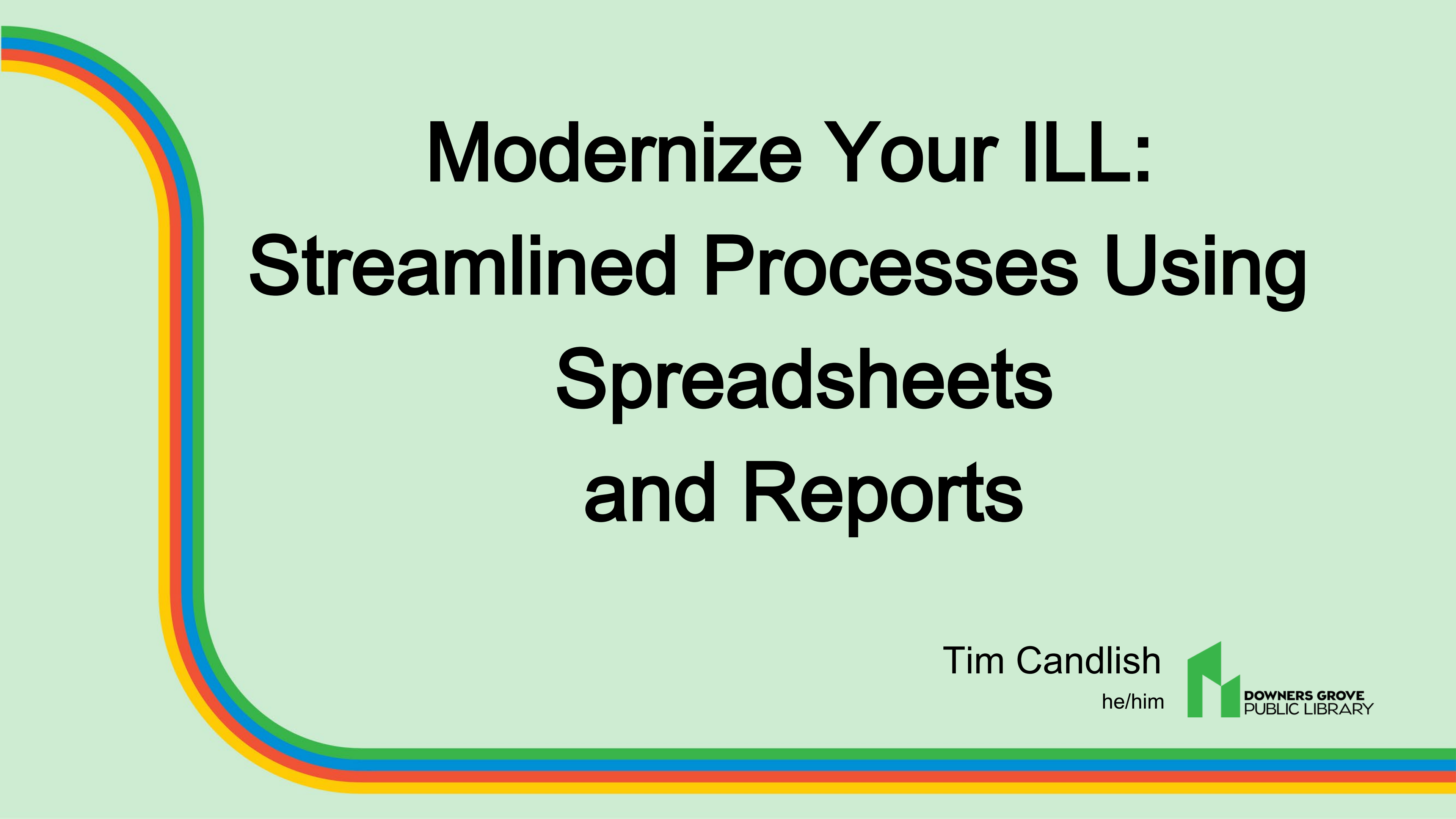


A thick, multi-colored line in shades of green, blue, yellow, orange, and red. It starts as a curved line on the left side of the slide and then continues as a straight horizontal line across the bottom.

