

April 11, 2024

WorldShare® Interlibrary Loan: Borrowing

Lucia Shelton

OCLC Member Education

In this course you will learn...

- **Basics of WSILL Borrowing**
- **Submit requests as a Borrowing Library**
Including patron-initiated requests (Discovery tool)
- **Manage requests as a Borrowing Library**
Including batch processing options & issues
- **Generate statistics reports**

Documentation & Support

1- BASICS OF WSILL BORROWING

The three ILL request methods

Staff-Initiated,
staff-Mediated



Susan
Librarian

Patron-Initiated,
staff-Mediated



Preston
Library patron

Patron-Initiated,
unmediated



Paula
Library patron

Automated Request Manager

- OCLC Service Configuration

The screenshot displays the OCLC Service Configuration interface. On the left is a navigation menu with the following items: WorldShare ILL, Interlibrary Loan Options, Borrower Data, Lender Data, Custom Holdings Groups, Custom Holdings Paths, Automated Request Manager (highlighted in blue), Purchase Options, and Patron Request Workforms. The main content area is titled 'Automated Request Manager' and includes a sub-section 'Borrowing New Request'. It lists standard actions for all Borrowing New Requests, regardless of profile:

- Bibliographic record**: Best matching bibliographic record applied to request
- WorldCat holdings check**: Available when holdings set in WorldCat
- Knowledge base holdings check**: Available when OCLC knowledge base holdings set in WorldCat
- Custom Holdings Group check**: Available when Custom Holdings Group holdings set in WorldCat

Below these is the 'Main Automations' section, which states: 'Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.'

All 3 ILL request methods

- Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.
- Automations allow you to determine how patron-generated requests are processed.

1. Staff-initiated/staff-mediated method



Staff-Initiated,
staff-Mediated

Requests processed by staff directly
from the WorldShare ILL interface

Susan
Librarian

Borrower Request Workflow

Copy and Loan Requests:

1. Search for Item
2. Select appropriate bibliographic record
3. Select potential lenders for lender string
4. Apply Constant Data
5. Complete request form
6. Submit request

Automation options



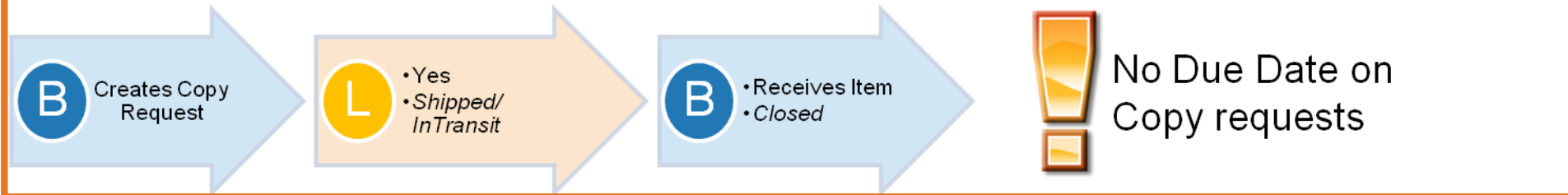
Request type determines workflow

Type also determines completion (Borrower or Lender)

Loan Request



Copy Request



2- SUBMIT REQUESTS AS A BORROWING LIBRARY

**Staff-Initiated,
staff-Mediated**



**Susan
Librarian**

Borrower Request Workflow

Copy and Loan Requests:

1. Search for Item
2. Select appropriate bibliographic record
3. Select potential lenders for lender string
4. Apply Constant Data
5. Complete request form
6. Submit request

Automation options



Searching

- Basic search
- Advanced search
- Expert search (maps, scores, articles)



[A few beautiful minutes : experiencing a solar eclipse](#)

Authors: [Kate Allen Fox](#) (Author), [Khoa Le](#) (Illustrator)

Summary: "Sky gazers experience a total solar eclipse in this descriptive picture book about the wonders of this phenomenon"-- Provided by publisher

Print Book, English, 2023

Edition: First edition

Publisher: Little, Brown and Company, New York, 2023

← Loan request

Functional Ecology



Functional Ecology 2016, **30**, 1665–1674

doi: 10.1111/1365-2435.12653

Trade-offs among locomotor performance, reproduction and immunity in lizards

Jerry F. Husak¹, Haley A. Ferguson¹ and Matthew B. Lovern²

¹Department of Biology, University of St. Thomas, St. Paul, Minnesota 55105, USA; and ²Department of Integrative Biology, Oklahoma State University, Stillwater, Oklahoma 74078, USA

