

Borrowing Tips & Tricks

More tips than tricks

Direct Request

Access at WorldCat Services Administrative
Module

[http://firstsearch.oclc.org/crs/servlet/
org.oclc.fsadmin.AdmBuildLogonPage?
show=admin&language=en](http://firstsearch.oclc.org/crs/servlet/org.oclc.fsadmin.AdmBuildLogonPage?show=admin&language=en)

using your OCLC Authorization Number and
Password.

Direct Request

The screenshot displays the WorldCat Services Administrative Module interface. At the top, a navigation bar includes links for Usage Statistics, WorldCat Services, WorldCat Registry, WorldCat.org, and Administrative Module. Below this is the WorldCat Services logo and a set of tabs: Home, Authentication/Access, Resource Sharing (selected), Linking, Interface Display, and WorldCat.org. A left-hand sidebar contains a 'Patron ILL Settings' dropdown menu and a 'Staff ILL Settings' dropdown menu. The 'Staff ILL Settings' menu is open, showing a list of options: Authorizations, Constant Data Options, Constant Data Records, Saved Notes, Custom Holdings Groups, Custom Holdings Paths, and Direct Request Profiles. The 'Direct Request Profiles' option is highlighted with a blue border and a blue oval. The main content area shows the breadcrumb 'Resource Sharing > Staff ILL Settings > Authorizations' and a section for 'Staff View Display Settings' with a checkbox for 'Display link to WorldCat Services Administrative Module in WorldCat Resource Sharing' which is checked and labeled 'On'. At the bottom right, a status message reads 'You are logged on as ILL authorization 100017159'.

More information: http://firstsearch.oclc.org/crs/servlet/org.oclc.fsadmin.AdmBuildHelp;jsessionid=4EE7E39F5DF6C6BAF0A642A481F4C484.eleven?lang=en&show=admhlp_dirreqpro_fields#reqsources

Patron ILL Settings
- select an option -

Staff ILL Settings
Direct Request Profiles

Per-Article Purchase
- select an option -

OpenURL Links

ILL Authorization: 100017159 | FirstSearch Authorization: 100197467 | Symbol: GZM

Resource Sharing > Staff ILL Settings > Direct Request Profiles

View/Print New Blank Record Delete Record Save Chan

To edit a specific Direct Request Profile:
 Select Profile Name: Direct Request Profile OR enter an existing Profile Name

 Go

View/Print Profile Descriptions

Profile Information

* Profile Name: Last Modified Date:

Description:

Request Sources:

Request Types:

Patron Statuses:

Patron Departments:

Patron Will Pay Up To:

Need At Earliest:

But No Later Than:

Bibliographic Formats:

Age of Material:

But No Older Than:

Language:

Route to Review File Options

If Potential Duplicate Request:

If Held By Your Institution:

If Held By Custom Holdings Group:

Additional Profile Options

Constant Data Record:

Minimum Number in Lender String:

* Custom Holdings Path:

Produce The Request:

* indicates a required field

View/Print New Blank Record Delete Record Save Chan

OCLC Usage Statistics

Access at OCLC Usage Statistics Reports

<http://www.stats.oclc.org/cusp/nav>

using your OCLC Authorization Number and
Password.

OCLC Usage Statistics: Resource Sharing Reports

The screenshot shows the OCLC Usage Statistics interface. At the top left is the OCLC logo. The page title is "OCLC Usage Statistics". Below the title are two bullet points: "Welcome to the OCLC Usage Statistics, Resource Sharing reports." and "About WorldCat Resource Sharing". A navigation bar contains tabs for "FirstSearch", "WorldCat.org", "Resource Sharing" (which is active), "Online Cataloging", and "COUNTER". On the right of the navigation bar are links for "Resource Sharing Service" and "Comments". Below the navigation bar is a control panel with "Period:" set to "August 2008", "Months:" set to "6", and an "Update" button. To the right of the control panel are icons for "Export", "Help", and "E-mail" (the latter is circled in red). Below the control panel is a breadcrumb trail: "All -> Institution: GZM". The main content area shows a tree view for "Institution: GZM" with a list of reports. Blue arrows point to the following reports: "ILL Fee Management Program Borrower Report", "Resource Sharing Borrower Reasons For No Report", "Borrower Resource Sharing Stats Report", "Borrower Activity Overview Report", and "Borrower Transaction-Level Detail Report". Below the institution list are links for "Group: CICN (CIC Resource Sharing Group)", "Group: CIC (CIC Center for Library Initiatives)", "Group: WISCONSIN (Wisconsin Libraries)", and "Group: UWSystem (Univ of Wisconsin System)".

