Contents

Introduction to WorldShare Interlibrary Loan ............................................................... 6
  Preparing and planning ................................................................. 7
  Creating an account .................................................................. 9
  Accessing the system .............................................................. 12

Article Exchange ............................................................................ 13
  Article Exchange workflow ....................................................... 14

Batch processing .......................................................................... 16
  Batch processing for borrowers ................................................... 17
  Batch processing for lenders ....................................................... 19

Borrowing Requests ...................................................................... 20
  Create Request (from a blank workform) ........................................... 21
  Create borrowing requests using Discover Items ......................... 23
  Create request from an existing request ........................................ 25
  Create Book Club requests ........................................................ 26
  Edit borrowing requests .......................................................... 28
  Email a copy of a request .......................................................... 29
  Process New For Review requests ................................................ 30
  Process Open Access requests ...................................................... 31
  Receive items (from In Transit status) ............................................ 32
  Renew item (from Received status) ................................................ 33
  Respond to conditionals from lenders (from Produced status) ...... 34
  Return item (from Received status) .............................................. 35

Constant data ............................................................................. 36
  Edit constant data .................................................................. 38

Document suppliers ....................................................................... 39
  Purchasing articles from British Library On Demand ....................... 40
    How to get the most from the British Library on Demand ................ 42
    Purchase documents from British Library On Demand ...................... 44
  Purchasing articles from Get It Now ................................................. 46

Interlibrary Loan Fee Management (IFM) ........................................ 48
  Set up IFM ............................................................................... 49
Introduction to WorldShare Interlibrary Loan

WorldShare Interlibrary Loan provides new functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users.
Preparing and planning

There are a few things you can do to prepare for your use of WorldShare Interlibrary Loan.

OCLC Policies Directory

Add or update your records in the OCLC Policies Directory. Some key areas to review include Contacts and Policies for copy, loan and deflections. For more information, see OCLC Policies Directory (page 64) and the Policies Directory Online Help system.

Once logged in to WorldShare Interlibrary Loan, on the WorldShare Interlibrary Loan Home, under Quick Links, click OCLC Policies Directory.

OCLC Service Configuration

Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. On the WorldShare Interlibrary Loan Home, under Quick Links, click OCLC Service Configuration to go to Service Configuration. For more information on these settings, see OCLC Service Configuration settings (page 101).

Message Board

Below the Quick Links, you will find the Message Board. This space is updated regularly by OCLC staff with information about scheduled system maintenance, training opportunities, ILL-related webinars, and other information about the ILL system.

Constant Data
Administrative settings for WorldShare Interlibrary Loan, such as constant data, are maintained in OCLC Service Configuration. Make sure to add your constant data in the WorldShare ILL module under Borrower Data and Lender Data. See Constant data (page 36), Borrower Data (page 102), and Lender Data (page 118) for more information.
Creating an account

If you already use WorldShare Management Services, WorldShare Collection Manager, or WorldShare License Manager, you have an existing OCLC Services account that gives you access to several services in the WorldShare platform. Before you log on to WorldShare Interlibrary Loan for the first time, you will need to work with someone at your institution who has administrative rights to add WorldShare Interlibrary Loan permissions to your account. If you need assistance, contact OCLC Support in your region.

If you have a 9-digit ILL authorization number and password but do not have an OCLC Services account in the WorldShare platform, follow the steps below.

For a video tutorial, see Create Your WorldShare ILL Account (5:01 minutes).

Create an account

Note: If you are a user outside the United States, your account process differs.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
</table>
| 1    | Go to [https://share.worldcat.org/myaccount](https://share.worldcat.org/myaccount)  
*Note:* The URL is case-sensitive. | The Welcome screen appears.                                           |
| 2    | Click Create account.                                                   | The Create an OCLC Services account screen appears.                    |
| 3    | Type your 9-digit WorldCat Resource Sharing Authorization and Password. |                                                                       |
| 4    | Click Next.                                                             | The Confirm your institution screen expands.                          |
| 5    | Confirm your institution and service(s) used.                          |                                                                       |
| 6    | Click Confirm.                                                          | The Create your new account screen expands.                           |
|      | *Note:* If this is not your institution, click Not my institution to  |                                                                       |
|      | return to the Welcome screen.                                          |                                                                       |
| 7    | Fill out all fields.                                                    |                                                                       |
|      | *Note:* If the user name you choose is already in use, you will        |                                                                       |
|      | get an error message.                                                   |                                                                       |
| 8    | Click Create account.                                                   | A confirmation message appears and a list of available services appears.|
| 9    | Click WorldShare Interlibrary Loan.                                    | You are redirected to your institution’s custom Sign In screen.        |
| 10   | Type the User Name and Password you just created.                      | You are signed into WorldShare Interlibrary Loan.                     |
| 11   | Click Sign In.                                                          |                                                                       |

If you have neither a 9-digit ILL authorization number and password nor an OCLC Services account in the WorldShare platform, contact OCLC Support in your region.
Best practices for creating an account:

- Each user should have their own account to allow for improved security and addition of other services in the future.
- Email addresses should be an individual’s email address, and not an email address for the institution itself.

Once you are in the interface, bookmark the home page for future use.

Create accounts for other users at your institution

Note: You should first obtain the preferred user names and email addresses of users at your institution.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the Admin tab at the top of the screen.</td>
<td>The User Management screen appears.</td>
</tr>
<tr>
<td>2</td>
<td>Click New User.</td>
<td>The screen expands.</td>
</tr>
</tbody>
</table>
| 3    | Fill out the fields on the screen.  
**Note:** Required fields are marked with an asterisk (*). |  |
| 4    | Click Create. | A confirmation message appears, and additional menus appear on the screen. |

Once a new user account has been created, use the additional screens to configure additional settings.

Edit user privileges

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Edit</strong> next to the <strong>Roles</strong> menu.</td>
<td>The screen expands.</td>
</tr>
<tr>
<td>2</td>
<td>To change privileges, click the check box next to desired level of privileges (see below).</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Save</strong> to save your changes, or click <strong>Cancel</strong> to start over.</td>
<td>A confirmation message appears.</td>
</tr>
</tbody>
</table>

WorldShare Interlibrary Loan user privilege levels

<table>
<thead>
<tr>
<th>Privilege Level</th>
<th>Description</th>
</tr>
</thead>
</table>
| Everyone        | This is the default account level, but does not allow access to WorldShare Interlibrary Loan.  
**Note:** This check box should remain checked. |
| WORLDSHARE_ILL_ADMIN | This type of account is designed for library staff members who are responsible for creating or modifying other staff accounts for WorldShare Interlibrary Loan. |
| WORLDSHARE_ILL_USER | This type of account is designed for most library staff using WorldShare Interlibrary Loan. |
For more information on WorldShare Interlibrary Loan roles, see the WorldShare Admin Online Help.

**Set/reset passwords**

Click **Set/reset password** under **Basic User Data** for the system to send an email to that user with instructions for creating a new password.

**When the user receives the email, they should:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the link provided in the email. <strong>Note:</strong> This link will expire 24 hours after being sent.</td>
<td>The Change Password screen appears.</td>
</tr>
<tr>
<td>2</td>
<td>Fill out the fields to provide the <strong>User Name</strong>, a <strong>New Password</strong>, and <strong>Confirm New Password</strong>.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Change Password</strong>.</td>
<td>A confirmation screen appears.</td>
</tr>
</tbody>
</table>

**See also:**

WorldShare Admin Online Help
Accessing the system

To access the site, go to your WorldShare URL (you may have bookmarked the URL after creating your account), 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).

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

If you are not immediately directed to the WorldShare Interlibrary Loan screen, click the [Interlibrary Loan] tab (as shown in the image).

![WorldShare Interlibrary Loan Image]

The Home screen lists all of your borrowing, lending and other requests, a search option for finding requests, and the ability to search WorldCat and create requests.

Navigating the system

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

The OCLC Article Exchange document-sharing site is accessible from within WorldShare Interlibrary Loan and through an ILLiad Addon.

Article Exchange provides a single secure location where lending libraries can place requested articles for interlibrary loan. It allows users to upload files for pickup anywhere in the world. Only authorized users will be able to download the file.

Once a user drops off a file, they will receive a URL and password with which the file can be retrieve anywhere in the world.

Once the file has been picked up for the first time, it will remain available on this site for 30 days. After 30 days, the file will be removed. A file can be picked up a maximum of five times for each URL/password combination. Files that are never picked up will be removed after 30 days.

Technical Requirements

Files should be no larger than 60 MB, including high resolution documents. Users may upload up to 1000 files per day per authorization.

<table>
<thead>
<tr>
<th>BMP</th>
<th>GIF</th>
<th>J2K</th>
</tr>
</thead>
<tbody>
<tr>
<td>JIF</td>
<td>JFI</td>
<td>JFIF</td>
</tr>
<tr>
<td>JP2</td>
<td>JPE</td>
<td>JPEG</td>
</tr>
<tr>
<td>JPEG2000</td>
<td>JPF</td>
<td>JPG</td>
</tr>
<tr>
<td>JPM</td>
<td>JPX</td>
<td>MDI</td>
</tr>
<tr>
<td>MJ2</td>
<td>PEG/JFIF</td>
<td>PDF</td>
</tr>
<tr>
<td>PNG</td>
<td>PSD</td>
<td>TGA</td>
</tr>
<tr>
<td>TIF</td>
<td>TIFF</td>
<td>TPIC</td>
</tr>
<tr>
<td>WEBP</td>
<td>ZIP</td>
<td></td>
</tr>
</tbody>
</table>

See also:

Article Exchange workflow (page 14)
Article Exchange workflow

1. A borrowing institution sends a Copy request to a lending institution.
2. The lending institution staff checks to determine if they can supply the article.
3. If they have the document, they save it to their desktop in one of the file formats supported.
4. The staff person logs into WorldShare Interlibrary Loan with their custom Web address, authorization and password.

Once logged in, the Lender should:

1. In the request, click OCLC Article Exchange under the URL field.
2. Locate the article file on your computer.
3. Click Open.
4. Click Drop file.
5. The URL field is updated with the URL, the Password field is updated with the password, and a Preview button appears.

Once logged in, the Borrower should:

1. On the left navigation, click Borrowing Requests > AE Alert.
2. On the AE Alert screen, click the request ID or Title to display the request.
3. The request appears, and the AE Alert information appears to the right under the Request Details accordion.
4. Click Preview to preview the item.
5. Click Email doc to patron to send an email to let the patron know there is a document available for pick-up. The Email Request screen appears.
   - Note: If the borrower and patron email addresses are in the appropriate fields in the request, they will be automatically mapped to the From and To address boxes in the email template. Citation data will also transfer to the email, along with information about how long the file will be maintained in Article Exchange.*
6. If needed, change the data in the fields.
7. Click Send.
8. A confirmation message appears, and an email is sent to the patron.
9. Click OK.

*To avoid errors in email formatting, include only a valid email address (do not include extra text) in the Email field of your constant data records.

After receiving the email, the patron should:

1. Open the email, which includes a tinyURL and password for the article.
2. Click the URL to see the article online. The OCLC Article Exchange screen appears, asking for the password.
3. Type the password in the field provided.
4. Click **Get my file**. A File Download window opens.
5. Choose to either **Open** or **Save** the document.

**See also:**

*Article Exchange* (page 13)
Batch processing

Use batch processing to receive, return, and complete requests for multiple items. There is a limit of 100 requests at a time. The batch icon ( ) appears on queues in the left navigation where batch processing is available.

For a video tutorial, see Batch Processing in WorldShare ILL (5:51 minutes).
Batch processing for borrowers

Follow the below procedures to perform batch processing as a borrower. For a video tutorial, see Borrower: Batch Processing Requests in WorldShare ILL (5:01 minutes).

To use batch processing to receive items:

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

To use batch processing to return items:

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

Batch processing for lenders (page 19)
Batch processing for lenders

Follow the below procedures to perform batch processing as a lender. For a video tutorial, see [Batch Processing as a Lender](3:27 minutes).

To use batch processing to complete requests:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Lending Requests</strong> from the left navigation bar.</td>
<td>The list of Lending categories expands.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Returned</strong>.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>At the top of the next screen, click <strong>Batch complete &quot;Returned&quot; items</strong></td>
<td>The screen refreshes to include the additional batch processing fields.</td>
</tr>
<tr>
<td>4</td>
<td>In the <strong>Request ID</strong> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol.</td>
<td>The request is added to the list.</td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Complete Items</strong>.</td>
<td>A confirmation message appears, and the requests are updated to <strong>Closed</strong>.</td>
</tr>
</tbody>
</table>

To use batch processing to respond Yes or No in a batch:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Lending Requests</strong> from the left navigation bar.</td>
<td>The list of Lending categories expands.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Can You Supply?</strong>.</td>
<td>The Can You Supply? screen appears.</td>
</tr>
<tr>
<td>3</td>
<td>At the top of the next screen, click <strong>Yes</strong> or <strong>No</strong> next to <strong>Batch respond to &quot;Can You Supply&quot; items</strong>.</td>
<td>The screen refreshes to include the additional batch processing fields.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Optional for Yes.</strong> Click any desired print options, and to <strong>Apply constant data</strong>.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Optional for No.</strong> Choose a <strong>Reason for No</strong> from the drop-down list.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This Reason for No applies to all requests that you process as No.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Request ID</strong> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.</td>
<td>The request is added to the list.</td>
</tr>
<tr>
<td>6</td>
<td>Click <strong>Yes</strong> or <strong>No</strong>.</td>
<td>A confirmation message appears, and the requests are updated.</td>
</tr>
</tbody>
</table>

See also:

Batch processing for borrowers (page 17)
Borrowing Requests

After creating requests, they appear in the left navigation under Borrowing Requests and under Quick Links on the WorldShare Interlibrary Loan Home. The major queues are listed first, followed by minor queues for easier organization. Click a queue to see all requests in that queue. See the Categories and queues (page 161) table for a detailed description of each queue. Note: Queues with no current requests will not appear in the list.
Create Request (from a blank workform)

You may also search for items and create requests by using the **Create Request** heading. Clicking **Create Request** produces a blank workform.

![Create Request (from a blank workform)](image)

To create a request:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Type the details of your request in the fields provided.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Choose the request <strong>Type</strong> and <strong>Format</strong>.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Provide a <strong>Needed By:</strong> date.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Apply your constant data record.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Provide a lender in the <strong>Lender String</strong>.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Click <strong>Send Request</strong>.</td>
<td>A confirmation message appears and the request appears under the category <strong>Borrowing Requests &gt; New For Review.</strong></td>
</tr>
<tr>
<td>7</td>
<td>Click <strong>Borrowing Requests</strong> from the left navigation bar.</td>
<td>The list of Borrowing categories expands.</td>
</tr>
<tr>
<td>8</td>
<td>Click <strong>New For Review</strong>.</td>
<td></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
<td>Result</td>
</tr>
<tr>
<td>------</td>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>9</td>
<td>Click your new request ID.</td>
<td>The request opens.</td>
</tr>
<tr>
<td>10</td>
<td>Click <strong>Send Request</strong>.</td>
<td>A confirmation message appears.</td>
</tr>
<tr>
<td>11</td>
<td>Choose either <strong>View Next Request</strong> or <strong>Return to list</strong>.</td>
<td>Your request is sent to the lender and you are returned to the screen of your choice.</td>
</tr>
</tbody>
</table>
Create borrowing requests using Discover Items

You can search for items and create a request under Discover Items.

To discover items and create requests:

1. Click Discover Items in the left navigation. When you open the Discover Items tab, an Advanced Search form also opens in the main panel of the screen. See Advanced search (page 97) for additional information about this function.

2. For a basic search, choose where you would like to search and the type of search from the drop-down lists at the top of the tab.

3. Type your search terms in the box provided.

4. Click Search. Matching results appear, along with holdings display options. When you click Search, the Advanced Search form collapses at the top of the screen. Click Advanced Search to expand or collapse the form.

5. On the Results screen, you may search or view items using one of the following options:
   
   a. If available, click the View Now link for open access resources. The resource will open in a new window.
   
   b. Search for versions with the same title and author by clicking the link. This will launch a new search based on title and author.
   
5. To display holdings, use one of the following options:
   
   a. Click State Holdings, Regional Holdings or All Holdings.
      
      Note: Regional Holdings includes all holdings in contiguous states.
   
   b. To filter by Custom Holdings Path, Profiled Group, Year, or Volume, use the dropdown filters and the text boxes to enter filters. Click Go to see results based on the selected filters.
7. On the Holdings screen, you also have several options:

   a. Hover your cursor over the information icon (i) next to the title to see brief bibliographic data.

   b. Click Yes (or anywhere in the Yes box) to add a Supplier to your lender string. Note: Once a lender has been added to the lender string, the hyperlink in the Supplier column will no longer be clickable. If a lender is removed from the lender string, your ability to click on Yes in the Supplier column is restored. This selection status will be maintained as you move through all holdings lists.

   c. Click the information icon (i) next to the library’s name to go the OCLC Policies Directory and confirm a lender’s policies. The OCLC Policies Directory for the lender will open in a new window.

   d. Click the library name to go to the library’s online catalog.

      Note: This link is maintained in the WorldCat Registry, http://www.worldcat.org/registry/Institutions. In the Registry, you are able to configure your OPAC to provide deep links to the specific OCLC number or other identifiers.

   e. View suppliers’ Days To Respond. Note: If an item is Held by your library, you will see the icon at the top of the Holdings screen, indicating that your library has a holding set on that item in WorldCat. You will also see this icon on the top of the Request work form. Note: If an item is Held by your library, you will see the icon at the top of the Holdings screen, indicating that your library has a holding set on that item in WorldCat. You will also see this icon on the top of the Request work form.

8. Click Create Request. The request work form appears.

9. Apply your constant data record in the Request work form using the Apply constant data dropdown. Data in a field of a constant data record will always overwrite the value shown in the request; however, pre-existing patron data will not be overwritten. When a different Constant Data is applied to a record, the fields are briefly highlighted in green as a visual indicator of the change.

10. On the request work form, provide a Needed Before date (required).

11. Under Borrowing Library, the Address field is required for both Shipping and Billing.

12. Under Lending Libraries, lender policies are listed for any lenders you chose on the Holdings screen. To add more lenders, type the institution symbol(s) of up to 15 of your preferred lender(s) in the Lender String field, separated by commas.


14. If applicable, direct notes and supplier history, including reasons for no, will appear under Request History after the request is sent.

15. Click Send Request if the request is complete. A confirmation message appears and the request appears under the category Borrowing Requests > Produced > Awaiting Response. If you wish to save the request to submit in the future, click Save For Review.

16. Click Request ID in the confirmation message to search that request ID number.

17. The request is re-displayed.
Create request from an existing request

You may also create requests by accessing an existing request with one of the following statuses.

- Conditional
- Considering
- Conditions Accepted
- Submitted
- Not Received
- Complete
- Closed: Any disposition
- Unfilled
- Expired

To create a request from an existing request:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click on one of the statuses listed above, either on the Interlibrary Loan Home page or in the left navigation bar. <strong>Note:</strong> Requests with submitted or considering statuses can be found under the <strong>Awaiting Response</strong> and <strong>Direct Produced</strong> headings.</td>
<td>A list of requests with the given status appears.</td>
</tr>
<tr>
<td>2</td>
<td>Click on the <strong>Request ID</strong> of the item you would like to use to create a request.</td>
<td>The request details screen opens.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>New</strong> button in the upper right corner of the request.</td>
<td>A new request form opens, prepopulated with the information from the original request.</td>
</tr>
<tr>
<td>4</td>
<td>Confirm that the information is the same and make changes where necessary.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Save for Review</strong>.</td>
<td>A message that you have successfully created the request will appear at the top of the page with a hot linked Request ID.</td>
</tr>
</tbody>
</table>
Create Book Club requests

WorldShare Interlibrary Loan’s Book Club feature allows you to create multiple requests for a single item using a single request screen. Book Club requests are also known as Linked Requests.

To create multiple requests for a single item:

1. Locate the item you need to request multiple copies of using a Basic search (page 95), Advanced search (page 97), or Expert search (page 99).
2. On the results screen, find the item you need to request and click State Holdings, Regional Holdings, or All Holdings to open a request screen and view the holdings from one of these categories.
3. On the holdings screen, click the Quantity dropdown and select the number of copies you want to request. Numbered lender string text boxes equal to the quantity you choose will open.
4. To populate the Lender String boxes use established workflows or one of the two suggestions below. You can add up to 15 OCLC symbols to each lender string:
   A. To create multiple requests using established loan agreements with other libraries, you can either:
      a. Manually enter lender strings of libraries that you know hold the item. If you would like to request multiple items from a single institution, enter that library's symbol in multiple lender strings, OR
      b. Select the appropriate tab containing the libraries you know hold them item—All Holdings, State Holdings, or Regional Holdings—then click Yes for each lender string for which you would like to use that institution as a supplier.
   B. To use Custom Holdings Paths (page 108), click the All Holdings tab.
      a. Select the Custom Holdings Path you would like to apply to the lender strings.
      b. Click Go.
      c. The symbols in that custom holdings path will be distributed evenly among the lending strings, beginning with the first Custom Holdings Group, until all libraries holding the item have been assigned to a string or all of the strings have hit the maximum of 15 symbols. If you have not configured Custom Holdings Paths, see Custom Holdings Paths (page 108) for more information.
5. Click Create Request. The request screen will open.
6. Add a note about the book club request to the Borrowing Notes field in the Borrowing Library form. This note should indicate the following:
   - The request is for book club purposes.
   - There is a desired loan period (for example 30 days).
   - Lenders may receive more than one request to satisfy quantities needed.
   - Each copy requested should be treated as a single ILL requests and is not a duplicate request.

If you make book club requests often, you might want to set up a Constant Data record that includes this information so you do not have to manually enter it every time you make a request for multiple copies. For more information about Constant Data, see Constant data (page 36).
7. At the top of the screen, confirm that your request quantity is correct and all lender strings have at least one supplier listed. Click **Send Request** to submit the multiple requests. A confirmation message will appear at the top of the screen.

8. Click **Linked Requests Queue** in the confirmation message to review the request. You can also open the Linked Requests Queue by clicking **Borrowing Requests > Linked Requests** in the left navigation.

9. To review the Status of your multiple requests, in the Linked Requests Queue, click the tab containing the title of the item you requested. A results list with the requests sent to each supplier will appear, and a separate status for each item will be listed in the Status column.

10. Click on a single request’s ID to open and view it individually. From the individual request screen, you can move to the next or previous request using the **Previous Request** and **Next Request** buttons in the upper right corner of the screen.

11. As items arrive, find the individual requests under Linked Requests, and click **Mark as received** on the individual item request page.
Edit borrowing requests

In some cases, it is possible to edit requests once they have been submitted. Following are scenarios where editing is currently allowed.

**Note:** Editing is not allowed on closed requests.

New For Review requests

Edit bibliographic data via WorldCat:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>New For Review</strong> under <strong>Borrowing Requests</strong>.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Click the request ID.</td>
<td>The request opens.</td>
</tr>
<tr>
<td>3</td>
<td>Click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via <strong>Discover Items</strong>.</td>
<td>A contextual search is launched for the terms selected.</td>
</tr>
<tr>
<td>4</td>
<td>Click the item’s title, then click <strong>Apply data</strong> on the bibliographic record. OR Click a link to holdings, or use a Custom Holdings Path or Profiled group. Then click <strong>Update request</strong> on the Holdings screen.</td>
<td>A confirmation message appears and the request is updated.</td>
</tr>
</tbody>
</table>

Add lenders based on holdings:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>New For Review</strong> under <strong>Borrowing Requests</strong>.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Click the request ID.</td>
<td>The request opens.</td>
</tr>
<tr>
<td>3</td>
<td>Click the <strong>View Holdings</strong> link.</td>
<td>The Holdings screen appears.</td>
</tr>
<tr>
<td>4</td>
<td>Click <strong>Yes</strong> in the <strong>Supplier</strong> column to add a lender.</td>
<td>The lender is added to your <strong>Lender String</strong>.</td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Update request</strong>.</td>
<td>The request is updated.</td>
</tr>
</tbody>
</table>

Produced requests

You may edit a **Produced** request that has not yet shipped by a lender in the following queues:

- Awaiting Response
- Direct Produced
- Conditional
Email a copy of a request

Send a formatted email of the request details to any email address using the Email button at the top right of any request screen.

**Note:** When a library sends an email, the email address in the From field will also receive a copy of the email.
Process New For Review requests

Follow the instructions below to process New for Review requests. For a video tutorial, see Borrower: New for Review Requests in WorldShare ILL (4:54 minutes).

To process New for Review requests:

1. From the Borrowing Requests category, click New For Review. The initial categories of Not Reviewed and Reviewed are listed.
   - **Note:** Requests under Not Reviewed are requests that have not been seen by your staff. These requests originate from a source outside of WorldShare ILL.
   - Requests with a status of Reviewed have been saved by your staff, using the Save For Review feature.

2. Click the request ID or Title to display a request.

3. Review and confirm the information in the Request Details section.

4. If the citation needs to be verified, click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via Discover Items. A contextual search is launched for the terms selected, and the Results screen appears.