← Copy request

2. Patron-initiated/staff-mediated method



Preston
Library patron

**Patron-Initiated,
staff - Mediated**

**Patron Request Form
linked from your
Discovery tool, which
sends request to a
queue for staff review.**

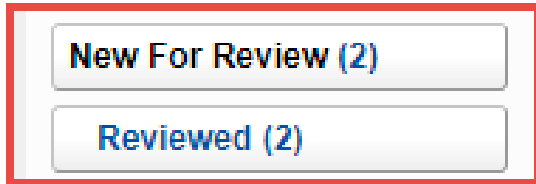
A screenshot of a library discovery tool interface. At the top right, there are buttons for 'Cite', 'Share', and 'Save'. The main title is 'Assessing ill/d/d services : new cost-effective alternatives.' with the author 'Mary E Jackson'. Below the title, there is a 'Print Book 2010' button and the publisher information '[Place of publication not identified] : Nabu Press, 2010.'. On the left, there is a book cover image. Below the title, there is a section titled 'How to get this item' which contains a 'Request from Libraries Worldwide' link and a blue button labeled 'Request this item from another library'. This button is highlighted with a red rectangular box. Below this section, there is a table with the following information: Database: WorldCat; MARC View (Employees Only): MARC Record; OCLC Number/Unique Identifier: 945093335; ISBN: 1176204742, 9781176204744.



New For Review



→ **Not Reviewed**- not seen by your staff.



→ **Reviewed** – seen or created by your staff.

Patron-Initiated,
staff - Mediated



Preston
Library patron

3. Patron-initiated/unmediated method



Paula
Library patron

**Patron-Initiated,
unmediated**

**Automated system
review where patron
requests bypass staff
review and go directly
to lenders.**

ILL requesting configurations

OCLC Service Configuration

Interlibrary Loan Home

Search for requests

Request ID

Active Requests Closed Requests

Quick Links

Borrowing:	Lending:	Other:
AE Alert (9)	Can You Supply? (14)	OCLC Policies Directory
Produced (75)	Considering - Copies (3)	OCLC Service Configuration
In Transit (80)	Considering - Loans (11)	OCLC Usage Statistics
Received? (57)	Supplied	OCLC Article Exchange
Unfilled (4)	Not Received (1)	Resource Sharing News
Received	Overdue (40)	

Configuring ILL for Discovery

Patron-Initiated,
staff-Mediated

Patron-Initiated,
unmediated

To enable patron-initiated ILL requesting (OCLC Service Configuration):

1. Configure IP Address(es)
2. Configure Request Item buttons
3. Configure Patron Request Form

[How to configure OpenURL](#)

A screenshot of the OCLC Service Configuration menu. The menu items are: WorldCat Discovery and WorldCat Local (highlighted with an orange box), Search Settings, Item Detail Settings, User Interface Options, Display Settings, Relevancy and Scoping, Full Text OpenURL Resolvers (outgoing requests), Place Hold/Request Buttons (marked with a '2' in an orange circle), OPAC Statuses, Locations and Circulation Policies, Holding Codes & Shelving Location Messages, IP Addresses (marked with a '1' in an orange circle), and WorldShare ILL (marked with a '3' in an orange circle and highlighted with an orange box).

WorldShare ILL

Interlibrary Loan
Options

Borrower Data

Lender Data

Custom Holdings
Groups

Custom Holdings
Paths

Automated Request
Manager

Article Exchange
Settings

Purchase Options

Request Forms

Print Settings

Advanced Workflows

Patron Settings

Address Book

Notifications

External System

Change

Request Forms

[Help on this screen](#)

Customize the WorldShare ILL or Tipasa® request form(s).

