Just Let It Go!

Direct Request for Loans and Articles

Agenda

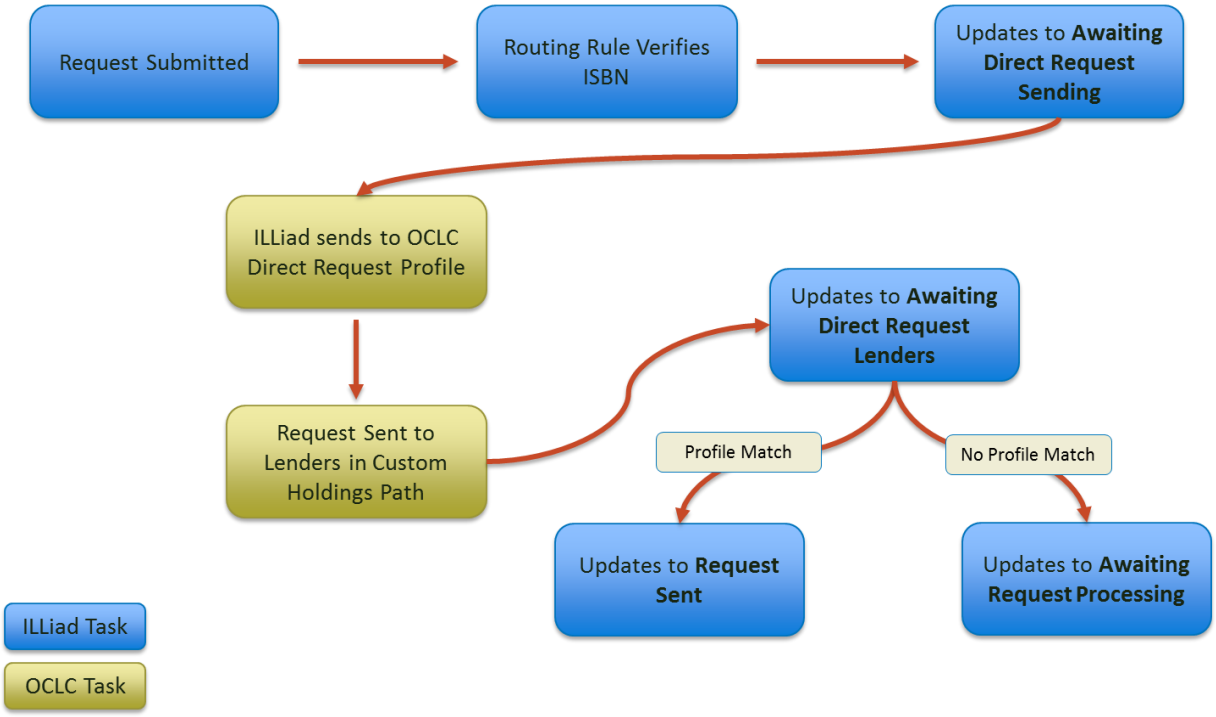
- Direct Request Overview
  - Workflow
  - Views in ILLiad
- Loans
  - ILLiad and WRS Configuration Details
- Articles
  - OCLC Knowledgebase (KB)
  - ILLiad and WRS Configuration Details
  - Lending Processing
  - Borrowing Processing
- ILLiad Trusted Sender

At the end of the session, you should understand the ***purpose of direct request*** and have the ability to ***configure the necessary components*** in ILLiad and WorldCat Resource Sharing.

