Integration Workflow

Last updated: Fri, 03 Nov 2017 20:19:46 GMT

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 and integration.

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

There are nine steps in the integration workflow:

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

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.

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 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.
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 Default hold request period exceeded.
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. Email notifications are sent at the top of every hour.)

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 button 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.

Unfilled requests

If a request is canceled, unfilled, expires, or is changed from a Loan to a Copy:

• Delete the temporary item in the Circulation module. Please see Delete item for more information.
• Confirm the hold is removed from the patron's account. Please see Edit or delete hold for more information.

Watch a video

Workflow integration: WorldShare ILL and Circulation (13:48)

This video provides a step-by-step walk-through and demonstration from patron request in WorldCat Discovery through WorldShare Interlibrary Loan and Circulation to process an interlibrary loan request and check out that item in circulation.

Learn more in a training course: Workflow Integration: ILL and Circulation