Modernize Your ILL: Streamlined Processes Using Spreadsheets and Reports

Tim Candlish

he/him



Background

- Took over ILL at the end of 2023
 - Predecessor had been doing it for 26 years
 - System was pretty old-school: lots of paper forms, multiple filing boxes
- Knew there was room for improvement
 - Needed to balance ILL with other duties like desk shifts, programming, and more



Goals

- Eliminate filing of paper request forms
 - Lots of info on those OCLC forms; what's most crucial to track?
- Simplify checkout process for Circ staff
 - No special due dates, allow check-ins
- Faster brief title record creation
 - Spreadsheets offered opportunity here!



Paperless* Lending

Really only need three things
from a Lending Request:

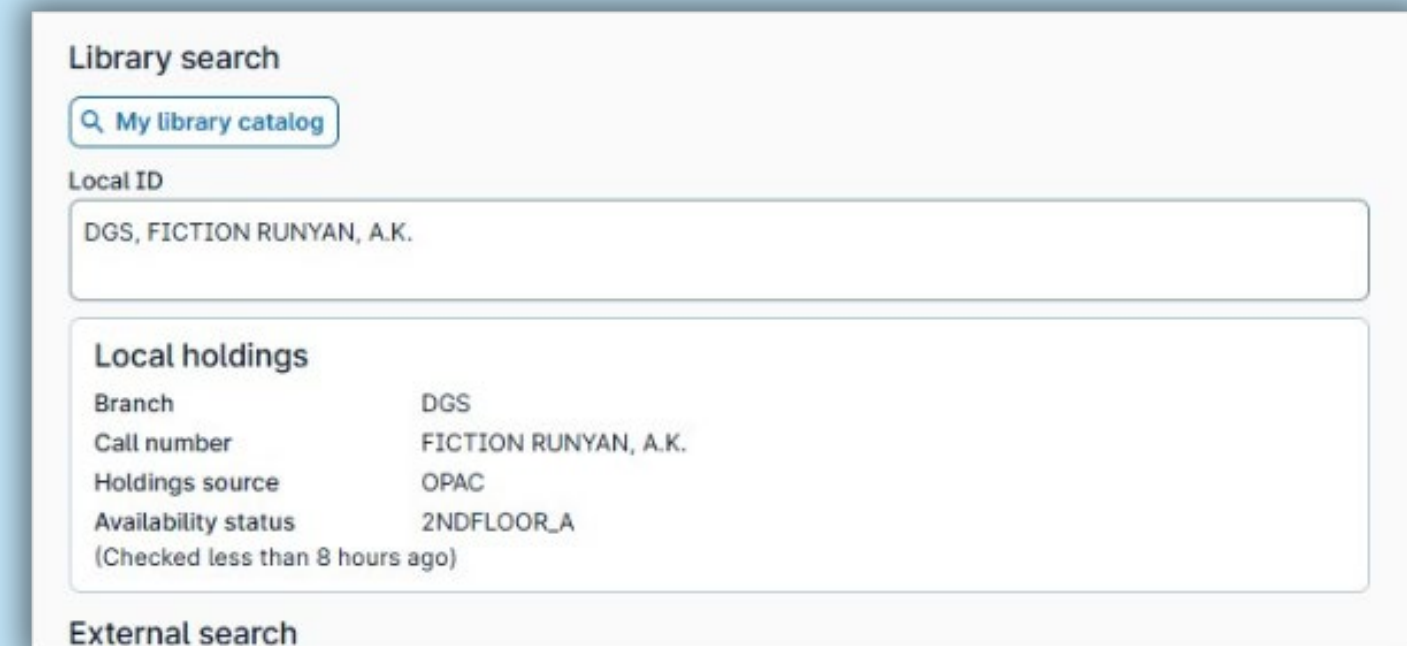
1.OCLC Request ID

2.Destination

- In-state or out, LV IS
or IFM

3 .Bibliographic info

- If LHR/ RTA doesn't link,
ISBN or accession no.