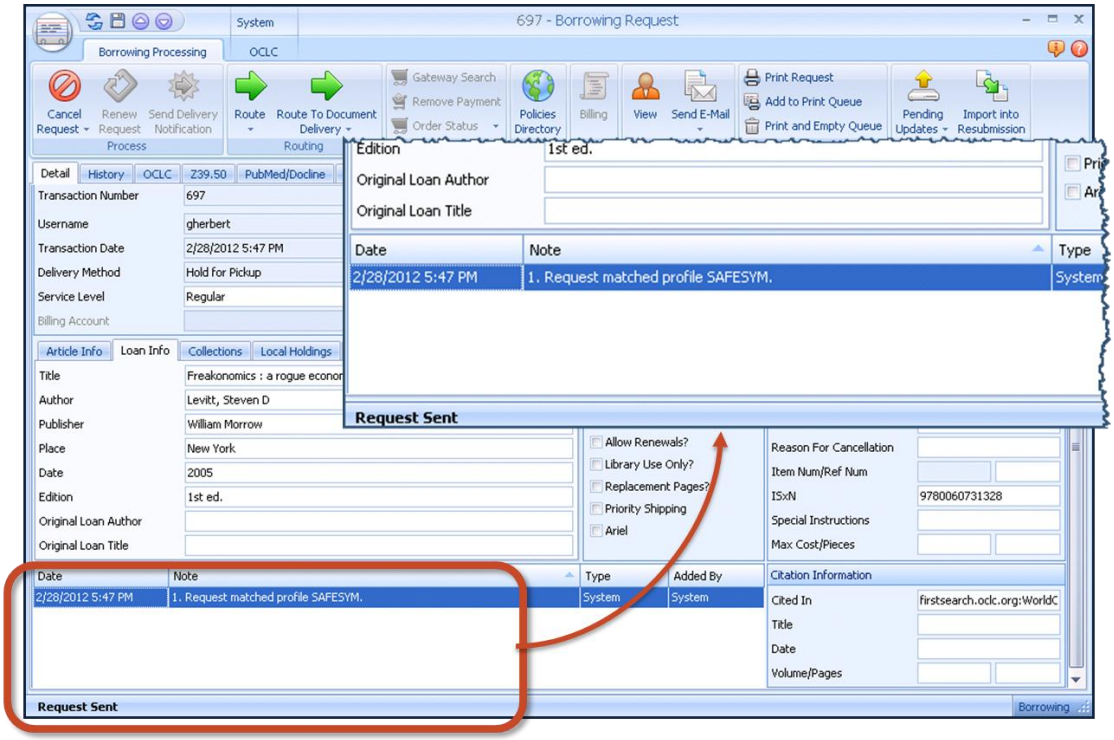
Direct Request Overview

- Automatically sends requests to preferred lenders
- No manual creation of **Lender String** or **Workform**
- Create parameters/filters to limit requests sent with **Direct Request Profile**
  - Bibliographic format type
  - Owned or by consortia Members
  - Published date
- Works in conjunction with **Custom Holdings** service
- Primary processing in **WRS**
- Improves turn-around-time and workflow efficiency
- Can be activated manually through routing or automated with system routing rules

