Getting Started with OCLC WorldShare® Interlibrary Loan: for members of borrowing management groups

Introduction

OCLC WorldShare® Interlibrary Loan provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users. This new, single service provides an automated workflow to increase efficiency, and eliminate the need for manual technologies.

This document is intended only for institutions who are members of an ILL borrowing management group. (If you are part of one of these groups, another institution manages your requests.)

For more general information, please refer to the **OCLC WorldShare Interlibrary Loan Web page** for more details.

Preparing and planning

Browser requirements

PLEASE NOTE: Functionality in the WorldShare Interlibrary Loan service is updated periodically. During these updates, the service is tested with specific browser versions to ensure the service functions correctly when used with different browsers.
Please see the current browser requirements on this **Web page**.

Please see **OCLC WorldShare® Interlibrary Loan Support** for other valuable documentation and training resources.

Support

Contact **OCLC Support in your region**.

Your account

An account has been created for you. If you have not received this information, please contact your administrator.

Accessing the WorldShare ILL system

To access the site, go to the URL for your institution, and sign in with your user name and password. You will be directed to WorldShare Interlibrary Loan (there may be a slight delay before the screen refreshes).
Note: As a member of an ILL borrowing management group, you are accessing a member version of the system with limited functionality.

You may also see a branch selection pop-up window. Select your branch and click **OK** to proceed.

Note: If you are not immediately directed to the WorldShare Interlibrary Loan Home screen, click the **Interlibrary Loan** tab (as shown in the image).

The Home screen lists all of your requests, and a search option for finding requests.

Navigating the system

For best performance, **please do not use the browser Back button**. Instead, click a link on the screen to return to a previous page.

Creating requests

To create new requests in WorldShare Interlibrary Loan, click the **New Request** heading. Clicking **Create New Request** produces a blank workform.

If you currently use OCLC FirstSearch®, you can use OCLC WorldCat® to find items, then place requests in WorldShare Interlibrary Loan.

If you currently use WorldCat.org™, you can request items via a blank request form, by manually cutting and pasting details from the WorldCat record into the form.
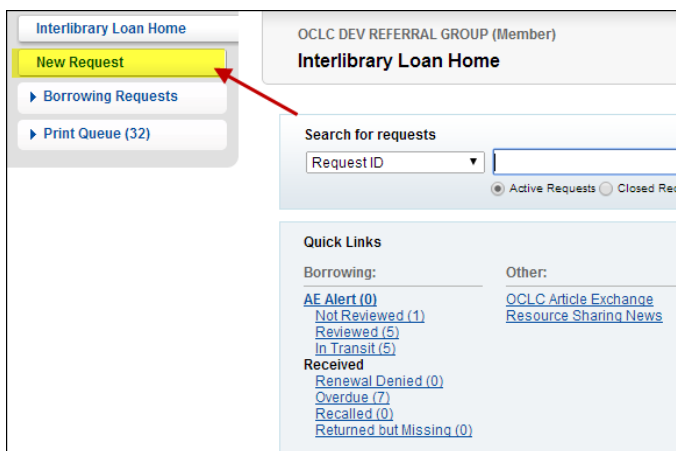
To create a request:

Step	Action	Result
1	On the workform, cut and paste details for your request.	
2	Choose the request **Type** and **Format**.	
3	Provide a **Needed By:** date.	
4	Apply your constant data record. **Note:** Your group administrator has configured constant data records for you.	
5	Click **Save For Review**.	A confirmation message appears and the request is sent to the group administrator.

Searching for requests

From the Interlibrary Loan Home screen, you may search active and closed requests by:

- Request ID
- Borrower Symbol
- Lender Symbol
- Author
- Title
- Article Title (active requests only)
- Patron Name (borrower active requests only)
- Patron ID (borrower active requests only)
- Patron Department
- Local ID (borrower active requests only)

Note: Results are limited to the 500 most recent requests.

Note: After patron requests have been closed, all patron information that could identify an individual is discarded for privacy and legal reasons. Only Borrower Active Requests can be searched by Patron Name, Patron ID, and Local ID.