Library search

Local ID

Local holdings

Branch	DGS
Call number	FICTION RUNYAN, A.K.
Holdings source	OPAC
Availability status	2NDFLOOR_A
(Checked less than 8 hours ago)	

External search

*Local holdings can save a step
by eliminating the need to check
WorkFlows!*

The Spreadsheet

Current												
Found	Tr Call #	Tr Title	Tr Author	# Item ID	Response	Request ID	IS or OOS	Tr ILDS Stop	Tr OOS Destination	IFM	Special Due Date?	Tr
☐	910 WRITINGS USA ROAD TRIPS GUI	The vagabonds : the story of Henry Ford and Thomas Ed	Guinn, Jeff	31191012362315	Considering	237434882	IS	XGV			9/24/2026	
☐	CD ROCK COLD YEAR	Year of the spider /	Cold (Musical group)	31191007290406	Considering	237237052	OOS		Carroll County Public Library HQ	\$0.00		
☐	DVD HARLOW	Harlow	Baker, Carroll; Connors, M	31191012504163	Considering	237431069	IS	XWH				
☐	DVD VALLEY	Valley of the kings	Pirosh, Robert; Tunberg, I	31191011063740	Conditional	237423736	OOS		WASHINGTON CO COOP LIB SEP	\$0.00		
☐												
☐												

- This acts as my ILL pick list
 - Include item ID for backup request matching
- Separate tabs for current requests and supplied
 - No paperwork returned? No problem!
- CTRL+F is your new best friend

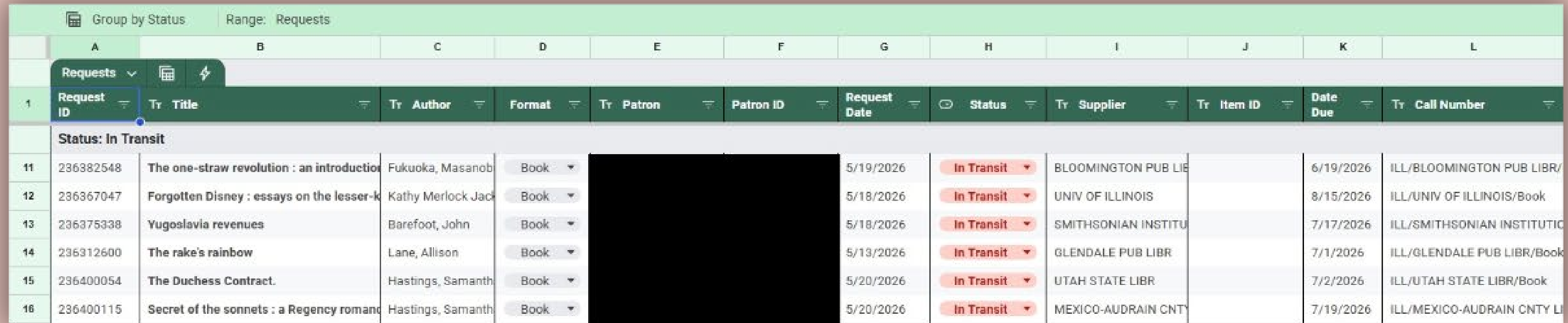


... Paperless*?

- Mostly! The only paperwork generated is the lending bookstrap and the transit label
 - The borrower still needs to be able to match the item with the request
 - If they don't return the paperwork, we can still quickly find the request ID using our spreadsheet!



Paperless Borrowing



Group by Status Range: Requests											
Requests											
Request ID	Tr Title	Tr Author	Format	Tr Patron	Patron ID	Request Date	Status	Tr Supplier	Tr Item ID	Date Due	Tr Call Number
Status: In Transit											
11	236382548	The one-straw revolution : an introduction	Fukuoka, Masanobu	Book		5/19/2026	In Transit	BLOOMINGTON PUB LIB		6/19/2026	ILL/BLOOMINGTON PUB LIBR/
12	236367047	Forgotten Disney : essays on the lesser-known	Kathy Merlock Jack	Book		5/18/2026	In Transit	UNIV OF ILLINOIS		8/15/2026	ILL/UNIV OF ILLINOIS/Book
13	236375338	Yugoslavia revenues	Barefoot, John	Book		5/18/2026	In Transit	SMITHSONIAN INSTITU		7/17/2026	ILL/SMITHSONIAN INSTITUTIO
14	236312600	The rake's rainbow	Lane, Allison	Book		5/13/2026	In Transit	GLENDALE PUB LIBR		7/1/2026	ILL/GLENDALE PUB LIBR/Book
15	236400054	The Duchess Contract.	Hastings, Samantha	Book		5/20/2026	In Transit	UTAH STATE LIBR		7/2/2026	ILL/UTAH STATE LIBR/Book
16	236400115	Secret of the sonnets : a Regency romance	Hastings, Samantha	Book		5/20/2026	In Transit	MEXICO-AUDRAIN CNTY		7/19/2026	ILL/MEXICO-AUDRAIN CNTY LI