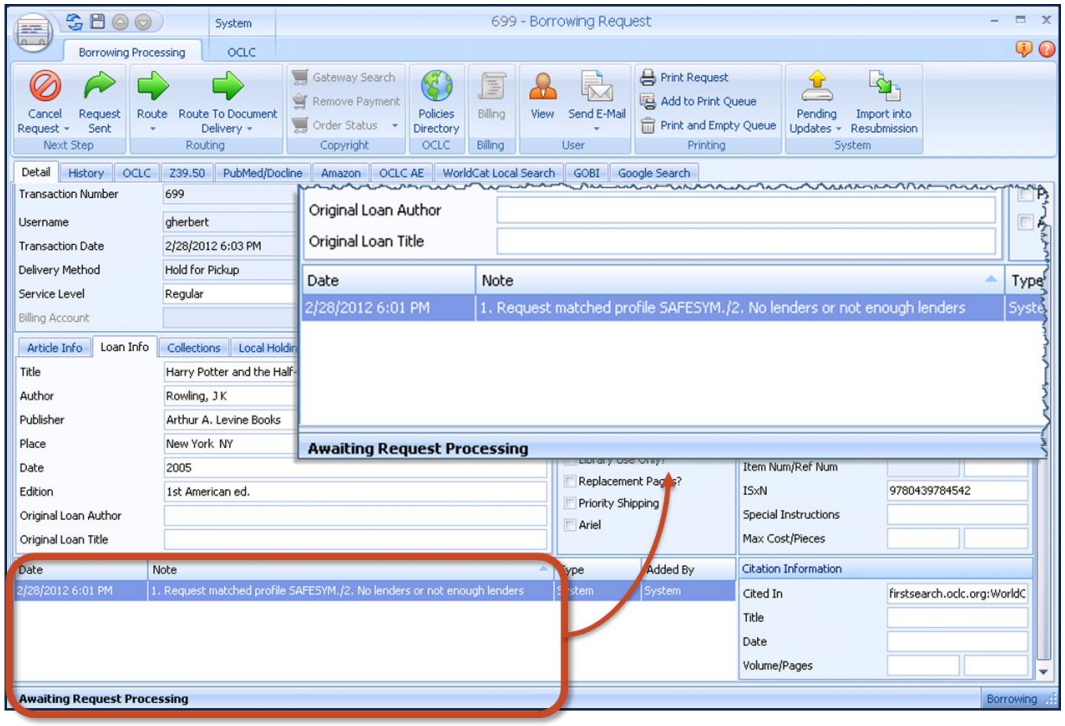
Direct Request Workflow for Loans



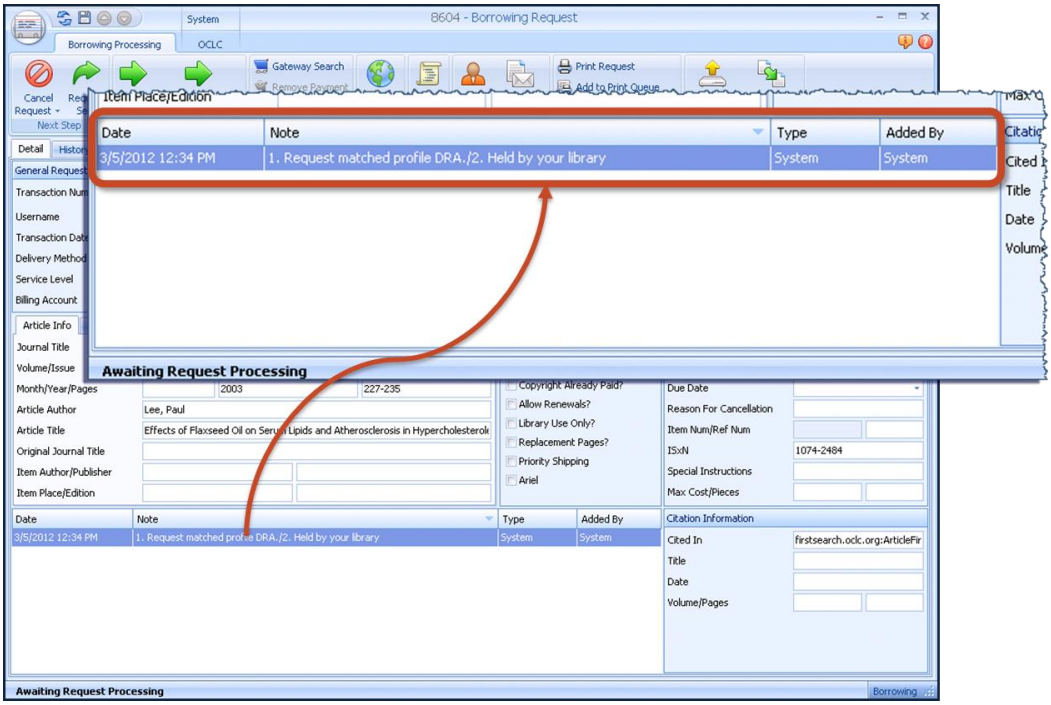
Direct Request Profile Match



Failed Direct Request—Not Enough Lenders



Failed Direct Request—Held Locally



Pre-Requisites

- Disable ILL Access in FirstSearch
    - Likely already done
    - www.firstsearch.oclc.org/admin
        - **Resource Sharing** Tab
        - **Patron ILL Settings** (Left Hand Menu)
            - **ILL Processing** (from Drop Down Menu)
                - **ILL Access**: Uncheck **On** box
- Configure Custom Holdings
    - Can use Client
        - **System** ribbon
            - **Resource Sharing Settings** button
                - **Custom Holdings Group** Tab
                - **Custom Holdings Paths** Tab
    - Can use WorldCat Admin Module
        - www.firstsearch.oclc.org/admin
        - **Resource Sharing** Tab
            - **Staff ILL Settings** (Left Hand Menu)
                - **Custom Holding Groups** (from Drop Down Menu)
                - **Custom Holding Paths** (from Drop Down Menu)

Configuration Steps

- Configure Customization Keys
    - Borrowing | Direct Request |DirectRequestEnabled
        - Set to **Yes**
    - System | General |SystemIDOCLCSymbol
        - Must be set to your OCLC Symbol
    - System | Custom Queues |CustomQueues
        - Verify record for **Awaiting Direct Request Sending**
- Create Routing Rule
    - Send only those items with ISBN in request
    - Can also add OCLC Number to match string
    - Rule number should be low
        - Priority rule to run before all others
    - System | Routing |Routing

Routing Rules

Basic Loan

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.ISSN > '' and t.RequestType = 'Loan' and (t.LendingString = '' or t.LendingString is NULL)
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Default Direct Request rule

Loan with OCLC Number Match

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	(t.ISSN > '' or t.ESPNumber > '') and t.RequestType = 'Loan' and (t.LendingString = '' or t.LendingString is NULL)
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Direct Request Rule with OCLC # Match in addition to ISBN