To search for requests:

| Step	Action	Result
1	Choose a search option from the drop-down list.	
2	Type a keyword or number in the field provided.	
3	Click the circle next to either **Active Requests** or **Closed Requests**.	
4	Click **Go**.	The system responds with any matching requests.
5	Click a request.	

Managing requests

Click the **Borrowing Requests** heading in the left navigation bar to see all requests.
Note: See the Categories chart (below) for a detailed description of each category.

Reviewing requests

The main categories are listed first, followed by sub-categories for easier organization.

The initial categories of **Not Reviewed** and **Reviewed** are listed under **New For Review** in the left navigation bar. If any requests contain an **AE Alert**, it is also listed.
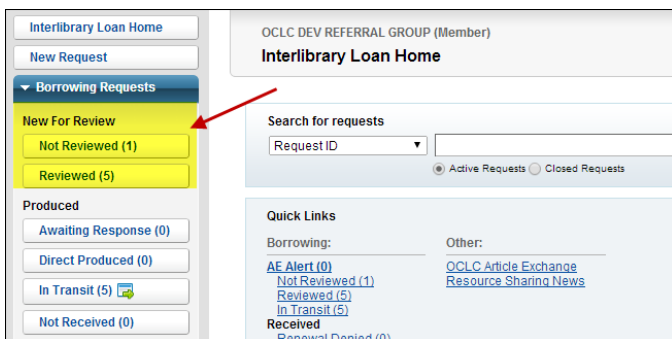
Click a category name to see all requests in that category.
Note: Categories with no current requests will not appear in the list.

Responding to requests

The main categories appear at the top, followed by sub-categories for easier organization.

To respond to a request:

Step	Action	Result
1	Click a category of request. **Note:** Results are sortable. Click the column title to sort requests.	The screen expands to list requests in that category. If there are more than 10 requests, you can page forward to view more.
2	Click an **ID** or **Title** to see the full request.	Request details appear. **Note:** Some details are listed in drop-down lists.

3	Complete any desired fields.	
4	Possible actions appear at the top of the request. Click the action you wish to apply.	A confirmation message appears.

Batch processing

Use batch processing to receive, return and complete requests for multiple items.
Note: There is a limit of 100 requests at a time.
Note: Request queues where batch processing is available include the icon in the left navigation sidebar.

To use batch processing to receive items:

Step	Action	Result
1	Click **Borrowing Requests** from the left navigation bar.	The list of Borrowing categories expands.
2	Click **In Transit**.	
3	At the top of the next screen, click **Batch receive "In Transit" items.**	The screen refreshes to include the additional batch processing fields.
4	Provide a **Date Received**.	
5	*Optional.* Click **Print Book Straps**.	The selected items are added to the **Print Queue**.
6	In the **Request ID** field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.	The request is added to the list.
7	Click **Receive Items**.	A confirmation message appears, and the requests are updated to **Received**.

To use batch processing to return items:

Step	Action	Result
1	Click **Borrowing Requests** from the left navigation bar.	The list of Borrowing categories expands.
2	Click **Received**.	
3	At the top of the next screen, click **Batch return "Received" items.**	The screen refreshes to include the additional batch processing fields. **Note:** The **Date Returned** defaults to the current date.
4	*Optional.* Click **Print Return Labels**.	The selected items are added to the **Print Queue**.
5	In the **Request ID** field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.	The request is added to the list.
6	Click **Return Items**.	A confirmation message appears, and the requests are updated to **Returned**.

Printing

You may print certain items, or all items in a queue.

To print now:

Step	Action	Result
1	From a request screen, click **Print Now** at the top of the screen.	The Print Preview screen appears.
2	Print using the printer icons or links.	The item prints.

Note: You may print only one request per page.

To print certain items later:

Step	Action	Result
1	From a request screen, click the **Dropdown Arrow** on the **Print Now** button.	A dropdown list of print options appears.
2	Choose **Add To Print Queue** from the drop-down list.	A confirmation message appears, and the request is added to the appropriate print queue.
3	Click **Print Queue** in the left navigation bar.	The print queues appear, as well as the option to **Print All** (see **instructions below**).
4	Click the desired print queue to expand the list.	Requests that were marked for that type of printing appear.
5	Click the check box(es) for items you wish to print.	
6	*When printing requests,* you may choose to print 1 or 2 requests per page. *When printing labels,* choose any special	

	Instructions or a **Label Format**.	
7	Click **Print.**	The Print Preview screen appears.
8	Print using the printer icons or links.	The item prints.
9	Once you have confirmed that your printing was successful, you may choose to delete requests from the **Print Queue.** Check the check box, and then click **Remove**. **Note:** Requests stay in the print queue indefinitely, unless they are removed.	