- Pretty much the same as Lending, swapping destination for patron info
 - And supplier/ item ID, once we know



Transferring Request Info to the Sheet

- Two options, depending on your process
 - After you've reviewed the request and are preparing to send to lenders
 - When the items are already In Transit
 - More on this in a bit!



Other Handy Tips

For the spreadsheet:

- Conditional formatting due dates
- Table views to separate by status
 - Column types!
- Optional call number formula

For WorldShare:

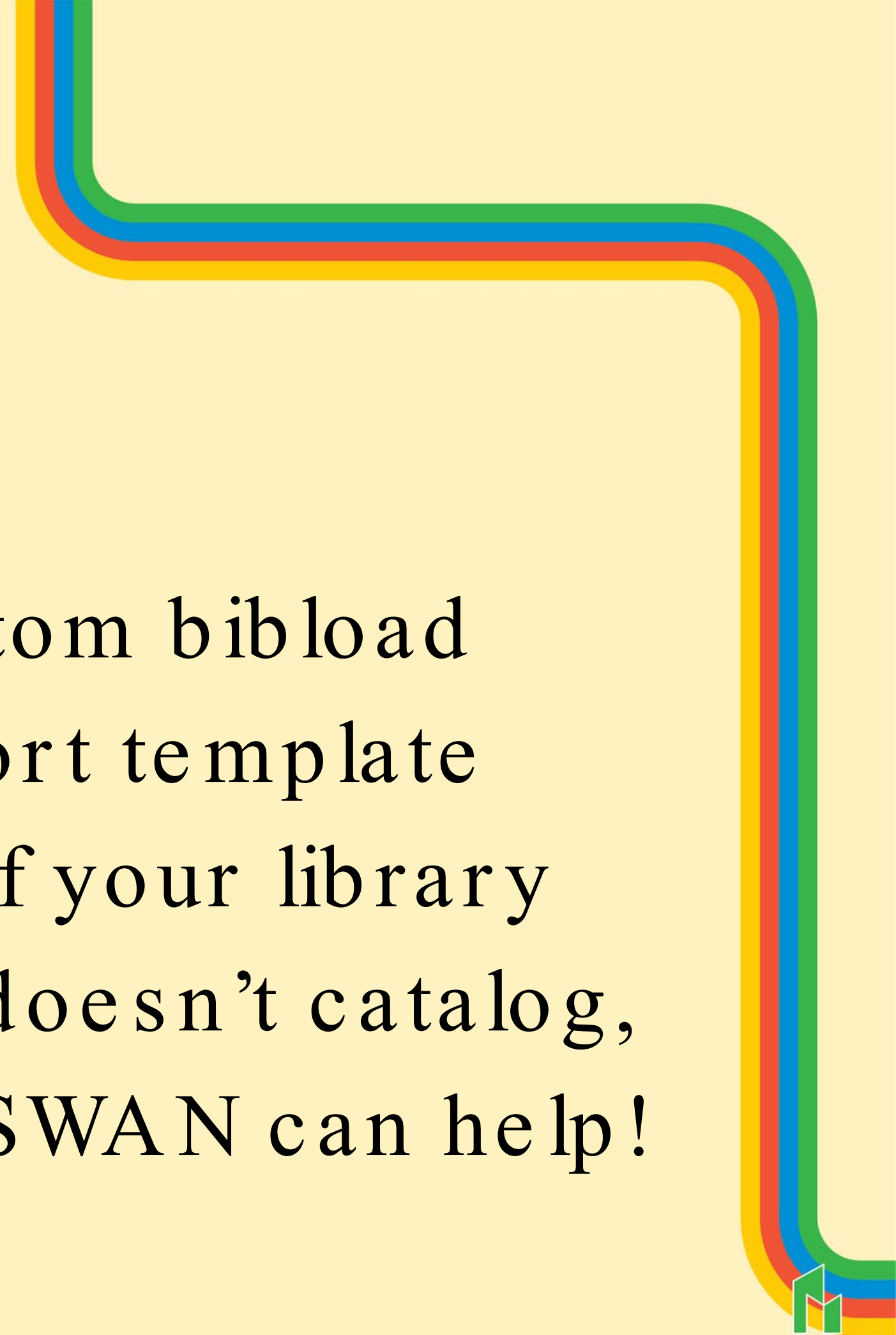
- Be brave, try the Automated Request Manager!
- Any queue can be exported to a .CSV



