Create ILL copy video transcript.

Welcome to Create ILL copy requests.

Copy requests are ILL requests for copy of materials such as articles, chapter, or pages of books.

Copy requests involve a lending library sending an electronic copy or paper copy of an item to a borrowing library.

It's important to configure your preferences to save time with your ILL requests and for a better experience with the service. You can configure your preferences in OCLC Service Configuration such as create constant data, select your preferred libraries to request from using custom holdings, set up your print settings for your labels and book straps, and add links to your online catalog in the service for easy access. You can find more documentation and short videos on these topics at help.oclc.org.

There are 6 steps to create and submit copy requests:

First the borrowing library searches for an item in WorldCat database.

Then selects the appropriate bibliographic record.

The next step is to select the potential lenders for the lender string.

Then Apply the constant data.

Check and complete the request form.

Finally submit the request.

There will be situations when a library will have to create a request from a blank form. This can be done from your interlibrary loan service homepage by clicking the Borrowing Requests accordion on the left side panel then Create Request button. You will then follow the 6 steps mentioned here before by first searching for an item in WorldCat and entering the bibliographic record information on the respective fields in the form. In this video, we will focus on creating a loan request starting from the **Discover Items** option instead.

For example, your patron needs an article that your library doesn't subscribe to. Then you need to gather as much information as possible such as title, author, ISSN to start an ILL copy request on behalf of your patron. In this example the patron needs the Journal of comparative politics, ISSN 1338-1385.

Starting from your interlibrary loan service homepage, click **Discover Items** accordion on the left side panel. You can either start with a basic search by selecting (keyword, title, author, ISBN, ISSN, or OCLC number) and entering the term or you can do an advanced search here on the right where you can combine indexes using the Boolean operators and select qualifiers to filter your search. As our example where I combine title, ISSN, and language. Then click the "Search" button.

At the result page, you can identify which bibliographic record corresponds to the item you are looking for. Now you have two ways to proceed: if your library has created custom holdings then you will be able to select and apply your custom holdings path on the last column on the right. Custom holdings are

pre-selected lending libraries your library prefers to request items from. The other way to proceed is by selecting libraries from the list you can find when you click one of the options on the column in the middle, where each option is in order of libraries nearest to your library that own the item. Let's click "All Holdings" link.

When you click the "All holdings" link you still have the two options to proceed: either applying your custom holdings path or selecting the libraries from the list below. The libraries whose names are hyperlinked, means that when you click the name you are being redirected to their online catalog to check for the item availability. The "i-icon" next to the library name takes you to the respective policies directory page to check the library's loan policies. From the list, you can also see a brief information on the lending libraries policies- if they supply the item, the days they take to respond, the costs involved, and if they accept IFM (the interlibrary loan fee management using the library's OCLC account). After you research and define your potential lenders, when you click the **Yes** link on the Supplier column then the respective symbol is added to the lender string. You can add up to 15 lenders to the string. If your library has created custom holdings, instead of working with the list, you simply select your custom holdings path for this request and when you click the **Go** button the system automatically fills out the lender string with the symbols of the libraries in the custom holdings path that own the item. After your lender string is populated either from the list or from the custom holdings path, click the Create Request button to create your request.

Now you are in the ILL workform. On the upper right side of the screen, you can select and apply your constant data your library has created for copy requests. Constant data is the information about your library that doesn't change from request to request and can be automatically filled by the system.

After you applied your constant data, check if the information is correct. The bibliographic information is automatically filled from your selection. The **magnified glass icon** located next to the fields takes you back to the search results while the **View holdings** link takes you back to the list of potential lenders; in case you need to edit any of this information. You will notice on the right side of the screen the "Search my library's online catalog" link to check the material on your library's online catalog (if your library has set up this link in the OCLC Service Configuration), then below you find the links to search Google Scholar, Google Books or Google as reference.

Complete any additional information related to the specific copy you need. Then scroll down to select your preferred electronic delivery option, check if the shipping information is correct (in case the lending library needs to send you a paper copy instead), add group affiliations and/or borrowing notes as needed. Scroll down to check if the billing information is correct, you can select IFM if your library accepts this method of payment and enter the maximum amount your library accepts for this request if this information is not part of your constant data. Then enter your patron's information- your patron's information is visible to your library only.

After your form is complete, you are ready to submit your request by clicking the Send Request button on the upper left side of the screen. The system will automatically create an ID number for your request. Use the ID number as reference as you manage your request. When you click on the ID number link, you can start managing your request. At this point, before any lending library has answered to your request, you have the option to edit and save any information or cancel the request by clicking the Cancel Request button, if you no longer need this request. You will be able to manage your request from your interlibrary loan service homepage from the options under the Borrowing Requests accordion on the left

side panel, or under the Quick links in the middle section, or by using the index options to search for your request, entering the term on the respective search box at the upper side of the screen. If a lending library sends you an electronic copy of the item using Article Exchange, you will find it under Borrowing Requests option on the left side panel by clicking the AE Alert button, then identify your request to find the Article Exchange unique url and password where the electronic copy is, you can preview the file and` then email the document to your patron. Article Exchange the file is available for 30 days or after viewed 5 times.

Another option you have when creating ILL copy requests on behalf of your patrons is to let the system automate some of these steps. For that, you need to configure the options in OCLC Service Configuration such as create constant data, custom holdings, and configure automation under **Automated Request Manager** in OCLC Service Configuration then apply automation to your requests.

Then, for example, you only need to search and select the record then skip all the other steps and send them to automation for the system to follow your rules before you submit the request.

You can contact OCLC Customer Support and find more documentation on all these topics in details on at help.oclc.org. Thanks for watching!