OCLC

UNIV OF WISCONSIN, MADISON, GEN LIBR SYS

OCLC Usage Statistics

- Welcome to the OCLC Usage Statistics, Resource Sharing reports.
- [About WorldCat Resource Sharing](#)

[FirstSearch](#) | [WorldCat.org](#) | **Resource Sharing** | [Online Cataloging](#) | [COUNTER](#)

[Resource Sharing Service](#) | [Comments](#)

Period: Months:

All -> Institution: GZM

- [Institution: GZM](#)
 - [ILL Fee Management Program Borrower Report](#) ←
 - [ILL Fee Management Program Lender Report](#)
 - [Resource Sharing Borrower Reasons For No Report](#) ←
 - [Resource Sharing Lender Reasons For No Report](#)
 - [Borrower Resource Sharing Stats Report](#) ←
 - [Lender Resource Sharing Stats Report](#)
 - [Strategic Union List Report](#)
 - [Borrower Activity Overview Report](#) ←
 - [Lender Activity Overview Report](#)
 - [Borrower Transaction-Level Detail Report](#) ←
 - [Lender Transaction-Level Detail Report](#)
 - [eSerials Requests by Journal Title Report](#)
 - [Serials Request Overview Report](#)
- [Group: CICN \(CIC Resource Sharing Group\)](#)
- [Group: CIC \(CIC Center for Library Initiatives\)](#)
- [Group: WISCONSIN \(Wisconsin Libraries\)](#)
- [Group: UWSystem \(Univ of Wisconsin System\)](#)




OCLC Usage Statistics: Resource Sharing Reports

Email Options:

[FirstSearch](#) | [WorldCat.org](#) | **[Resource Sharing](#)** | [Online Cataloging](#) | [COUNTER](#)

[Resource Sharing Service](#) | [Comments](#) | [E](#)

Edit E-Mailed Reports

 Export |
  Help |
  E-mail




List of E-mail Reports

Edit	Authorization	Report	E-mail Address	Send Monthly	Format	Style
edit	100017159	ILL Fee Management Program Borrower Report	hweltin@library.wisc.edu	yes	excel	attachment
edit	100017159	Resource Sharing Borrower Reasons For No Report	hweltin@library.wisc.edu	yes	excel	attachment
edit	100017159	Borrower Activity Overview Report -- Institution	hweltin@library.wisc.edu	yes	excel	attachment
edit	100017159	Borrower Transaction-Level Detail Report -- Institution	hweltin@library.wisc.edu	yes	excel	attachment
edit	100017159	Borrower Resource Sharing Stats Report	hweltin@library.wisc.edu	yes	excel	attachment

[FirstSearch](#) | [WorldCat.org](#) | **[Resource Sharing](#)** | [Online Cataloging](#) | [COUNTER](#)

[Resource Sharing Service](#) | [Comments](#)

E-mail: Borrower Resource Sharing Stats Report

 Export |
  Help |
  E-mail

[All](#)

E-mail Address:

Send Monthly:

Format: HTML Excel

Style: Attachment Hyperlink to report

Document Suppliers

Most people know about...

- British Library
- CISTI (CAI)

....but have you also tried...

- NYPL Express
- ESTIS-University of Minnesota
- MITS-Michigan Information Transfer Source
- WTS-Wisconsin TechSearch
- Publishers
- If all else fails, check out ShareILL (http://shareill.org/index.php/Document_suppliers)

When all else fails, ask someone...

ShareILL at

http://shareill.org/index.php/Main_Page

article discussion edit history Log in / create acc

Main Page

Welcome to *ShareILL*!

ShareILL is a gateway to electronic and print resources pertaining to all aspects of interlibrary loan (ILL), document delivery, and resource sharing. Designed to be comprehensive and international in scope, **ShareILL** features links to resources that will help practitioners locate materials for their clientele, manage the ILL process, and keep up with developments in the profession.

Finding aids and verification tools. When you can't find what you're looking for in the usual places, look here. **National libraries and archives** are great resources for materials published in their respective countries and languages. Search **gateways and union catalogs** and **online directories** for links to specialized library and archival collections. If you're unable to verify a problem citation but don't know where to look, check our list of **verification tools**. Order materials directly from **document suppliers** or search their catalogs to verify problem citations.

Managing your operation. ILL practices are governed by a vast array of **codes and guidelines** which can be regional, national or even international in scope. **Library networks and consortia** often publish their own protocols or promote joint licensing agreements for their members. **Systems, software and standards** directs you to the home pages of vendors for bibliographic utilities, ILL management systems, and document transmission software. These systems are based on computer standards such as the ISO ILL Standard 10160/61 or NISO Circulation Interchange Protocol (NCIP). The **copyright and licensing** page will direct you to sites where you can learn about copyright compliance and licensing restrictions, or even pay royalties online. **Marketing** tools are another way to make your operation more visible to both internal and external customers.

Current awareness tools. **Conferences** as well as **Discussion lists and blogs** are a great way to keep in touch with your colleagues and there are some excellent **training tools** available on the web. **Professional associations** often have sections or committees devoted to resource sharing concerns. Read up on the many **projects and current initiatives** underway all across the globe, or find out more through the print resources listed in **publications**.

Interested in contributing to ShareILL? [Click here to get started using ShareILL today](#).

finding aids and tools

- National libraries and archives
- Gateways and union catalogs
- Online directories
- Verification tools
- Document suppliers

managing your ill operation

- Codes and guidelines
- Library networks and consortia
- Systems, software and standards
- Copyright and licensing
- Training tools
- Marketing

keeping current

- Conferences
- Discussion lists and blogs
- Projects and current initiatives
- Professional associations
- Publications

search