Batch Creating Brief Titles

You will need:

- In Transits .CSV
- MarcEdit software
 - Templates for Marc Edit
- A Tech login for WorkFlows
- Custom bibload report template
 - If your library doesn't catalog, SWAN can help!



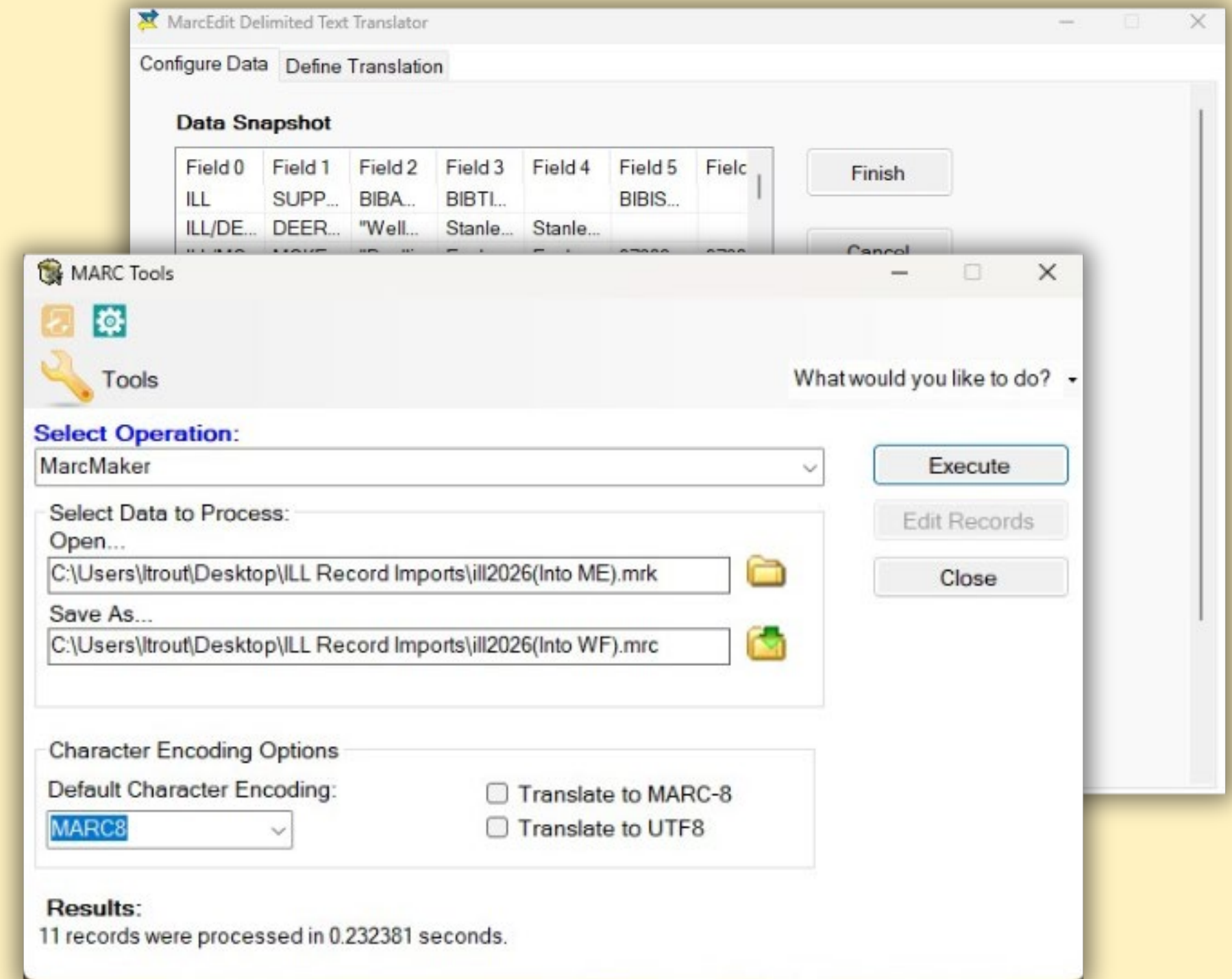
Preparing the Data

- We only need a handful of columns!
 - I like In Transit because we know who's supplying by this point
- Great time to add to your tracking sheet

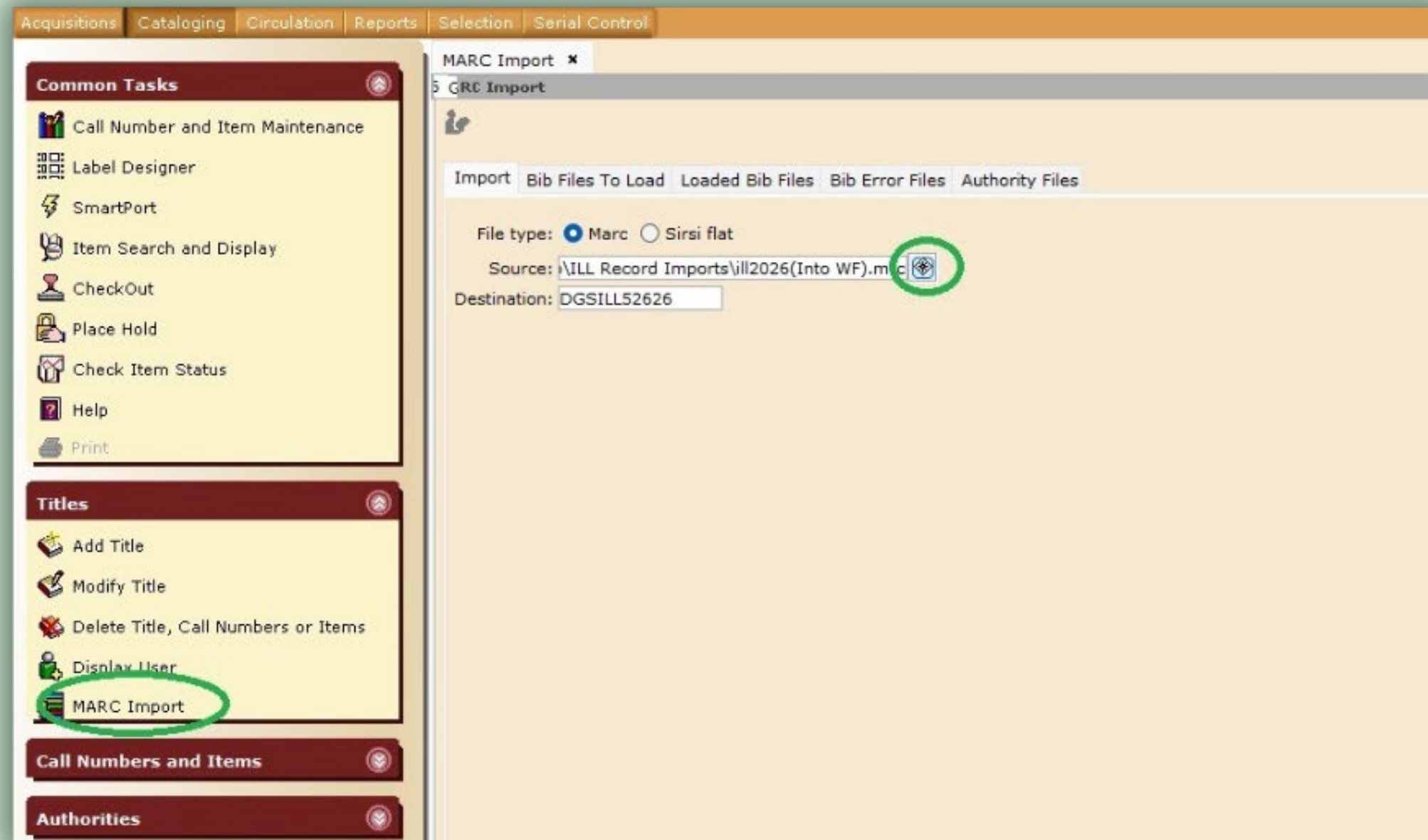
	A	B	C	D	E	F
1	SUPPLIERNAME	BIBAUTHOR	BIBTITLE	BIBISBN	BIBFORMAT	
2	GLENDAL PUB LIBR	Lane, Allison	The rake's rainbow	9780451186669	Book	
3	KANSAS CITY PUB LIBR	Cafferty, John; Beave	Tough all over		Sound Recording - CD	
4	EVANSTON PUB LIBR	Wilder, Jasinda	Badd motherf*cker	9781941098547 1941	Book	
5	UNIV OF ILLINOIS	Kathy Merlock Jackso	Forgotten Disney : essays	9781476689395	Book	
6	SMITHSONIAN INSTITUT	Barefoot, John	Yugoslavia revenues	9780906845639	Book	