To print all items in a print queue:

Step	Action	Result
1	Click **Print Queue** in the left navigation bar.	The **Borrowing**, **Lending**, and **Purchasing** print queues appear, as well as the **Print All** option.
2	Click **Print All.**	The Printing: Request Queues screen appears.
3	Click the check box(es) for items you wish to print.	
4	Click **Next**. Or click **Clear** to clear categories and start over.	The Printing: Marked Queues screen appears.
5	Click the **Print** button for queues you wish to print.	The Print Preview screen appears.
6	Print using the printer icons or links.	The item prints and a confirmation message appears.

Note: There is a limit of printing 500 requests at a time.

To remove all items from a print queue:

| Step	Action	Result
1	Click **Print Queue** in the left navigation bar.	The **Borrowing**, **Lending**, and **Purchasing** print queues appear, as well as the option to **Print All**.
2	Click **Remove All** for the appropriate print queue (**Borrowing**, **Lending**, or **Purchasing**).	A message appears asking you to confirm that all requests should be removed from the queue.
3	Click **Remove All** to proceed and remove all requests from the queue.	All items are removed and the counts for each queue return to 0.

Auto-Update with Print All

The auto-update option allows you to control the status of Borrowing **Not Reviewed** requests or Lending **New – Copies** and **New – Loans** requests after they are printed. The system default is to advance these items to an updated status after the **Print All** action is taken. **Not Reviewed** requests will be updated to **Reviewed**. **New – Copies** and **New – Loans** will be updated to **Considering**. If you do not want to advance the request to **Reviewed** or **Considering** status, uncheck the Auto-update box.
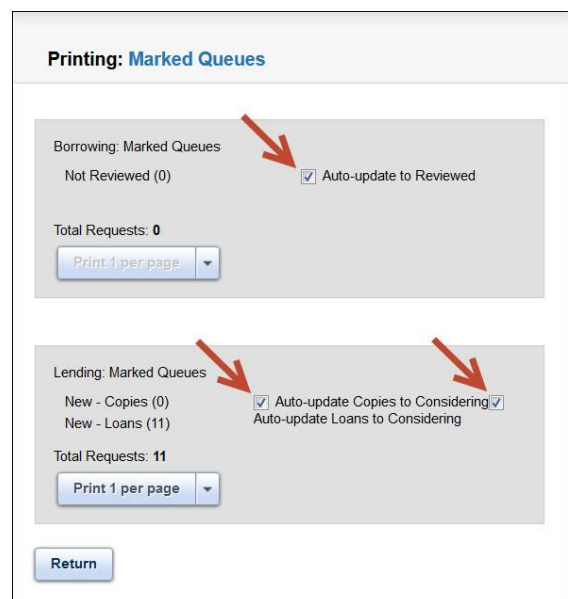
Note: The system does not retain the setting from the previous print. The update status must be chosen every time you print.

Other functions

E-mail a copy of a request

Send a formatted e-mail of the request details to any e-mail address using the **Email** button at the top right of any request screen.

Non-referral days/System days

OCLC counts standard working days (Monday-Friday) as system days. OCLC does not count Saturdays, Sundays and the following as working days for aging requests:

New Year's Day	Christmas Eve
Thanksgiving Day	Christmas Day
Day after Thanksgiving	New Year's Eve