Loan with Shared Server Limiter

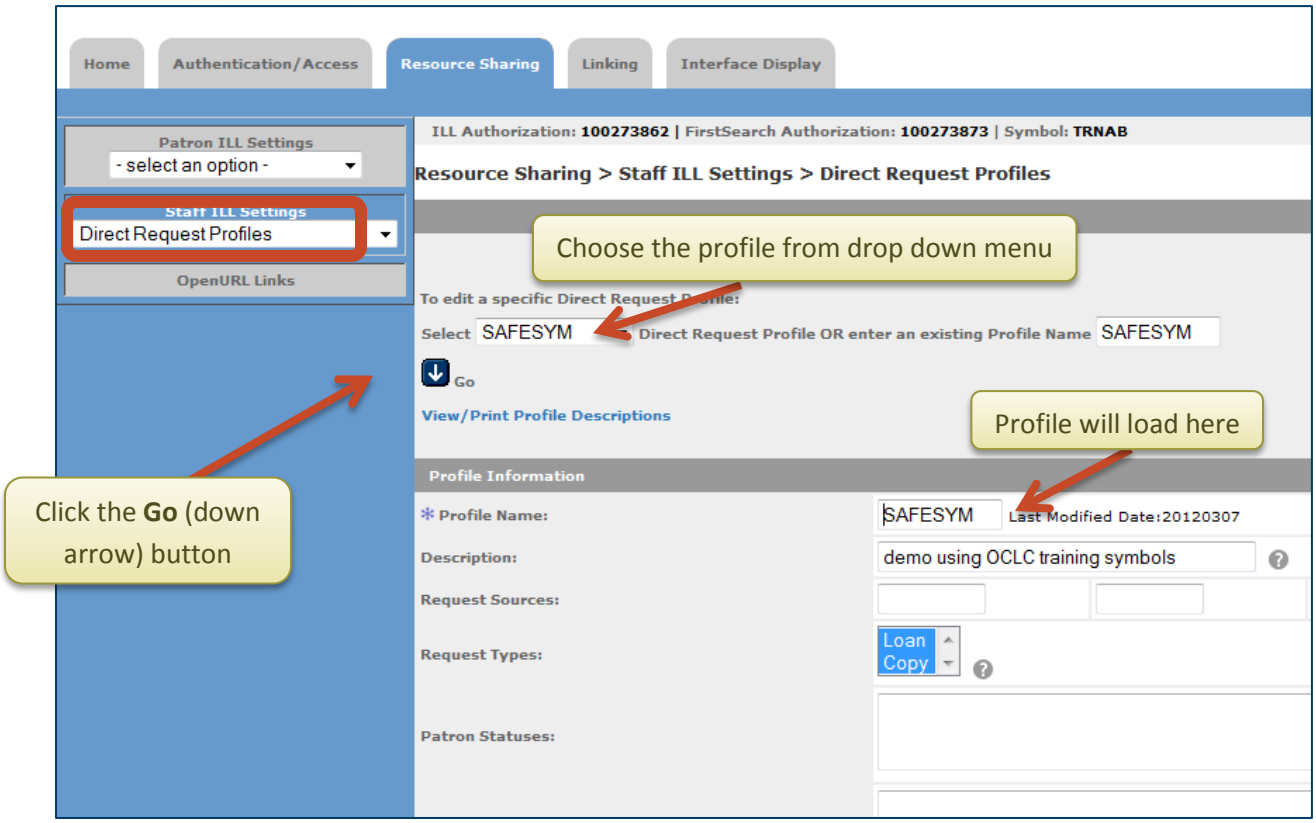
Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.ISSN > '' and t.RequestType = 'Loan' and (t.LendingString = '' or t.LendingString is NULL) and u.NVTGC in ('Wolfgang','Paula')
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Direct Request Rule for shared server sites Wolfgang and Paula

- Set up **an OCLC Direct Request Profile** for Loans
    - Create in ILLiad **Client** or in **WorldCat Admin** module
    - Keep it simple
        - Add any known filters to Routing Rule, if possible
        - E.G. If only requests from Faculty are sent to Direct Request, add **User Status** limit to the Routing Rule match string, rather than to the Direct Request profile
            - t.ISSN > '' and t.RequestType = 'Loan' and (t.LendingString = '' or t.LendingString is NULL) and u.Status = 'Faculty'
    - Test with sample requests