7	BLOOMINGTON PUB LIBI	Fukuoka, Masanobu;	The one-straw revolution	9781590173138 (alk.	Book	
8	PEORIA PUB LIBR	Lauren Biel	Sinners Retreat : a dark ro	9781959618270	Book	
9	JOHNSON CNTY PUB LIBI	Godwin, Pam	Dark notes	9781530784165 1530	Book	
10	ROCKFORD UNIV	Wilbur Sturtevant Ny	Bad medicine & good : tal	9780806105215	Book	
11	UTAH STATE LIBR	Hastings, Samantha	The Duchess Contract.	9798685360939	Book	
12	MEXICO-AUDRAIN CNTY	Hastings, Samantha	Secret of the sonnets : a R	9781524419585 (pap	Book	
13	JOHNSON CNTY LIBR	Lethbridge, Ann	The duke's daring debutar	9780373298402 (pap	Book	
14	WOODSTOCK PUB LIBR	London, Cait	When night falls	9780060001803 (pap	Book	
15	MOKENA COMMUN PUB	Boullier, Dianna	Exploring Irish music and	9780862785581	Book	
16	HIGHLAND PARK PUB LIE	Sawyers, June Skinne	Celtic music : a complete	9780306810077	Book	
17						
18						
19						
20						
21						

