Process requests-Borrower

Learn how to process New For Review and Open Access requests, how to receive items from In Transit and Received status, the options for unfilled requests, and how to respond to conditionals from lenders in WorldShare Interlibrary Loan.

Process New For Review requests

Follow the instructions below to process New for Review requests.

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.
   - Requests under Not Reviewed are requests that have not been seen by your staff. These requests originate from a source outside of your system.
   - 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:
   1. Click the item you want to request. Bibliographic information appears. If applicable, click Apply data, OR
   2. 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.

   Note: The citation information for copy requests will display at the top of the Holdings screen and will remain as you scroll through potential lenders. Compare the lenders holding information in the Holdings column to the citation information of the copy request to be sure the lender has the exact volume needed to fulfill the 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.

Filter holdings to build a lender string

When viewing holdings for an item, you can filter the list of holdings to assist in building a lender string or—in some cases—a lender string can be built automatically.

Filter by Custom Holdings Path

You can filter holdings by a custom holdings path when the item requested is a book or other monograph as well as for copy requests where:

- The patron did not specify the year or volume.
- The holding libraries do not specify their year or volume-level holdings.

1. Select a custom holdings path from the drop-down list.
2. Click Go. The results list identifies the group of the holding library in the Group column. Groups are also delineated by a heavy gray line.
3. Click Yes in the Supplier column to add lenders to the string. You can add up to 15 lenders from the results list.

Filter with Year and Volume

When viewing holdings for a journal or other periodical, you can filter the list of holdings by year or year and volume.
1. Enter a **year** in the Year field  
   **Or**  
   Enter a **year** in the Year field and a **volume** in the Volume field.

2. Click **Go**. The results list is split into three sections, delineated by a heavy gray line:
   - Libraries that hold the year/volume
   - Libraries where local holdings are not available
   - Libraries that do not hold the year/volume

3. Click **Yes** in the Supplier column to add lenders to the string. You can add up to 15 lenders from the results list. A lender string will be added based on libraries that hold the year/volume.

### Watch a video

**New For Review requests (4:54)**

Learn what New For Review requests are and how to manage requests in the New For Review category in your OCLC interlibrary loan service.

---

### Process Open Access requests

Follow the instructions below to process Open Access requests.

**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.
Caution: 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.

**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.

**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.
   
   Caution: 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.

**Watch a video**

Borrower: Processing requests (5:04)

This video covers how a borrowing library can receive, renew, and return items (including recalled items) requested through ILL.

Media, iframe, embed and object tags are not supported inside of a PDF.
Mark a request as Lost

If a received item is missing, mark the request as Lost to alert the Lending library.

To mark an item as Lost:

1. From the Borrowing Requests category, click Received.
   - Items can be marked as Lost from the Received/ In Use, Renewal Requested, Renewal Approved, Renewal Denied, Overdue, and Recalled queues.
2. Click the request ID or Title to display a request.
3. Select Lost on the request detail screen.

The request status is updated to Lost and the request moves to the Received but Missing queue for both the borrowing library and the lending library.

If the item is recovered, return or renew the item. See Return items for more information.

Unfilled requests

If a request is not filled by any of the lenders in the Lender String, the request will age to Unfilled. Options for Unfilled requests include Resend Request, Change Fulfillment Type, or Cancel Request.

To resend the request:

1. Click on the request ID of the unfilled request.
2. Under Lending Libraries, enter additional lenders into the Lender String.
   - The History appears below to indicate the lenders who have previously received this request and their response.
3. Optional. Edit the bibliographic data in the Request Details, Borrowing Notes, Billing Notes, or IFM Maximum Cost.
   - Search options appear for Title, Author, ISSN, ISBN, and OCLC Number fields.
   - The Preferred edition field is not editable.
4. From the request screen, click Resend Request.
5. The request will move to Awaiting Response.

You can change the Fulfillment Type of an unfilled request to a Purchase Request.

To change the fulfillment type of the request:

1. Locate the request you want to change.
2. In the request, click Change Fulfillment Type and select Purchase Request.
3. The request moves to the new fulfillment type queue.
Respond to conditionals from lenders (from Produced status)

Follow the instructions below to respond to conditionals.

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.

**Watch a video**

Borrower: Responding to conditionals (4:12)

This video covers how a borrowing library respond to conditionals sent by lenders.

**Watch a video**

Requests: Expired, overdue, or unfilled (7:23).

This video covers how to proceed with requests with the status of expired, overdue, or unfilled.