WorldCat Admin Module

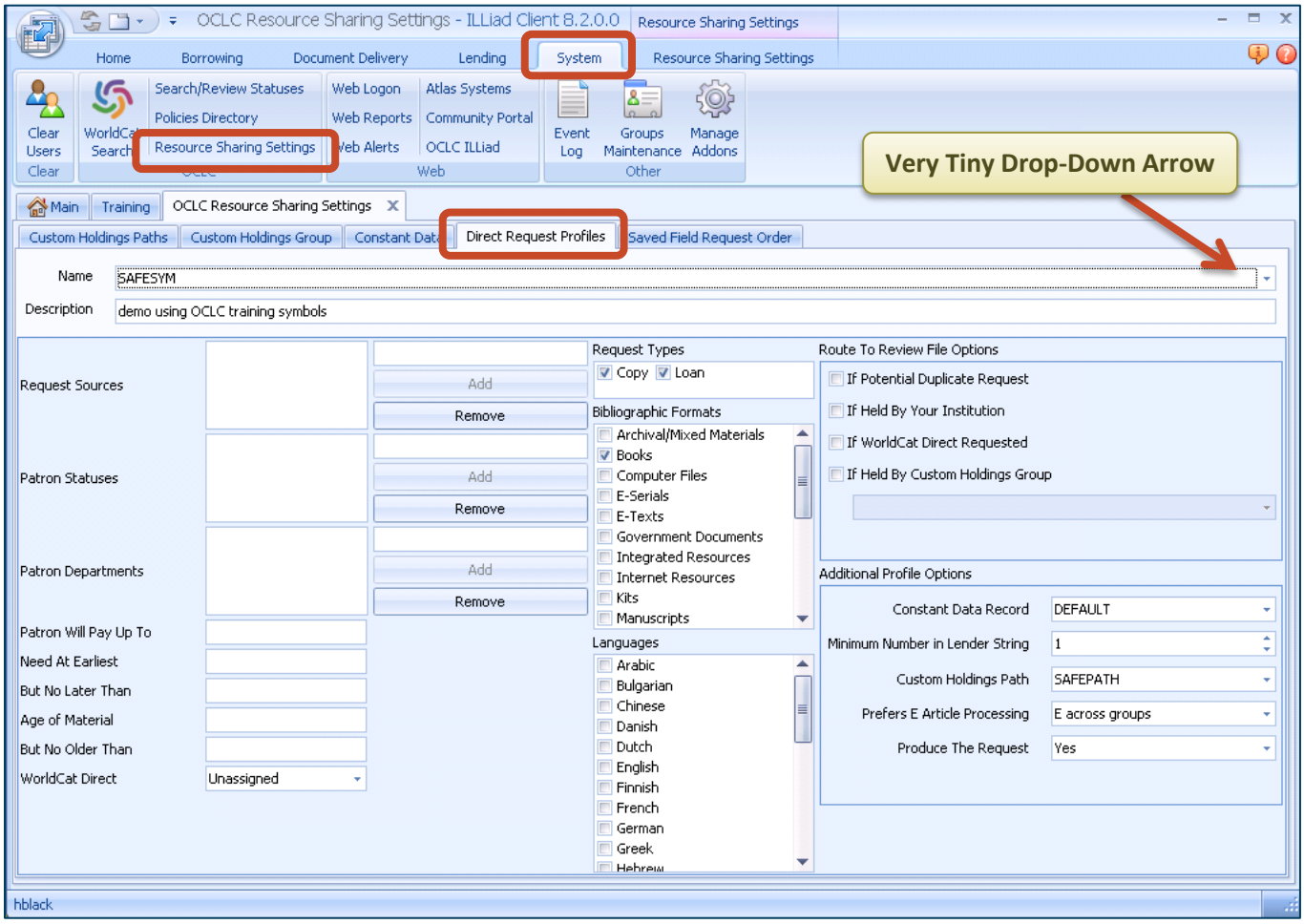
From the Direct Request Profiles option

- Choose the profile from drop down menu
- Click the **Go** (down arrow) button



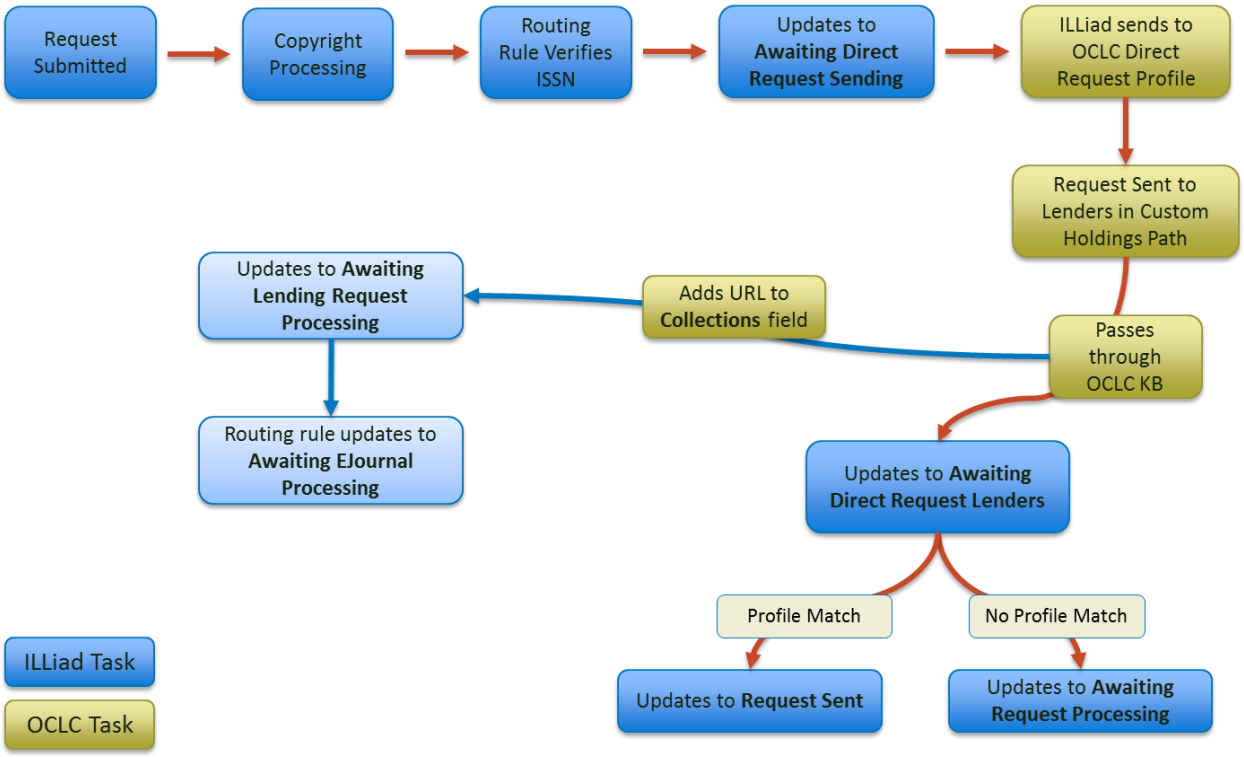
ILLiad Client

- **System** ribbon→ **Resource Sharing Settings** option→ **Direct Request Profile** tab
  - Drop-down arrow at far end of the first blank field
  - Click on this arrow to select a profile and load it



Direct Request for Articles

- **Overview**
  - Uses OCLC's **WorldCat knowledge base**
  - Functionality affecting **Lending** and **Borrowing** processes

