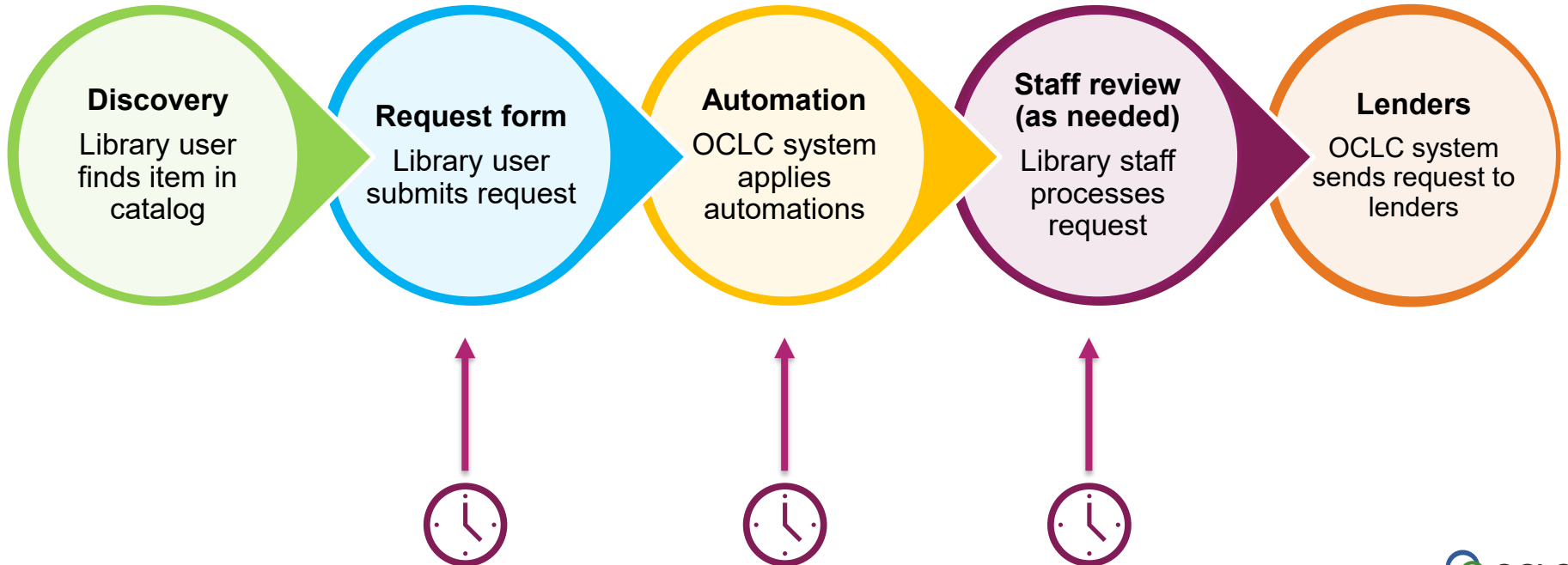
# How does it benefit your library users?



- **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

# Exactly where will I save time?



# Setting up the form

# WorldShare ILL request form

## Request workflow

Catalog or database

Request form

Staff interface

Find in a Library

Set tag symptoms

Sign in

Advanced Search Resources

Search history Saved Items (0)

Back to Search Results

Result 2 of 34

Cite Share Save

Access Options

Request from Libraries Worldwide

Request from through Interlibrary Loan

**Farewell jet lag : cures from a flight attendant**

Authors: Christopher Babayode (Author)

Print Book 2016

St Albans: Panoma Press, 2016.

Summary: TRAVEL TIPS & ADVICE: GENERAL. At a time when globalization and technology make the world smaller when... fully present if you're jet-lagged. Solving the challenges of jet lag requires Show More

More Author/Title Info: Christopher Babayode.

Physical Description: 191 pages : illustrations ; 21 cm.

Subjects: Library of Congress Subject Headings: [Jet Lag Prevention](#) [Flight Attendants--Social Aspects](#) [Revue de la Vieillesse--Magazine](#) [Vol. Aspects.chv5sb6sou](#)

Bibliography: Includes bibliographical references (pages 182-186)

Database: WorldCat

ISBN: 9781784520786, 1784520780

Find in a Library

Search

Hello Clive My account

Advanced search Resources

Search history

Oliver Borrower

WSILL request form

\*Required field  
This is a change text.