WorldShare ILL Request Form

Preview

Display Name:

WorldShare ILL Request Form

In Use:

Enabled

URL:

<https://128802.account.worldcat.org/account/route/wsill/workform>

Bibliographic Section

Section Header:

About my item

Remove a Section

Field:

Input Type:

Field Label:

Field Values:

Options:

Title/Journal Title

textarea

Title:

required
 editable

Author

textarea

Author:

required
 editable

Publisher

textentry

Publisher:

required
 editable

Place of Publication

textentry

Place of Publication:

required
 editable

Date

textentry

Date:

required
 editable

ISBN

textentry

ISBN:

required
 editable

Automated Request Manager

- OCLC Service Configuration

The screenshot displays the OCLC Service Configuration interface. On the left is a navigation menu with the following items: WorldShare ILL, Interlibrary Loan Options, Borrower Data, Lender Data, Custom Holdings Groups, Custom Holdings Paths, Automated Request Manager (highlighted in blue), Purchase Options, and Patron Request Workforms. The main content area is titled "Automated Request Manager" and includes a sub-header "Borrowing New Request". Below this, it states: "These standard actions are done for all Borrowing New Requests, regardless of profile:"

- Bibliographic record**
Best matching bibliographic record applied to request
- WorldCat holdings check**
Available when holdings set in WorldCat
- Knowledge base holdings check**
Available when OCLC knowledge base holdings set in WorldCat
- Custom Holdings Group check**
Available when Custom Holdings Group holdings set in WorldCat

Main Automations
Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

Links in the top right: [How to create Constant Data](#) and [How to create Custom holdings](#). A link for [self-paced training](#) is located below the main title.

All 3 ILL request methods

- Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.
- Automations allow you to determine how patron-generated requests are processed.

Policies Directory Changes – Hours

NDHCO (US Central Time UTC –6:00 hours) viewing their own open hours



OCCLC™ Policies Directory

Welcome [Jenny \(NDHCO\)](#)
[Sign Out](#) / [Help](#)

Search

Institution Information

Search By

Institution Symbol

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

ND- Clone of Hennepin County Library - Test Library (NDHCO)

Profile Collections Policies (0) Schedule Contacts

Last updated Wednesday, February 15, 2023 10:28:47 AM EST

Operating Hours

This is when we are open!

DAYS	HOURS	NOTES
Monday thru Friday	6:00 AM to 5:00 PM	

OCCLC™ Policies Directory

Welcome [super \(NDSTJ\)](#)
[Sign Out](#) / [Help](#)

Search

Institution Information

Search By

Institution Symbol

ndhco

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

ND- Clone of Hennepin County Library - Test Library (NDHCO)

Profile Collections Policies (0) Schedule Contacts

Last updated Wednesday, February 15, 2023 10:28:47 AM EST

Operating Hours

This is when we are open!

DAYS	HOURS	NOTES
Monday thru Friday	08:30 to 19:30	

NDSTJ (Newfoundland Time UTC –3:30 hours) viewing NDHCO's open hours



Note how hours have adjusted to their format and time.

Policies Directory Changes – Closures

NDDRW (Australian Eastern Daylight Time UTC +11:00 hours) viewing their own scheduled closure



Closures				Add
Closed for our March Break				Edit Delete
TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES	
Academic Break	20/03/2023 thru 27/03/2023	No	March is our Fall break	

Closures			
Closed for our March Break			
TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Academic Break	03/19/2023 thru 03/26/2023	No	March is our Fall break

NDHCO (US Central Time UTC –6:00 hours) viewing NDDRW's scheduled closure



Note the dates and formats are adjusted.

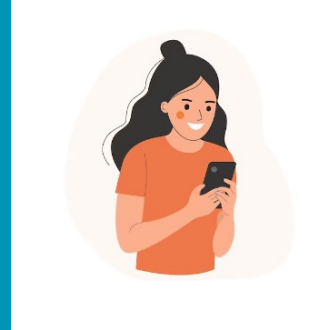
SUBMIT REQUESTS AS A PATRON

Patron-Initiated,
staff - Mediated



Preston
Library patron

Patron-Initiated,
unmediated



Paula
Library patron

WorldCat Discovery- Patron ILL request

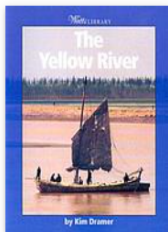
Advanced Search Course Reserves Resources ▾

Search history Saved Items (0)

< [Back to Search Results](#)

Result 1 of 1

1



The Yellow River

Authors: [Kim Dramer](#)

Print Book ©2001

New York : Franklin Watts, ©2001.