5. On the Results screen, you have two options:
   a. Click the item you want to request. Bibliographic information appears. If applicable, click Apply data, OR
   b. Click a link to holdings, or use a Custom Holdings Path or Profiled Group. On the Holdings screen, add lenders to the Lender String, then click Update request.

6. The request form appears, and the bibliographic data is updated.

7. Apply your constant data, and click Send Request.

8. A confirmation message appears and the request is updated.
Process Open Access requests

Follow the instructions below to process Open Access requests. For a video tutorial, see Borrower: Open Access Fulfillment in WorldShare ILL (6:25 minutes).

To process Open Access requests:

1. On the left navigation, click Discover Items.
2. Search for a journal or magazine title by typing your search terms in the box provided.
3. Click Search. Matching results appear, along with holdings display options.
4. On the Results screen, click View Now. Note: The resource will open in a new window.
5. In the WorldShare ILL window, click Regional Holdings from the Results screen.
6. On the Holdings screen, click Create Request. Note: The View Now link is also available on this screen.
7. On the request workform, click Save For Review.
8. A confirmation message appears and the request appears under the category Borrowing Requests > New For Review.
9. Click the Request ID in the confirmation message.
10. Or access the request from the Borrowing Requests > New For Review category.
11. Click the Email button and fill out the form to send the patron the open access link for the item requested.
12. Open the request and select Open Access from the Change Fulfillment Type list to record fulfillment of the item. A confirmation message appears, and the request is updated to Closed/Open Access.

- Note: It is important to email the patron the Open Access link to the request before clicking Open Access because when the request is updated to Closed/Open Access, the patron information attached to the request will be cleared.
- Note: Requests filled via Open Access will be included in monthly statistical reporting.
Receive items (from In Transit status)

Follow the instructions below to mark an item as received. For a video tutorial, see Borrower: Receiving Requests in WorldShare ILL (5:01 minutes).

To mark an item as received:

1. From the Borrowing Requests category, click In Transit.

2. Click the request ID or Title to display a request. Note: Request queues where batch processing is available include an icon in the left navigation sidebar.

3. Click Mark as received.

4. A confirmation message appears and the request appears under the category Borrowing Requests > Received > Received/In Use.
Renew item (from Received status)

Follow the instructions below to renew a request item. For a video tutorial, see Borrower: Renewing Requests in WorldShare ILL (5:05 minutes).

To renew an item:

1. From the Borrowing Requests category, click Received.
2. Click the request ID or Title to display a request.
3. Enter a Desired due date.
4. Click Renew item. Note: When suggesting a desired due date, be sure to consult the lender’s renewal policies by scrolling down in the request form and clicking the question mark icon (?) to open the lender’s Policies Directory profile.
5. A confirmation message appears and the request appears under Borrowing Requests > Received > Renewal Requested.
Respond to conditionals from lenders (from Produced status)

Follow the instructions below to respond to conditionals. For a video tutorial, see Borrower: Responding to Conditionals in WorldShare ILL (4:33 minutes).

To respond to conditionals:

1. On the left navigation, click Borrowing Requests.
2. Click Conditional.
3. On the Conditional screen, review the Conditions column to see the lender’s conditions.
4. Click the request ID or Title to display a request.
5. Respond to the Lender’s condition with Yes, No, or Cancel Request.
   - If you click Yes, the request returns to the Lender and appears under Lending Requests > Can You Supply? > Conditions Accepted.
   - If you click No, the request goes to the next Lender in the lender string.
   - If you click Cancel Request, the request is canceled.
6. A confirmation message appears.
Return item (from Received status)

Follow the instructions below to return an item to a Lender. For a video tutorial, see Borrower: Returning Requests in WorldShare ILL (4:57 minutes).

To return an item:

1. On the left navigation, click Borrowing Requests.
2. Click Received.
3. Click the request ID or Title to display a request.
   - Note: Request queues where batch processing is available include an icon in the left navigation.
4. Click Return item.
5. A confirmation message appears and the request appears under the category Borrowing Requests > Returned.
**Constant data**

Constant data allows you to create data records that can be saved and applied to both borrowing and lending requests. Once you have entered constant data and saved it, you can select any of your saved records and instantly populate your borrowing or lending fields with this information. This feature saves time in data entry on interlibrary loan requests and workforms.

**Constant data records for Borrowers**

Constant data records can be created to fit any routine borrowing situation. Examples of situations where constant data records can be useful for borrowers are listed in the table below.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Suggestion</th>
</tr>
</thead>
<tbody>
<tr>
<td>You regularly borrow photocopies as well as material that must be returned.</td>
<td>Create one constant data record for loans and another for copies.</td>
</tr>
<tr>
<td>You request some photocopies be faxed to you, but that most be mailed.</td>
<td>Create one constant data record for faxcopy requests and another for mailcopy requests.</td>
</tr>
<tr>
<td>A patron requests multiple items.</td>
<td>Create a temporary constant data record to transfer data specific to that patron into each of the workforms.</td>
</tr>
<tr>
<td>You handle all ILL transactions at your main library, but want lenders to ship materials directly to branches when appropriate.</td>
<td>Create constant data records with a different :SHIP TO: address for each branch.</td>
</tr>
<tr>
<td>Some faculty members are regular ILL customers.</td>
<td>Create a constant data record for each high-volume customer.</td>
</tr>
<tr>
<td>You have established policies for the amount you will pay for each type of ILL material.</td>
<td>Create a constant data record for each type of material with its appropriate :MAXCOST:.</td>
</tr>
<tr>
<td>You have established policies for using ILL Fee Management.</td>
<td>Create constant data records with IFM values in :MAXCOST:.</td>
</tr>
<tr>
<td>You regularly request multiple copies of the same item for book clubs.</td>
<td>Create a constant data record that contains a Borrowing Note indicating that the request is for a book club.</td>
</tr>
</tbody>
</table>

**Constant data records for Lenders**

Constant data records can also be created to fit any routine lending situation. Examples of situations where constant data records can be useful for lenders are listed in the table below.

<table>
<thead>
<tr>
<th>Situation</th>
<th>Suggestion</th>
</tr>
</thead>
<tbody>
<tr>
<td>You regularly loan photocopies as well as material that must be returned.</td>
<td>Create one constant data record for loans and one for copies.</td>
</tr>
<tr>
<td>Situation</td>
<td>Suggestion</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
</tr>
<tr>
<td>You handle all ILL transactions at your main library, but want borrowers to return materials directly to branches when appropriate.</td>
<td>Create constant data records reflecting a different :RETURN TO: address for each branch.</td>
</tr>
<tr>
<td>You have established policies for the amount you charge for each type of ILL material.</td>
<td>Create a single constant data record for each type of material reflecting the appropriate :LENDING CHARGES:.</td>
</tr>
<tr>
<td>You lend to members of your consortium free of charge, but charge other borrowers a fee.</td>
<td>Create one constant data record for a freeloan and one for a payloan.</td>
</tr>
<tr>
<td>You have established policies for the method of payment for loans and copies.</td>
<td>Create constant data records for various ILL Fee Management charges and separate records for invoiced charges, for example, 10IFM or 10INV.</td>
</tr>
</tbody>
</table>

See also:

Edit constant data (page 38)
Edit constant data

Constant data can be edited and updated in the administrative settings for WorldShare Interlibrary Loan within the OCLC Service Configuration. You can reach your institution's Service Configuration options by clicking OCLC Service Configuration on the WorldShare Interlibrary Loan Home screen.

For additional instructions on how to edit constant data, see Borrower Data (page 102) and Lender Data (page 118). Note: A default constant data record is created for any institution that does not have one. For a video tutorial, see Creating and Editing Constant Data in WorldShare ILL (13:36 minutes).

See also:

Constant data (page 36)
Document suppliers

The documentation in this section explains how to receive articles from document suppliers such as the British Library, Get It Now, and MyeBib.
Purchasing articles from British Library On Demand

This topic outlines the procedures for purchasing articles from the British Library On Demand using WorldShare Interlibrary Loan.

Setting up a British Library account

Before you begin purchasing documents from the British Library On Demand, using WorldShare Interlibrary Loan, you must register for a personal British Library Account. If your library orders or plans to order more than 100 documents/year from the British Library, you should consider setting up a Business Account as well.

Note: For more information on the difference between an Individual and Business Account, see Registration types (page 42).

Registering

You can register for an Individual Account or Business Account.

To register for an Individual Account:

1. Go to the British Library On Demand page.
2. Click the Register button in the top right corner of the screen.
3. Follow the steps to register for an individual account.
4. After your account is confirmed, you will be given an Online Account ID number. Make sure to save this number if you plan to register for a Business Account. You will need to provide it along with your Document Supply Business Account Registration form.

To register for a Business Account:

1. Visit the Regular users/Organizations page.
2. From here, open the Document Supply Registration Form PDF using the link at the bottom of the screen.
3. Complete this form and return it according to the instructions at the end of the form.
4. The British Library will confirm your registration by email within one working day.

Signing in

Sign in to the British Library Service with your British Library Username and Password. You can log in at any time before ordering by visiting the British Library On Demand page and clicking Login at the top of the page. By logging in, you may review account specific pricing.

You can also wait to log in until you are ready to complete the purchase of a document.

See Purchase documents from British Library On Demand (page 44) for more information about when to log in and complete your purchase.
British Library On Demand for ILLiad

To download the British Library On Demand addon for ILLiad, go to the ILLiad BL on Demand Addon.

See also:

Purchase documents from British Library On Demand (page 44)
How to get the most from the British Library on Demand (page 42)
How to get the most from the British Library on Demand

These tables provide definitions of the different options available for purchasing a document through the British Library on Demand through WorldShare Interlibrary Loan. This information was provided by the British Library.

Delivery format

<table>
<thead>
<tr>
<th>Option</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encrypted Download</td>
<td>Some publishers ask the British Library to apply technical protection measures to documents to ensure that only the person receiving the document can view it. The document will be viewable for 3 years and can be printed once. You will need a FileOpen plug-in installed on your computer to view an encrypted document. The FileOpen plug-in can be downloaded via the links on BL on Demand and from FileOpen.</td>
</tr>
<tr>
<td>Unencrypted Download</td>
<td>Many publishers allow the British Library to supply without encryption. You do not need any software to view these documents other than Adobe Reader. Note: Select Unencrypted Download whenever it is available.</td>
</tr>
<tr>
<td>Ariel</td>
<td>Ariel delivery allows documents to be delivered to an Ariel workstation.</td>
</tr>
<tr>
<td>Paper</td>
<td>The British Library prints the document in a booklet format and delivers it by mail.</td>
</tr>
</tbody>
</table>

Delivery speed

<table>
<thead>
<tr>
<th>Option</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate Download</td>
<td>Where BL on Demand holds an electronic item on its servers, the document can be delivered almost immediately. If you select a download delivery format and Immediate Download is available, it will be automatically selected, as it is the fastest and cheapest mode of delivery.</td>
</tr>
<tr>
<td>2 hours</td>
<td>The item will be supplied within 2 hours of order confirmation. This option is only available for scans of print items.</td>
</tr>
<tr>
<td>24 hours</td>
<td>The item will be supplied within 24 hours of order confirmation. This option is only available for scans of print items.</td>
</tr>
<tr>
<td>4 days</td>
<td>The item will be supplied within 4 days of order confirmation. This option is only available for scans of print items.</td>
</tr>
</tbody>
</table>

Registration types
### Registration Type | Meaning
---|---
**Individual** | If you don’t expect to order more than 100 items from BL on Demand per year, you only need to register as an individual. You only need to register once. There is a registration link at the top right of the order screen, or you can click [here](#). Once registered, you can quickly log in and order requests at any time. Payment is via IFM.

**Business account** | This option is available to customers who intend to purchase over 100 documents a year. To open a Business Account, [register](#) by downloading and completing the Registration Form. Then, visit [BL on Demand](#) to set up an Online Account for use in conjunction with your Business Account. Provide us with your Online Account ID number when sending us your completed form.

The advantages in registering are:
- Wider delivery options
- Custom price lists

If you already have a Business Account with the British Library, visit [BL on Demand](#) to set up an Online Account. Send us your Online Account ID number and Customer Code to link both accounts.

Contact email: [customer-services-accounts@bl.uk](mailto:customer-services-accounts@bl.uk)

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**See also:**
- Purchasing articles from British Library On Demand (page 40)
- Purchase documents from British Library On Demand (page 44)
Purchase documents from British Library On Demand

Documents available through the British Library On Demand can be purchased only after a request has been created and saved in the WorldShare ILL system. You will not have the option to purchase a document from the British Library until it has been saved as a Borrowing Request.

Note: If you would like to borrow an item from the British Library, complete the ILL request process by sending a request to lender BRI as you would for any other library.

To purchase a document from the British Library On Demand:

1. On the left navigation, click Borrowing Requests.
2. Open a request category—New for Review, Not Reviewed, or Reviewed—by clicking on the link. The Borrowing Request list opens.
3. Open a request for an article by clicking on the ID number or the article Title. The request details expand.
4. If it has not already been entered, scroll down and fill in the Article's Title, Author, and Page Numbers, and the Journal Volume, Number, and Date. Note: For best results, enter as much bibliographic information about the item as possible.
5. Scroll down and click Purchase Options. An accordion opens with information about the availability and pricing of the item through BL on Demand. Note: If the connection to the vendor times out, click Refresh until you receive a message confirming whether the item is available or not.
6. If the item is available and pricing options are provided, click the British Library On Demand link. An Item Details screen from the British Library opens in a new tab or window with bibliographic information about the article requested and pricing information.
7. If you have not yet logged in with your British Library account, click Sign in to Proceed. The Login screen appears.
8. Login with your British Library Individual Account Username and Password. If your account is associated with a Business Account, the Select Account screen appears.
9. Optional. Click the desired account. Note: When ordering articles from the British Library on Demand using WorldShare Interlibrary Loan, your IFM account will be charged for all purchases. Choosing Pay as You Go will still charge your IFM account. You are returned to the Direct Ordering screen.
10. Select or confirm the Delivery Format and Delivery Options.
11. Scroll down and click Order. The order is completed, and the Order Confirmation screen appears. See Managing incomplete orders (page 45), below.
12. Click Return to WorldShare ILL. The Purchase Request Note pop-up window appears, with the order details included.
13. Add a Purchase Note, if desired.
14. Click Save. The Borrowing Requests queue appears with a confirmation message, and the request is added to the Purchasing Requests > On Order queue.
15. After you receive the item, open the request and click Mark as received. A confirmation message appears.
To receive account-specific pricing, you must enter your business account information in OCLC Service Configuration, in the Purchase Options module of the WorldShare ILL section.

Managing incomplete orders

If you place an order, your library’s IFM account will be charged by the British Library. However, there are a few circumstances where the British Library may not be able to supply the order. If the order cannot be completed, you will receive an email. Possible reasons that the order cannot be completed include:

1. The requested item was not available.
2. Copyright restrictions prevent the British Library from supplying the item.

**Note:** Even if an order is not completed, ILL Fee Management (IFM) may already be triggered to process payment. In this case, OCLC will work with the British Library to handle any reconciliation of missing items at month end.

**See also:**

- Purchasing articles from British Library On Demand (page 40)
- How to get the most from the British Library on Demand (page 42)
Purchasing articles from Get It Now

This topic outlines the procedures for purchasing articles from Get It Now. Before you begin purchasing documents from Get It Now, you will need to implement the service. If you have questions about using Get It Now, email getit-nowsupport@copyright.com.

OCLC Service Configuration setup

After you have implemented Get It Now, you will need to configure this service to work with WorldShare Interlibrary Loan in the Service Configuration module. You can access Service Configuration through the link in the Other column on the WorldShare Interlibrary Loan Home screen or at Service Configuration.

1. Once Service Configuration is open, on the left navigation, click WorldShare ILL > Purchase Options.
2. On the Purchase Options screen, in the Get It Now form, enter the following information provided by Get It Now:
   - Institute
   - Order Source
   - ILL Email Address
   - Bill to Email Address
3. Click Save.

Purchasing documents from Get It Now

Documents available from Get It Now can be purchased only after a request has been created and saved in the WorldShare Interlibrary Loan system. You will not have the option to purchase a document from the Get It Now until it has been saved as a Borrowing Request.

To purchase a document from Get It Now:

1. On the left navigation, click Borrowing Requests.
2. Open a request category—New for Review, Not Reviewed, or Reviewed—by clicking on the link. The Borrowing Request list opens.
3. Open a request for an article by clicking on the ID number or the article Title. The request details expand.
4. If it has not already been entered, scroll down and fill in the Article’s Title, Author, and Page Numbers, and the Journal Volume, Number, and Date. Note: For best results, enter as much bibliographic information about the item as possible.
5. Scroll down to the bottom of the screen and click Purchase Options. An accordion opens with information about the availability and pricing of the item through Get It Now. Note: If the connection to the vendor times out, click Refresh until you receive a message confirming whether the item is available or not.
6. If the item is available and a price is provided, click the **Get It Now** link. A new tab with an Item Details screen from Get It Now opens with bibliographic information about the article requested.

7. Enter the **email address** to which you would like the electronic document to be sent. **Note:** You may email the item directly to the patron, but if you do this, you will only be able to confirm its arrival by contacting the patron directly.

8. Agree to the terms and conditions, and click **Accept**. A confirmation page appears, and your IFM account will be charged.

9. Click **Return to WS ILL**. The Get It Now tab will close, and your WS ILL tab will open. The order number and IFM price will be shown in a pop up in WS ILL.

10. Click the **request number** to review the purchase or click **On Order** under Purchasing Requests to view request details. The item request screen opens.

11. After the item has been received, open the request and mark it **Received**. **Note:** If you do not mark the item as received, after 21 days, the item will also show up in the Received? queue. The order will be closed and moved to the Closed queue.

### Managing incomplete orders

If you place an order, your library’s IFM account will be charged by Get It Now. However, there are a few circumstances where Get It Now may not be able to supply the order. If the order cannot be completed, you will receive an email and Get It Now will refund the IFM charges.
Interlibrary Loan Fee Management (IFM)

The Interlibrary Loan Fee Management (IFM) feature of WorldShare Interlibrary Loan lets libraries reconcile resource-sharing charges and payments through their monthly OCLC invoice. IFM helps libraries save money on fee-based transactions that take place within WorldShare Interlibrary Loan and simplify the transaction process. For a video tutorial on IFM, see OCLC IFM: Interlibrary Loan Fee Management (3:17 minutes).

See also:

Set up IFM (page 49)
Borrowing with IFM (page 50)
Lending with IFM (page 51)
Set up IFM

In order for an IFM transaction to take place, both the borrowing and lending institutions must have IFM selected in the constant data applied to the request, and the IFM conditions must match (e.g., the borrowers max cost must be greater than or equal to the lender’s charge for the request).

To configure IFM for use with WorldShare Interlibrary Loan, you must access OCLC Service Configuration. To access Service Configuration click the previous hyperlink, or click OCLC Service Configuration under the Other Quick Link column on the WorldShare Interlibrary Loan homepage.

In Service Configuration, you can create Borrower and Lender constant data records with IFM settings. For more information about constant data records, see Constant data (page 36). Different IFM settings can be applied to individual constant data records. If you do not select ILL Fee Management (IFM) for a constant data record, IFM will not be used to handle charges made using this record.

Configure IFM in Borrower Constant Data

After logging in to Service Configuration, click WorldShare ILL > Borrower Data to configure IFM for borrowing requests. Constant data records with IFM selected should be created for instances where you would like to use IFM to handle transactions where you are willing to pay the lender’s requested fee to fulfill a request. Adding a constant data record to a request will not guarantee the use of IFM. IFM will only be used if the borrower and lender IFM settings match.

Follow the instructions on Borrower Data (page 102) to add or edit a constant data record. Before saving the record, ensure that you have selected ILL Fee Management (IFM) and entered the Maximum Cost you are willing to pay for item requests to which you add this constant data record.

Configure IFM in Lender Constant Data

After logging in to Service Configuration, click WorldShare ILL > Lender Data to configure IFM for lending requests. Constant data records with IFM selected can be used in instances where you would like to use IFM to handle for-a-fee lending transactions.

Follow the instructions on Lender Data (page 118) to add or edit a constant data record. Before saving the record, ensure that you have selected Add ILL Management Fee (IFM) and entered the Lending Charges for requests to which you will apply this constant data record.

See also:

Borrowing with IFM (page 50)
Lending with IFM (page 51)
Borrowing with IFM

When using IFM with WorldShare Interlibrary Loan Borrowing, it is important to keep the following considerations in mind:

IFM Borrowing Fees Are Charged When Item Ships

When a lending library receives your request and fulfills it, your IFM account will be charged when the lending library clicks Shipped. This will only occur when an IFM-enabled lending library supplies your request.

IFM History Displays in Individual Requests

After a request has been filled, you can review the IFM payments associated with the request in the Request History, ILL Fee Management (IFM) History section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including the amount debited from the borrower for the request and the supplier. See IFM Borrowing Message (page 50) below for more detail about these notifications.

IFM Borrowing Message

The following messages may be displayed in the ILL Fee Management (IFM) History section of a borrowing request.

<table>
<thead>
<tr>
<th>Transaction Meaning</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment - #.##</td>
<td>The amount in the currency that has been charged to your account by the lender. This message will appear after the lender has clicked Shipped. After the payment has succeeded, a supplier column will be added to the History panel with the lending library’s OCLC symbol.</td>
</tr>
</tbody>
</table>

ILLiad and IFM Refunds

Borrowers who use ILLiad to process interlibrary loans with IFM may also see a message alerting the borrower that the supplier has changed the request’s status from Shipped to Unshipped. This change in status will result in an automatic IFM refund by the system.

For a video tutorial, see Borrower: Using IFM (5:35 minutes).

See also:

Borrower Data (page 102)
Lending with IFM (page 51)
Lending with IFM

When using IFM with WorldShare Interlibrary Loan Lending, it is important to keep the following considerations in mind:

Payments Are Triggered on Ship Action

When a lending library updates a request’s status to Shipped, by responding Yes to Can You Supply?, the borrowing library will automatically be charged for that item.

IFM Lending Charges Must Match the Borrower’s Settings

When a lender submits an IFM eligible request as Shipped, the system will perform IFM validation checks and warn the lender if an expected IFM charge cannot be processed due to one of the following problems:

a. The lender has set their IFM flag but the borrower has not.
b. The lender’s ILL charge is greater than the borrower’s state max cost.

The lender can take two actions if this warning is generated:

a. Proceed with the Ship action (click Update twice), agreeing to the Borrower’s terms, which include the maximum cost and method of processing payment for that request.
b. Abandon the current Ship action (click Cancel), and respond No or Conditional to the request.

These checks are also performed when a lender performs a Bulk Shipping action. Any requests that fail the IFM validation checks will not be included in the Bulk Action and will be listed in the post-bulk action status report that appears on screen after a bulk action has been performed.

IFM History Displays in Individual Requests

After a request has been filled, you can review the IFM notifications associated with the request in the Request History, ILL Fee Management (IFM) History section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including whether the payment has cleared, the amount of the payment, and error messages if the payment cannot be completed. See IFM Lending Messages (page 51) below for more detail about these messages.

IFM Lending Messages

The following messages may be displayed in the ILL Fee Management (IFM) History section of a lending request:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment</td>
<td>The system is processing an IFM payment in response to the recent Ship action.</td>
</tr>
<tr>
<td>IFM Payment</td>
<td>The system has successfully processed the IFM payment for this request—this includes the amount credited to the lender.</td>
</tr>
<tr>
<td>IFM Error</td>
<td>Something has prevented the system from completing the IFM Payment successfully. Possible reasons for an IFM payment not to proceed as expected are:</td>
</tr>
<tr>
<td>Message</td>
<td>Meaning</td>
</tr>
<tr>
<td>---------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td>• The borrower had not set their IFM flag in the request.</td>
</tr>
<tr>
<td></td>
<td>• The lender’s charge exceeds the borrower’s max cost.</td>
</tr>
<tr>
<td></td>
<td>• WorldShare Interlibrary Loan has been unable to contact the IFM service so an IFM payment could not be made for this request.</td>
</tr>
</tbody>
</table>

For a video tutorial, see [Lender: Using IFM](#) (5:57 minutes).

**See also:**

- [Borrowing with IFM](#) (page 50)
- [Lender Data](#) (page 118)
Lending Requests

Your requests appear in the left navigation menu and under Quick Links on the Home screen. The major queues are listed first, followed by minor queues for easier organization. Click a queue to see all requests in that queue. See the Categories and queues (page 161) table for a detailed description of each queue.

Note: Queues with no current requests will not appear in the list.
Respond Yes to a Loan Request

Follow the instructions below to respond yes to a loan request. For a video tutorial, see Lender: Respond Yes to a Loan Request (6:27 minutes).

To respond yes to a loan request:

1. On the left navigation, under Lending Requests, click Can You Supply?.
   
   • **Note:** Request queues where batch processing is available include a batch icon ( ) in the left navigation.

2. On the Can You Supply? screen, click the request ID or Title to display the request.

3. In the request, review and confirm the information in the Request Details accordion.

4. From the Apply constant data list at the top of the screen, select your constant data for loans.
   
   • **Note:** When a different Constant Data is applied to a request, the fields are briefly highlighted in green as a visual indicator of the change. Data in a field of a constant data record will always overwrite the value shown in the request.

