Set up 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 copy 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.

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

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<thead>
<tr>
<th>DONE</th>
<th>SERVICE CONFIGURATION ACTION</th>
<th>DESCRIPTION</th>
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<tr>
<td></td>
<td>Step 1: Create a new branch</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>
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<td></td>
<td>Step 2: Update the Holding Codes Translation Table</td>
<td>Add the Branch Registry ID to your list of holdings locations and connect it with WorldShare Circulation.</td>
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<td></td>
<td>Step 3: Update circulation policies</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...</td>
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<tr>
<td><strong>Step 4</strong>: Edit your patron request form</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>
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</tr>
<tr>
<td><strong>Step 5</strong>: Activate integration</td>
<td>After you have completed the above steps, turn on WorldShare Interlibrary Loan and WorldShare Circulation integration.</td>
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**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 processing center.

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 for the integration to work properly.
   - **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.
   - **Definite Match**
   - **Likely Match**
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

Select the WS ILL branch to check in the temporary item at the end of the loan and set the item’s status to Unavailable.
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 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
   ◦ Fulfil 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 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:

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<th>POLICY</th>
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<th>CONSIDERATIONS</th>
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<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>
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<tr>
<td>POLICY</td>
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</tr>
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</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>Loan Policy and Loan Policy Map</td>
<td>Yes</td>
<td>Do you associate different billing, loan periods, renewals, and recalls for ILL items? 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. Note: At checkout, the Due date will revert to the more restrictive of either the Circulation Policy or the due date of the ILL request.</td>
</tr>
<tr>
<td>Hold Limit Policy and Hold Limit Matrix</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>Hold Request Policy and Hold Request Policy Map</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>Hold Fulfillment Policy and Hold Fulfillment Policy Map</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? Note: When received, the hold expiration date will be the more restrictive of either the Hold...</td>
</tr>
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</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 that 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 forms.

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.