Summary: Examines the history, geography, and environment of the [Yellow River](#), and discusses aspects of Chinese culture, as well as famous locations along the [river](#).

Subject Headings:

Library of Congress Subject Headings
[China--Civilization--Juvenile literature](#)
[Yellow River \(China\)--Juvenile literature](#)

Faceted Application of Subject Terminology
[Civilization](#)
[China](#)
[China--Yellow River](#)
[Juvenile works](#)

Library of Congress Subject Headings for Children's Literature
[China--Civilization](#)

Cite

Share

Save

How to get this item

Request from Libraries Worldwide

[Request this item from another library](#)

Patron-Initiated,
staff - Mediated



Preston
Library patron

Patron-Initiated,
unmediated



Paula
Library patron

223531691: The Yellow River /

Previous Request Next Request

Apply constant data: Actions:

Request Purchase Staff Notes 0

Request Details (Request ID 223531691)

Patron Summary

Source	WSILLFORM
Status	Not Reviewed
Title / Journal	The Yellow River /
Uniform Title	
Author	Kim Dramer
Publisher	New York : Franklin Watts, 2001
ISBN	9780531118559
ISSN	
OCLC	44067026
DOI	

[Search my library's online catalog](#)

Local ID

Open Access

No links found

[Search Google Scholar](#)

[Search Google Books](#)

[Search Google](#)

[View Holdings](#)

- Discover Items
- Borrowing Requests
- New For Review (11)
- Not Reviewed (5)
- The Yellow River /
- Reviewed (6)
- Produced (9)
- Awaiting Response (8)
- In Transit (1)
- Received (1)
- Received/In Use (1)
- Overdue (1)
- Returned
- Create Request

Patron workflow

OCLC Training - TSF Library

[Chat with a librarian](#)

The Yellow River

by [Kim Dramer](#)

Print book ©2001

Database: WorldCat

Publication:

New York : Franklin Watts, ©2001.

Physical Description:

63 pages : color illustrations, color map ; 25 cm.

Language:

English

Staff View:

[MARC Record](#)

ISBN:

053111855X 9780531118559 0531139832 9780531139837

OCLC Number:

44067026

Database:

WorldCat

Workform opens from the ILL button. Required fields are customized by library.

About my request

* Service Type:

Book/Media - Loan

* Needed before (yyyyymmdd):

Amount Willing to Pay:(optional)

Comments:(optional)

Loan requests may take up to a week to fill; you will be contacted when your item is ready to pick up. Questions? Call us at (614) 555-1212 to obtain status report on your request.

My address and contact information

* First Name:

* Last Name:

* Library Barcode:

* E-mail Address:

Telephone:(optional)

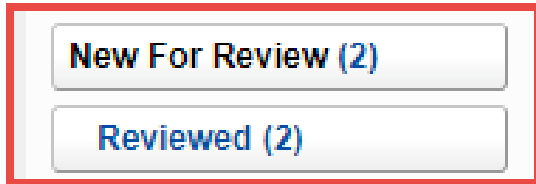
* Department:

[Send Feedback](#)

New For Review



→ **Not Reviewed**- not seen by your staff.



→ **Reviewed** – seen or created by your staff.

**Patron–Initiated,
staff Mediated**

New for Review

Patron ILL request displays in WorldShare ILL
New For Review > Not Reviewed status

Discover Items

Borrowing Requests

- AE Alert (4)
- New For Review (2)**
- Not Reviewed (2)
- Produced (14)
- Awaiting Response (1)
- In Transit (4)

Borrowing Requests: [New For Review \(2\)](#)

Export All

Results 1 - 2 of 2

Rows 20

ID	Status	Media Type	Title	Patron	Date Requested	Need Before
180012197	Not Reviewed		The Yellow River /	Rohrstein, Richard		
179969989	Not Reviewed		Journal of the American Chemical Society.	Morgan, Mary		

Results 1 - 2 of 2

Rows 20

New For Review- Not Reviewed

Staff checks request:
applies constant data
and Marks as
Reviewed (moves to
status = Reviewed)

180012197: The Yellow River /

Send Request Change Fulfillment Type Cancel Request

Request Details

- Open Access
- Purchase Request

Apply constant data: Actions: DEFAULT Mark as Reviewed Save R

Status: Not Reviewed

Title / Journal: The Yellow River /

Uniform Title:

Author: Kim Dramer

Publisher: New York : Franklin Watts, 2001

ISBN: 9780531118559

ISSN:

OCLC: 44067026 [View Holdings](#)

DOI:

PMID:

Dissertation:

Series:

Request Tags: Choose... ?