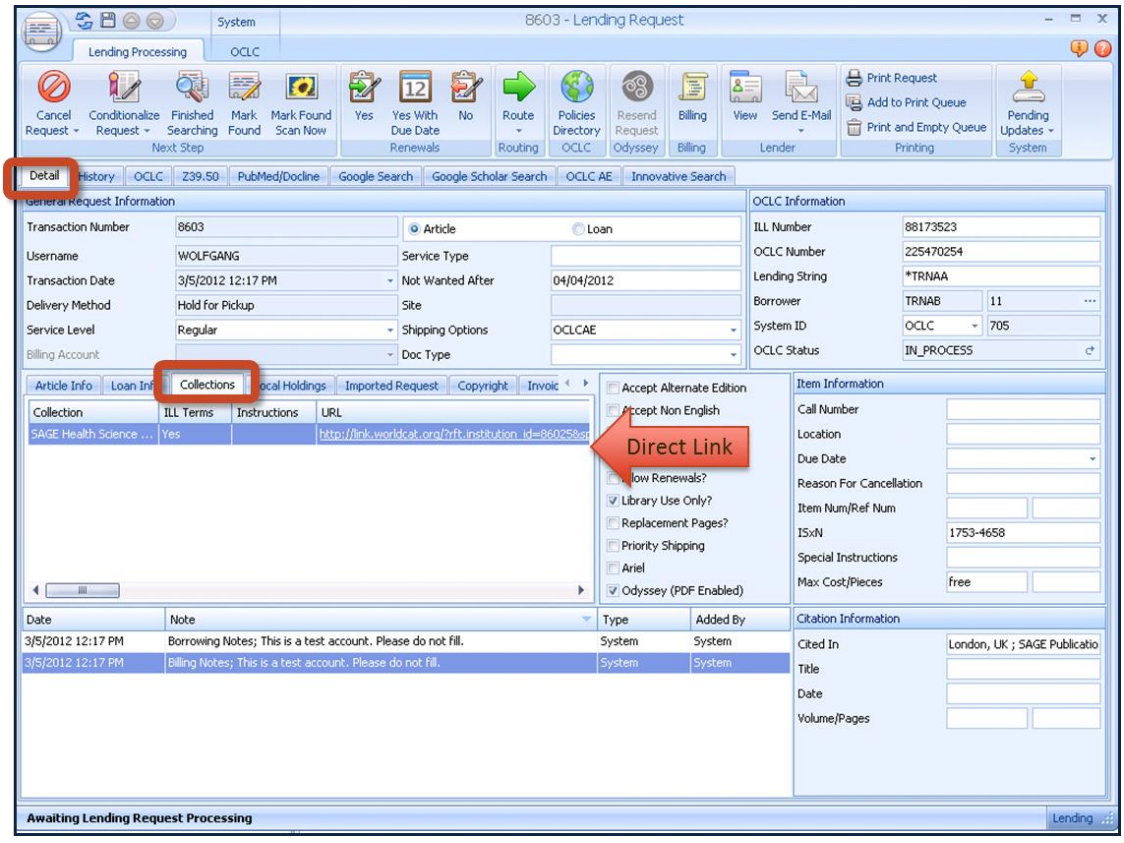


- **Pre-Requisites**
  - Running ILLiad version 8.0.8 or higher
  - Contact OCLC join the **WorldCat Knowledge Base**
    - What is it?
      - Aggregation service of e-resources within WorldCat
    - How does it work?
      - You provide access to your OpenURL resolver/KB services such as SFX or Serials Solutions
      - Pubget (contract servicers for OCLC) will crawl your content and push URL info back to WorldCat KB
    - What's the benefit?
      - Direct URL links provided within the ILL request for fulfillment (**Lending**)
      - Can configure to include license terms for ILL (**Lending**)
      - Target other KB libraries for improved turn-around time (**Borrowing**)
- **Configuration**
  - Enable interlibrary loan for WorldCat knowledge base in the **Service Configuration** module

- Activate the link to holdings information in the **WorldCat Services (FirstSearch) Administrative Module**
  - **Resource Sharing** tab→ **Staff Settings** (left hand menu)/**Resource Sharing Options** (option from drop-down menu) → **Knowledge Base** option checked **On**
  - **Note**: Serials holdings information must be added to the Knowledge Base before an active link will display
- Turn off **deflection** of E-serial requests
- Add or modify your **Direct Request Profile** for articles
  - Add **Request Type: Article** or
  - Create new article only profile
- Add or modify your **Custom Holdings Groups** and **Paths** as needed
  - Additional groups
    - KBWC—all KB members (~400)
    - KBIL—KB members (~ 90) who have ILL activated linking

- **Lending Processing**
  - Provides a link to electronic resource
    - Directly access document
    - Save to local drive
    - Deliver and update without closing the request