Into MarcEdit ...

- After formatting our .CSV, save as tab delimited
 - This gets converted to a .MRK, and then a .MRC



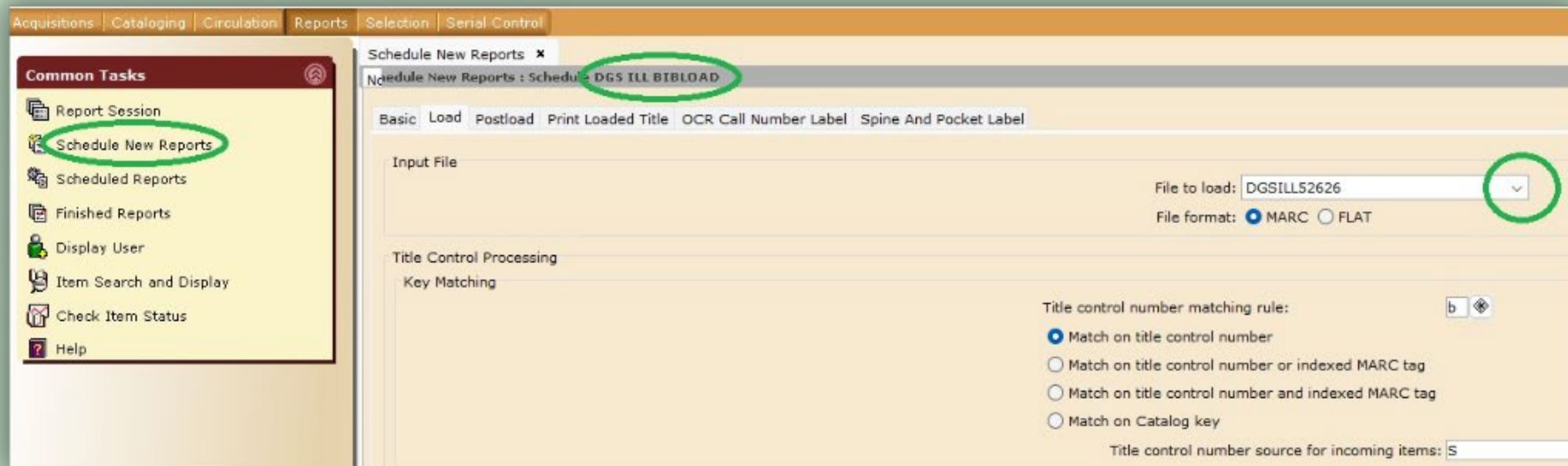
... then to WorkFlows



- Use MARC Import in the Cataloging module to load the MARC records into WorkFlows

The Bibload Report

- Run your custom ILL bibload report on the MARC records in the Reports module



Processing Deliveries

- Since our item records already exist, now we just need to update the item ID when it arrives!

Change Item ID

Search for: The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /

Index: Title

Library: DGS

Current: KEYWORD Title The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /, DGS: 1 record

Title	Author	Pub. Year
The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /	Georg von Rauch; Gerald Onn	1999

Description: Call Number/Item

Description	Call Number/Item
The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /	3462123-1001-1 - NS_ILL_PRT - AVAIL SOON

Price: \$0.00

Home location: ILL_IN

Item category 1: none

Item category 2: none

Item category 3: none

Item category 4: none

Item category 5: none

Item category 6: none

Item category 7: none

Item category 8: none

Item category 9: none

Item category 10: none

Date created: 8/11/2026

Date last charged: Never

Last checked in: Never

Date inventoried: Never

Times inventoried: 0

Item type: NS_ILL_PRT

Current location: AVAIL_SOON

Media desk: none

Previous user ID: none

Last activity: Never

Total checkouts: 0

In-house uses: 0

Ongoing renewals: C

Ongoing checkouts: C

Checkouts to date: C

Renewals to date: C

Date last cleared: N

Change Item ID Cancel

Change Item ID

Search for: The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /

Index: Title

Library: DGS

Current: KEYWORD Title The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /, DGS: 1 record

Title	Author	Pub. Year
The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /	Georg von Rauch; Gerald Onn	1999