5. Review the information in the Borrowing Information accordion.
   
   • **Note:** Click the information icon ( ) next to the Borrower's symbol to view their profile in the Policies Directory.

6. Review the information in the Lending Information accordion.

7. In the Request Details accordion, confirm the Due Date.

8. Optional. Enter a Local ID. The Local ID can be any local identifier number (for example, a call number or barcode number).

9. At the top of the screen, click Save.

10. Optional. Select any printing options. For more information, see Printing (page 85).

11. To respond yes to the request, click Yes.

12. Optional. If you have specified an ILL or IFM charge for the item you are lending, you will receive an alert if your IFM charges exceed the maximum cost set by the borrower or the borrower has not selected IFM payment. If you click Update to proceed and update the status to Shipped, you are agreeing to the Borrower's terms, which include their maximum cost and method of processing that payment. If you click Cancel, you have the option to respond no or conditionally to the request.
13. A confirmation message appears and the request appears under the category Lending Requests > Supplied > Shipped/In Transit.
Respond Yes to a Copy Request

Follow the instructions below to respond yes to a copy request. For a video tutorial, see Lender: Respond Yes to a Copy Request (5:07 minutes).

To respond yes to a copy request:

1. On the left navigation, under Lending Requests, click Can You Supply?. Note: Request queues where batch processing is available include an icon ( ) in the left navigation.

2. On the Can You Supply? screen, click the request ID or Title to display the request.

3. In the request, review and confirm the information in the Request Details accordion.

4. From the Apply constant data list at the top of the screen, select your constant data for loans. Note: When a different Constant Data is applied to a request, the fields are briefly highlighted in green as a visual indicator of the change. Data in a field of a constant data record will always overwrite the value shown in the request.

5. Optional. If you can supply an electronic copy of the article, use the OCLC Article Exchange link to upload the copy ot share with the borrower. Note: You are automatically signed into Article Exchange when using WorldShare Interlibrary Loan.
   a. Click OCLC Article Exchange (under URL).
   b. Locate the file on your computer.
   c. Click Open. Note: For a list of file formats supported by OCLC Article Exchange, see Article Exchange (page 13).
   d. Click Drop File. The URL and Password fields are respectively updated with the URL and password for the document. A Preview button also appears. Click Preview to preview the uploaded document before sending the document to the borrower.
   e. Once the file has been picked up for the first time, it will remain available on the site for 30 days. After 30 days, the file will be removed. A file can be picked up a maximum of five times for each URL/password combination. Files that are never picked up will be removed in 30 days.

6. Review the delivery information in the Borrowing Information accordion.

7. Review the information in the Lending Information accordion.

8. Optional. Select Print Shipping Labels and/or Print Book Straps/Stickers to create labels that you can print later, or click Print Now to print a copy of the request immediately. Note: If you are using Article Exchange, no shipping labels or book straps/stickers are needed. See Printing for more information.

9. Click Yes to respond yes to the request.

10. Optional. If you have specified an ILL or IFM charge for the item you are lending, you will receive an alert if your IFM charges exceed the maximum cost set by the borrower or the borrower has not selected IFM payment. If you click Update to proceed and update the status to Shipped, you are agreeing to the borrower’s terms, which include their maximum cost and throttle processing that payment. If you click Cancel, you have the option to respond no or conditionally to the request.
11. A confirmation message appears and the request appears under the category Lending Requests > Supplied > Shipped/In Transit.
Respond No to Requests as a Lender

If you have received a lending request and cannot supply the borrower with the item, follow the instructions below to respond no to the request. For a video tutorial, see Lender: Respond No to a Request (2:34 minutes).

To respond no to a request:

1. On the left navigation, under Lending Requests, click Can You Supply?.
2. On the Can You Supply? screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion.
4. Review and confirm the information in the Borrowing Information accordion.
5. To respond no to the request, click No.
6. Optional. Click the down arrow to select a reason for saying no.
7. A confirmation message appears, and the request goes to the next Lender in the lender string.
Respond Conditionally to a Request

If you have received a request, but need more information to decide whether you can fulfill it, you can respond conditionally.

To respond conditionally to a request:

1. On the left navigation, under Lending Requests, click Can You Supply?.
2. On the Can You Supply? screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion.
4. In the Borrowing Information accordion, confirm the delivery and payment information.
5. To respond conditionally to the request, click Conditional.
6. Optional. Click the down arrow to select a reason for the conditional.
7. On the Send Conditional window, enter any additional information you want to send to the Borrower, if needed.
8. Click Send Response.
9. A confirmation message appears and the request is returned to the Borrowing library. If the conditions are accepted, the request appears on the left navigation under Lending Requests > Can You Supply? Conditions Accepted.
Respond to a Renewal Request

Follow the instructions below to respond to a renewal request. For a video tutorial, see Lender: Respond to a Renewal Request (2:21 minutes).

To respond to a renewal request:

1. On the left navigation, under Lending Requests, click Supplied > Renewal Requested.
2. On the Renewal Requested screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion. Note the Borrower’s desired Due Date and Renewal Requested date (if applicable).
4. If you are willing to grant the renewal, edit the Due Date to reflect the new due date you wish to give.
5. Click an action:
   - Accept Renewal to accept the request
   - Deny Renewal to reject the request
   - Recall item to request the return of an item
6. A confirmation message appears and the request appears on the left navigation under Supplied > Received/In Use.
Completing Requests

When an item you have lent to a borrowing library is returned back to you, you can close the request and mark it as complete.

To complete a request:

1. On the left navigation, under Lending Requests, click Returned > Returned/In Transit.
2. On the Returned/In Transit screen, click the request ID or Title to display the request. Note: Request queues where batch processing is available include a batch processing icon ( ) in the left navigation.
3. In the request, review and confirm the information in the Request Details accordion.
4. To complete the request, click Checked-in/Complete.
5. A confirmation message appears and the request is complete. Note: If the item is marked Not Returned, it appears in the left navigation under Returned > Returned but Missing and ages out of the system after 180 days.
Edit lending requests

Lenders may edit some request details once they have responded Yes. The following fields are editable:

- Type (Loan/Copy)
- Due Date (a value is required in this field)
- Local ID
- Lending Charges
- Insurance Amount
- Lending Notes
- Lending Restrictions
- Return Via
- Return Address

Note: Other fields are editable, as necessary.

To edit fields on a lending request:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Open a lending request.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Edit any desired fields by typing in the box provided.</td>
<td>The Save button at the top of the screen becomes active.</td>
</tr>
<tr>
<td>3</td>
<td>Click Save.</td>
<td>A confirmation message appears and the request is updated.</td>
</tr>
</tbody>
</table>
Email a copy of a request

Send a formatted email of the request details to any email address using the Email button at the top right of any request screen.

**Note:** When a library sends an email, the email address in the From field will also receive a copy of the email.
OCLC Policies Directory

The OCLC Policies Directory is the repository of lending and copying policies of libraries participating in WorldShare Interlibrary Loan and WorldCat Resource Sharing.

The location of the OCLC Policies Directory is: https://illpolicies.oclc.org. There is also a link to the Policies Directory from WorldCat Resource Sharing and WorldShare Interlibrary Loan. Using your OCLC ILL authorization and password, sign in to either WorldCat Resource Sharing (http://www.firstsearch.org) or WorldShare Interlibrary Loan, and click the Policies Directory link.

Overview

The Policies Directory provides two main functions to enhance your workflow. First, it provides a way to search resource sharing libraries by OCLC institution symbol or name and group symbol or name. **Note:** The Policies Directory contains only groups profiled by OCLC.

The second function of the Policies Directory is to enable you to enter and display information about:

- Your lending, copying and deflection policies
- Your resource sharing supplier status
- Your library collections
- Your library schedules
- Contacts at your library
Sign in to the Policies Directory

Sign in to the OCLC Policies Directory at https://illpolicies.oclc.org/. You need an OCLC ILL authorization and password to use the Policies Directory. Alternately, you may sign in using your WorldShare Interlibrary Loan username and password (OCLC services account).

You may be prompted to update your policies periodically.
Searching the Policies Directory

You can search by any combination of criteria (you are not required to search by institution or group). For example, you can search for all OCLC suppliers that support rush handling in California and bill with OCLC IFM.

WorldCat Registry data is updated within 2 hours. If you change any data in the WorldCat Registry, users searching the Policies Directory will not see the changed data until after a two-hour delay.

Institution or group

Choose the type of search from the **Search By** list, then type the corresponding name of the institution or group or the symbol of the institution or group.

<table>
<thead>
<tr>
<th>Search by</th>
<th>Description</th>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name (Institution or Group)</strong></td>
<td>The name of the institution or group</td>
<td>Due to the variety of abbreviations used in names, wildcards are recommended when searching by name. For example, Ohio State univ*</td>
</tr>
<tr>
<td><strong>Institution Symbol</strong></td>
<td>The three-five character OCLC symbol of the institution</td>
<td>Only exact matches are retrieved. Searching for ORE results in ORE, not VOREL, OREVE, FORES, etc.</td>
</tr>
<tr>
<td><strong>Group Symbol</strong></td>
<td>The four-character OCLC symbol of the OCLC-profiled group</td>
<td></td>
</tr>
</tbody>
</table>

Search guidelines

Search phrases are case-insensitive. Articles and most punctuation are ignored. Special characters (such as ( and &) are treated as spaces.

Wildcard characters

- ? matches any single character
- matches zero or more characters

Search strings that do not contain wildcards search for that string anywhere within the result (not just a result that begins with that string).

How to search

**Note:** The options in steps 3 and 4 do not apply to group name searches.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | From the **Search By** list, choose what you want to search for (institution symbol or name, group symbol or name).  
**Note:** Symbol searches retrieve exact matches only. If a group symbol is found, all its members are listed on the search results screen. |
| 2    | Type the **name** or **symbol** of the institution or group (based on your choice in step 1). |
| 3    | **Geography.** (Country; State (USA)/province (Australia, Canada); City)  
**Institution Types.** Each library can choose a single type to describe itself.  
**OCLC Supplier.** Libraries that lend using the OCLC ILL system.  
**Days To Respond.** Number of days needed to respond to a request (4, 8, 12, 16 or 20)  
**Rush Supported.** Libraries that will expedite requests. **Note:** Rush handling often costs more than normal handling.  
**International Lender.** Libraries that lend to countries other than their own.  
**Group Affiliation.** To limit search by group, the group must be profiled by OCLC.  
**Note:** These options do not apply to group name searches. |
| 4    | Policy Information options.  
**Fee.** Limit search by fee charged. The search will return institutions with policies that indicate a fee of less than or equal to the search amount. **Must be numeric.**  
**Currency.** Specify the currency defined in the policy.  
**Format.** Limit search by material type or physical manifestation of the item.  
**Request Method.** Limit search by request method (means by which ILL requests are accepted by the library).  
**Delivery Method.** Limit search by delivery method (service used or means by which items are delivered to a library).  
**Billing Method.** Limit search by billing method (service used or means by which a library will request payment for ILL transactions).  
**Note:** These options do not apply to group name searches. |
| 5    | Click the **Search** button.  
Click **Reset** to clear all data you entered. |
| 6    | The Search Results screen displays. **Note:** The maximum number of search results is 5000. |
Search results

This screen lists any matches from a search, up to 5000. Search results display as follows.

Hourly update of WorldCat Registry data

Fields marked with an asterisk (*) in the Profile Information section contain data from the WorldCat Registry. The Policies Directory updates this data on an hourly basis. If you change any data in the WorldCat Registry, users searching the Policies Directory will not see the changed data until after the hourly update.

Display symbols

Search results screens that list institution symbols have a Display Symbols button (above and below the search results table) that displays all retrieved institution symbols in a window from which you can copy them.

Symbol search results

<table>
<thead>
<tr>
<th>Search</th>
<th>Type of matching</th>
<th>Kind of search result displayed</th>
<th>Display symbols on search results screen?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Symbol</td>
<td>Exact match (one result or nothing)</td>
<td>Institution profile displays, if found</td>
<td>No</td>
</tr>
<tr>
<td>Group Symbol</td>
<td></td>
<td>If group found, all symbols of group members displayed</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Name search results

<table>
<thead>
<tr>
<th>Search</th>
<th>Type of matching</th>
<th>Actions</th>
<th>Display symbols on search results screen?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution Name</td>
<td>List of results</td>
<td>Click <strong>Institution name</strong> to display profile</td>
<td>No</td>
</tr>
<tr>
<td>Group name</td>
<td>List of results</td>
<td>In the Institutions column, click the <strong>number</strong> to display all symbols of group members</td>
<td>Yes (if number in institution column has been clicked)</td>
</tr>
</tbody>
</table>

Return to tabs from search results

To return to the **Profile** tab (and the other tabs), click the institution name in the upper right corner of the screen.
Profile information

The Profile tab provides a summary of your institution’s information. The table below indicates where the information is stored. Asterisks (*) indicate that data in the field comes from the WorldCat Registry (Not Defined indicates the data is absent). To change this data, log on to the WorldCat Registry.

Summary fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name (Symbol)*</td>
<td>Library’s name, as it would appear on a shipping label or billing address.</td>
</tr>
<tr>
<td>Also Called*</td>
<td>Library is also called by this name.</td>
</tr>
<tr>
<td>Location*</td>
<td>City, state/province, postal code, country.</td>
</tr>
<tr>
<td>Shipping Address</td>
<td>The library’s mailing address, as defined on the Contacts tab.</td>
</tr>
<tr>
<td>Institution Type*</td>
<td>The library’s description of itself (one type per library).</td>
</tr>
<tr>
<td>OCLC Supplier</td>
<td>Indicates whether the library lends through OCLC.</td>
</tr>
<tr>
<td>Days To Respond</td>
<td>Indicates the number of days needed to respond to a request (4, 8, 12, 16 or 20).</td>
</tr>
<tr>
<td>Note: For more information about Days To Respond, see Days To Respond (page 165).</td>
<td></td>
</tr>
<tr>
<td>Non-Circulating</td>
<td>Materials, formats, or collections that are not lent out.</td>
</tr>
<tr>
<td>Periods</td>
<td>Length of time items are loaned or renewed, as defined on the Policies tab.</td>
</tr>
<tr>
<td>Fees</td>
<td>The range of costs to the borrower of loans or copies, as defined on the Policies tab.</td>
</tr>
<tr>
<td>Request Methods</td>
<td>Methods used by borrower to request loan or copy of an item, as defined on the Policies tab.</td>
</tr>
<tr>
<td>Delivery Methods</td>
<td>Methods used by lender to send requested item, as defined on the Policies tab.</td>
</tr>
<tr>
<td>Group Affiliations</td>
<td>Groups of which the library is a member. Defined by OCLC and the library.</td>
</tr>
<tr>
<td>International Lender</td>
<td>Countries the library will lend to (in addition to the country in which the library is located), as defined on the Policies tab.</td>
</tr>
</tbody>
</table>

Details fields

Asterisks (*) indicate that data in the field comes from the WorldCat Registry (Not Defined indicates the data is absent). To change this data, log on to the Registry.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Article Exchange</td>
<td>The library’s status for OCLC Article Exchange is listed.</td>
</tr>
<tr>
<td>Odyssey Address</td>
<td>The library’s Odyssey FTP address, as defined on the Contacts tab.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Library Catalog URL*</td>
<td>The institution or library's Web-accessible catalog.</td>
</tr>
<tr>
<td>Library Homepage URL*</td>
<td>The institution or library's main Web site address.</td>
</tr>
<tr>
<td>Lending URL*</td>
<td>The internet address of the part of the library responsible for lending.</td>
</tr>
<tr>
<td>FEIN*</td>
<td>Federal Employer Identification Number (also known as Federal Tax Identification Number). A nine-digit number issued by the Internal Revenue Service to track a business’s tax returns.</td>
</tr>
</tbody>
</table>
Collections

Create descriptions of each collection that you supply (or do not supply) to borrowing libraries. If you have a URL link to a collection's description, enter it on the Collections tab.

If you enter collections on the Collections tab, they are also available on the Policies tab for selection in creating copy and loan policies.
**Schedule**

List your department’s normal operating hours and any closures, such as holiday breaks, regular “closed” days, etc.

Possible conflict between statuses. See Change supplier status (page 79) for more information.
Contacts

Create multiple contacts. We highly recommend that you maintain current contact information.

Have the following information available:

- A list of contacts for interlibrary loan or document delivery. List contacts for lending and borrowing. In many cases, this contact may be one person. Other contacts might be in billing, returns, general, etc. A complete list of contact types is located in the drop-down box on the Add Contacts workform.

- Each contact’s phone, email, fax or other communication numbers or addresses. **Note:** You may list as much contact information as each contact wishes to be made public.

- Addresses for each contact, if they differ from the main shipping address.

- For Electronic contact types, use the Attention: field to note the type of electronic contact (Skype, Yahoo messenger, etc.) and the URL: field to define the specific address (if one is needed).
Create copy or loan policies

Use the OCLC Policies Directory to explain your lending policies. For example, you can create a loan policy for libraries within your state or consortia for which you have a special reciprocal relationship. You may also list a copy policy for libraries outside your state with which you may not have any lending relationship. In that case, charges may apply and can be included.

Tip: If you are a reciprocal lender, enter Reciprocal Lender as the policy name so that other lenders can find this information easily.

When entering your policies, have the following information available:

- The different groups to whom you lend. Include them in your policies. Only groups that have been profiled by OCLC will display.
- The fees that you charge to libraries for your ILL services. These may include flat or per item/page/exposure charges, taxes, shipping, service or rush fees. You may always indicate a zero charge in any policy. Enter 0.00 in the fee field if there is no fee.
- The billing methods that you support. These may include IFM or “invoice with item” methods, for example. If you have more than one method, they are listed in order of preference, with the first being the most preferred.
- The delivery methods that you support. These could include physical methods, such as USPS, UPS or FedEx, or electronic methods, such as email, FTP or OCLC Article Exchange.
- Specific loan and renewal periods.

To add or edit a copy or loan policy:

1. Click the Policies tab.
2. Click either Copies or Loans.
3. Click Add or Edit. The workform appears.
4. Type the Policy Name (required field).
5. Copies:
   - Copy Type. The type of copy the policy applies to. Note: Policies based on a single copy type are often easier to understand than those that apply to multiple copy types.
6. Loans:
   - Loan Item Maximum. The maximum number of items loaned.
   - Loan period. The length of the loan. Renewal Maximum. The maximum number of times a loan can be renewed.
   - Renewal Period. The length of the renewal period.
7. Fees (required field):
   - **Increment.** The unit of measurement (page, exposure, item)
   - **Minimum/maximum.** The number of copies available per Fee. **Note:** To indicate a flat fee, fill in Fee, but leave Minimum and Maximum blank.
   - **Currency.** The monetary unit used.
   - **Tax included.** Indicates if tax is part of fee or not.
   - **Tax type.** Rate (per cent) or fee.
   - **Tax.** The amount of the tax.
   - **Reciprocal Type.** The kind of reciprocal agreement (fee vs. free), if any.
     - **Example:** A policy for copying the first 10 items at $2 and the next 10 at $8 would be recorded in two rows:
       - Increment: Item; min: 1; max: 10; fee: $2
       - Increment: Item; min: 11; max: 20; fee: $8

8. Borrowers:
   - **OCLC Group.** The groups the policy applies to and any exceptions.
   - **Library Categories.** A description chosen by the library.
   - **Locations.** The locations the policy applies to and any exceptions.

9. Items:
   - **Collections.** The collections the policy applies to and any exceptions.
   - **Formats.** The formats the policy applies to and any exceptions.
   - **Restrictions.** Any conditions that restrict the use of the item.

10. Details:
    - Methods and their fees are listed in order of preference.

11. Click **Save.**
Create deflection policies

Deflection is applied to the lender string to ensure that an unfilled request does not remain in Request Manager in WorldCat Resource Sharing, or in WorldShare Interlibrary Loan as Pending, waiting for potential lenders to manually deny the request.

Deflection is not the same process as filtering. Filtering is a process that chooses lenders based on holdings data and other information from the holdings record before the request is created (produced). It takes place before the lender string is built. The Policies Directory is not involved with this processing.

If the borrower returns to the request after it has been placed, the asterisk indicating the current lender will have moved to the next lender. The Request History will indicate the Reason for No:

- Auto-Deflection: Format Type
- Auto-Deflection: Profiled Group (covers profiled groups and Custom Holding Groups)
- Auto Deflection: Maximum Cost
- Auto Deflection: Age of Material
- Auto Deflection: Multiple Reasons
- Auto Deflection: Request Type

Deflection may be based on the request service type, local holdings, format type, OCLC profiled group membership, Custom Holding Group, maximum cost, E- license terms and material age in years. Exceptions can also be set, based on format type, OCLC profiled group membership, and Custom Holding Group. The default setting is for no deflection policies to be set.

If you have multiple deflection policies, requests will be processed in the order the policies are created.

The hierarchy for deflection

1. Non-supplier status—if a lender is a non-supplier, nothing can be loaned or copied
2. Local Holdings Record (LHR)—bytes 20 and 21 override deflection settings
3. Deflection Type—enabled or disabled
4. Deflection Profile—deflection by policies set up in the Policies Directory

How it works

A simple scenario for deflection by format would be:

1. The borrowing library creates a request choosing lenders that appear to be suppliers for the material.
2. WorldCat Resource Sharing (WCRS), or WorldShare Interlibrary Loan searches the first lender’s policies in the Policies Directory to see if they will loan that format. For example, the format is "musical score" and the first lender has created a deflection policy to indicate that it does not loan musical scores.
3. Instead of the lender getting the request as Pending, it skips that lender and automatically deflects to the next lender.
4. The request moves through the string until it identifies a lender that might supply it.
Deflection exceptions

If you select Format, OCLC Group (profiled group), or Custom Holding Group as deflection criteria, you cannot select those criteria as exceptions.

<table>
<thead>
<tr>
<th>Example policy</th>
<th>Deflection option(s) selected</th>
<th>Exception criteria available</th>
</tr>
</thead>
<tbody>
<tr>
<td>I do not loan e-serials.</td>
<td>Format</td>
<td>OCLC Group</td>
</tr>
<tr>
<td>I do not loan e-serials to profiled group XXXX.</td>
<td>Format OCLC Group</td>
<td></td>
</tr>
<tr>
<td>I do not loan to profiled group XXXX.</td>
<td>OCLC Group</td>
<td>Format</td>
</tr>
<tr>
<td>I charge $15.</td>
<td>Borrower Maximum Cost</td>
<td>Format</td>
</tr>
<tr>
<td>I loan books only.</td>
<td>Format 2</td>
<td>OCLC Group</td>
</tr>
<tr>
<td>I loan books only.</td>
<td>Format 3</td>
<td>OCLC Group</td>
</tr>
<tr>
<td>I only loan to all members of group XXXX.</td>
<td></td>
<td>Format 4</td>
</tr>
</tbody>
</table>

Note: Filtering impacts the lender string that is created, i.e., a symbol can be excluded from the lender string based on the filter that is applied. Filtering is based on custom holdings paths/groups based on volume and year data in the local holdings record.

2 Note: There are two ways to create this policy. Here all formats are selected for deflection except for “book.” This is a listing of all formats not loaned.

3 No deflection criteria are selected. Service type “loan” with no deflection criteria indicates that no formats are loaned. However, the exception format “book” indicates that only books are loaned.

4 The institution only loans material to a selected profiled group. Choosing the exception eliminates the selection of the (long list of) individual profiled groups.

Deflection Includes/Excludes

When creating deflection policies for your group, you can choose to block or not block certain groups or items. This feature allows your institution to be very specific about what groups and items a deflection policy pertains to, and those that it does not pertain to.

If you want to deflect a group or one or two items, use the Include feature. If you want to deflect everything except a group or one or two items, use the Exclude feature.

Examples

- To deflect everything except books, use **Exclude** and click **Book** (instead of using Include, where you would have to click all the other formats except Book). This is because when you are making an exception for that format and excluding it from your institution’s deflection policies.
My library does not loan DVDs, but I want to allow other libraries in my group to borrow. For this policy, you would **Exclude** your group, and **Include** **Visual Material** - **DVD**.

Also, choosing two limiters combines both into one policy.

For example: Excluding the format **Visual Material** - **DVD** and then selecting a **Material Age** of **Less than**: 1 year will deflect only DVDs that are less than one year old.

On the Deflections screen, a green check mark (✅) indicates that the group or item is included in the deflection (in my library’s policies), meaning that the requests from those groups or for those items will be deflected. A red X (🚫) indicates that the group or item is **not** included in the deflection.
Change supplier status

You may want to change your supplier status for periods of time when you are unable to fill requests. These situations might include vacations, library holidays, or situations when your collections will be inaccessible, such as when a library or collection is being moved, or during renovations.

Possible conflict between statuses. Changing Supplier status on the Profile tab overrides any Supplier status you may have set on the Schedule tab (under Closures). However, during Closure periods Supplier status is checked on the Schedule tab every midnight (Eastern Standard Time). If the two statuses conflict, the status on the Profile tab is changed to match the status on the Schedule tab. The only time the two statuses might conflict is during a Closure period.

Note: Changing OCLC Supplier also changes supplier status in FirstSearch. See the table for when changes take effect.