Lending Direct Request Link



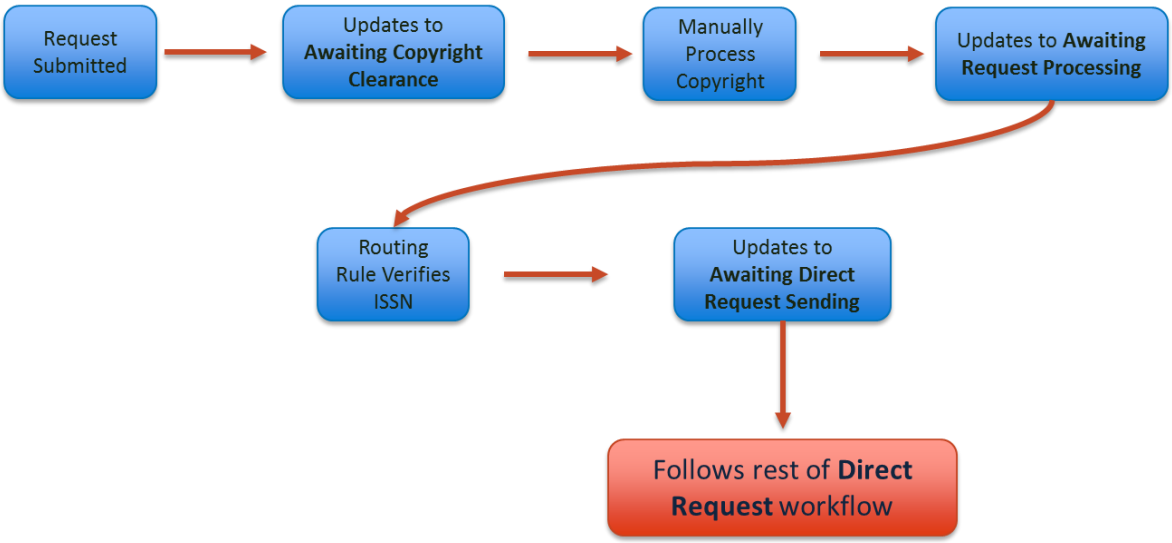
Routing Rules for DR Articles

Lending Requests with KB Link

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Lending
Transaction Status	Awaiting Lending Request Processing
Match String	t.TransactionNumber in (select distinct TransactionNumber from OCLCCollectionData)
New Process Type	Lending
New Transaction Status	Awaiting EJournal Processing
Rule Description	Routes requests with KB Links to special processing queue

- **Borrowing Processing**
  - Follows same workflow as loans with addition of copyright processing
  - Can be activated manually through routing or automated with system routing rules

- **Copyright Processing and Direct Request**

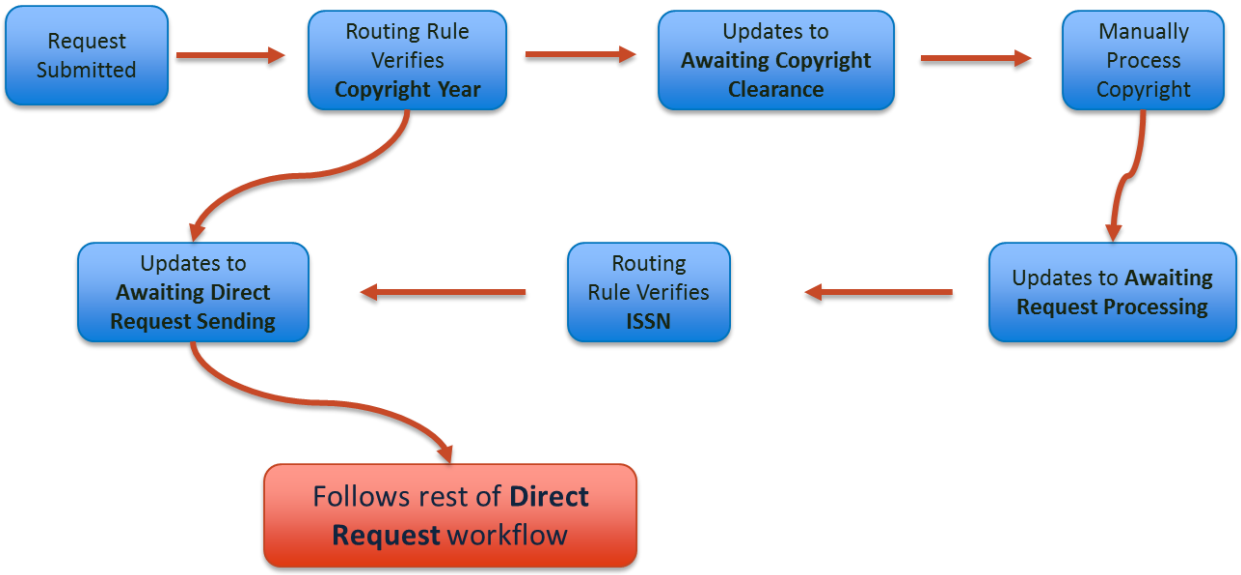


Borrowing Basic Article Routing Rule

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Request Processing
Match String	t.ISSN > '' and t.RequestType = 'Article' and (t.LendingString = '' or t.LendingString is NULL)
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Direct Request rule for Articles