Type: Loan

Format: Book

Language: Choose...

Edition:

Search my library's online catalog

Open Access
No links found

[Search Google Scholar](#)

[Search Google Books](#)

[Search Google](#)

Staff populates lender
string to send request

3. MANAGE REQUESTS AS A BORROWING LIBRARY

Manage Requests as a Borrower

1. Respond to conditional (up to 4 days to respond)
2. Receive items in batch (loan and copy)
3. Request renewal
4. Return items in batch (loan)
5. Multiple copies of item workflow (linked requests)
6. Unfilled requests
7. Expired requests

Managing Off-System Requests

The screenshot shows the WorldShare Interlibrary Loan (ILL) interface. The left sidebar contains a navigation menu with the following items: Discover Items, Find Patrons, Borrowing Requests, Document Delivery, Lending Requests, Purchasing Requests, Off-System Requests (highlighted with a red box), Lending (59), Create Lending Request, Print Queue (24), and Manage Copyright. Under the Off-System Requests section, 'Borrowing (301)' is selected. The main content area displays a table of 301 off-system borrowing requests, with the first 10 rows visible. The table has columns for ID, Status, Media Type, Title, Patron, Off-System Lender, Need Before, Due Date, and Tags. The first three rows show 'Submitted' status requests from various providers, while the remaining seven rows show 'Unfiled' or 'In Transit' requests from various lenders.

ID	Status	Media Type	Title	Patron	Off-System Lender	Need Before	Due Date	Tags
160650725	Submitted	Book	The participator year		Prov 3	30/04/2022		
168849723	Submitted	Book	Dust	last bill	Prov 4	30/04/2022		
168849674	Submitted	Book	Mystery of the Ivory Charm	last bill	Prov 5	30/04/2022		
168848707	Unfiled	Book	Operations of Billie Solisales - report	last export loan	Fred Smith Library	11/04/2022		
168840800	Unfiled	Book	The Rand McNally book of accounts resumes	NJCSU, Sugar	OFF-SYS Borrower loan re-submit	20/04/2022		
168840883	Unfiled	Book	An echo in the bone : a novel		OFF-SYS Borrow holdings	20/04/2022		
168840882	Unfiled	Book	Adventures of Huckleberry Finn		OFF-SYS bib search	17/05/2022		
160845303	Unfiled	Book	Pearl and Wagner : one future day		borrower sys	05/04/2022		
160845302	In Transit	Book	Bury My Heart at Wounded Knee... An Indian History of the American West		Borrowersymbol	13/05/2022	31/03/2022	

For requests with libraries not participating in WorldShare ILL

The Off-system borrowing queue

Off-system for Borrowing.

Managing Off-System Requests

168845991: A light in the attic NDOSU Reg ID: 148455

Request successfully saved

Resend Request **Change Fulfillment Type** Cancel Request

Request Purchase **Document Delivery**
Off-System Request
Purchase Request
WMS Acquisitions

Actions: Note Save Reset New Email Print Now

Request Details (Request)

Patron Summary

Source	WSILL
Status	Unfilled
Title / Journal	A light in the attic
Uniform Title	
Author	Silverstein, Shel
Publisher	New York, N.Y. : Harper & Row, ©1981.
ISBN	9780080256739 0080256745 (lib. bdg.) 9780080256746
ISSN	
OCLC	7574216

[View Holdings](#)

[Search my library's online catalog](#)

Open Access
No links found
Apply Citation

[Search Google Scholar](#)
[Search Google Books](#)
[Search Google](#)

- 1-Create or reuse ILL request
- 2- Change Fulfillment Type to "Off-System Request"

The borrower changes the fulfillment type to "Off-System Request"

Managing off-System Requests

The screenshot displays a library system interface for managing off-system requests. The main window shows a request for the book "A light in the attic" (Request ID 168845991) by Ed Davidson. A modal window titled "Off-System Request Details" is open, prompting the borrower to provide information about the current off-system lender. The modal includes the following fields:

- Lender Name ***: A text input field.
- Lender Symbol**: A text input field.
- Email Address**: A text input field.
- Need before ***: A date input field with the value "04/05/2022".

