Requests
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Find details about Interlibrary Loan requests and closed requests in the User Portal. Also, learn how to submit and copy an ILL request in the User Portal for Tipasa patrons.

Interlibrary Loan Requests

From the Interlibrary Loan Requests accordion, patrons can create new requests, cancel or renew requests (if enabled), and view articles from Article Exchange, knowledge base, or Open Access links.

1. Active requests

This message will display if your library has set a limit for patrons’ active requests. Each of your patrons will be unable to request more than the limit allowed by your library. For example, in the above image, patrons cannot have more than 100 active requests. If they have 100 active requests, they will be unable to create or submit new requests. They will have to wait until one of their active requests has been completed or canceled in order to submit new requests. Requests with a status of Complete do not count against the active request limit.
• See Patron Request Management for information on configuring patron request limits.

• If patron request limits are enabled, and a patron has reached their limit, the Create Request button will be disabled. If they try to submit a request through your online catalog, using OpenURL, the Submit Request button on the form will also be disabled.

2. Create Request

Patrons can click Create Request to create an interlibrary loan request. The forms that you configure in Service Configuration on the Patron Request Workforms screen will be accessible to the patrons on the Submit an Interlibrary Loan Request screen.

3. Request ID

The Request ID for the patron’s request is listed in the Request ID column. Click the Request ID to see the Request Details.

4. Title

The Title column displays the title (or journal title and article title), author, and format of the item requested by the patron. If you update this information via Tipasa, the title information in the user portal will also be updated.

5. Status

The Status column displays the status of the request. Patrons can also access Article Exchange, knowledge base, or open access links. To view a copy, patrons should click Available to view. The statuses displayed to patrons are a simplified set and may have different names than those in librarian-facing administrative settings. For information on how statuses appear in Tipasa and the user portal, see ILL statuses.

6. Due Date

By default, the Display patron due date setting in the Patron Settings module of the OCLC Service Configuration is set to On. If this setting is turned off, the due date and overdue status will not display in the User Portal. See ILL Statuses for more information.

7. Pickup Location

The Pickup Location column displays the patron’s preferred pickup location. This is where they will pickup any physical copies they receive. Pickup locations can be added to any Article, Book, and Other Forms you configure. See Configure your patron request forms for details on how to configure the patron request forms.

8. Sort by

Patrons can use the options in the Sort by list to determine how their requests are sorted. They can sort by:

• Most Recent
• Pickup Location (A - Z)
• Pickup Location (Z - A)
• Request ID (Low - High)
• Request ID (High - Low)
• Status (A - Z)
• Status (Z - A)
• Title (A - Z)
• Title (Z - A)

9. Cancel and renew

If you have enabled the cancel and/or renew buttons, they will show in this column. Patrons are able to cancel items until they have been shipped by the lender. Patrons can renew loan items after they have checked the item out.

• For information on configuring these features, see Patron Request Management.
• If enabled, the Cancel button appears if the user portal status is Submitted. To cancel a request, click Cancel.
• If enabled, and the request is a loan request, the renew button appears if the user portal status is Received by Library or Due. To renew a request, click Renew.
  ◦ Once the Patron Due Date has passed, the request will appear as Overdue in the User Portal and the Renew option will not be available. Staff will be able to renew materials for the user in the staff interface.
• For more information on statuses, see ILL statuses.

Closed requests

By default, requests will remain in the User Portal for 1 month after they are closed. To alter this setting:

1. Navigate to the WorldShare ILL > Patron Settings module of the OCLC Service Configuration.
2. In the Patron Data Retention section, select the number of months to retain patron data.
   ◦ The maximum time for retention is 60 months.

Once a request is closed for the specified amount of time, the patron data associated with the request will be purged and the closed request will no longer be available to the patron in the User Portal. Please see Patron Data Retention for more information.

Request Details

The Request Details screen shows detailed information about the patron's request. If you change any information in the patron's request in the staff interface, it will be reflected in the user portal.
1. Request Details

The top of the Request Details screen contains information about the patron's request. Patrons can also cancel or renew requests. These buttons only display if you have turned them on in Service Configuration. See Patron Settings for more information. If enabled, the Cancel button appears if the user portal status is Submitted. To cancel a request, click Cancel. If enabled, and the request is a loan request, the renew button appears if the user portal status is Received by Library or Due. To renew a request, click Renew.

2. Notifications

The Notifications accordion displays all of the notifications that have been sent to the patron about their interlibrary loan requests. Notifications must be set up by your library in order for your patrons to receive them. Your can set up notifications in OCLC Service Configuration. For more information on notifications, see Set up Notifications.

3. Notes

The Notes accordion displays any notes about the patron's request. It can contain the following information: Patron need by date. The patron need by date will be displayed in this format: NB:YYYYMMDD Max cost amount. The Patron Max cost that the patron entered on the request form. This is the maximum amount they are willing to pay for the request item. The max cost amount will be displayed in this format: MC: ##.##
4. Additional Information

Any additional information about the patron's request appears here.

Submit an Interlibrary Loan Request

When patrons click Create Request under Interlibrary Loan Requests, they will be taken to the Submit an Interlibrary Loan Request screen. The Patron Request Workforms you configure in Service Configuration will appear on this screen. Patrons can use the forms you have enabled to submit a request. The Article request form is the default form. Patrons must click Book or Other in order to fill out a different request form.

Add direct links to your library website to point users toward specific forms for making their ILL requests.

Find your registry ID:

1. Sign in to OCLC Service Configuration
2. Navigate to the WorldCat Registry > Identifiers
3. Find the Identifier Type WorldCat Registry ID and the associated number

Use the following formats to create your request URL:

- Article https://registryid.account.worldcat.org/profile/route/workform-article
- Other https://registryid.account.worldcat.org/profile/route/workform-other

Note: You will need to substitute your institution's registry ID to customize the direct links. If you have customized your patron request form names, the direct link name will not reflect those changes.
Copy an Interlibrary Loan Request

When a patron wants to request an item they have previously requested because their check out expired or the request went unfilled, they can copy the request from the Interlibrary Loan Requests accordion.

1. From the Interlibrary Loan Requests accordion, locate the request you want to copy and click Copy. Or
   From the Request Details screen, click Copy.

   After you click Copy, a new request form will be generated with the details of the existing request cloned.

2. Update any fields and submit as a new request.

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Copyright Section

Declaration for NZ copyright (SW)

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