Sent to Direct Request after Copyright Clearance Processing

- **Direct Request and Routing to skip Copyright Clearance for older articles**



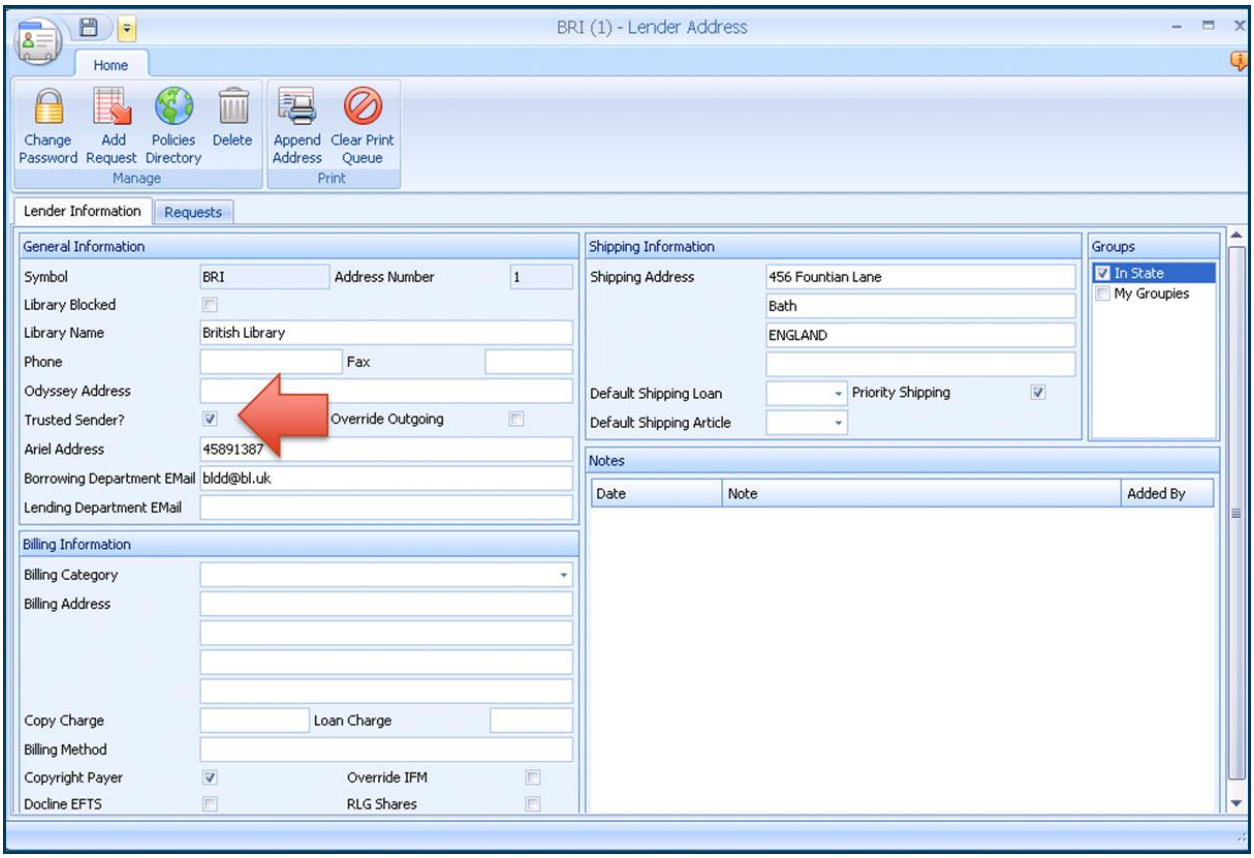
Borrowing Article with Copyright Processing Modification

Field Name	Entry
Rule Number	0
Rule Active	Yes
Process Type	Borrowing
Transaction Status	Awaiting Copyright Clearance
Match String	t.RequestType='Article' and len(t.PhotoJournalYear)=4 and t.PhotoJournalYear < convert(varchar(4),(datepart(year,getdate())-5)) and t.ISSN > ''
New Process Type	Borrowing
New Transaction Status	Awaiting Direct Request Sending
Rule Description	Direct Request rule for articles & to skip Copyright Clearance or older articles

Would probably use with rule above to catch requests after Copyright Processing

Trusted Sender

- Allows electronic document delivery to patron direct upon receipt from lending library **without staff intervention**
- When **billing** is active for Borrowing, Trusted Delivery functions only for customers exempt from billing
- Activate for all or for individual lenders
    - **Trusted Sender** option on Lender Address records
- Customization Manager Setting
    - Odyssey | Trusted |OdysseyAutoElecDel
        - Always = All
        - Never= No One
        - Trusted = As set in **Lender Address** record



Helpful Links

ILLiad Documentation

◊ https://prometheus.atlas-sys.com/display/illiad/Unmediated+ILL+-+Direct+Request
Implementation Guide → Unmediated ILL – Direct Request

Custom Holdings Creation

◊ http://www.oclc.org/support/documentation/resourcesharing/customholdings/default.htm

Direct Request Profile Creation

◊ http://www.oclc.org/support/documentation/firstsearch/managing/directill/directill.pdf
See Step 3—NOTE: Additional directions in this document are not for libraries that use ILLiad

◊ http://www.oclc.org/support/documentation/resourcesharing/direct/planguide/3-3/3-3.htm

WorldCat Knowledge Base

Informational

◊ http://www.oclc.org/knowledgebase/default.htm

Sign Up

◊ https://www.oclc.org/forms/wckb-request.en.html