<table>
<thead>
<tr>
<th>Tab from which supplier status is changed</th>
<th>Timing of change to supplier status in FirstSearch databases</th>
<th>WorldCat</th>
<th>FirstSearch databases</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
<td>Real time</td>
<td>Midnight (EST)</td>
<td>Midnight (EST)</td>
</tr>
<tr>
<td>Schedule</td>
<td>Midnight (EST)</td>
<td>Midnight (EST)</td>
<td>Midnight (EST)</td>
</tr>
</tbody>
</table>
## Example deflection policies

**Note:** Fields not listed are left blank.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Policy field</th>
<th>What you enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will not copy or loan e-Serials to anyone</td>
<td>Policy Name</td>
<td>E-Serials Copy or Loan</td>
</tr>
<tr>
<td></td>
<td>Service Type</td>
<td>Enable Real Time Deflection</td>
</tr>
<tr>
<td></td>
<td>Deflection Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Deflect</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td></td>
</tr>
<tr>
<td>I charge $10 for DVDs, and $0 for everything else</td>
<td>Policy Name</td>
<td>DVD at $10 Loan</td>
</tr>
<tr>
<td></td>
<td>Service Type</td>
<td>Enable Real Time Deflection</td>
</tr>
<tr>
<td></td>
<td>Deflection Type</td>
<td>Visual Material - DVD 10</td>
</tr>
<tr>
<td></td>
<td>Deflect</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Borrower Maximum Cost</td>
<td></td>
</tr>
<tr>
<td>I charge $25 for libraries not in ILLD</td>
<td>Policy Name</td>
<td>$25 not in ILLD Copy or Loan</td>
</tr>
<tr>
<td></td>
<td>Service Type</td>
<td>Enable Real Time Deflection</td>
</tr>
<tr>
<td></td>
<td>Deflection Type</td>
<td>25</td>
</tr>
<tr>
<td></td>
<td>Deflect</td>
<td>N/A ILLD</td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Borrower Maximum Cost</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Exceptions</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Format OCLC Group</td>
<td></td>
</tr>
<tr>
<td>I will not loan materials less than three years old or more than 100</td>
<td>Policy Name</td>
<td>No lend new and old Loan</td>
</tr>
<tr>
<td>years old</td>
<td>Service Type</td>
<td>Enable Real Time Deflection</td>
</tr>
<tr>
<td></td>
<td>Deflection Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Deflect</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Format OCLC Group</td>
<td>N/A N/A N/A</td>
</tr>
<tr>
<td></td>
<td>Borrower Maximum Cost</td>
<td>less than three, or more than 100 years old</td>
</tr>
<tr>
<td></td>
<td>Material Age</td>
<td></td>
</tr>
<tr>
<td>I don’t loan or copy serials unless I’m the last in the lender string</td>
<td>Policy Name</td>
<td>No Serials Copy or Loan</td>
</tr>
<tr>
<td></td>
<td>Service Type</td>
<td>Enable Real Time Deflection - except when I am last in the lender string</td>
</tr>
<tr>
<td></td>
<td>Deflection Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Deflect</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Format</td>
<td></td>
</tr>
</tbody>
</table>
# Deflection policy formats

<table>
<thead>
<tr>
<th>Deflection Format</th>
<th>Description</th>
<th>Bibliographic Definition of Formats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archival/Mixed Material</td>
<td>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.</td>
<td>Leader/06 is &quot;p&quot;</td>
</tr>
<tr>
<td>Book</td>
<td>Books, pamphlets, technical reports, typescripts, theses, dissertations, manuscripts and other written works.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;a&quot; or &quot;c&quot; or &quot;d&quot; or &quot;m&quot;</td>
</tr>
<tr>
<td>Computer File</td>
<td>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.</td>
<td>Leader/06 is &quot;m&quot;</td>
</tr>
<tr>
<td>E-Audio Book</td>
<td>Leader value of sound recording and cataloged as website with no dimension (300/c) information provided.</td>
<td>Leader/0t is &quot;i&quot; (lower case letter i) or &quot;j&quot; AND material type is &quot;url&quot; AND no 300/c is in the record.</td>
</tr>
<tr>
<td>E-Serial</td>
<td>Serial material cataloged as a website.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;s&quot; or &quot;b&quot; AND material type is &quot;url&quot;</td>
</tr>
<tr>
<td>E-Text</td>
<td>Non-serial material cataloged as a website.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;a&quot; or &quot;c&quot; or &quot;d&quot; or &quot;m&quot; AND material type is &quot;url&quot;</td>
</tr>
<tr>
<td>Government Document</td>
<td>Any material type code for Government publication.</td>
<td>Material type is &quot;gpd&quot;</td>
</tr>
<tr>
<td>Integrated Resource</td>
<td>Continually updated resources.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;i&quot;</td>
</tr>
<tr>
<td>Internet Resource</td>
<td>A resource available via a connection to a computer network.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;i&quot; AND 008/23 is &quot;o&quot; or &quot;s&quot;</td>
</tr>
<tr>
<td>Deflection Format</td>
<td>Description</td>
<td>Bibliographic Definition of Formats</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Kit</td>
<td>Mixtures of various components issued as a unit and intended primarily for instructional purposes.</td>
<td>Material type is &quot;kit&quot;</td>
</tr>
<tr>
<td>Manuscript</td>
<td>Any material type code for Government publication.</td>
<td>Material type is &quot;mss&quot;</td>
</tr>
<tr>
<td>Map</td>
<td>Maps, map manuscripts, globes, atlases, aeronautical charts, navigational charts, celestial charts, remote-sensing images, computer-generated maps, and other cartographic material.</td>
<td>Leader/06 is &quot;e&quot; or &quot;f&quot;</td>
</tr>
<tr>
<td>Microform</td>
<td>Original microform publications.</td>
<td>Material type is &quot;mic&quot;</td>
</tr>
<tr>
<td>Musical Score</td>
<td>Printed music materials, including full score, choirs score, close score, condensed score, miniature score, part, music manuscript, books of musical studies and exercises.</td>
<td>Leader/06 is &quot;c&quot; or &quot;d&quot;</td>
</tr>
<tr>
<td>Newspaper</td>
<td>Serial publications in newspaper format.</td>
<td>Material type is &quot;new&quot;</td>
</tr>
<tr>
<td>Serial</td>
<td>Serial publications such as periodicals, newspapers, annuals, journals, memoirs, proceedings, monographs.</td>
<td>Leader/06 is &quot;a&quot; or &quot;t&quot; AND Leader/07 is &quot;s&quot; or &quot;b&quot;</td>
</tr>
<tr>
<td>Sound Recording</td>
<td>Both musical and non-musical sound recordings. Nonmusical sound recording may include sound effects; bird calls; physical exercise recordings (for example, aerobic workouts) that consist of spoken, shouted, sung, or chanted instructions over musical accompaniment; stories read over incidental music accompaniment; and plays with incidental music.</td>
<td>Leader/06 is &quot;i&quot; or &quot;j&quot;</td>
</tr>
<tr>
<td>Sound Recording - Cassette</td>
<td>Material type: cassette recording.</td>
<td>Leader/06 is &quot;i&quot; or &quot;j&quot; AND material type is &quot;cas&quot;</td>
</tr>
<tr>
<td>Sound Recording - CD</td>
<td>Material type: CD audio.</td>
<td>Leader/06 is &quot;i&quot; or &quot;j&quot; AND material type is &quot;cda&quot;</td>
</tr>
<tr>
<td>Sound Recording - LP</td>
<td>Material type: LP records.</td>
<td>Leader/06 is &quot;i&quot; or &quot;j&quot; AND material type is &quot;lps&quot;</td>
</tr>
<tr>
<td>Visual Material</td>
<td>Projected media—Motion pictures, viderecordings, filmstrips, slides, transparencies, and overhead projections or projected images. Two-dimensional nonprojected graphics—activity cards, charts, collages, drawings, duplication masters, flash cards, graphics, original artwork, paintings, photonegatives, photoprints, pictures, postcards, posters, prints, spirit masters, study prints, technical drawings, transparency masters, photomechanical reproductions, and reproductions of any of these.</td>
<td>Leader/06 is &quot;g&quot; or &quot;k&quot; or &quot;o&quot; or &quot;r&quot;</td>
</tr>
<tr>
<td>Deflection Format</td>
<td>Description</td>
<td>Bibliographic Definition of Formats</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td></td>
<td>Three-dimensional artifacts and naturally occurring objects—models, dioramas, games, puzzles, simulations, sculptures, and other three-dimensional art works, exhibits, machines, clothing, toys, and stitchery. Also may include microscope specimens (or representations of them) and other specimens mounted for viewing.</td>
<td></td>
</tr>
<tr>
<td>Visual Material - DVD</td>
<td>Material type: videodisc.</td>
<td>Leader/06 is &quot;g&quot; or &quot;k&quot; or &quot;o&quot; or &quot;r&quot; AND material type is &quot;vdc&quot;</td>
</tr>
<tr>
<td>Visual Material - VHS</td>
<td>Material type: VHS.</td>
<td>Leader/06 is &quot;g&quot; or &quot;k&quot; or &quot;o&quot; or &quot;r&quot; AND material type is &quot;vca&quot;</td>
</tr>
</tbody>
</table>
Printing

With WorldShare Interlibrary Loan, you can print individual requests, all requests in a queue, add requests to the print queue to print out later, and queue book straps and shipping and return labels to be printed.
Print an individual request (print now)

You can print individual requests from the request screen.

- **Borrowers:** You must save or submit a request first before you can print it. The request must be in any of the following queues to print now: New for Review, Received, Produced, Returned.
- **Lenders:** You can print a request from any queue.

For a video tutorial, see [Print Individual Requests in WorldShare ILL](#) (4:06 minutes).

**To print an individual request:**

1. Open the request you want to print.
2. In the request, on the upper right side of the screen, click **Print Now**.
   - **Note:** Some requests will show additional print check boxes (for example, Print Book Straps/Stickers or Print Shipping Labels/Return Labels) if they are available.
3. On the Print Preview window, use the **printer icon** or links to print the request.
4. Click **Done** or the **X** (X) at the top of the window to close it.

**See also:**

- [Print all items in a request queue](#) (page 88)
- [Add requests to the print queue (print later)](#) (page 87)
- [Remove items from a print queue](#) (page 89)
Add requests to the print queue (print later)

You can add requests to the print queue to print them later.

- **Borrowers:** You must save or submit a request first before you can print it. The request must be in any of the following queues to add it to the print queue: New for Review, Received, Produced, Returned.
- **Lenders:** You can print a request from any queue.

For a video tutorial, see [Print Individual Requests in WorldShare ILL](#) (4:06 minutes).

To add a request to the print queue

1. Open the request you want to print.
2. In the request, on the upper right side of the screen, click the down arrow next to Print Now.
3. Select Add to Request Print Queue.
4. A confirmation message appears, and the request is added to the appropriate print queue.
5. On the left navigation, click Print Queue.
6. Click Requests (either under Borrowing, Lending, or Purchasing, depending on the request).
7. On the Print Queue screen, select the check boxes for the requests you want to print.
   - To print all requests in the table, select the check box at the top of the first column of the table.
   - To change the number of rows you see in the table, select a number from the Rows list.
8. When printing requests, you may select to print 1 or 2 requests per page. Click either Print 1 per page or Print 2 per page, depending on how many requests you want to print per page.
9. On the Print Preview screen, use the printer icon or links to print the request.
10. Once you have confirmed your printing was successful, you can delete requests from requests print queue. Requests stay in the print queue until they are removed.
11. Go back to the Requests queue, select the check boxes for the requests you printed, and click Remove.
Print all items in a request queue

You can print all items in a request queue at once. For a video tutorial, see Print All Requests in a Category in WorldShare ILL (6:46 minutes).

Print all items in a queue

Follow the below instructions to print all items in a queue.

**To print all items in a request queue:**

1. On the left navigation, click **Print Queue**.
2. Click **Print All**.
3. The Request Queues screen appears and displays all the request queues.
4. Select the **check boxes** for the request queues you want to print. **Note:** There is a limit of printing 500 requests at a time.
5. Click **Next**.
6. On the Marked Queues screen, click **Print 1 per page** or **Print 2 per page** for the marked queues you want to print, depending on how many requests you want to print per page.
7. The Auto-update check box is automatically selected. If you do not want the status of the request to automatically update, deselect the **check box**. For more information, see [Auto-update with Print All](#) (page 88) below.
8. On the Print Preview screen, use the **printer icon** or **links** to print the requests.
9. The requests print and a confirmation message appears.

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, deselect the **Auto-update** check box.

**Note:** The system does not retain the setting from the previous print. The update status must be chosen every time you print.
**Remove items from a print queue**

Items are not removed from a print queue until you remove them.

**To remove all items from a print queue:**

1. On the left navigation, click **Print Queue**.
2. Select the **queue** from which you want to remove items.
3. Select the **check boxes** for the items you want to remove. To select all items, select the **check box** at the top of the first column in the table.
4. Click **Remove**.
5. The items are removed from the queue.
Print book straps or stickers

Follow the below instructions to add book straps and stickers to the print queue and to print book straps/stickers for items you are lending.

For a video tutorial on printing book straps or stickers, see Print Book Straps/Stickers in WorldShare ILL (4:06 minutes).

To add book straps or stickers to the Print Queue:

1. On the left navigation, click **Lending Requests**.
2. Click **Can You Supply**?
3. On the Can You Supply? screen, click the request ID or **Title** to display the request.
4. Process the request as normal.
5. At the top of the request, select **Print Book Straps/Stickers** and, optionally, **Print Shipping Labels**.
6. Click **Yes** to respond yes to the request.

To print book straps or stickers:

1. On the left navigation, click **Print Queue**.
2. Click **Book Straps/Stickers**.
3. On the Lending Book Straps / Stickers screen, select the **check boxes** next to the items you want to print book straps or stickers for. Select the **check box** at the top of the table to select all items in the table.
4. In the Format list, select **2 per page** to print book straps, or select **6 per page** to print stickers.
5. If you have selected to print stickers, a template appears underneath the table. To start at a different label position, select the **number** in the template, or enter the **number** in the Start at label position field.
6. Click **Print**.
7. On the Print Preview window, click the Print icon or links to print the book straps or stickers.
Customize book straps

Borrowers and Lenders can have customized book straps. Customized book straps can include your library's logo and any notes. You can customize your book straps in OCLC Service Configuration. See Print Settings (page 132) for more information.

For a video tutorial on customizing book straps, see Customize Book Straps in WorldShare ILL (4:00 minutes).

To customize borrower and lender book straps:

1. Sign in to Service Configuration.
2. On the left navigation, click WorldShare ILL > Print Settings.
3. On the Print Settings page, under Logo Image Settings, enter the URL of the logo you want to appear on your books straps.
5. Enter any notes you want to include on the book strap in the Notes field.
6. Click Save.

See also:

Print book straps or stickers (page 90)

Print Settings (page 132)
Print shipping and return labels

Follow the instructions below to print shipping and return labels. For a video tutorial, see Print Shipping & Return Labels in WorldShare ILL (5:15 minutes).

Print return labels as a borrower

Return labels can be printed for items you are returning back to the lender. Follow the below instructions to add return labels to the Print Queue and print the return labels.

To add return labels to the Print Queue:

1. On the left navigation, click Borrowing Requests.
2. Click Received.
3. On the Received screen, click the request ID or Title to display the request.
4. Process the request as normal.
5. At the top of the request, select Print Return Labels.
6. Click Return item.

To print return labels:

1. On the left navigation, click Print Queue.
2. Under Borrowing, click Return Labels.
3. On the Borrowing Return Labels screen, select the check boxes next to the requests you want to print return labels for. Select the check box at the top of the table to select all items in the table.
4. In the Format list, select 6 per page or 30 per page.
5. A template is displayed underneath the table. To start at a different label position, select the number in the template, or enter the number in the Start at label position field.
6. Optional, when 6 per page is selected. Select the check boxes under Include on labels to include the following on the labels:
   - Request ID barcode
   - LIBRARY MAIL DMM: 173.5.0
   - RETURN SERVICE REQUESTED
7. Click Print.
8. On the Print Preview window, click the print icon or links to print the return labels.

Print shipping labels as a lender
Shipping labels can be printed for items you are lending to another library. Follow the instructions below to add shipping labels to the Print Queue and print the shipping labels.

**To add book straps or stickers to the Print Queue:**
1. On the left navigation, click *Lending Requests*.
2. Click *Can You Supply*?
3. On the Can You Supply? screen, click the request ID or Title to display the request.
4. Process the request as normal.
5. At the top of the request, select *Print Shipping Labels* and, optionally, *Print Book Straps/Stickers*.
6. Click *Yes* to respond yes to the request.

**To print shipping labels:**
1. On the left navigation, click *Print Queue*.
2. Under Lending, click *Shipping Labels*.
3. On the Lending Shipping Labels screen, select the check boxes next to the requests you want to print shipping labels for. Select the check box at the top of the table to select all items in the table.
4. In the Format list, select *6 per page* or *30 per page*.
5. A template is displayed underneath the table. To start at a different label position, select the number in the template, or enter the number in the Start at label position field.
6. Optional, when 6 per page is selected. Select the check boxes under Include on labels to include the following on the labels:
   - Request ID barcode
   - LIBRARY MAIL DMM: 173.5.0
   - RETURN SERVICE REQUESTED
7. Click *Print*.
8. On the Print Preview window, click the print icon or links to print the return labels.
Searching in WorldShare Interlibrary Loan

When you click Discover Items on the left navigation, an Advanced Search form will open on the screen. Completing a basic search will pre-populate the Advanced Search form with the terms from the original search. You can also conduct a search using only the Advanced Search form.

See also:

Basic search (page 95)
Advanced search (page 97)
Expert search (page 99)
Search for requests (page 100)
Basic search

You can find records quickly using the basic search. For example, the basic search can be useful when you have an ISBN or other standard number.

To perform a basic search:

1. On the left navigation, click Discover Items.
2. From the first list, select a search scope. See Search Scopes (page 95) below for details.
   - Select My Library Holdings if you already have at least one copy of the item.
   - Select All WorldCat if you do not own any copies of the item.
3. From the second list, select an index. See Indexes (page 95) below for details.
4. In the search field, enter your search terms. The search field will expand to fit your search terms, if needed.
5. Click Search or press <Enter>.

Search Scopes

When you search for records, you can limit your search to:

<table>
<thead>
<tr>
<th>Search Scope</th>
<th>Limits Search to</th>
</tr>
</thead>
<tbody>
<tr>
<td>All WorldCat (default)</td>
<td>All records in WorldCat</td>
</tr>
<tr>
<td>My Group Holdings (only available to WMS libraries with group aware)</td>
<td>Records held by institutions in your group</td>
</tr>
<tr>
<td>My LHRs</td>
<td>Your local holdings records</td>
</tr>
<tr>
<td>My Library Holdings</td>
<td>Records held by your library</td>
</tr>
</tbody>
</table>

Indexes

Select a search index:

<table>
<thead>
<tr>
<th>Index</th>
<th>Searches for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Terms in the author or author indexed field</td>
</tr>
<tr>
<td>Barcode (option under My LHRs)</td>
<td>Items by barcode. For more information, see Search for local holdings records using a barcode.</td>
</tr>
<tr>
<td>Call Number Browse (option under My LHRs)</td>
<td>Call numbers above and below the call number entered. The call number you enter can be as specific as you want. For example, you can enter TX771 .S9377 2009 or TX771. For more information, see Browse local holdings using a call number.</td>
</tr>
<tr>
<td>ISBN</td>
<td>International Standard Book Number (ten or thirteen-digit number)</td>
</tr>
<tr>
<td>Index</td>
<td>Searches for</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ISSN</td>
<td>International Standard Serial Number (eight-digit number)</td>
</tr>
<tr>
<td>Keyword (default)</td>
<td>Terms anywhere in the record</td>
</tr>
<tr>
<td>OCLC Number</td>
<td>Unique identifier assigned to WorldCat records. This search will only retrieve a single record.</td>
</tr>
<tr>
<td>Title</td>
<td>Terms in the title or a title indexed field</td>
</tr>
</tbody>
</table>

For more information on indexes, see [Searching WorldCat Indexes](#).  

**See also:**

- Advanced search ([page 97](#))
- Expert search ([page 99](#))
Advanced search

Use the advanced search to perform a more in-depth search than the Basic search (page 95) allows. You can combine up to five indexes and apply limits to retrieve a more precise set of search results.

To perform an advanced search:

1. On the left navigation, click Discover Items.
2. Click Advanced Search.
3. On the Advanced Search window, select the Search Scope:
   - Select My Library Holdings if you already have at least one copy of the item.
   - Select My Group Holdings to search for items held by any institution in your group (only available to WMS libraries with group aware).
   - Select All WorldCat if you do not own any copies of the item.
4. Select an Index from the list. For a list of all indexes, see Indexes.
5. Based on the index you selected, enter your search terms into the search field.
6. Optional. Enter up to five combinations of indexes and search terms:
   - Click the plus sign (➕) to add an index and the minus sign (➖) to remove an index.
   - Select a Boolean operator (AND, OR, NOT) for each index that you add.
7. Fill out the remaining fields. See Advanced search settings (page 97) below for details.
8. Click Search.

Advanced search settings

This table describes all of the fields you can use on the Advanced Search window (you are not required to fill in all the fields):

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbreviated-level records only</td>
<td>Select the check box to search for bibliographic records in WorldCat with an encoding level of 3. For more information on encoding levels, see Abbreviated-level cataloging guidelines in Bibliographic Formats and Standards.</td>
</tr>
<tr>
<td>Format(s)</td>
<td>Select one or more formats from the list. Format is defined in the master record. For more information, see Material Type Names and Codes.</td>
</tr>
<tr>
<td>Languages(s)</td>
<td>Language of the item. Select one or more languages from the list.</td>
</tr>
<tr>
<td>Language(s) of Cataloging</td>
<td>Language used for the description of the item. Select one or more languages from the list.</td>
</tr>
<tr>
<td>Reset</td>
<td>Click Reset to clear out all fields on the Advanced Search window. If you have Set your advanced search user preferences, the search will reset to your default preferences.</td>
</tr>
<tr>
<td>Source of Cataloging</td>
<td>Select the source of cataloging from the list:</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>● Any</td>
</tr>
<tr>
<td></td>
<td>● DLC: Library of Congress</td>
</tr>
</tbody>
</table>

| Year(s) | Limits a search by year. Enter a single year or a range. |

**See also:**

[Basic search](#) (page 95)
Expert search

Use the expert search to perform a complete search in a single string. An expert search is made up of a combination of index labels and search terms. With the use of Boolean operators (AND, OR, NOT), you can search through several indexes at once and apply limits at the same time. Expert searches can be performed in the basic search area or the advanced search window.

To perform an expert search in the basic search area:

1. On the left navigation, click Discover Items.
2. From the first list, select a search scope. See Search Scopes (page 95) for details.
   - Select My Library Holdings if you already have at least one copy of the item.
   - Select All WorldCat if you do not own any copies of the item.
3. From the second list, select any index other than OCLC Number. An expert search will not work if this index is selected.
4. In the search field, enter your expert search in this format: [Index label][Search terms]
   - For example: ti:girl dragon tattoo mt:nsr pb=random house
   - When you are performing an expert search with multiple indexes, the Boolean AND is implied. If you are using the Boolean operators OR or NOT, you must type the operator and use capital letters.
5. Click Search.

See also:

Advanced search (page 97)
Basic search (page 95)
Searching WorldCat Indexes
Search for requests

You can search for active and closed requests from the Interlibrary Loan Home screen. For a video tutorial, see Searching for Existing Requests in WorldShare ILL (4:53 minutes).

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.

![Search for requests](image)

**To search for requests:**

1. Choose a search option from the drop-down list.
2. Type a keyword or number in the field provided.
3. **Optional.** Un-check the check box to deselect **Active Requests** or **Closed Requests,** divided into Borrower and Lender requests. The system responds with any matching requests.
4. Click **Go.**
5. Click the request you would like to view. The request details screen opens.
OCLC Service Configuration settings

Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. In Service Configuration, you can set your interlibrary loan options, print settings, borrower and lender constant data, custom holdings groups, direct request profiles, and purchase options.

There are twelve WorldShare ILL modules in Service Configuration:

1. Interlibrary Loan Options (page 115)
2. Borrower Data (page 102)
3. Lender Data (page 118)
4. Custom Holdings Groups (page 106)
5. Custom Holdings Paths (page 108)
6. Direct Request Profiles (page 110)
7. Purchase Options (page 135)
8. Patron Request Workforms (page 120)
9. Print Settings (page 132)
10. Prime Advanced Workflows (page 129)
11. Prime Patron Settings (page 131)
12. Prime Notifications (page 130)
**Borrower Data**

Use this screen to configure Borrower constant data. Constant data is stored information that your staff can use to ensure consistency when they initiate or respond to requests. Constant data automatically transfers repetitive data to workforms and requests. A default constant data record is created for any institution that does not have one.

For more information on constant data and examples of how it can be used, see Constant data (page 36).

**Configure Borrower Constant Data**

Follow the instructions below to add, edit, or delete a constant data record.

**To add a constant data record:**

1. Click Create New CD record.
2. Fill in the fields. See Borrowing Library Information fields (page 102) and Patron fields (page 104) for details.
3. Click Save as New.