Title: \*  
Farewell jet lag : cures from a flight attendant 48/500

Author: \*  
Christopher Babayode 20/500

Publisher:  
Panoma Press 12/100

Place of Publication:  
St Albans 12/100

Date:  
2016 4/100

ISBN:  
9781784520786 13/100

Volume:  
0/100

Issue/Number:  
0/100

Page Numbers:  
0/100

Title of chapter/section/paper:  
0/500

217354391: Farewell jet lag : cures from a flight attendant /

NDCLIV Reg ID: 114960

Send Request Change Fulfillment Type Cancel Request

Apply consistent data: Actions: DEFAULT Note Mark as Reviewed Save Reset Email Print Now

Request Purchase Staff Notes

Request Details (Request ID 217354391)

Patron Summary

Source: WSILLFORM

Status: Not Reviewed

Title / Journal: Farewell jet lag : cures from a flight attendant /

Uniform Title:

Author: Christopher Babayode

Publisher: St Albans : Panoma Press, 2016

ISBN: 9781784520786

ISSN:

OCLC: 945399164

DOI: [View Holdings](#)

PMID:

Dissertation:

Series:

Type: Loan

Format: Book

Language: English (eng)

Edition:

Preferred edition:  Most recent edition  This edition  Any edition

Local ID:

Open Access: No hits found

Apply Citation: [Search Google Scholar](#) [Search Google Books](#) [Search Google](#)

## WorldShare ILL request form

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

## Recipe

oc.lc/ill-form



Ingredients	Directions
<b>For the cookie:</b>	
<ul style="list-style-type: none"><li>WorldShare username &amp; password (admin role)</li><li>Form sections, fields, and labels</li></ul>	1. Customize the form fields and labels. See <a href="#">WorldShare ILL Request Form</a> .
<ul style="list-style-type: none"><li>Library's IP range(s) for your library</li><li>Library's EZproxy "prefix" (if applicable)</li></ul>	2. Set your IP range. See <a href="#">Manage IP Addresses</a> .
<ul style="list-style-type: none"><li>Library's registry ID</li></ul>	3. Create an OpenURL resolver. See <a href="#">Add an OpenURL resolver</a> .
<ul style="list-style-type: none"><li>For services other than WorldCat Discovery: admin access for configuration; documentation for OpenURL buttons</li></ul>	4. Provide ILL buttons in your discovery service(s). See <a href="#">Configure OpenURL</a> .
<b>For the frosting:</b>	
<ul style="list-style-type: none"><li>Library's brand color (hex code) and logo image URL</li><li>URLs for library resources</li></ul>	5. Further customize the form page. See <a href="#">User Interface Options</a> and <a href="#">Display Settings</a> .
<ul style="list-style-type: none"><li>Custom holdings paths (copies, loans)</li><li>Constant data (copies, loans)</li></ul>	6. Create basic automations. See <a href="#">Automated Request Manager</a> .





## Recipe for WMS users

[oc.lc/illform-wms](https://oc.lc/illform-wms)

Ingredients	Directions
<b>For the cookie</b>	
<ul style="list-style-type: none"><li>Your WorldShare username &amp; password (admin role)</li><li>Form sections, fields, and labels</li></ul>	1. Customize the form fields and labels. See <a href="#">WorldShare ILL Request Form</a> .
<ul style="list-style-type: none"><li>Your library's Registry ID</li><li>Base URL = <a href="https://&lt;yourregistryid&gt;.account.worldcat.org/account/route/wsill/openurl?">https://&lt;yourregistryid&gt;.account.worldcat.org/account/route/wsill/openurl?</a></li></ul>	2. Create an OpenURL 1.0 resolver. See <a href="#">Add an OpenURL resolver</a> . 3. Set Resource Sharing buttons in WorldCat Discovery to use the OpenURL 1.0 resolver. See <a href="#">Configure OpenURL</a> .
<b>For the frosting</b>	
<ul style="list-style-type: none"><li>For other discovery services: admin access and documentation for OpenURL buttons</li></ul>	4. Create buttons in other discovery service(s). See <a href="#">Configure OpenURL</a> .
<ul style="list-style-type: none"><li>Custom holdings paths (copies, loans)</li><li>Constant data (copies, loans)</li></ul>	5. Create basic automations. See <a href="#">Automated Request Manager</a> .

## 1. Customize the form fields and labels

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

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 Workforms**
- Print Settings
- Advanced Workflows

WorldShare ILL Request Form


**Display Name:** WorldShare ILL reques

**In Use:** Enabled **URL:** <https://148757.account.worldcat.org/account/route/wsill/workform>

**Bibliographic Section**

**Section Header:** About my item Remove a Section

Field:	Input Type:	Field Label:	Field Values:	Options:
Title/Journal Title	textarea	Title:		<input checked="" type="checkbox"/> required <input checked="" type="checkbox"/> editable
Author	textarea	Author:		<input checked="" type="checkbox"/> required <input checked="" type="checkbox"/> editable
Publisher	textentry	Publisher:		<input type="checkbox"/> required <input checked="" type="checkbox"/> editable
Place of Publication	textentry	Place of Publication:		<input type="checkbox"/> required <input checked="" type="checkbox"/> editable