Borrowing Requests

Category	Description	Borrower Action(s)
AE Alert	Borrower alert category is present when a lender has entered text into the **AE Alert** field on the workform.	Mark as received Not Received
NEW FOR REVIEW		
Not Reviewed	No one in your library has yet viewed these requests. After clicking Mark as Reviewed, the request moves to the administrator as *Reviewed*. **Note:** When a user views a request in this category, its status changes to *Reviewed*. **Note:** When using the Print All feature to print Not Reviewed requests, a user has the option to use the default setting and auto-update all requests printed to *Reviewed* or to turn auto-update off and retain the *Not Reviewed* status. For more information see **Auto-Update with Print All**.	Mark as Reviewed Cancel Request
Reviewed	All requests that have been transferred from the management center for further processing.	Open Access Cancel Request
PRODUCED		
Awaiting Response	The request has been submitted by the management center, and is awaiting a response from a potential lender.	Cancel Request
Direct Produced	These requests have been successfully forwarded through Direct Request for Direct-to-Profile processing during the past 4 system days.	Depends on the request's status.
In Transit	The lender has sent the item.	Mark as received Not Received

Not Received	Borrower has not received an item and responded **No** to *Received?*	Mark as received
Received?	The borrower has not yet marked an item as received and the system is asking if it's an oversight.	Mark as received Not Received
RECEIVED		
Received/In Use	Borrower received the item from Lender, and it is with the requesting patron.	Return item Renew item Lost
Renewal Requested	The Borrower wants to renew the loan, and is awaiting a response from the Lender.	Return item Lost
Renewal Approved	The Lender agreed to renew a loan.	Return item Renew item Lost
Renewal Denied	The Lender did not renew the loan.	Return item Lost
Overdue	Item is 14 or more system days overdue.	Return item Renew item Lost
Recalled	The Lender wants the item returned immediately, or the Lender has sent an erroneous **Yes**.	Return item Lost
Received but Missing	The Lender has marked this item as missing. The request will age after 180 days.	
RETURNED		
Returned	The Borrower has returned the item.	
Returned but Missing	The Borrower has returned the item, but the Lender did not receive it.	

Item Formats

Format	Examples
Archival Material	Materials in two or more forms that are usually related by virtue of their having been accumulated by or about a person or body. This category includes comprehensive archives and manuscript collections of mixed forms of materials, such as text, photographs, and sound recordings.
Article	Text that is part of a larger item such as conference papers, chapters, or articles.
Audiobook	Books for use on audio devices. Includes CD, eAudiobook, LP and cassette.
Book	Books, pamphlets, technical reports, typescripts, theses, dissertations, manuscripts and other written works. Includes braille, continually updated resource, eBook, large print, microform and thesis/dissertation.
Computer File	Items in the following classes of electronic resources: computer software (including programs, games, images, graphics, sounds, and fonts), numeric data, computer-oriented multimedia, interactive multimedia, computer-oriented documents.
Game	Items or sets of items designed for play according to prescribed rules and intended for recreation or instruction. Includes video games, puzzles and simulations.
Image	A physical likeness or representation in either print or electronic format.
Interactive Multimedia	A multimedia system in which related items of information are connected and can be presented together.

Internet Resource	Websites with online documents, graphics, systems or services. Includes downloadable images.
Journal/Magazine	Serial publications such as periodicals, annuals, journals, memoirs, proceedings, monographs, eJournals or eMagazines.
Kit	Mixture of various components issues as a unit and intended primarily for instructional purposes. No one component is identifiable as the predominant component of the item. Examples are: packages of assorted materials, such as a set of K-12 social studies curriculum material (books, workbooks, guides, activities, etc.), or packages of educational test materials (tests, answer sheets, scoring guides, score charts, interpretative manuals, etc.).
Map	Maps, map manuscripts, globes, atlases, aeronautical charts, navigational charts, celestial charts, remote-sensing images, computer-generated maps, eMaps, and other cartographic material.
Music	Forms of music such as CD, eMusic, LP, or cassette.
Musical Score	Music materials, including downloadable musical scores, full score, choirs score, close score, condensed score, miniature score, part, music manuscript, books of musical studies and exercises.
Newspaper	Serial newspaper publications. Includes eNewspaper.
Object	Physical item, either tangible or visible.
Toy	Material objects for children or others to play with, often an imitation of some familiar object (e.g., a plaything or something contrived for amusement rather than for practical use). Use for puppets.
Video	Includes Bluray, eVideo, DVD, Film, VHS.
Visual Material	Items in the following classes: Motion pictures, video recordings, graphic materials, three dimensional artifacts, downloadable visual material.