**To copy a constant data record:**

1. From the Constant Data Record list, select the constant data record you want to copy.
2. Edit the Constant Data Record Name.
3. Make any additional edits to the record, if needed.
4. Click Save as New.

**To edit a constant data record:**

1. From the Constant Data Record list, select the constant data record you want to edit.
2. Edit the record.
3. Click Save.

**To delete a constant data record:**

1. From the Constant Data Record list, select the constant data record you want to delete.
2. At the bottom of the screen, click Delete Record.
3. On the confirmation window, click OK.

**Borrowing Library Information fields**

*Note:* Required fields are marked with an asterisk (*).
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constant Data</td>
<td>The name of this record (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>Record Name</td>
<td>A brief description of this record.</td>
</tr>
<tr>
<td>Description</td>
<td>Date by which you want to receive the item. <strong>Note:</strong> To assign a period of up to 99 days, type +DD for the system to calculate a date that is 1-99 calendar days from today’s date.</td>
</tr>
<tr>
<td>Request Type</td>
<td>• Loan - Only requests for loans will match.</td>
</tr>
<tr>
<td></td>
<td>• Copy - Only requests for nonreturnable copies will match.</td>
</tr>
<tr>
<td>Shipping and Con-</td>
<td>Complete mailing address and contact information.</td>
</tr>
<tr>
<td>stant Info</td>
<td></td>
</tr>
<tr>
<td>Bill to</td>
<td>Billing address. Click <strong>Copy From Shipping Info</strong>, to use the same information from the <strong>Shipping and Contact Info</strong> fields. Otherwise, provide new information.</td>
</tr>
<tr>
<td>Ship Via</td>
<td>Preferred method of shipment.</td>
</tr>
<tr>
<td>Electronic Delivery</td>
<td>Choose your preferred method of electronic delivery:</td>
</tr>
<tr>
<td>Field</td>
<td>Definition</td>
</tr>
<tr>
<td>Arie (FTP)</td>
<td>FTP delivery via Ariel.</td>
</tr>
<tr>
<td>Article Exchange</td>
<td>Delivery via OCLC Article Exchange.</td>
</tr>
<tr>
<td>Electronic</td>
<td>Delivery via email</td>
</tr>
<tr>
<td>ILLiad Odyssey</td>
<td>Delivery via ILLiad Odyssey software.</td>
</tr>
<tr>
<td>Note: Electronic Delivery is defined in the OCLC Policies Directory. Log in to the Policies Directory to make changes.</td>
<td></td>
</tr>
<tr>
<td>ILL Fee Management (IFM)</td>
<td>Select the <strong>ILL Fee Management (IFM)</strong> check box to turn IFM on. For more information on IFM, see Interlibrary Loan Fee Management (IFM) (page 48).</td>
</tr>
<tr>
<td>Maximum Cost</td>
<td>• Maximum amount (in US dollars) that you will pay for the item. Type the amount you will pay, and check the IFM check box to apply IFM. <strong>Note:</strong> This reflects the total cost, not the cost per page.</td>
</tr>
<tr>
<td></td>
<td>• If you will <strong>not</strong> pay, leave the check box empty and type <strong>0.00</strong> in the box. <strong>Note:</strong> If you do not provide a value, you are responsible for whatever the Lender charges. If both the IFM and Maximum Cost boxes are empty, the Lender is able to specify a Maximum Cost amount when the request is returned to you. You automatically agree to pay the specified amount when you update the request.</td>
</tr>
<tr>
<td>Copyright Com-</td>
<td>Indicates your compliance for photocopy requests. There are 2 valid codes:</td>
</tr>
<tr>
<td>pliance</td>
<td>• CCG Conforms to CONTU Guidelines</td>
</tr>
</tbody>
</table>
### Field Description

- **CCL** Conforms to U.S. Copyright law

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Affiliations</strong></td>
<td>Symbols, names, or acronyms of your reciprocal or local groups.</td>
</tr>
<tr>
<td><strong>Example:</strong></td>
<td>LVIS</td>
</tr>
<tr>
<td><strong>Billing Notes</strong></td>
<td>Additional billing information, if needed.</td>
</tr>
<tr>
<td><strong>Borrowing Notes</strong></td>
<td>Type here any additional information needed to clarify the request.</td>
</tr>
</tbody>
</table>

### Patron fields

**Note:** Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron Name</strong></td>
<td>The patron’s name.</td>
</tr>
<tr>
<td></td>
<td>• For best results, use the format: last name, first name, middle name or initial.</td>
</tr>
<tr>
<td></td>
<td>• If necessary, add descriptive text to differentiate patrons with similar names.</td>
</tr>
<tr>
<td></td>
<td>• Do not enter patron identification numbers in this field. Use ID instead.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>Butterworth, Ada Esther</td>
</tr>
<tr>
<td></td>
<td>Smith, Bob, CompSci Dept.</td>
</tr>
<tr>
<td><strong>Patron ID</strong></td>
<td>A number used for patron identification.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>123-45-6789</td>
</tr>
<tr>
<td></td>
<td>ALI/6496KRTXX/0001</td>
</tr>
<tr>
<td></td>
<td>OH4751603</td>
</tr>
<tr>
<td><strong>Patron Department</strong></td>
<td>The patron’s department. Be consistent in the use of department names</td>
</tr>
<tr>
<td><strong>Example:</strong></td>
<td>Department of Chemistry</td>
</tr>
<tr>
<td></td>
<td>ChemDept</td>
</tr>
<tr>
<td></td>
<td>Chemistry</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The patron’s status.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>Faculty</td>
</tr>
<tr>
<td></td>
<td>Executive</td>
</tr>
<tr>
<td></td>
<td>Undergraduate</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>The patron’s email address.</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>The patron’s address.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------</td>
<td>-------------</td>
</tr>
<tr>
<td>Notes</td>
<td>Any relevant information about the patron.</td>
</tr>
</tbody>
</table>

**Examples:**
- Maximum Cost $5.00
- Can pickup from East Branch on Tuesdays
Custom Holdings Groups

Use this screen to configure custom holdings groups that contain the OCLC symbols of preferred lenders for a particular category of borrowing activities.

**Hint:** To find libraries to add to your custom holdings group, review your borrowing history in OCLC Usage Statistics. Or search the OCLC Policies Directory for close libraries or libraries in your consortium.

Configure Custom Holdings Groups

To create a custom holdings group:

1. Click **Create New Custom Holdings Group**.
2. Enter the **Custom Holdings Groups Name**, and optionally, a **Description**.
3. Click **Add/Edit symbol(s)**.
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
   - If you need to look up OCLC symbols, click the link to access the [OCLC Policies Directory](https://www.oclc.org/policies-directory.html).
5. Click **Update Symbols**.
6. Click **Save as New**.

To add an institution to a custom holdings group (on the by group name screen):

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to edit.
2. Enter the **Custom Holdings Groups Name**, and optionally, a **Description**.
3. Click **Add/Edit symbol(s)**.
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
   - If you need to look up OCLC symbols, click the link to access the [OCLC Policies Directory](https://www.oclc.org/policies-directory.html).
5. Click **Update Symbols**.
6. Click **Save as New**.

To delete an institution from a custom holdings group (on the by group name screen):

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to edit.
2. You have two options:
   1. Select the **check box** next to the symbol you want to delete and click **Clear selected symbols**, or
   2. Click the **delete button** next to the symbol you want to delete.
3. Click **Save**.
To add or remove an institution to a custom holding group (on the by symbol screen):

1. Under Display groups, click **by symbol**.
2. On the Custom Holdings Groups Symbol Search screen, enter the **symbol** you want to add or delete from one or more custom holdings groups.
3. Click **Search**.
   - A list of all of your custom holdings groups appears, along with an indication of whether or not that symbol is contained in each group that contain that symbols appears, including an indicator of whether that symbol appears in the group.
   - **Note:** If no results are found, a message will appear the symbol does not exist in any groups, the groups are all displayed with a **No** indication.
4. Select **Yes** to add a symbol to the group, or **No** to remove a symbol from the group.
5. Click **Save**.

To delete a custom holdings group:

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to delete.
2. On the bottom of the screen, click **Delete Custom Holdings Record**.
3. On the confirmation window, click **OK**.

**Custom Holdings Groups fields**

**Note:** Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Holdings</td>
<td>The name of the custom holdings group (20-character limit, with no special</td>
</tr>
<tr>
<td>Groups Name</td>
<td>characters).</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the group.</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> Institutions that charge for book loans.</td>
</tr>
<tr>
<td>OCLC Symbol(s)</td>
<td>The OCLC symbols for institutions that are part of the custom holdings</td>
</tr>
<tr>
<td></td>
<td>group. <strong>Examples:</strong> AAU, ABI, ACN</td>
</tr>
</tbody>
</table>
Custom Holdings Paths

Use this screen to configure custom holdings paths that contain the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference.

Configure Custom Holdings Paths

To add a custom holdings path:

1. Click Create New Custom Holdings Path.
2. Enter the Custom Holdings Path Name, and optionally, a Description.
3. Drag and drops the groups you want to include from the Choose from available groups list to the Groups chosen for this path list.
4. Click Save as New.

To edit a custom holdings path:

1. From the Custom Holdings Path list, select the custom holdings path you want to edit.
2. Drag and drop the groups you want to include from the Choose from available groups list to the Groups chosen for this path list.
3. Click Save.

To delete a custom holdings path:

1. From the Custom Holdings Path list, select the custom holdings path you want to edit.
2. On the bottom of the screen, click Delete Custom Holdings Path.
3. On the confirmation window, click OK.
**Custom Holdings Paths fields**

**Note:** Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Custom Holdings Path Name    | The name of the custom holdings path (20-character limit, with no special characters).
|                              | *Example:* DOTLIBS                                                                                                                            |
| Description                  | A brief description of the path.                                                                                                             |
|                              | *Example:* Dept of Transportation libraries and other partners.                                                                               |
| Choose from available groups  | The names of custom holdings groups that can be included in the group holdings path.                                                          |
| Groups chosen for this path   | The names of custom holdings groups that are currently included in the group holdings path or that will be included when changes are saved. |
Direct Request Profiles

Use this screen to configure direct request profiles to automate your request process. Direct Request automatically sends patron-generated requests created in your system to Lenders for fulfillment.

Configure Direct Request Profiles

To add a direct request profile:

1. Click Create New Direct Request Profile.
2. Fill in the fields. See Direct Request Profiles fields (page 110) for details.
3. Click Save as New.

To edit a direct request profile:

1. From the Profile Name list, select the direct request profile you want to edit.
2. Edit information, as appropriate.
3. Click Save.

To delete a direct request profile:

1. From the Profile Name list, select the direct request profile you want to delete.
2. On the bottom of the screen, click Delete Direct Request Profile.
3. On the confirmation window, click OK.

Direct Request Profiles fields

Note: Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Information</strong></td>
<td></td>
</tr>
<tr>
<td>Profile Name</td>
<td>The name of this profile (20-character limit, with no special characters) that clearly indicates the scope of the group of requests to which the profile pertains. The name must be unique.</td>
</tr>
<tr>
<td><strong>Note:</strong> In reports generated by Direct Request, the profile is identified only by name. Profile names are not case sensitive, so, for example, TEST is the same as test.</td>
<td></td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>EARTICLTEST MAXCOPY</td>
</tr>
<tr>
<td>Description</td>
<td>A description of the group of requests to which the profile pertains, up to 140 alpha-numeric characters long. Leave blank if no description is necessary.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td></td>
</tr>
<tr>
<td>Loan</td>
<td>Loans for faculty</td>
</tr>
<tr>
<td>Copy request costing less</td>
<td>Copy requests costing less than $5.00</td>
</tr>
<tr>
<td>Request Sources</td>
<td>• Indicates if the source of a request is relevant to the profile, and if so, the source name or names.</td>
</tr>
<tr>
<td></td>
<td>• If you want the profile to apply to requests from particular sources, type the names of up to six sources in the boxes provided. Source names can be up to eight alpha-numeric characters. The values must be valid values in your ILL requests.</td>
</tr>
<tr>
<td></td>
<td>• Source names are not case sensitive, so FSILL is the same as fsill. Spelling is important, however, so FSlink is not acceptable as the valid value FSILL.</td>
</tr>
<tr>
<td></td>
<td>• Leave blank if the source of a request is not relevant to the profile.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td></td>
</tr>
<tr>
<td>FSILL</td>
<td></td>
</tr>
<tr>
<td>FSlink</td>
<td></td>
</tr>
<tr>
<td>Request Type</td>
<td>• Loan - Only requests for loans will match the profile. (default value)</td>
</tr>
<tr>
<td></td>
<td>• Copy - Only requests for nonreturnable copies will match the profile.</td>
</tr>
<tr>
<td>Patron Statuses</td>
<td>• Patron status or statuses, if any, to which the profile applies, up to 65 alpha-numeric characters long.</td>
</tr>
<tr>
<td></td>
<td>• Patron status is not case sensitive, so Grad is the same as grad. Spelling is important, however, so Grad is not the same as Graduate.</td>
</tr>
<tr>
<td></td>
<td>• Spaces and commas are not valid; they are used as delimiters between multiple patron statuses. If the profile applies to more than one status, type each status separated by at least one blank space or comma.</td>
</tr>
<tr>
<td></td>
<td>• Leave blank if the status of patrons does not apply to the group of requests you are profiling.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td></td>
</tr>
<tr>
<td>Grad</td>
<td></td>
</tr>
<tr>
<td>UnderGrad</td>
<td></td>
</tr>
<tr>
<td>Faculty</td>
<td></td>
</tr>
<tr>
<td>Patron Departments</td>
<td>• Patron department or departments, if any, to which the profile applies, up to 65 alpha-numeric characters long.</td>
</tr>
<tr>
<td></td>
<td>• Patron department is not case sensitive, so CompSci is the same as compsci. Spelling is important, however, so CompSci is not the same as CSCI.</td>
</tr>
<tr>
<td></td>
<td>• Spaces and commas are not valid characters; they are used as delimiters. If the profile applies to more than one department, type each department separated by at least one blank space or comma.</td>
</tr>
<tr>
<td></td>
<td>• Leave blank if department does not apply to the group of requests you are profiling.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Examples:**                | CompSci  
|                              | Chemistry  
|                              | Biology                                                                                                                                                                                                     |
| **Patron Will Pay Up To**    | • The amount (in US dollars), if any, the patron will pay for the requested material.  
|                              | • For a request to match a profile, the amount specified in the request must be equal to or greater than the amount specified in the profile. For example, if the request specifies 7 ($7.00), and the profile specifies 5 ($5.00), the request matches the profile — a patron willing to pay $7 is also willing to pay $5. On the other hand, if the profile specifies 10, then the profile does not match, because a patron willing to pay $7 is not willing to pay $10.  
|                              | • Type a number. Do not type the dollar ($) symbol. A value of 0 means that the patron is not willing to pay anything for the material being requested. Leave blank if the amount the patron will pay does not apply to the group of requests you are profiling.  
|                              | **Examples:**  
|                              | 6  
|                              | 6.00  
|                              | 6.10                                                                                                                                                                                                       |
| **Need at Earliest/ No Later Than** | • Used to define a date range, if any, within which the patron must receive the material.  
|                              | • In a loan request, the patron’s date requirement is specified in the field named **Need Before**. For example, a **Need Before** value of 4 means that the patron must receive the material within four days of creating the request. To match the profile, the **Need Before** value in a request must fall within the range you specify in the profile by values you associate with **Need At Earliest** and **No Later Than**.  
|                              | • For example, if the profile has a **Need At Earliest** value of 4 and a **No Later Than** value of 7, an incoming request with a **Need Before** value of 5 will match the profile. However, if the patron specifies a **Need Before** value of 3 in the request, the request will not match the profile.  
|                              | • Type a whole number from 0-1000. Leave both fields blank if date range does not apply to the group of requests you are profiling.                                                                                                                                 |
| **Format**                   | • One or more bibliographic formats that a request must specify if it is to match the profile.  
|                              | • Select a format from the list provided. Do not select a format if it does not apply to the group of requests you are profiling.                                                                                                                                     |
| **Age of Material/ But No Older Than** | **For Loans:**  
|                              | Used to restrict the borrowing of items that are either very new or very old based on their publication date.  
<p>|                              | <strong>Note:</strong> The number you type in <strong>Age of Material</strong> must be smaller than the number you type in <strong>But No Older Than</strong>.                                                                                                                                                    |</p>
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>For Copies:</strong></td>
<td><strong>Age of Material</strong> can be used to designate whether the copy request is CCG or CCL. The age is pulled from the <strong>Article Date</strong> field. Libraries can set a Copyright designation using Direct Request Profiles. A copy-based request that comes through ILL Direct Request with an Article date field of 1994 could be matched to a Direct Request Profile with CCL in the copyright Compliance field. Type a whole number from 0-1000 representing the age of the material in years. Leave blank if the age of the material does not apply to the group of requests you are profiling.</td>
</tr>
<tr>
<td><strong>Languages</strong></td>
<td>One or more languages that a request must specify if it is to match the profile.</td>
</tr>
<tr>
<td><strong>Route to Review File Options</strong></td>
<td></td>
</tr>
<tr>
<td><strong>If Potential Duplicate Requests</strong></td>
<td>- <strong>Yes:</strong> Potential duplicate requests will be sent to your Review File.</td>
</tr>
<tr>
<td></td>
<td>- <strong>No:</strong> A request can be processed whether or not it is a potential duplicate.</td>
</tr>
<tr>
<td><strong>If Held By Your Institution</strong></td>
<td>- <strong>Do Nothing:</strong> A request can be processed whether or not your institution holds the requested item.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Route to ILL Review:</strong> Requests will be sent to your Review File when your institution holds the requested item.</td>
</tr>
<tr>
<td><strong>If Held By Custom Holdings Group</strong></td>
<td>- If you want requests matching this profile to be routed to your Review File when one or more members of a particular group holds the requested item, select the name of the Custom Holdings group record that identifies the group. Select one group name from the list provided.</td>
</tr>
<tr>
<td></td>
<td>- The list includes all current Custom Holdings groups for your institution. If group holdings are not relevant to the set of requests you are profiling, do not select a Custom Holdings group.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>- The group name that represents all library branches on your campus.</td>
</tr>
<tr>
<td></td>
<td>- The group name that represents consortia for which you have special borrowing procedures.</td>
</tr>
<tr>
<td><strong>Additional Profile Options</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Constant Data Record</strong></td>
<td>- The Constant Data record, if any, that applies to the group of requests you are profiling. The list contains all current Constant Data records for your institution.</td>
</tr>
<tr>
<td></td>
<td>- Select a Constant Data record from the list provided. Do not select from the list if no current Constant Data record applies to the group of requests you are profiling.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> If you want to define a Constant Data record for this group, create the Constant Data record BEFORE creating the profile.</td>
</tr>
<tr>
<td><strong>Minimum Number in Lender Strings</strong></td>
<td>- The minimum number of lenders that must be specified in the request in order for the request to match the profile. For example, if the minimum number of lenders specified in the profile is 4, an incoming request with only three lenders does not match.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Custom Holdings Path</td>
<td>Direct Request finds lenders for requests based upon Custom Holdings paths you define. The list contains all current Custom Holdings paths defined for your institution. Select one path from the list provided. Also see Custom Holdings Paths (page 108).</td>
</tr>
<tr>
<td>Produce the Request</td>
<td></td>
</tr>
</tbody>
</table>
|                              | • **Yes:** You want Direct Request to automatically produce requests that match this profile.  
|                              | • **No:** You want Direct Request to put all matching requests in your Review File so you can review the work done by Direct Request before it is sent to a lender. |
| Prefers E-article processing |  
|                              | • This option applies to your library only if it has added metadata about its electronic collections to the WorldCat knowledge base and activated a link to the WorldCat knowledge base. Then your library is ready to use Direct Request for articles or Direct Request for e-books.  
|                              | • This option has three values: **No**, **E within group**, and **E across groups**:  
|                              |   • **No:** This is the default value. It leaves Direct Request for articles and Direct Request for e-books turned off. Select this value for all of your Direct Request profiles if your library has not added its metadata and activated the link to the WorldCat knowledge base. If your library has activated the link, use **No** for Direct Request profiles that are not copy profiles for articles or loan profiles for e-books. Use **E within group** or **E across groups** for Direct Request profiles that are copy profiles for articles. Use **E within group** for Direct Request profiles that are loan profiles for e-books so e-book requests will be searched in the knowledge base even though all e-book requests will be placed in your Review file for action and not sent automatically to potential lender.  
|                              |   • **E within group:** For each Custom Holdings group in your Custom Holdings path for articles, Direct Request selects lenders who have an electronic version of the article and then selects lenders who have a print copy only.  
|                              |     **Example:** In a path containing two groups, Direct Request selects lenders in this order: group 1 lenders who have an electronic version; group 1 lenders who have a print copy only; group 2 lenders who have an electronic version; group 2 lenders who have a print copy only.  
|                              |   • **E across groups:** Across all Custom Holdings groups in your Custom Holdings path for articles, Direct Request selects lenders who have an electronic version of the article and then selects lenders who have a print copy only.  
|                              |     **Example:** In a path containing two groups, Direct Request selects lenders in this order: group 1 lenders who have an electronic version; group 2 lenders who have an electronic version; group 1 lenders who have a print copy only; group 2 lenders who have a print copy only. |
Interlibrary Loan Options

Use this screen to select your settings for WorldShare Interlibrary Loan.

Persistence Setting

This setting allows you to select whether you want constant data records (Borrower Data (page 102) and Lender Data (page 118)) to be automatically applied to each request.

- **On** - The DEFAULT constant data record is automatically applied to requests. **Note:** If you select a different constant data record to be applied to a request in WorldShare Interlibrary Loan, that constant data record will be applied to all future requests until you select another constant data record.

- **Off** - Users must manually select a constant data record for each resource sharing request.

To select a Persistence setting:

1. Select the On check box to turn persistence on.
2. Optionally, deselect the On check box to turn persistence off.
3. Click Save.

Knowledge Base Active Link

This setting allows you to select whether you want the system to look through your WorldCat knowledge base collections, when a patron submits a borrowing request or you process a lending request, to determine whether your library has electronic access to the requested item. When turned on, this setting will cause a link to appear in the Request Details accordion of a borrowing or lending request if the item is held by your library in the WorldCat knowledge base.

As a borrower, when this setting is turned on, and the following is true: a patron submits a request, the request matches a Direct Request Profile, and the requested item is held by your library, as indicated by your holdings in the WorldCat knowledge base, then the request is routed to your New for Review queue and a link to the item is included in the Request Details accordion.

As a lender, when this setting is turned on, when you receive a lending request, and the requested item is held by your library, as indicated by your holdings in WorldCat knowledge base, you will see a link to the item in the Request Details accordion.

**Note:** You should only turn on the Knowledge Base Active Link setting only if your library has already added metadata about its electronic collections to the WorldCat knowledge base and set your ILL License terms.
To activate or deactivate links to WorldCat knowledge base:

1. Select the On check box to turn the links on.
2. Optionally, deselect the On check box to turn the links off.
3. Click Save.

Primary Symbol

This setting allows you to change your primary symbol used for WorldShare Interlibrary Loan. Your current symbol is shown.

To change your primary symbol:

1. Click Change Primary Symbol.
2. On the Select Primary Symbol screen, select the symbol you want to use.
3. Click Save.

WorldShare Circulation Integration

Use this setting to activate the WorldShare Interlibrary Loan and WorldShare Circulation integration. Activating integration is the final step in configuring this feature. For complete instructions on how to configure the integration, see Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137).
To activate integration:

1. Complete all steps as described in Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137).

2. Select the On check box to activate the integration (the final step in the process).

Note: If all other configuration steps described in the document have not been completed, selecting the On check box here will not activate the WorldShare Circulation integration.
Lender Data

Use this screen to configure Lender constant data. Constant data is stored information that your staff can use to ensure consistency when they initiate or respond to requests. Constant data automatically transfers repetitive data to workforms and requests. A default constant data record is created for any institution that does not have one.

For more information on constant data and examples of how it can be used, see Constant data (page 36).

Configure Lender Constant Data

Follow the instructions below to add, edit, or delete a constant data record.

To add a constant data record:

1. Click Create New CD record.
2. Fill in the fields. See Lending Library Information fields (page 118) for details.
3. Click Save as New.

To copy a constant data record:

1. From the Constant Data Record list, select the constant data record you want to copy.
2. Edit the Constant Data Record Name.
3. Make any additional edits to the record, if needed.
4. Click Save as New.

To edit a constant data record:

1. From the Constant Data Record list, select the constant data record you want to edit.
2. Edit the record.
3. Click Save.

To delete a constant data record:

1. From the Constant Data Record list, select the constant data record you want to delete.
2. At the bottom of the screen, click Delete Record.
3. On the confirmation window, click OK.