 **Preview**

# 1. Customize the form fields and labels

## Default form

WorldShare ILL request form

\* Required field

About my item

Title: *	Author: *
<input type="text"/>	<input type="text"/>
0/500	0/500
Publisher:	Place of Publication:
<input type="text"/>	<input type="text"/>
0/100	0/100
Date:	ISBN:
<input type="text"/>	<input type="text"/>
0/100	0/100
Volume:	Issue/Number:
<input type="text"/>	<input type="text"/>
0/100	0/100
Page Numbers:	Title of chapter/section/paper:
<input type="text"/>	<input type="text"/>
0/100	0/500
Author of chapter/section/paper:	ISSN:
<input type="text"/>	<input type="text"/>
0/500	0/100
OCLC#:	
<input type="text"/>	
0/100	

- 
- 
- 

About my request

Service Type: *	Needed before (yyyyymmdd): *
<input type="text" value="Loan"/>	<input type="text" value="mm/dd/yyyy"/>
Amount Willing to Pay:	Comments:
<input type="text"/>	<input type="text"/>
0/100	0/500

My address and contact information

First Name: *	Last Name: *
<input type="text"/>	<input type="text"/>
0/100	0/100
Patron ID: *	E-mail Address: *
<input type="text"/>	<input type="text"/>
0/100	0/100
Mobile Phone:	
<input type="text"/>	
0/100	

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

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

## IP Addresses > Manage IP Addresses

### Manage IP Addresses

#### IP Address Ranges

Sort: Ascending Descending

14.84.5.5
132.174.254.204

#### IP Address Range Attributes

**14.84.5.5**  
Owning Institution ID: 148455  
Owning Institution Name: NDOSU - OSU Test Library

OpenURL Resolver ID:

Product:

### 3. Create an OpenURL resolver

# OCLC Service Configuration (worldcat.org/config)

## OpenURL Resolvers > Manage Resolvers > Create Resolver

Fields marked with an asterisk are required.

OpenURL ID:

Base URL: \*

Resolver Name: \*

IP Address: [To view or update the IP Addresses associated with this resolver, please manage them in the IP Registry.](#)

Resolver Image Location:


Institution Domain:

Vendor:

Vendor Product Version:

OpenURL Version: \*

Z39.88-2004 Community Profiles:



### 3. Create an OpenURL resolver

## OCLC Service Configuration ([worldcat.org/config](https://worldcat.org/config))

### OpenURL Resolvers > Manage Resolvers > Create Resolver

Field	Example value
Base URL	<a href="https://&lt;yourregistryid&gt;.account.worldcat.org/account/route/wsill/openurl?">https://&lt;yourregistryid&gt;.account.worldcat.org/account/route/wsill/openurl?</a>
Base URL – with EZproxy	<a href="https://&lt;yourezproxyprefix&gt;/login?url=https://&lt;yourregistryid&gt;.account.worldcat.oclc.org/account/route/wsill/openurl?">https://&lt;yourezproxyprefix&gt;/login?url=https://&lt;yourregistryid&gt;.account.worldcat.oclc.org/account/route/wsill/openurl?</a>
Resolver Name	Request with WorldShare ILL form

## 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

## WorldCat Discovery and WorldCat Local > Place Hold/Request Buttons > Resource Sharing (Any Level)

For this field...	Do this...
Resource Sharing Button Label	Enter text to display on the ILL button (e.g., Request from libraries worldwide).
Type of button configuration	Select OpenURL 1.0. Then, select the OpenURL resolver created in step 3.
For items owned by WorldCat Libraries	Specify which item types display the ILL button.

## 4. Provide ILL buttons in your discovery service(s)

# For WorldCat.org or WorldCat Discovery

**\* Resource Sharing Button Label:**

Open in a new tab or window

For best display, keep this label under 40 characters  
Configure visibility of this button in the "Items owned by..." sections below.

[+ Add Translation](#)

Type of button configuration:

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

[View registered OpenURL Resolvers](#)

▼ For items owned by WorldCat Libraries

Specify when to display each fulfillment button.