The modal also features "Save" and "Cancel" buttons. The background interface includes a sidebar with navigation options like "Borrowing Requests", "Document Delivery", and "Off-System Requests", and a main area with various request details and actions.

Complete the *Off-System* form

The system prompts the borrower for information about the current off-system lender

Managing off-System Requests

Tipasa® Home

168845991: A light in the attic

NDOSU Reg ID: 148450

Request 168845991 moved to Off-System: Borrowing queue

Change Status

Apply constant data: Actions: Note Save Reset New Email Print Now

Request Staff Notes

Request Details (Request ID 168845991)

Patron Summary

Source: WBILL
Status: Submitted
Type: Loan
Supplier Reference ID: [Empty]
Request Tags: Choose...

Fulfillment Type: Off-System
Lender Name: Fred Smith Library
Lender Symbol: FRECO
Email Address: fl@FredSmithLibrary.org

Max Cost: 99.99 USD
Requested on: 30/03/2022
Need Before: 04/05/2022
Shipped Date: [Empty]
Due Date: [Empty]
Received Date: [Empty]
Return Date: [Empty]
Supplier's Item Barcode: [Empty]

Title / Journal: A light in the attic
Local ID: [Empty]

Open Access: No links found
Apply Citation

Search Google Scholar
Search Google Books
Search Google

Uniform Title: [Empty]
Author: Silverstein, Shel
Publisher: New York, N.Y. : Harper & Row, ©1991.
ISBN: 9780060256739 0060256745 (lib. bdg.) 9780060256748
ISSN: [Empty]
OCLC: 7574216
DOI: [Empty]
PMID: [Empty]
Dissertation: [Empty]
Series: [Empty]
Format: Book
Language: English (eng)

- System will display request ID as *Off-System*
- Use the **Email** button to send the request to the lender
- Request will be under **Off-System Requests** status

The system displays the request in off-system format

4. STATISTICS REPORTS

Reports for Borrowers

Interlibrary Loan Home

Search for requests

Request ID

Go

Active Requests Closed Requests

Quick Links

Borrowing:

- [AE Alert \(2\)](#)
- [Produced \(23\)](#)
 - [Conditional \(1\)](#)
 - [In Transit \(16\)](#)
 - [Received? \(16\)](#)
 - [Expired \(3\)](#)
 - [Unfilled \(3\)](#)

Received

- [Renewal Approved \(1\)](#)

Returned

Lending:

- [Supplied](#)
- [Returned](#)

Other:

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)
- [WS ILL Training Resources](#)
- [OCLC Community Center](#)

WorldCat Discovery

WorldCat.org

OCLC WorldShare Interlibrary Loan

COUNTER

Link Resolver

Assessment Tools





Period: June 2023 Months: 6 Update

Institution: WSTPU

- [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](#)

[Documentation: Statistics reports for WorldShare ILL](#)

The **four** topics...

1. Basics of WSILL Borrowing 
2. Submit requests as a Borrowing Library 
3. Manage requests as a Borrowing Library 
4. Generate statistics reports 

Support, Documentation & Tutorials



<https://help.oclc.org>

System Status Dashboard

Contact OCLC Support

Welcome to OCLC Support

How can we help you?

Search

Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing

OCLC support regions

Region	Location	Contact information
Asia Pacific	OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US	Or: +1-614-764-6009 Send an email Submit/View requests
Australia and New Zealand	OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU	T: 1300 260 795 (local call w Or: +61 (0) 3 9929 0800 Send an email Submit/View requests
United States	OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US	T: 1-800-848-5800 (toll free in USA and Canada) Or: +1-614-793-8682 Send an email Submit/View requests

Thank You!

Please remember to fill out the evaluation for this class

- Category: Resource Sharing and Delivery
- Class name: WorldShare ILL Borrowing
- Instructor: Lucia Shelton
- Date: April 11, 2024

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)