Lending Library Information fields

Note: Required fields are marked with an asterisk (*).
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constant Data Record Name</td>
<td>The name of this record (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of this record.</td>
</tr>
<tr>
<td>Due Date</td>
<td>- The date on which the Borrower should return the item, <strong>not</strong> the date on which the item should arrive at your library.</td>
</tr>
<tr>
<td></td>
<td>- <strong>When editing a request</strong>, type the specific date or specify a time span of 1-999 days from today’s date using the format +DDD.</td>
</tr>
<tr>
<td></td>
<td>- <strong>For copy requests</strong>, type <em>N/A</em> for the Due Date.</td>
</tr>
<tr>
<td><strong>Example:</strong></td>
<td>+101</td>
</tr>
<tr>
<td>Shipped Date</td>
<td>The date on which the item leaves your library (past or current), using the format -DD.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>-0</td>
</tr>
<tr>
<td></td>
<td>-10</td>
</tr>
<tr>
<td>Add ILL Management Fee (IFM)</td>
<td>Select the <strong>Add ILL Management Fee (IFM)</strong> check box to turn IFM on. For more information on IFM, see Interlibrary Loan Fee Management (IFM) (page 48).</td>
</tr>
<tr>
<td>Lending Charges</td>
<td>- All costs: handling, photocopying, postage, etc., in U.S. dollars. Numeric data only. Type <em>0.00</em> if there are no charges.</td>
</tr>
<tr>
<td></td>
<td>- To accept a Borrower’s IFM offer, enter a numeric value, and check the IFM check box.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>8</td>
</tr>
<tr>
<td>Insurance Amount</td>
<td>The amount of insurance, if applicable.</td>
</tr>
<tr>
<td>Lending Notes</td>
<td>- Required only for Conditional responses. Type additional information or a Conditional query.</td>
</tr>
<tr>
<td></td>
<td>- Optional for non-Conditional responses. Use for notes about method of payment, invoicing, no-renewal responses, etc.</td>
</tr>
<tr>
<td>Lending Restrictions</td>
<td>Restrictions that apply to loans.</td>
</tr>
<tr>
<td><strong>Example:</strong></td>
<td>Library use only.</td>
</tr>
<tr>
<td>Return to</td>
<td>Complete return mailing address.</td>
</tr>
<tr>
<td></td>
<td>- If you include a Due Date, you must supply a return address.</td>
</tr>
<tr>
<td></td>
<td>- If you type <em>N/A</em>, you need not complete this field.</td>
</tr>
<tr>
<td>Return Via</td>
<td>A preferred method for returning loaned materials. This field provides tracing information if the item is lost in transit.</td>
</tr>
</tbody>
</table>
Patron Request Workforms

Use the Patron Request Workforms screen in OCLC Service Configuration to customize your patron request form. Patrons can use the patron request form to request interlibrary loans.

If you are a WorldShare Interlibrary Loan Prime user looking for help on this screen, see the WorldShare Interlibrary Loan Prime documentation page (sign in required).

See also:

Configure your patron request form (page 124)
WorldCat Discovery Request Form (page 121)
WorldCat Discovery Request Form Fields (page 127)
WorldCat Discovery Request Form

For WorldShare Interlibrary Loan libraries, use this screen to customize the WorldCat Discovery Request Form. This request form displays to your patrons in WorldCat Discovery. The image below is an example of the WorldCat Discovery Request Form. The sections of the form are described below.

![WorldCat Discovery Request Form](image)

1. Preview

Once you have configured the form, you can preview how it will appear to patrons.

- To preview the form, click **Preview**.

2. Section Header

Use the Section Header to assign a title to the section of the request form. Entering a header can help the patron understand the type of information you expect them to input in the fields contained in the section. For example, you can title a section "About My Request" to inform patrons that the following fields will ask for information about the item being requested.

- To edit the Section Header, enter a new **header** into the Section Header field.

3. Remove a Section

Use the Remove a Section button to remove the section. **Note:** You will not be asked to confirm the removal of the section. Before clicking the button, make sure you want the section to be removed.

- To remove the section, click **Remove a Section**.
4. Move a section

The arrows allow you to change a section's position on the form.

- Arrows will only appear in the directions you can move the sections.
- To move the section up on the form, click the **up arrow** (↑).
- To move the section down on the form, click the **down arrow** (↓).

5. Field

The fields you select determine what appears on the request form. If you have not configured the form yet, default fields will be selected. **Note:** Only the Note to Patron (page 127) field can be reused on the forms. All other fields can only be used once.

- To add a field, see 11. Add a field to display on this Section (page 123)
- To change a field, click the **Field list** and select a new field.
- To delete a field, see 10. Remove a field (page 123).

6. Input Type

The Input Type displays how the patron inputs information into the field. Input type is fixed for each field.

7. Field Label

The Field Label determines how the field is described on the form. Each field has a default field label. Use the field label to provide patrons with a description of the information you would like them to input in the field. For example, Patron Max cost could be relabeled to Max cost I am willing to pay. **Note:** Field labels are limited to 30 characters.

- To edit a field label, enter a new **label** in the Field Label.

8. Field Values

Field Values can be used to enter default text or options that will appear on the form to the patron. For example, you may enter a value for Patron Max cost to let patrons know the maximum amount charged for any item.

- If the Input Type is **dropdown**, you can select the default selection from the list, or depending on the field, you can enter your own values to appear in the dropdown.
- If the Input Type is **textentry**, you can enter default text in the field.

9. Options

Options allow you to further define the fields on your form. By selecting an option, you can make fields required or editable.

- Select the **Required** check box if you want the field to be required. When a field is required, patrons must provide information in the field in order to submit the form. Patrons will encounter an error if they try to submit the form without filling
out all required fields.

- Deselect the **Required** check box if you do not want to the field to be required. When a field is not required, patrons do not have to fill in the field.
- Select the **Editable** check box so that patrons can edit the field. Most fields should be editable.
- Deselect the **Editable** check box if you do not want patrons to edit the field. You can enter a value in the 8. Field Values (page 122) that patrons cannot edit.

### 10. Remove a field

Use the **remove icon** to remove a field from the section. **Note:** You will not be asked to confirm the removal of a field. Before clicking the remove icon make sure you want the field to be removed.

- To remove a field, click the **remove icon** to remove a field from the section.

### 11. Add a field to display on this Section

Use the **Add a field to display on this Section** button to add another field to the section.

- To add a field to the section, click **Add a field to display on this Section**.

### 12. Add a Section

Use this button to add another section to the form.

- To add a section to the form, click **Add a Section**.

### 13. Reset to Standard Form

Use the **Reset to Standard Form** button to reset the form to the default (non-customized) version of the form.

- To reset the form, click **Reset to Standard Form**.

### 14. Save and Cancel

Once you have completed editing the form, you can save or cancel your changes.

- To save the form, click **Save**.
- To cancel your changes, click **Cancel**.

**See also:**

Configure your patron request form (page 124)

WorldCat Discovery Request Form Fields (page 127)
Configure your patron request form

Follow the instructions below to configure your patron request form. For an explanation of each section of the form, see WorldCat Discovery Request Form (page 121).

Configuration tips

Some points to keep in mind when configuring your form:

- Use the definitions in WorldCat Discovery Request Form Fields (page 127) to create a draft of your form.
- Only the Note to Patron (page 127) field can be reused on a form. All other fields can only be used once.
- Fields can be grouped into sections under a labeled Section Header to organize the information on the form.
- Sections can be moved up or down at any time by clicking the arrows in the upper right corner of each section.
- Fields can be reordered by removing and adding them in the order that you would like them to appear on your form.
- You can preview your form before you save it to confirm that it will appear to your patrons as you expect.
- Any updates you make to the patron request form will not take effect immediately. Changes will usually appear on the form within 2-3 minutes.

Before you begin: WorldCat Discovery Request Form set up

If you want the WorldCat Discovery Request form to function properly, you must first configure the following:

1. The Resource Sharing (Any Level) button must be set to WCRS/WS ILL for patron requests in WorldCat Discovery to be submitted to WorldShare Interlibrary Loan.
   a. To configure the button, in Service Configuration, on the left navigation, click My WorldCat.org > Place Hold/Request Buttons.
   b. On the Place Hold/Request Buttons screen, under Resource Sharing (Any Level), select WCRS/WS ILL from the Type of button configuration list.
2. Your institution’s IP Addresses must also be entered in Service Configuration so that patrons who are within your IP range are able to access the request form.
   a. To add an IP address, in Service Configuration, on the left navigation, click IP Addresses > Manage IP Addresses.
   b. On the Manage IP Addresses screen, click Add.
   c. In the window, enter an IP address range.
   d. Click OK.
   e. Under IP Address Range Attributes, click the plus sign (+) to add an attribute to the IP address range.
   f. From the first list, select Product.
   g. From the second list, select WorldCat Discovery.
   h. Click Save.
i. Repeat steps b-h as needed.

j. Continue to Customize the patron request form (page 125) below.

Customize the patron request form

If this is your first time customizing the patron request form, the form will contain default fields. Forms can be customized to include parameters and information relevant to your library. Refer to WorldCat Discovery Request Form (page 121) for an explanation of each section of the form.

To customize your patron request form:

1. In Service Configuration, on the left navigation, click WorldShare ILL > Patron Request Workforms.

2. If this is your first time customizing the form, you will see the default form.

3. Edit the Section Header or use the default text.

4. Under Field, click the field list to select a field.

   a. Input type is fixed for each field and will change depending on the field you select.

5. Optional. Rename the field by entering a new Field Label.

   a. Use the field label to provide patrons with a description of the information you would like them to enter.

   b. For example, Patron Max cost could be relabeled Max cost I am willing to pay.

   c. Field labels are limited to 30 characters.

6. Determine whether you would like to apply any of the Options to the field.

   a. Select the required or editable check box to turn the options on.

   b. Deselect the check boxes to turn the options off.

7. Optional. To remove the field, click the remove icon (X) at the end of the field line.

   a. You will not be asked to confirm the removal of a field. Before clicking the icon, make sure you want the field to be removed.

8. To add another field, click Add a field to display on this Section.

9. Continue adding and editing the fields you want to include until you are satisfied with that section of the form.

   a. At any time, you can click Preview at the top of the form to view the form as a patron will see it.

10. To add another section, click Add a Section.

11. Repeat steps 3-10 until you are satisfied with the sections and fields within each.

12. Click Preview to confirm that the forms looks as you expect.

13. Click Save you save your customizations to the form. Patrons will not be able to see the changes you have made to the form until you save it.
**Note:** At any time, you can click **Reset to Standard Form** at the bottom left of the form to return to the default (non-customized) version of the form.

**See also:**

- [WorldCat Discovery Request Form](#)
- [WorldCat Discovery Request Form Fields](#)
**WorldCat Discovery Request Form Fields**

The WorldCat Discovery Request Form contains fields that the patron can use to describe themselves or the item they are requesting.

These are all the fields that are available on the WorldCat Discovery Request Form:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1</td>
<td>Patron's street address</td>
</tr>
<tr>
<td>Address 2</td>
<td>Other address information, such as Apartment, Suite, etc.</td>
</tr>
<tr>
<td>City</td>
<td>Patron's city</td>
</tr>
<tr>
<td>Country</td>
<td>Patron's country. Select your country from the list to make it the default setting.</td>
</tr>
<tr>
<td>Department</td>
<td>This field can be customized to allow patrons to select a department they are associated with from a customized list.</td>
</tr>
<tr>
<td></td>
<td>- For information on how to customize the list, see 8. Field Values (page 122).</td>
</tr>
<tr>
<td></td>
<td>- <strong>Note</strong>: Be consistent when entering the department names.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>- Department of Chemistry, Department of English, Department of History, etc.</td>
</tr>
<tr>
<td></td>
<td>- ChemDept, EngDept, HistDept, etc.</td>
</tr>
<tr>
<td></td>
<td>- Chemistry, English, History, etc.</td>
</tr>
<tr>
<td>Edition</td>
<td>Allows the patron to select the preferred edition of the requested item from a list (Any, Recent, This).</td>
</tr>
<tr>
<td>Email</td>
<td>Patron's email address</td>
</tr>
<tr>
<td>Fax</td>
<td>Patron's fax number</td>
</tr>
<tr>
<td>First Name</td>
<td>Patron's first name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Patron's last name</td>
</tr>
<tr>
<td>Need by date</td>
<td>Allows the patron to enter the date by which the item is needed (in YYYYMMDD format)</td>
</tr>
<tr>
<td>Note to Patron</td>
<td>Enter additional information or provide directions to patrons. When displayed to the patron, the field will not begin with the Note to Patron field label. This field can be reused throughout the form.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong></td>
</tr>
<tr>
<td></td>
<td>- Using the dropdown below, select which edition of the item you would prefer to receive. (Placed above the <strong>Edition</strong> (page 127) field)</td>
</tr>
<tr>
<td></td>
<td>- In the box below, provide any additional information about this request. (Placed above the <strong>Notes</strong> (page 127) field)</td>
</tr>
<tr>
<td>Notes</td>
<td>Provides the patron with a free text field to enter any relevant information about themselves or their request. This field cannot be reused.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Examples of potential patron entries:</strong></td>
<td></td>
</tr>
<tr>
<td>• Maximum cost $5.00</td>
<td></td>
</tr>
<tr>
<td>• Can pick up from East Branch on Tuesdays.</td>
<td></td>
</tr>
<tr>
<td><strong>Patron Id</strong></td>
<td>Allows the patron to enter an identification number (library card, student or faculty id, etc.) in a free text field.</td>
</tr>
<tr>
<td><strong>Patron Max cost</strong></td>
<td>If your library charges patrons for certain types of ILL requests, this field allows you to ask patrons to provide information about the maximum amount (in US dollars) that they are willing to pay for a particular item. If it is used, the label could be changed to provide patrons with clearer instructions about what information to enter, or a [Note to Patron](page 127) could be added to explain the meaning of this field.</td>
</tr>
<tr>
<td><strong>Examples:</strong></td>
<td></td>
</tr>
<tr>
<td>• Max cost I am willing to pay ([7. Field Label](page 122))</td>
<td></td>
</tr>
<tr>
<td>• Enter the maximum amount that you would be willing to pay for this item if it cannot be obtained for free. ([Note to Patron](page 127))</td>
<td></td>
</tr>
<tr>
<td><strong>Phone</strong></td>
<td>Patron’s phone number</td>
</tr>
<tr>
<td><strong>Pickup Location</strong></td>
<td>Maximum 400 branches) Allows the patron to select a preferred pickup location from a customized list.</td>
</tr>
<tr>
<td>• For information on how to customize the list, see [8. Field Values](page 122).</td>
<td></td>
</tr>
<tr>
<td><strong>Postal Code</strong></td>
<td>Patron's postal code (e.g., zip code)</td>
</tr>
<tr>
<td><strong>Service Type</strong></td>
<td>Allows the patron to select the type of service being requested from the two options in the list (Book/Media-Loan and Article - copy)</td>
</tr>
<tr>
<td><strong>State/Province</strong></td>
<td>Allows the patron to enter their state. Select your state or province from the list to make it the default setting. Values are available to the United States, Canada, and Australia. A country must be selected if State/Province is included on the form.</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>Patron's status (within the library, company, school, etc.), selected from a list of customized statuses.</td>
</tr>
<tr>
<td>• For information on how to customize the list, see [8. Field Values](page 122).</td>
<td></td>
</tr>
</tbody>
</table>

See also:

*WorldCat Discovery Request Form* ([page 121])

Configure your patron request form ([page 124])
Prime Advanced Workflows

If you are a WorldShare Interlibrary Loan Prime user looking for help on this screen, see the WorldShare Interlibrary Loan Prime documentation page (sign in required).
Prime Notifications

If you are a WorldShare Interlibrary Loan Prime user looking for help on this screen, see the WorldShare Interlibrary Loan Prime documentation page (sign in required).
Prime Patron Settings

If you are a WorldShare Interlibrary Loan Prime user looking for help on this screen, see the WorldShare Interlibrary Loan Prime documentation page (sign in required).
Print Settings

Use this screen to select your print settings and customize your book straps.

Printing Default Settings

This setting allows you to select the default paper size for printing. The default paper size you select here applies to all items printed from the Print Queue. For more information, see Printing (page 85).

To select a printing default setting:

1. Select the ISO A4 radio button or the US Letter radio button.
2. Click Save.

Logo Image Settings

This setting allows you to add a logo to your book straps. Note: The logo will only appear on your book straps if you select to use customized book straps. See Book Strap Settings (page 133).
To select a logo:

1. In the Image URL field, enter the **URL of the logo** you want to use.

2. Optional. Click **Test URL** to test the image. **Note:** The logo image cannot exceed 250 pixels in width and 60 pixels in height.

3. Click **Save**.

**Book Strap Settings**

Use this section to customize your Borrower and Purchasing book strap and Lender book strap. Book straps can be printed from the Print Queue or while processing an individual request. See **Print book straps or stickers** (page 90) for more information.

**Borrower and Purchasing Strap**

This setting allows you to customize your library's Borrower and Purchasing book strap. The Borrower and Purchasing book strap can be printed out and used when you receive a borrowing request item. A customized book strap includes the logo you selected in the **Logo Image Settings** (page 132), patron data (if selected), and any notes you enter into the Notes field.

To use the default book strap:

1. Select the **Use default book straps** radio button.

2. Optional. Click **Preview Book Strap** to preview the book strap.

3. Click **Save**.

To customize the book strap:

1. Select the **Use customized book straps** radio button.

2. Select the **Show Patron Data on book straps** check box if you want to show information about the patron who requested the item on the book strap.
3. In the Notes field, enter any **notes** you want to include on the book strap.

4. Optional. Click **Preview Book Strap** to preview the book strap.

5. Click **Save**.

### Lender Strap

This setting allows you to customize the Lender book strap. The Lender book strap can be printed out and used when you are processing lending requests. A customized book strap includes the logo you selected in the [Logo Image Settings](#) (page 132) and any notes you enter into the Notes field.

![Lender Strap](image)

**To use the default book strap:**

1. Select the **Use default book straps** radio button.

2. Optional. Click **Preview Book Strap** to preview the book strap.

3. Click **Save**.

**To customize the book strap:**

1. Select the **Use customized book straps** radio button.

2. In the Notes field, enter any **notes** you want to include on the book strap.

3. Optional. Click **Preview Book Strap** to preview the book strap.

4. Click **Save**.
Purchase Options

Use this screen to enter institutional account information for content providers that offer purchase options in WorldShare Interlibrary Loan. The content providers displayed on your Purchase Options screen may differ from those described here. Read the description for each content provider for additional details about why you may or may not see them on your Purchase Options screen.

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Availability</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Library on Demand</td>
<td>All libraries</td>
<td>To ensure the purchase price you see in the Purchase Option accordion on the request screen reflects the lowest price available from the British Library on Demand, enter your British Library on Demand Account ID. Then click Save. To find out more about British Library on Demand go to <a href="http://www.bl.uk/articles">www.bl.uk/articles</a>. For more information, see Purchasing articles from British Library On Demand (page 40).</td>
</tr>
</tbody>
</table>
| Get It Now                    | Subscribing libraries only                        | Once you have implemented this service, enter the following information, provided by Get it Now, in Service Configuration to make this option available in WS ILL:  
  - Institute  
  - Order Source  
  - ILL Email Address  
  - Bill to Email Address  
  Then click Save. To learn more about Get It Now, visit http://www.copyright.com/getitnow. For more information, see Purchasing articles from Get It Now (page 46). |
WorldShare Interlibrary Loan and WorldShare Circulation integration

WorldShare Interlibrary Loan and WorldShare Circulation integration provides you with a method to streamline the interlibrary loan-circulation process and workflow. Librarians and staff who process interlibrary loan (ILL) requests through WorldShare Circulation no longer have to manually create temporary items or holds for ILL requests.

See also:
Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)
Integration workflow (page 143)
Exception processing (page 152)
Policy considerations (page 157)
Set up WorldShare Interlibrary Loan and WorldShare Circulation integration

Libraries that subscribe to both WorldShare Interlibrary Loan and WorldShare Management Services can streamline the ILL-circulation process and workflow with WorldShare Interlibrary Loan and WorldShare Circulation integration. Librarians and staff who process ILL requests through WorldShare Circulation will no longer have to manually create temporary circulation items for ILL requests.

This integration only impacts borrowing in WorldShare Interlibrary Loan; it has no impact on lending. Temporary items are created for loan requests but not borrowing requests.

This topic provides details about how to use OCLC Service Configuration to set up WorldShare Interlibrary Loan and WorldShare Circulation integration. The process is brief, but all steps must be completed for the integration to work properly.

For a video tutorial on setting up the integration, see Configuring: WorldShare ILL and WorldShare Circulation Integration (12:16 minutes, sign in required).

Service Configuration Setup

To setup the integration, you need access to Service Configuration. If you do not have access, ask your WorldShare Management Services (WMS) administrator, systems librarian or staff member in charge of configuration to assist with access and setup.

Summary and Checklist of Steps

<table>
<thead>
<tr>
<th>Done</th>
<th>Service Configuration Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Step 1: Create a new branch (page 137)</td>
<td>Create a new Branch Registry ID that will represent the ILL processing location for your library. Think of this “branch” as an ILL processing center.</td>
</tr>
<tr>
<td></td>
<td>Step 2: Update the Holding Codes Translation Table (page 138)</td>
<td>Add the Branch Registry ID to your list of holdings locations and connect it with WorldShare Circulation.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Update circulation policies (page 139)</td>
<td>Add a Location Policy for your WS ILL Holding Location (required). Update existing or create new circulation policies for your WS ILL branch so the appropriate hold requests, notifications and billing are triggered when ILL requests are placed and fulfilled.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Edit your patron request form (page 141)</td>
<td>Add a Patron ID field to your patron request form for patrons to enter their patron barcode. This entry connects the request to the patron account and creates a hold request in WorldShare Circulation.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Activate integration (page 142)</td>
<td>After you have completed the above steps, turn on WorldShare Interlibrary Loan and WorldShare Circulation integration.</td>
</tr>
</tbody>
</table>

Step 1: Create a new branch

Create a new Branch Registry ID that will represent the ILL processing location for your library. Think of this “branch” as an ILL
1. Click WorldCat Registry > Create a New Institution in the left navigation.

2. In the form, enter at least the following information:
   - **Institution Name:** WS ILL
     Required: You must name your Institution WS ILL to connect it with the WSIL holding code already created by OCLC for your institution.
   - **Also Called:** Your library’s name
     This will help identify your WS ILL branch as a part of your library.
   - **Include Address:** Check this box. This is optional but will help you identify your WS ILL branch.
   - **Institution Type:** Other
   - **Type:** Main Address
   - **Street Address 1:** Your library’s main branch address
   - **City:** The city where your library is located
   - **Country:** The country where your library is located

3. Click Create.

4. On the Duplicate Institutions screen, confirm that a WS ILL Branch ID has not been created for your library. Results marked as Definite and Likely matches should be investigated to confirm they are not existing WS ILL institutions for your library.

5. If no Branch ID has been created for your library, click Confirm Create.

6. When the Name Location page appears, you will be in the newly created branch’s Service Configuration. Update any information on this page, and click Save Changes.

7. Determine the Branch Registry ID. It can be found in parentheses, following WS ILL in the institution name drop-down list or by clicking WorldCat Registry > Identifiers in the left navigation. You will need this Branch Registry ID to update the Holding Codes Translation Table.

---

**Step 2: Update the Holding Codes Translation Table**

Add the Branch Registry ID to your list of holdings locations and connect it with WorldShare Circulation.

1. Before you begin these steps, ensure you are in Service Configuration for your main branch. In the upper left corner, in the institution name drop-down list, find and select your institution’s name, and click Go.
2. Click **MyWorldCat.org > Holding Codes Translation Table** in the left navigation.

3. Click the **add 1 row** button above the table.

4. Click on the empty field under each column in the new row and enter the following information into each of the fields:
   - **Holding Symbol**: Your library’s holding symbol. (Must be in all caps.)
   - **Holding Code**: WSIL (Must be in all caps.)
   - **Branch Registry ID**: The new branch’s assigned registry ID noted in step 6 above.
   - **Display Name**: WS ILL
   - **Shelving Scheme**: Your library’s scheme
   - **Shelving Location**: WS-ILL (Recommended) The Shelving Location will be used in creating circulation policies. Select a shelving location name that is easily associated with WS ILL processing.

   *These fields must be entered as shown in the table to ensure WorldShare Circulation Integration works properly.

5. Click **Save Changes**.

Once the WS ILL branch has been included in the Holding Codes Translation Table, it will be visible in your instance of WMS. The branch will appear:

- At sign in
- As a Holding Location when adding holdings

You will never need to select this branch when signing in or when choosing a holding location to add holdings. This branch only exists so temporary items can be assigned to this location when created.

**Step 3: Update circulation policies**

After your WS ILL branch has been added, you must add a Location Policy to your Main Branch Location Policy for the WS ILL Holding Location. You will also need to think about setting up specific circulation policies for this branch. Talk to your circulation manager to discuss whether to use existing policies or create new policies. For more information on how to set these policies see WMS Circulation in the Service Configuration Online Help, or click on the individual policy in the table below. Additionally, see **Policy considerations (page 157)** for other considerations.
To add a Location Policy (required):

In order for WorldShare Interlibrary Loan and WorldShare Circulation integration to function, a Location Policy for the WS ILL Holding Location is required. If the required settings below are not saved, the hold request will fail.

1. Before you begin these steps, ensure you are in Service Configuration for your main branch. In the upper left corner, in the institution name drop-down list, find and select your institution’s name, and click Go.

