

## Searching Completed ILL Requests Now Possible

OCLC has added the ability to search an archive of completed ILL requests in WorldCat Resource Sharing using the Request ID number.

When searching requests in the Request Manager, users automatically default to searching active requests. Users may choose to search their completed requests by selecting the radio button that reads “Search Closed Requests” and entering a Request ID number for a request that has been completed.

The request archive goes back to May 2005 (migration to WorldCat Resource Sharing). OCLC will maintain an archive of five years worth of requests. In the future OCLC will add additional search parameters to the archive of completed requests, for example the ability to search by borrowing or lending library, title or author.

## Is Your ILL Policy Record Up-to-Date?

Accurate ILL policies let other libraries quickly determine if and how a resource that you hold can be borrowed. You can improve ILL efficiency by entering or updating your ILL policy.

To help you enter a new policy or update an existing policy, OCLC has created the OCLC ILL Policies Directory Quick Reference. This document provides a brief overview of OCLC's Policies Directory as well as information that will help you to prepare to enter your policies, contacts, and institution information into the Policies Directory <<http://www.oclc.org/support/documentation/resourcesharing/libpolicies/getstart/>>.

## OCLC ILL Direct Request Saves Time

The OCLC ILL Direct Request service streamlines the ILL process by automatically processing user-initiated interlibrary loan requests. ILL Direct Request sends requests created in an external system, usually FirstSearch, directly to eligible lenders without additional editing or review from library staff. Once requests are created, they are sent to profiles (filters) in criteria established by the borrowing library.

OCLC has created a *Direct Request Reference Guide* that explains this service: <<http://www.oclc.org/support/documentation/firstsearch/managing/directill/>>.

## A Reminder: Update to Shipped and Prevent Duplicates

The lending library should be careful to update ILL Pending requests to shipped BEFORE sending the item to the borrowing library.

Failure to update may result in duplicate items received by the borrowing library. This creates unnecessary confusion and potential billing problems. If the borrower is billed for duplicate materials, the lender who did not update is not eligible for payment.

Failure to update to shipped also prevents the lender from receiving a lending credit or IFM credits, if applicable.

## Using the Conditional Notes Manager

Do you find yourself using the same Lending Notes when sending a conditional response? If so, you may wish to use the Conditional Notes Manager to create and store multiple Lending Notes. Here are some instructions:

Conditional Notes are created in the FirstSearch Administrative Module.

1. Go to <<http://firstsearch.oclc.org/admin>>.
2. Enter your ILL authorization and password.
3. Click the start button.
4. Click the Resource Sharing section of the main menu, then choose “Saved Notes” from the drop-down list under “Staff ILL Settings” in the sidebar menu. The system displays the Saved Notes screen.
5. In the Conditional Note Name field, type in a name. Each name can contain up to 30 characters and blank spaces. In the Conditional Note Text field, type in any information to identify the note.
6. Text can contain up to 500 characters and blank spaces.
7. Click “Save Changes.” The note name displays in the Conditional Note Name field, and the text displays in the Conditional Note Text field. The note name also is listed in the Select a Conditional Note field.
8. To clear the form and start over, click “New Blank Record.” The system clears the screen.
9. Click “View/Print” to see more information about Conditional Notes. The system displays a Print screen listing all Conditional Notes, with Conditional Note Text, for your institution.

## Changing the Display Order of Conditional Notes

To change the order of how Conditional Notes are listed:

1. From the FirstSearch Administrative Module, click the Resource Sharing section of the main menu, then choose "Saved Notes" from the drop-down list under Staff ILL Settings in the sidebar menu. The system displays the Saved Notes screen.
2. Select the desired note by clicking it in the "Select a Conditional Note" field. The system fills in the Conditional Note Name and Conditional Note Text fields, and highlights the note name in the Select a Conditional Note list.
3. Click "Move Up" or "Move Down." The note name will move up or down accordingly in the list.
4. Click "Save Changes."

OCLC has produced an online tutorial that covers the conditional notes manager. This tutorial may be viewed at <http://www.oclc.org/support/training/firstsearch/tutorial/>.

## OCLC ILLiad Newsletter Available on Atlas Systems Web Site

Volume five, issue one (Spring 2007) of the *OCLC ILLiad Newsletter* is now available on the Atlas Systems home page at <http://www.atlas-sys.com>. This issue includes information on Ares 2.2, an "At Your Service" column titled "Don't Panic: Basic ILLiad Troubleshooting Part 1," and a great article by Sherry Buchanan on customizing printer templates. Check it out, and if you have any comments, questions, or suggestions, please forward them on to John Brunswick at [jbrunswick@atlas-sys.com](mailto:jbrunswick@atlas-sys.com).

## Resource Sharing Contact Information

Please contact Jon Penn, Resource Sharing Librarian at Nylink, with questions. Jon is available via email ([pennj@nylink.org](mailto:pennj@nylink.org)) or phone (800-342-3353/518-443-5444).