Description: Call Number/Item

Description	Call Number/Item
The Baltic States : the years of independence, Estonia, Latvia, Lithuania, 1917-1940 /	3462123-1001-1 - NS_ILL_PRT - AVAIL SOON

Price: \$0.00

Home location: ILL_IN

Item category 1: none

Item category 2: none

Item category 3: none

Item category 4: none

Item category 5: none

Item category 6: none

Item category 7: none

Item category 8: none

Item category 9: none

Item category 10: none

Date created: 8/11/2026

Date last charged: Never

Last checked in: Never

Date inventoried: Never

Times inventoried: 0

Item type: NS_ILL_PRT

Current location: AVAIL_SOON

Media desk: none

Previous user ID: none

Last activity: Never

Total checkouts: 0

In-house uses: 0

Ongoing renewals: C

Ongoing checkouts: C

Checkouts to date: C

Renewals to date: C

Date last cleared: N

Change Item ID Cancel

When Batch Adding, Watch for...

- Multiple copies of the same title (book clubs)
 - Delete all but one or leave them out entirely
- Make sure any data you add is 100% exact
- Need to have enough items in transit to make it worthwhile
 - It's the same amount of work to batch add five items as it is to batch add 50!



Streamlining for Circ

Under the old paper filing system:

- Predecessor would specify a due date for the item based on the lender's due date
 - Circ desk staff had to remember to modify
- Desk staff were also discouraged from checking in returns
 - needed to be on the patron's record to match up the paperwork



The Paperless* System

- No modifying due dates!
 - WorkFlows assigns loan rules to the ILL item type; let it check them out how it wants to
 - We can monitor due dates using conditional formatting on our tracking spreadsheet
- Check them in!
 - If a patron returns it, it should come off their account
 - We can match it to the request using CTRL+F and the item ID





Thank you!

Questions?

tcandlish@dglibrary.org