2. Click WMS Circulation > Location Policy in the left navigation.

3. Click the plus sign (+) in the last column to create a new location policy.

4. Enter or select the following information for each column in the new row:
   - **Holding Location**: WS ILL
   - **Shelving Location**: All
   - **Material Format**: All
   - **Available?**: Available
   - **Fulfils Holds For**: All patrons
   - **Can Override Holds?**: Cannot Override Holds
   - **Reshelving Period**: 0 Days
   - **In Processing Mode**: None
   - **In Processing Period**: Can be left blank
   *These fields must be entered as shown in the table to ensure WorldShare Circulation Integration works properly.

5. Click Save.

Other Circulation Policy Updates

The following optional circulation policies can also be set in the WMS Circulation module of Service Configuration. Before setting any of these policies, ensure that you are setting the policies in your Main Branch. Review the following policies, requirements, and considerations:

<table>
<thead>
<tr>
<th>Policy</th>
<th>Add or Update Policy?</th>
<th>Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification Policy</td>
<td>Yes</td>
<td>Do you want to use existing or create new messages to notify patrons of about their ILL items?</td>
</tr>
<tr>
<td>Loan Limit Policy and Loan Limit Matrix</td>
<td>No</td>
<td>These policies should not be set and should be controlled as part of your library’s normal ILL process. The ILL process is handled separately, and limits will not stop the ILL workflow.</td>
</tr>
<tr>
<td>Policy</td>
<td>Add or Update Policy?</td>
<td>Considerations</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Loan Policy</strong> and <strong>Loan Policy Map</strong></td>
<td>Yes</td>
<td>Do you associate different billing, loan periods, renewals, and recalls for ILL items? Due dates are determined by the lending institution, so staff will need to adjust the due date of an item based on the lender’s requirements. Note: When you are configuring the Loan Policy Map for the WS ILL location, set your Holding Location to WS ILL and Shelving Location to All.</td>
</tr>
<tr>
<td><strong>Hold Limit Policy</strong> and <strong>Hold Limit Matrix</strong></td>
<td>No</td>
<td>Do not place limits on holds against ILL requests. The ILL process is handled separately, and limits will not stop the ILL workflow.</td>
</tr>
<tr>
<td><strong>Hold Request Policy</strong> and <strong>Hold Request Policy Map</strong></td>
<td>Yes</td>
<td>How long will you attempt to fulfill a hold request, how will the patron be notified if that hold is not fulfilled, and will they be billed?</td>
</tr>
<tr>
<td><strong>Hold Fulfillment Policy</strong> and <strong>Hold Fulfillment Policy Map</strong></td>
<td>Yes</td>
<td>Once a request is fulfilled, what pick-up notice would you like to be generated, and how long will the ILL item be held for pickup?</td>
</tr>
</tbody>
</table>

### Step 4: Edit your patron request form

**To use the integration with the WorldCat Discovery Patron Request Form:**

You must have your Patron Request Form configured with the Patron ID field so patrons are required to enter their patron barcode when submitting ILL requests. If you do not already have this field configured, complete the steps below. For additional information about editing the Patron Request Form, see Configure your patron request form (page 124).

1. Click **WorldShare ILL > Patron Request Workforms** in the left navigation.
2. Ensure that you have a **Patron ID** field in your form. You can change the name of this field to Patron Barcode or other library-specific terminology to direct the patron to enter this information.
3. **Optional—Instructions for your patrons:** Patrons must manually enter their patron barcode in the Patron Request Form, it will not automatically populate. You may want to add a **Note to Patron** field below the Patron ID field on your form to provide information about what must be entered (e.g., Please enter your 9-digit patron barcode in the field above.).
4. Select the **required** check box for the Patron ID field to require patrons to enter this information when placing a request. If no Patron ID or an invalid Patron ID is entered, the integration process will not work.
5. Click **Save**.

**To use the integration without the Patron Request Form:**

If you do not use the patron request form in WorldCat Discovery to allow patrons to create their own requests, staff can supply the patron ID in the ILL request screen to trigger WorldShare Interlibrary Loan-Circulation integration.
Step 5: Activate integration

After you have completed the above steps, turn on WorldShare Interlibrary Loan and WorldShare Circulation integration.

1. Click WorldShare ILL > Interlibrary Loan Options in the left navigation.
2. Scroll to the bottom of the screen to the WorldShare Circulation Integration heading.
3. Select the On check box to activate this feature.

See also:

Integration workflow (page 143)
Exception processing (page 152)
Policy considerations (page 157)
Integration workflow

WorldShare Interlibrary Loan and WorldShare Circulation integration provides you with a method to streamline the interlibrary loan-circulation process and workflow. Librarians and staff who process interlibrary loan (ILL) requests through WorldShare Circulation no longer have to manually create temporary items or holds for ILL requests.

You must set up the integration before following the procedures outlined below. For details on how to set up the integration, see Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)

Note: The integration workflow only applies to loan requests, which require circulation of a physical item. Copy requests are handled through WorldShare ILL exclusively, with no need to “check out” an electronic, non-returnable item.

For a video tutorial on the integration workflow, see Workflow Integration: WorldShare ILL and Circulation (13:48 minutes, sign in required).

Integration workflow overview

![Process Flow – Patron ILL Loan Request WorldShare Circulation / WorldShare ILL Integration](image)

There are nine steps in the integration workflow:

1. Patron requests ILL item (WorldCat Discovery) (page 144)
2. ILL staff review request and send to lenders (WorldShare ILL) (page 144)
3. Temporary item is created and hold placed (System) (page 145)
4. ILL staff receive item from lender (WorldShare ILL) (page 146)
5. Temporary item and item status updated (System) (page 147)
6. Circulation staff check in item (WorldShare Circulation) (page 148)
7. Circulation staff check out item to patron (WorldShare Circulation) (page 148)
8. Patron returns item and Circulation staff check in item (WorldShare Circulation) (page 149)
9. ILL staff mark item as returned and return item to lender (WorldShare Interlibrary Loan) (page 150)

Staff actions take place across three services: WorldCat Discovery, WorldShare ILL, and WorldShare Circulation. System refers to the automatic integration steps done by the system.

1. Patron requests ILL item (WorldCat Discovery)

The workflow begins when the patron submits an ILL request in WorldCat Discovery. Patrons can submit their request via Discovery by filling out a Patron Request Form. Library staff can also create a request on behalf of the patron using this method by supplying the patron’s information. The Patron Request Form must contain the Patron ID field so patrons are required to enter their patron barcode when submitting a request. The patron barcode is the connection between the ILL Request and the Circulation module.

If patrons at your institution cannot submit ILL requests via WorldCat Discovery, library staff can also initiate requests for the patron within WorldShare Interlibrary Loan by providing the patron’s barcode in the ILL Request.

To place an ILL request, the patron will:

1. Locate the item.
2. In the Item Detail view, under Availability / Holdings, click Request Item.
3. On the Patron Request Form, fill in the fields. Required fields are marked with an asterisk (*). The Patron ID (patron barcode) field must be completed in order for the integration to work.
4. Click Submit.
5. Once submitted, the Request ID is returned. The ILL request can be tracked by this number in WorldShare Interlibrary Loan.

Considerations

- Patrons must be authenticated by IP range (on campus or via proxy) to display the Patron Request Form.
- The patron barcode must match a barcode in a patron account in WorldShare Circulation to trigger the integration.

2. ILL staff review request and send to lenders (WorldShare Interlibrary Loan)

Once the request is received in WorldShare ILL, library staff need to review the request and send it to lenders.

To review and send the request:

1. Click the Interlibrary Loan tab.
2. On the left navigation, click Borrowing Requests > New for Review.
3. Click the Request ID or Title to view the request.

4. Review the request and select the lenders.

5. Click Send Request to send the request.

6. A confirmation message will appear if the request was sent.

7. Click the Request ID in the confirmation message to return to the request.

8. At the bottom of the request, in the Circulation accordion, review the Circulation History section and confirm that the Status says “Temporary item record was successfully created.” If the Status says “Temporary item record creation pending (new),” wait a few seconds, then click Refresh.

Once the ILL request is sent, the integration between WorldShare Interlibrary Loan and WorldShare Circulation is triggered. The Circulation History section in the Circulation accordion of the ILL Request provides feedback on the success of the integration. When the patron barcode matches, the system creates a temporary item in the Circulation module for the ILL item and places an item-level hold on the temporary item for the patron. If the system encounters any errors, the Status will show an exception. For details on how to manage exceptions, see Exception processing (page 152).

Considerations

- The ILL request will be directed to the New for Review queue or match a Direct Request Profile (if set up). With Direct Request Profiles, information in the request is matched against the profile. If the request matches the profile, it is processed based on the Direct Request settings. Some libraries may automatically send out patron-initiated ILL requests to select lenders.

- Depending on your ILL staff workflow, the ILL request in New for Review may be reviewed (marked as reviewed) prior to being sent. In other words, you may have staff responsible for reviewing and selecting lenders, while a final review and submission is done by another staff member. If your library reviews requests prior to submission, you may want to consider adding patron name and barcode verification to this step.

3. Temporary item is created and hold placed (System)

After you submit a request, the system creates a temporary item and places an item-level hold on the item for the patron. You can confirm that the system created the temporary item by searching for the record in the Circulation module.

To confirm the item was created:

1. Click the Circulation tab.

2. On the left navigation, click Discover Items.

3. From the list under the Enter barcode field, select Temporary Items.

4. Search for the title (or author) of the item that was requested.

5. From the search results, click the item’s Title and confirm that the temporary item was created.
6. On the Item Details screen, in the upper right corner of the screen, click Holds.

7. Verify that an item-level hold was placed for the patron.

**Considerations**

- Notice that the Shelving Location is empty. Since the creation of the temporary item does not supply a shelving location, it is critical that your circulation policies look at ALL shelving locations within the WS ILL location when assigning policies. The system treats your WS ILL location like a branch library or processing location. See [Policy considerations](page 157) for more information.

You can also confirm that the hold was created by checking the Holds tab in the patron’s account. The ILL request should appear as an active hold. The linked barcode brings up the item details for the temporary item.

The hold will also be visible to the patron if they check their account in Discovery. They can immediately see that a hold has been placed for the title they requested via ILL. They will be able to track the progress of their ILL request by viewing their hold.

![](image)

4. **ILL staff receive item from lender (WorldShare Interlibrary Loan)**

Once you receive the item from the lender, you need to enter the item’s barcode into the ILL Request in WorldShare Interlibrary Loan and mark the request as received. The system will use the barcode to update the temporary item, which can be seen in step 5.

It is recommended that you use the WorldShare Interlibrary Loan Request ID as the item’s barcode. This provides a match point between the Circulation and Interlibrary Loan modules and can be helpful if you need to research the ILL request after it has been closed by the lending library.

**To update the barcode and mark the item as received:**
1. Click the **Interlibrary Loan** tab.
2. On the left navigation, click **Borrowing Requests > In Transit**.
3. In the request for the item, in the Circulation accordion, enter the **Item Barcode**. (It is recommended to use the WorldShare Interlibrary Loan Request ID for the item's barcode.)
4. Click **Mark as received**.
5. A confirmation message will appear and the item status is updated to Received.
6. Click the **Request ID** in the confirmation message to return to the request.
7. In the Circulation accordion, the Circulation History section shows the update of the temporary item is pending (running). The time to complete the record may vary, but it is generally within seconds. Click **Refresh** to reload Circulation History.
8. Upon completion, the Circulation History status will say “Temporary item record updated successfully.”

After completing these steps, ILL staff should print a book strap, place it on the physical item, and send the physical item to Circulation staff. If you encounter an exception during this step, see 7. Default hold request period exceeded (page 156).

5. Temporary item and item status updated (System)

After you mark the item as received, the system updates the temporary item. This occurs during the few seconds it takes to update the status in the Circulation History section. During this time the system automatically:

- Updated the temporary item barcode
- Checked in the item at the WS ILL location. The status of the item now appears as On Route from ILL to Circulation

The system treats the WS ILL location like a branch library. Think of your ILL department as a virtual branch, processing requests.

Patrons can track the process of the ILL request by checking their account in WorldCat Discovery. The On Route status is displayed to the patron as “This item is being sent to [patron’s pickup location].”
6. Circulation staff check in item (WorldShare Circulation)
Circulation staff receive the physical item from the ILL department and check in the item to trigger the hold fulfillment for the patron.

To check in the item:
1. Click the Circulation tab.
2. On the left navigation, click Check In.
3. Check in the item, scanning the barcode from the book strap, if provided (the ILL book strap includes a scannable barcode for the Request ID, which is the recommended barcode).
4. Print the Hold Receipt that is generated.

After completing these steps, place the physical item and Hold Receipt on the hold shelf for pickup.

As a result, the patron’s hold request is updated to On Shelf, which can be seen in:
- The patron’s account in WorldCat Discovery (The patron can immediately determine that their item has arrived and is ready for pickup.)
- The Circulation module (Circulation staff will see that a hold is ready for pickup when the patron arrives.)
- The Hold Pickup Notification (The system generates a pick-up notification to be sent to the patron by email. This notification is queued in the email system, which typically delivers mail every day around 7:00 AM.)

7. Circulation staff check out item to patron (WorldShare Circulation)
When the patron arrives to pick up the item, Circulation staff check out the item to the patron.
Pay particular attention to the Due Date on the book strap and adjust according to your library policies. The Interlibrary Loan Code of the United States says, “The due date is defined as the date the material is due to be checked in at the requesting library for return to the supplying library.” For example, if the lender expects the item back on January 15th, you may want to have 2 days for processing time and make the due date January 13th.

**To check out the item:**

1. Click the Circulation tab.
2. In the Enter barcode field, under Assist Patrons, scan or type the patron’s barcode.
3. In the patron’s account, in the Enter barcode field, scan or type the item’s barcode.
4. Review the due date on the book strap.
5. If you need to change the due date to allow time for processing before returning the item to the lender, make sure the item is selected and click Change Due Date, at the bottom of the screen.
6. Enter the new Due Date by typing the date or click the calendar icon to select a date. Click OK.
7. Confirm the Due Date before giving the item to the patron.

Item Statistics will indicate the Circulation Rule applied to the check out. To view the Item Statistics screen, in the patron’s Checkout list, click the item’s barcode. In the item record, click Statistics in the upper right corner.

Within Discovery, the patron can see that the ILL item that was checked out to them and can view the item’s due date.

**8. Patron returns item and Circulation staff check in item (WorldShare Circulation)**

Time passes while the patron has the item on loan. When the patron returns the item, Circulation staff check in the item.

**To check in the item:**

1. Click the Circulation tab.
2. On the left navigation, click Check In.
3. In the Item Barcode field, scan or type the item’s barcode.
4. A Routing Receipt is generated, which indicates that the physical item needs to be sent to the ILL department (WS ILL location).

After completing these steps, Circulation staff should send the physical item to the ILL department.

In the Circulation module, the item details and statistics are updated and show:
- Status: In Transit to the Owning Institution (WS ILL location)
- Last Issued To: The patron associated with the ILL request

**Considerations**

At this point in the process, all actions performed by the system within the Circulation module have been completed. Notice that the item’s status is set to In Transit. The completion of the ILL request (processing and returning to the lender) is done within WorldShare Interlibrary Loan. If your library wants, you may consider these optional actions:

- ILL staff check in item to the WS ILL location (using the Circulation module) when the item arrives back to the ILL department. This will change the item’s status to Available.
- Once the request is closed by the lender, delete the temporary item in the Circulation module.

**9. ILL staff mark item as returned and return item to lender (WorldShare Interlibrary Loan)**

Once the item is returned to the ILL department, ILL staff mark the item as returned and ship the item back to the lender.

**To mark the item as received and return it to the lender:**

1. Click the **Interlibrary Loan** tab.
2. On the left navigation, click **Print Queue > Return Labels**.
3. Confirm that the item is listed.
4. On the left navigation, click **Borrowing Requests > Received/In Use** and open the item’s request.
5. Click **Return item**.
6. A confirmation message will appear and the item status is updated to Returned.
7. On the left navigation, click **Print Queue > Return Labels**. Process the print queue.
8. Print the label.

Affix the label to the package with the item and ship to the lender. Once the lender receives the returned item, they will mark it Checked In/Complete and the ILL request is closed.

When an ILL request is closed (marked as complete), it is archived. Personally identifiable patron information, including name and barcode, are removed. The request archive can be searched by Request ID. If the Request ID is used as the temporary item barcode, you can search within the Circulation module to find the item and see which patron last checked it out.

**See also:**

- Exception processing (page 152)
- Policy considerations (page 157)
Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)
Exception processing

The previous section describes the standard WorldShare Interlibrary Loan and WorldShare Circulation integration workflow. However, there will be times when exceptions in the process may occur. If an exception occurs, it will be noted in the Circulation History section in the Circulation accordion of the ILL Request. An exception halts the integration process and must be remedied in order for the integration to occur. This section describes those exceptions and what to do if you encounter them during the integration process.

There are four statuses you will see in the Circulation History section if an exception has interrupted the workflow:

1. No status (Circulation History appears empty)
2. Temporary item record failed to create (invalid patron id). Correct the patron id and retry.
3. Temporary item record failed to create (exception)
4. Temporary item record failed to update (exception)

There are seven reasons exceptions may occur (and the status you will see):

1. Setup and configuration steps have not been completed (page 152) (status 1)
2. Patron barcode is missing/empty (page 153) (error message appears when trying to send the ILL request)
3. Patron barcode does not match an existing barcode (page 153) (status 2)
4. Patron account is blocked or expired (page 154) (status 3)
5. Temporary item cannot be created due to bibliographic information (page 154) (status 3)
6. Hold cannot be placed due to policies or limits (page 155) (status 3)
7. Default hold request period exceeded (page 156) (status 4)

Note: These errors will NOT stop the ILL request from being sent and processed between borrower and lender. As your staff work to correct any errors, your patron’s request has not been delayed.

1. Setup and configuration steps have not been completed

No Status in Circulation History

If you do not see anything in the Circulation History section of the ILL Request, this indicates an activation error. Verify all setup and configuration steps have been completed correctly.
Review the documentation and view the video that outlines the process:

- Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)
- Configuring: WorldShare ILL and WorldShare Circulation Integration (12:16 minutes, login required)

2. Patron barcode is missing/empty

*Error message appears when trying to send the ILL request*

The patron barcode is the matching data point between WorldShare Circulation and WorldShare Interlibrary Loan. This field must be populated in order to send the ILL request to lenders.

When the integration is activated, it requires the patron barcode to be included in the Patron information section of the ILL Request. If your patrons are submitting requests directly through WorldCat Discovery, the patron barcode is required to submit the Patron Request Form.

When the ILL request is generated from within WorldShare, staff entering requests on behalf of their patrons also need to include the patron barcode. If the barcode is missing, the request cannot be sent to lenders and you will receive an error message.

If you find that you need to place ILL requests for special programs or situations where a patron account does not exist in the Circulation module, it is recommended that you create a patron account before submitting the ILL request.

**Workaround (in WorldShare)**

1. Search for the patron in the Circulation module.
2. In the ILL Request, in the Patron accordion, enter the barcode in the ID field.
3. Save the ILL Request.
4. Resend the request.

3. Patron barcode does not match an existing barcode

*Circulation History Status: Temporary item record failed to create (invalid patron id). Correct the patron id and retry.*
If the patron enters their barcode incorrectly and no matching barcode is found in the Circulation module, the integration will fail.

If the patron incorrectly enters their barcode and the mistyped barcode matches another patron barcode, the request will be placed for the wrong patron. Some libraries may wish to add a patron barcode verification step within ILL where staff check the Circulation module for the barcode and correct patron name. If the correct barcode is found and updated before the request is sent, no remediation will be needed.

**Workaround (in WorldShare)**

1. Search for the patron in the Circulation module and find the correct barcode.
2. In the ILL Request, in the Patron accordion, update the barcode in the ID field.
3. Save the ILL Request.
4. In the Circulation accordion, click Retry.
5. The Circulation Status will update if the barcode was entered correctly.

**4. Patron account is blocked or expired**

*Circulation History Status: Temporary item record failed to create (exception)*

The creation of the temporary item and item-level hold will fail if the patron’s account is expired. When a patron’s account expires, they no longer have circulation privileges.

The first place to look is the patron’s account. Check that they do not have a manual block applied to their account (the Blocked? check box has not been selected) and that their Circulation Expiration Date has not been reached. If you find any blocks and library procedures allow, remove the blocks and retry within the ILL Request in the Circulation accordion.

**Workaround (in WorldShare)**

1. Search for the patron in the Circulation module.
2. Review the patron account:
   a. Check for a manual block (make sure the Blocked? check box is not selected)
   b. Check the Circulation Expiration Date (make sure the date has not been reached)
3. If library procedures allow, remove the manual block and/or update the Circulation Expiration Date.
4. In the ILL Request, go to the Circulation accordion, and click Retry.
5. The Circulation History Status will update if the exception has been resolved. If the Status stays the same, see #5.

**5. Temporary item cannot be created due to bibliographic information**

*Circulation History Status: Temporary item record failed to create (exception)*
The temporary item may also fail to be created if the Author field is populated with more than 250 characters in the ILL Request. Information about the item comes from the WorldCat bibliographic record. The Item’s Title, Author, and Material Format is transferred to the temporary item. If there is an exception due to the bibliographic information, it will be in one of those fields.

Edit the ILL Request Details that may be causing the exception, save the request, and retry within the Circulation accordion.

**Workaround**

1. Check item bibliographic information for potential exceptions in Title and Author fields (an Author field with more than 250 characters is a known cause).
2. In the ILL Request, in the Request Details accordion, modify the fields that may be causing the exception. Save your changes.
3. In the Circulation accordion, click Retry.
4. The Circulation History Status will update if the exception has been resolved. If the Status stays the same, see #6.

**6. Hold cannot be placed due to policies or limits**

*Circulation History Status: Temporary item record failed to create (exception)*

The temporary item could also fail to be created if the patron is blocked based on any of the circulation policies for your library. (Circulation policies are set in the WorldShare Circulation module of [OCLC Service Configuration](https://www.oclc.org).) For example, a patron may have outstanding bills and the amount exceeds the maximum bill limit for their patron type. This type of block will cause the integration to fail.

Think of all the loan policies and limits associated with your circulation configuration. At any time, a request to place a hold could fail due to exceptions to these policies and limits. For example, if you place limits on the number of holds a patron can place, the attempt by the system to create the hold may fail.

In WorldShare Circulation, when you try to place a hold for a patron that has exceeded their limits, you may encounter the Acknowledgement window in order to override the block. Think of the Acknowledgement window as an exception that the system will also encounter. However, the system cannot determine whether the override should be allowed and the exception occurs.

Review the patron’s account and your circulation policies to see if there are any blocks on the patron’s account. You can correct the reason for the block in the Circulation module and retry the ILL request.

**Workaround**

1. Review the patron account for any possible blocks:
   1. Overdue items
   2. Number of items checked out
   3. Number of hold requests
1. Correct the reason for block in the Circulation module.
2. In the ILL Request, go to the Circulation accordion, and click Retry.
3. The Circulation History Status will update if the exception has been resolved.

**7. Default hold request period exceeded**

*Circulation History Status: Temporary item record failed to update (exception)*

This exception occurs when you are trying to update the Item Barcode in the Circulation accordion of the ILL Request and mark the item as received. Holds will expire if they are not fulfilled within the time set in the Default Hold Request Period field in the Hold Request Policy in OCLC Service Configuration (WMS Circulation > Hold Request Policy). The Default Hold Request Period determines how long holds remain active in the system. If you have a short time period set, for example 2-3 weeks, it is possible that the ILL request will not be filled within that time period and the hold will expire.

The Default Hold Request Period starts when the ILL request is sent to lenders. At that time, the system creates a temporary item and item-level hold for the patron requesting the item. This hold is filled at the time ILL staff receive the physical item from the lender. If the Default Hold Request Period is met before the item is received, the hold is no longer active (removed from the patron account) and, therefore, the system is unable to update the hold request to be fulfilled.

Since the temporary item still exists in the Circulation module, you can place another hold request for the patron and retry in the Circulation accordion of the ILL Request.

**Workaround**

1. Check the patron account for the item-level hold.
2. If the hold is not found, search the temporary items for the item, and:
   a. Verify the temporary item
   b. Make sure the holding location says WS ILL
   c. Check if holds are outstanding
   d. Place a hold for the patron
3. In the ILL Request, go to the Circulation accordion, and click Retry.
4. The Circulation History Status will update if the exception has been resolved.

**See also:**

Integration workflow (page 143)

Policy considerations (page 157)

Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)
Policy considerations

Use your circulation policies to better manage ILL requests and communicate with your patrons. Circulation policies are set in the WMS Circulation module in OCLC Service Configuration.

1. Loan Limits (Loan Limit Policy and Loan Limit Matrix)

ILL renewal requests need to be processed through WorldShare ILL. You should consider limiting patrons from renewing items they have on loan via ILL. If you limit patron ILL renewals, you can allow staff to override a renewal after receiving a new date from the ILL department.

In the Loan Limit Matrix, the most restrictive limits that match Patron, Material Format, and Location will be applied to the circulation transaction. It is recommended that you rely upon your existing loan limits, but you should consider creating a “No Renewals” Loan Limit Policy and apply it to all items in the WS ILL holding location in the Loan Limit Matrix.

With these policies in place, Circulation staff will see the Acknowledgement window when attempting to renew the item. If patrons try to renew the item in WorldCat Discovery, they will get an error message indicating that a limit has been reached, and they will not be able to renew the item without staff assistance.