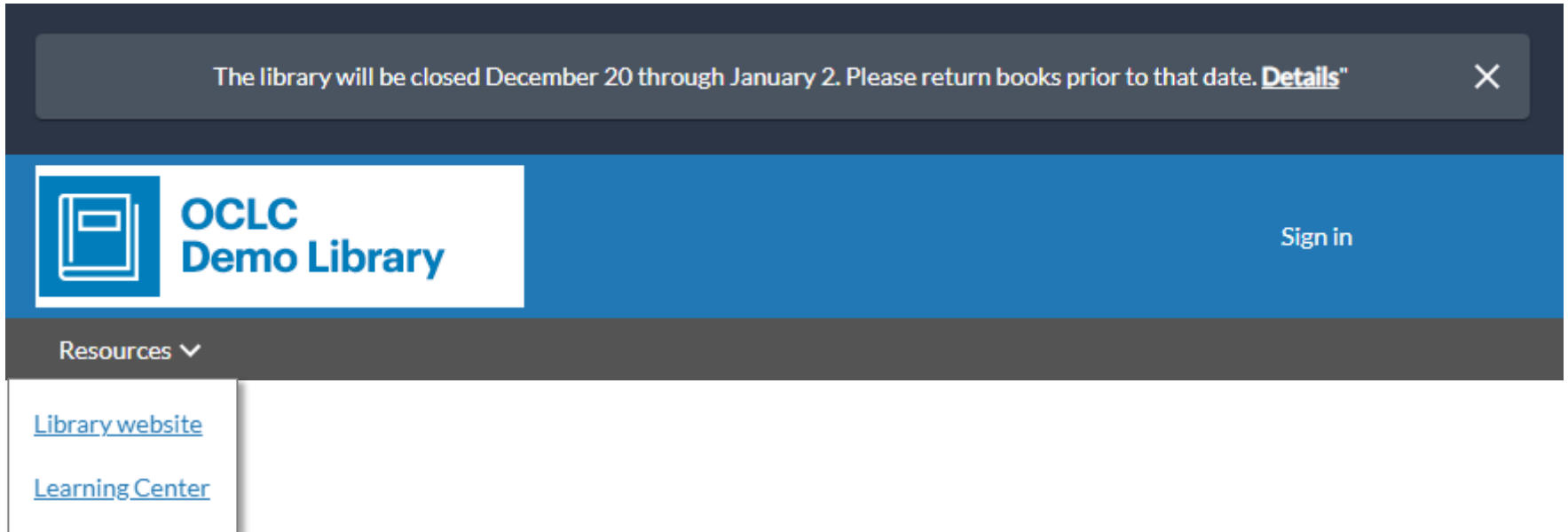
**\* Display WorldCat Libraries fulfillment button:**

<a href="#">Monograph (default type)</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>
<a href="#">Serial</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>
<a href="#">Article</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>
<a href="#">E-Serial</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>
<a href="#">Mass digitized electronic content</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>
<a href="#">All other electronic content</a>	<input type="text" value="OpenURL 1.0 -'Request with WorldShare ILL'"/>


## 5. Further customize the form page

# OCLC Service Configuration (worldcat.org/config)

## WorldCat Discovery and WorldCat Local



The library will be closed December 20 through January 2. Please return books prior to that date. [Details](#) ✕

 **OCLC  
Demo Library** Sign in

Resources ▾

- [Library website](#)
- [Learning Center](#)


## 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  

Navigational bar color  

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  [Test URL](#)

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

Home page URL

Send users to this destination upon clicking logo image.

Logo alternative text

Text appears upon hover over logo, or when image fails to load.

▼ Custom Links

**Custom Links**

Choose up to 7 custom links to appear in the header. [i](#)

**Custom link 1:**

Link type:

URL:

Display text:  [test URL](#)

25 character limit.

## 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!}`

### Resources Text

Use default text Resources

Use custom text

Display Text  
35 character limit.

Library Services

## 6. Create basic automations

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

Name	Matches	Actions	Priority 	
SENDLOANS	Request Type: Loan	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.	10	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
SENDCOPIES	Request Type: Copy	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.	20	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

# Next steps



# More information

Resource	URL
Recipe for non-WMS libraries	<b>oc.lc/ill-form</b>
Recipe for WMS libraries	<b>oc.lc/illform-wms</b>
Workshop (January 2023)	<a href="http://www.oclc.org/community/interlibrary_loan/events/worldshare-ill-form-jan2023.en.html">www.oclc.org/community/interlibrary_loan/events/worldshare-ill-form-jan2023.en.html</a>
December 2022 release notes (with links to documentation)	<b>oc.lc/releasenotes</b>
Automation webinar (June 2021)	<a href="http://www.oclc.org/community/ill_prime/events/maximizing-speed-resource-sharing-june2021.en.html">www.oclc.org/community/ill_prime/events/maximizing-speed-resource-sharing-june2021.en.html</a>
Assistance with setup	<b>oc.lc/support</b>

# We'd your feedback

To...	Use...
Let us know how it's going: <ul style="list-style-type: none"><li>• How's are the communications and documentation around the form?</li><li>• Did you encounter any obstacles? Where?</li></ul>	Questionnaire: <a href="http://www.oclc.org/oclc-forms/en/feedback-worldshare-ill-request.html">www.oclc.org/oclc-forms/en/feedback-worldshare-ill-request.html</a>
Submit an enhancement request	Community Center: <b>oc.lc/community</b>

April 2023

WorldShare ILL request form

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# Questions?

**OCLC Support**

[support@oclc.org](mailto:support@oclc.org)