2. Loan Policies (Loan Policy)

You should consider creating a Loan Policy for ILL items if you want different loan and renewal periods, bills, notifications, and recalls.

Loan periods - The due date for an ILL item is determined by the lending institution. Circulation staff will need to adjust the due date of an item based on your library’s procedures. You may want to establish a typical loan period as a default. For example, you may want to set your Loan Period to 3 weeks if you know from experience that you usually get 4 weeks from the lender.
**Bills** - Your overdue fines for ILL items may be calculated differently. For example, you may have higher overdue fines as an added incentive to get materials returned on time so that you can get them back to the lending institution. Overdue notifications should mention the item in question is an ILL item.

**Recalls** - Since the lending institution has the right to recall the item at any time, it is a good idea to include a Recall Notification and expect any recalls to be immediately returned.

### 3. Notifications (Notification Policy)

You should consider creating notification policies for ILL items if you want different messaging to go out to patrons when their ILL items are due.

This sample Loan Overdue Notification stresses the importance of returning materials shared through ILL. It also reiterates that you cannot renew ILL items.

### 4. Hold Policies (Hold Request Policy and Map, Hold Fulfillment Policy and Map)

There are two hold policies:
- **Hold Request Policy** - Determines how long holds remain active in the system (holds expire if they are not fulfilled within the Default Hold Request Period)

- **Hold Fulfillment Policy** - Determines how long holds remain on the hold shelf waiting for pickup

Both policies include notifications, which can help keep your patrons informed of the status of their ILL request and the actions they need to take.

ILL requests follow the same process in circulation as hold requests. Patrons will be notified when their hold expires (the Default Hold Request Period has been met). The Default Hold Request Period for ILL items begins when the ILL request is sent to lenders and lasts until ILL staff mark the item as received from the lender. Depending on the request, it may take several days to weeks to find a lender for the ILL request and get the material.

Since the Hold Request Policy Map does not take into account location, you may want to add some wording to your standard Hold Request Expiration Notification Policy, such as “If you requested an interlibrary loan item, this item is still active in the system and you will be notified when it arrives from the lender. Your ILL request has not been canceled.”

The notifications sent as part of the Hold Fulfillment Policy include the notice sent to patrons when the item has been checked in by Circulation staff and is ready for pickup (Hold Pickup Notification Policy) and the notification sent to patrons who failed to pick up their items (Hold Shelf Expiration Notification Policy).

This table illustrates when hold notifications are sent:

<table>
<thead>
<tr>
<th>Situation</th>
<th>Hold policy and notification policy applied</th>
<th>Considerations</th>
</tr>
</thead>
</table>
| Hold request expires before the ILL item is received from the lender | Hold Request Policy  
- Hold Request Expiration Notification Policy |  
- The Hold Request Policy Map does not consult location  
- Use standard hold policy  
- Add special wording to notification regarding ILL requests. |
| Hold request is fulfilled (the ILL item has been received from the lender and is checked in by Circulation staff) | Hold Fulfillment Policy  
- Hold Pick Up Notification |  
- Indicate in the Hold Pick Up Notification that the item has been received through ILL  
- Consider fewer days allowed to sit on the hold shelf |
| The patron fails to pick up the ILL item | Hold Fulfillment Policy  
- Hold Shelf Expiration Notification Policy |  
- May want to send a daily reminder until the item is picked up  
- Only one expiration notification is allowed |

**Final tips and reminders**

Think about how to take advantage of the benefits of WorldShare Interlibrary Loan and WorldShare Circulation when considering how to best integrate the modules.
- The ILL Request ID is a unique number which can serve as the temporary item barcode when marking the item as received from the lender. This creates an easy connection between the system if you need to research the request and its circulation in more detail (including archived requests).

- Weigh general hold policies with your ILL policies. Consider how you can best balance policies so there will be fewer exceptions during the integration process.

- Customize notifications so that patrons know the message relates to an outstanding ILL item.

- Encourage patrons to check My Account in WorldCat Discovery to track their ILL requests via the Holds tab.

**See also:**

Exception processing (page 152)

Integration workflow (page 143)

Set up WorldShare Interlibrary Loan and WorldShare Circulation integration (page 137)
Categories and queues

The following tables describe the queues that make up the categories in WorldShare Interlibrary Loan and the actions you can take from the respective queues.

Borrowing Requests

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Borrower Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE Alert</td>
<td>Borrower alert category is present when a lender has entered text into the AE Alert field on the workflow.</td>
<td>Mark as received</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not Received</td>
</tr>
<tr>
<td>NEW FOR REVIEW</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not Reviewed</td>
<td>All requests that are brand new to the system. No one in your library has yet viewed these requests.</td>
<td>Send Request</td>
</tr>
<tr>
<td></td>
<td>Note: When a user views a request in this category, its status changes to Reviewed.</td>
<td>Mark Unread</td>
</tr>
<tr>
<td></td>
<td>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 .</td>
<td>Cancel Request</td>
</tr>
<tr>
<td>Reviewed</td>
<td>All requests that are new to the system, but have been viewed (reviewed) by your staff. These requests are electronically-generated, waiting for evaluation and/or further processing.</td>
<td>Send Request</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Purchase Request</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Open Access</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cancel Request</td>
</tr>
<tr>
<td>PRODUCED</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Awaiting Response</td>
<td>The request has been submitted by the borrowing library, and is awaiting a response from a potential lender.</td>
<td>Cancel Request</td>
</tr>
<tr>
<td>Direct Produced</td>
<td>These requests have been successfully forwarded through Direct Request for Direct-to-Profile processing during the past 4 system days.</td>
<td>Depends on the request’s status.</td>
</tr>
<tr>
<td>Conditional</td>
<td>Lender has stated conditions for lending in Lending Notes.</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cancel Request</td>
</tr>
<tr>
<td>In Transit</td>
<td>The lender has sent the item.</td>
<td>Mark as received</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not Received</td>
</tr>
<tr>
<td>Not Received</td>
<td>The Borrower has not received an item sent by Lender and responded No to Received?</td>
<td>Mark as received New</td>
</tr>
<tr>
<td>Unfilled</td>
<td>No Lender could supply the item.</td>
<td>New</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cancel Request</td>
</tr>
<tr>
<td>Queue</td>
<td>Description</td>
<td>Borrower Action(s)</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td>Received?</td>
<td>The borrower has not yet marked an item as received and the system is asking if it's an oversight.</td>
<td>Mark as received Not Received</td>
</tr>
<tr>
<td>Expired</td>
<td>No Lender could supply the item prior to the <strong>Need Before</strong> date.</td>
<td>Cancel Request</td>
</tr>
</tbody>
</table>

**RECEIVED**

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received/In Use</td>
<td>The Borrower received item from Lender, and it is with the requesting patron.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Renewal Requested</td>
<td>The Borrower wants to renew the loan, and is awaiting a response from the lender.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Renewal Approved</td>
<td>The Lender agreed to renew a loan.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Renewal Denied</td>
<td>The Lender did not renew the loan.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Overdue</td>
<td>The item is 14 or more system days overdue.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Recalled</td>
<td>The Lender wants the item returned immediately, or the Lender has sent you an erroneous <strong>Yes</strong>.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Received but Missing</td>
<td>The Lender has marked this item as missing. The request will age after 180 days.</td>
<td></td>
</tr>
</tbody>
</table>

**RETURNED**

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned</td>
<td>The Borrower has returned the item.</td>
<td></td>
</tr>
<tr>
<td>Returned but Missing</td>
<td>The Borrower has returned the item, but the Lender did not receive it.</td>
<td></td>
</tr>
</tbody>
</table>

**Lending Requests**

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New - Copies</td>
<td>Copy requests that were created when a Borrower submitted a completed workform, and the request moved through the Lender string sequentially.</td>
<td>Yes No Conditional</td>
</tr>
<tr>
<td>Queue</td>
<td>Description</td>
<td>Lender Action(s)</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> When using the Print All feature to print New - Copies requests, a user has the option to use the default setting and auto-update all requests printed to <em>Considering</em> or to turn auto-update off and retain the <em>New</em> status. For more information see Auto-update with Print All (page 88).</td>
<td></td>
</tr>
<tr>
<td><strong>New - Loans</strong></td>
<td>Loan requests that were created when a Borrower submitted a completed workform, and the request moved through the Lender string sequentially.</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> When using the Print All feature to print New - Loans requests, a user has the option to use the default setting and auto-update all requests printed to <em>Considering</em> or to turn auto-update off and retain the <em>New</em> status. For more information see Auto-update with Print All (page 88).</td>
<td></td>
</tr>
<tr>
<td><strong>Considering - Copies</strong></td>
<td>Copy requests that you have already reviewed.</td>
<td></td>
</tr>
<tr>
<td><strong>Considering - Loans</strong></td>
<td>Loan requests that you have already reviewed.</td>
<td></td>
</tr>
<tr>
<td><strong>Conditions Accepted</strong></td>
<td>The Borrower has agreed to the condition stipulated.</td>
<td></td>
</tr>
</tbody>
</table>

**SUPPLIED**

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Shipped/In Transit</strong></td>
<td>The Lender has sent the item.</td>
<td>Recall item</td>
</tr>
<tr>
<td><strong>Not Received</strong></td>
<td>The Borrower has not received an item sent by Lender and responded <em>No</em> to <em>Received</em>?</td>
<td></td>
</tr>
<tr>
<td><strong>Recalled</strong></td>
<td>The Lender wants the item returned immediately, or the Lender has sent you an erroneous Yes.</td>
<td></td>
</tr>
<tr>
<td><strong>Overdue</strong></td>
<td>Item is 14 or more system days overdue.</td>
<td></td>
</tr>
<tr>
<td><strong>Renewal Requested</strong></td>
<td>The Borrower wants to renew the loan.</td>
<td></td>
</tr>
<tr>
<td><strong>Received/In Use</strong></td>
<td>Request has been updated to <em>Received</em> within 7 days of <em>Shipped date</em> for copies, and 14 days for loans.</td>
<td>Recall item</td>
</tr>
<tr>
<td><strong>Received but Missing</strong></td>
<td>The Borrower has received the item, but the Patron has lost it.</td>
<td>Return item</td>
</tr>
</tbody>
</table>

**RETURNED**
<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action (s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned/In Transit</td>
<td>The Borrower has returned the item.</td>
<td>Checked-in/Complete Not Returned</td>
</tr>
<tr>
<td>Returned/Complete</td>
<td>Request has shown a status of Returned for 30 system days or longer.</td>
<td>Checked-in/Complete Not Returned</td>
</tr>
<tr>
<td>Returned but Missing</td>
<td>The Borrower has returned the item, but the Lender did not receive it.</td>
<td>Checked-in/Complete</td>
</tr>
</tbody>
</table>

### Purchasing Requests

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action (s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>REVIEW FOR PURCHASE</td>
<td>Lists items the Borrower is considering purchasing.</td>
<td></td>
</tr>
<tr>
<td>ON ORDER</td>
<td>Lists items the Borrower wishes to purchase.</td>
<td>Mark as Received Cancel Request</td>
</tr>
<tr>
<td>RECEIVED?</td>
<td>The Borrower has not received an item sent by a vendor and responded No to Received?</td>
<td>Yes No</td>
</tr>
</tbody>
</table>
Days To Respond

WorldShare Interlibrary Loan automates variable lender aging (previously supported by Enter My Symbol Twice/EMST) through integration with the Days To Respond setting in the OCLC Policies Directory. This enhancement saves time for your ILL staff and keeps your ILL requests moving as quickly as possible to potential lenders. **Note**: Days To Respond settings from the Policies Directory are displayed only in WorldShare Interlibrary Loan and ILLiad.

Lenders' Days To Respond settings in the Policies Directory display in staff workforms and holdings displays. In addition, WorldShare Interlibrary Loan uses the Days To Respond setting from the Policies Directory when you select a lender that has set this value. WorldShare Interlibrary Loan automatically provides lenders with the appropriate number of days to respond, based on the type of request (Copies or Loans) and the number of days to respond (1, 2, 4, 8, 12, 16 or 20), as set in the Policies Directory. **Note**: In Days to Respond, a day is defined as one calendar day, not a 24 hour period. So, whether you receive a request at 8:00 am or 10:00 pm, if your Days To Respond is set to 1, if you do not respond by midnight, the request will advance to the next lender.

**Note**: If a lender changes the Days To Respond while the request is active, the new value will take effect immediately.

For a video tutorial, see [Lender: Set Days to Respond in ILL Policies Directory](#) (517 minutes).

How to prepare

Choose whether your library uses the default of four days to respond, or set a value of 1, 2, 8, 12, 16 or 20 days in the Policies Directory.

OCLC Policies Directory

Add or update your library’s information in the Policies Directory. You may access the Policies Directory directly from link on the WorldShare Interlibrary Loan Home screen.
To edit your Days To Respond:
1. Once logged in to the Policies Directory, select the Profile tab.
2. Click Edit next to the Days To Respond field. The Edit Profile pop-up window appears.
3. Under Days To Respond, select your preferred setting for Copies and Loans.
4. Click Save to save your changes, or click Cancel to start over. The window closes and a confirmation message appears.

To search for lenders by Days To Respond:
1. Once logged in to the Policies Directory, use the Search options in the left column.
2. Click the drop-down arrow next to the Days To Respond field for Copies or Loans. A window appears.
3. Select the value for the number of days you wish to search.
4. Click Search. A list of lenders appears.

WorldShare Interlibrary Loan
A library’s Days To Respond will be listed on the Holdings screen in a new Days To Respond column. Note: Days To Respond are color coded to show different daily increments.

Days to respond will also be listed under Lending Libraries on the request screen, for any library in the Lender String:
Formats

These formats are available:

**Note:** Not all formats are available for all items.

<table>
<thead>
<tr>
<th>Format</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archival Material</td>
<td>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.</td>
</tr>
<tr>
<td>Article</td>
<td>Text that is part of a larger item such as conference papers, chapters, or articles.</td>
</tr>
<tr>
<td>Audiobook</td>
<td>Books for use on audio devices. Includes CD, eAudiobook, LP and cassette.</td>
</tr>
<tr>
<td>Computer File</td>
<td>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.</td>
</tr>
<tr>
<td>Game</td>
<td>Items or sets of items designed for play according to prescribed rules and intended for recreation or instruction. Includes video games, puzzles and simulations.</td>
</tr>
<tr>
<td>Image</td>
<td>A physical likeness or representation in either print or electronic format.</td>
</tr>
<tr>
<td>Interactive Multi-</td>
<td>A multimedia system in which related items of information are connected and can be presented together.</td>
</tr>
<tr>
<td>Media</td>
<td></td>
</tr>
<tr>
<td>Internet Resource</td>
<td>Websites with online documents, graphics, systems or services. Includes downloadable images.</td>
</tr>
<tr>
<td>Journal/Magazine</td>
<td>Serial publications such as periodicals, annuals, journals, memoirs, proceedings, monographs, eJournals or eMagazines.</td>
</tr>
<tr>
<td>Kit</td>
<td>Mixture of various components issues as a unit and intended primarily for instructional purposes. 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.).</td>
</tr>
<tr>
<td>Map</td>
<td>Maps, map manuscripts, globes, atlases, aeronautical charts, navigational charts, celestial charts, remote-sensing images, computer-generated maps, eMaps, and other cartographic material.</td>
</tr>
<tr>
<td>Music</td>
<td>Forms of music such as CD, eMusic, LP, or cassette.</td>
</tr>
<tr>
<td>Musical Score</td>
<td>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.</td>
</tr>
<tr>
<td>Newspaper</td>
<td>Serial newspaper publications. Includes eNewspaper.</td>
</tr>
<tr>
<td>Object</td>
<td>Physical item, either tangible or visible.</td>
</tr>
<tr>
<td>Toy</td>
<td>Material objects for children or others to play with, often an imitation of some familiar object (e.g., a</td>
</tr>
<tr>
<td>Format</td>
<td>Examples</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>plaything or something contrived for amusement rather than for practical use). Use for puppets.</td>
<td>Video Includes Blu ray, eVideo, DVD, Film, VHS.</td>
</tr>
</tbody>
</table>
## Request aging

OCLC counts standard working days (Monday-Friday) as system days/working days. OCLC does not count Saturdays and Sundays as system days/working days.

<table>
<thead>
<tr>
<th>Type of request</th>
<th>Aging days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expired</td>
<td>7</td>
</tr>
<tr>
<td>Any problem status (Complete?, Not Received, etc.)</td>
<td>180</td>
</tr>
<tr>
<td>Review</td>
<td>24</td>
</tr>
<tr>
<td>Unfilled</td>
<td>7</td>
</tr>
<tr>
<td>From Returned to Complete?</td>
<td>30</td>
</tr>
<tr>
<td>From Received to Overdue (only applicable to Loans)</td>
<td>14 days after Due Date</td>
</tr>
<tr>
<td>From In Transit to Received? (Copy)</td>
<td>7</td>
</tr>
<tr>
<td>From In Transit to Received? (Loan)</td>
<td>14</td>
</tr>
<tr>
<td>From On Order to Received?</td>
<td>21</td>
</tr>
<tr>
<td>Conditional</td>
<td>4</td>
</tr>
<tr>
<td><strong>Note:</strong> Sending a <strong>Conditional</strong> response resets the clock and gives the requesting library four days to respond.</td>
<td></td>
</tr>
<tr>
<td>Standard request: update to Yes, No or Conditional</td>
<td><strong>Number of days specified in Days To Respond</strong></td>
</tr>
<tr>
<td><strong>Note:</strong> WorldShare Interlibrary Loan will not age a request to the next lender until the current lender’s <strong>Days To Respond</strong> have passed. If you don’t act on a request in that time, the system will automatically send it on to the next library in the string or, if there aren’t other libraries, it will become an <strong>Unfilled</strong> request.</td>
<td></td>
</tr>
<tr>
<td>Requests processed on weekends (non-referral days)</td>
<td>Next working day/system day</td>
</tr>
<tr>
<td>Requests process on holidays (non-referral days)</td>
<td>Next working day/system day</td>
</tr>
<tr>
<td><strong>Note:</strong> OCLC does not count the following holidays for aging requests:</td>
<td></td>
</tr>
<tr>
<td>- New Year’s Day</td>
<td></td>
</tr>
<tr>
<td>- Thanksgiving Day</td>
<td></td>
</tr>
<tr>
<td>Type of request</td>
<td>Aging days</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td></td>
<td>• Day after Thanksgiving</td>
</tr>
<tr>
<td></td>
<td>• Christmas Eve</td>
</tr>
<tr>
<td></td>
<td>• Christmas Day</td>
</tr>
<tr>
<td></td>
<td>• New Year’s Eve</td>
</tr>
</tbody>
</table>
Resource sharing features

This following table lists how features previously found in the WorldCat Services Administrative Module appear in OCLC Service Configuration, as well as how new features display. Resource sharing features in Service Configuration are found under WorldShare ILL on the left navigation. Specific locations are noted below.

Features list

Note: Institutions using WorldCat Local may already have existing settings in Service Configuration.

<table>
<thead>
<tr>
<th>Feature/Function in the administrative module of WorldCat Services (Resource Sharing options)</th>
<th>Module/location in Service Configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron ILL Settings</strong></td>
<td></td>
</tr>
<tr>
<td>ILL Processing</td>
<td></td>
</tr>
<tr>
<td>ILL Access</td>
<td>Your access to WorldShare ILL will be pre-set.</td>
</tr>
<tr>
<td>ILL Settings for Databases</td>
<td>Functionality TBD.</td>
</tr>
<tr>
<td>WorldCat ILL Access</td>
<td>Functionality TBD.</td>
</tr>
<tr>
<td>Patron ILL Request Form</td>
<td>WorldShare ILL &gt; Patron Request Workform (Future enhancement)</td>
</tr>
<tr>
<td>ILL via E-mail</td>
<td>Will not be re-implemented.</td>
</tr>
<tr>
<td>ILL Request Management</td>
<td>(Future enhancement)</td>
</tr>
<tr>
<td><strong>Staff ILL Settings</strong></td>
<td></td>
</tr>
<tr>
<td>Authorizations</td>
<td>Different authorization process in WorldShare ILL</td>
</tr>
<tr>
<td>Resource Sharing Options</td>
<td>WorldShare ILL &gt; Interlibrary Loan Options</td>
</tr>
<tr>
<td>Persistence</td>
<td>WorldShare ILL &gt; Interlibrary Loan Options</td>
</tr>
<tr>
<td>Knowledge Base</td>
<td>WorldShare ILL &gt; Interlibrary Loan Options</td>
</tr>
<tr>
<td>Electronic Delivery Options</td>
<td>WorldShare ILL &gt; Borrower Data</td>
</tr>
<tr>
<td>Constant Data Records</td>
<td>WorldShare ILL &gt; Borrower Data/Lender Data</td>
</tr>
<tr>
<td>Saved Notes</td>
<td>(Future enhancement)</td>
</tr>
<tr>
<td>Custom Holdings Groups</td>
<td>WorldShare ILL &gt; Custom Holdings Groups</td>
</tr>
<tr>
<td>Custom Holdings Paths</td>
<td>WorldShare ILL &gt; Custom Holdings Paths</td>
</tr>
<tr>
<td>Custom Holdings Symbols Search</td>
<td>WorldShare ILL &gt; Custom Holdings Groups</td>
</tr>
<tr>
<td>Direct Request Profiles</td>
<td>WorldShare ILL &gt; Direct Request Profiles</td>
</tr>
<tr>
<td><strong>New Features in Service Configuration</strong></td>
<td></td>
</tr>
<tr>
<td>Item Availability</td>
<td>WorldShare ILL &gt; Interlibrary Loan Options</td>
</tr>
<tr>
<td>New Features in Service Configuration</td>
<td>(Future enhancement)</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Purchase Options</td>
<td>WorldShare ILL &gt; Purchase Options</td>
</tr>
</tbody>
</table>
Search my library's online catalog

In WorldShare Interlibrary Loan, you can enable links to your library's catalog. Enabling these links can save time for your ILL staff and potentially increase fill rates for requests. With these links enabled, staff can confirm the availability of requested items.

Enable links to your library's online catalog

To enable your links, or make sure the links to your library's catalog are working as they should, you can either sign in to OCLC Service Configuration to review and update your links, or let OCLC staff make the updates for you. You will need to know the base URL for your library's online catalog, in addition to specific URLs for ISBN, ISSN, and OCLC number search results in your catalog.

Option 1: Update library catalog links yourself

If you already have an account to access Service Configuration, follow the steps below to update your links. Note: Settings may take up to 24 hours to appear. For a video tutorial on configuring links to your library's catalog, see Configure Links to Your Library's Online Catalog.

To enable or update your catalog links:

1. Sign in to Service Configuration.
2. On the left navigation, click WorldCat Registry > Online Catalog.
3. On the Online Catalog screen, under Online Catalog Availability, select Available Online.
4. Under Suggest Links, you will see the option to have the WorldCat Registry generate the links needed in the Online Catalog section below. Enter a sample URL from your catalog in the Suggest Links field, and click Suggest Links. WorldCat Registry will identify your local system vendor and will automatically populate the fields under Online Catalog.
5. Check over the links to ensure they are correct. You can test the links by clicking Test.
6. For the field Online Catalog Direct to ISBN, select Use 10 digits or Use 13 digits, depending on how the ISBN is searched in your local catalog. Click Test to test the link. A window will appear with an ISBN number. Click Test to search for the ISBN in your catalog.
7. Determine if you want to use the link supplied in the Online Catalog Direct to OCLC Number field. If the OCLC number is not consistently formatted and indexed in your local catalog, you may want to leave the field blank.
8. If you do want to use the OCLC Number link:
   a. If you want to add leading zeros to the OCLC search term because your library’s catalog does this, select the Yes check box in the Add Leading Zeroes to the OCLC search Term field.
   b. In the OCLC Number Prefix field, select either Do not add prefix to the OCLC Number, Add ocn/ocm prefix to the OCLC Number, or Add the following custom prefix to the OCLC Number, depending on whether prefixes are added to OCLC numbers in your catalog.
c. If you selected Add the following custom prefix to the OCLC Number, enter your **custom prefix** in the Custom Prefix field.

d. Click **Test** to test the link.

9. Optional. In the Online Catalog Direct to Multiple OCLC Numbers field, provide a **URL** to conduct an OR search against the local catalog for multiple OCLC numbers which identify the same record.

10. Click **Save Changes**.

**Option 2: Ask OCLC staff to update links to your library's catalog**

OCLC staff can set up links to your library's catalog for you. Complete the [catalog link information form](#), and OCLC will process your information. Your updated library catalog link information will be active in WorldShare Interlibrary Loan by the end of the business day following your submission.

**Using your catalog links in WorldShare Interlibrary Loan**

When you have enabled your online catalog links, you can search through your catalog for requested items as a borrower or lender.

**Borrowers**

Borrowers can link from a staff workform to confirm local availability before initiating a request and can link to catalogs of potential lenders to determine availability before including them in the lending string.
Lenders

Lenders can link to their own catalogs from lending requests to quickly determine whether requested items are available for loan. For example, you will see the following option for linking to library catalogs.

See also:

Linking from search results to your OPAC
Online Catalog
Contact OCLC Support

If you have questions or need further information, contact OCLC Support.