Requests

Find details about the Requests tab of My Account where a library user can view their active and closed requests and create new requests.

From the Requests tab, library users can view active and closed requests, create new requests, recreate previous requests, or renew and cancel requests (if enabled). See Patron Request Management for information on enabling the renew and cancel options. They can also view articles from Article Exchange, knowledge base, or Open Access links, as well as purchase requests.

The Requests tab will load 25 requests at a time. Use the Show more option at the end of the list of requests to view more if they are available.

<table>
<thead>
<tr>
<th>Title</th>
<th>Submitted date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harry Potter and the Half-Blood Prince</td>
<td>04/07/2022</td>
<td>Submitted</td>
</tr>
<tr>
<td>Clio.</td>
<td>12/09/2019</td>
<td>In transit</td>
</tr>
</tbody>
</table>

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

WorldCat Discovery users:

- If the requested item has an OCLC number:
  - Cover art will display. Clicking the cover art will take the user to the item details in WorldCat Discovery.
  - The title is hyperlinked to the item record in WorldCat Discovery.
- If the item does not have an OCLC number, default cover art will display and no link to WorldCat Discovery is provided.
Submitted Date

The Requests screen is sorted by Submitted Date with the most recently submitted requests appearing first. The Request ID for the library user's request is listed in the Submitted Date column. Click the Request Details: [Request ID] to see the Request Details.

Request Details

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

The top of the Request Details screen contains the bibliographic information about the user's request.

2. Request Details

The Request Details section contains the information about the user's request, including the Request ID, Date Requested, and Pick Up Location.

3. Notes

The Notes section displays any notes about the user's request. It can contain the following information:

- 04/07/2022 10:40 AM - New request acknowledged (Email)

Keep request  Cancel request
4. Notification History

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

5. Keep request or Cancel request

Library users can also cancel requests which are still open. The Cancel request button only displays if you have turned it on in Service Configuration. See Patron Settings for more information. Requests with a status of Submitted can be canceled. To cancel a request, click Cancel request. To keep the request, select Keep request or close the window.

Status

The Status column displays the status of the request. The statuses displayed to users 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 My Account, see ILL statuses.

If the Display patron due date setting is enabled, the due date for the request will appear in this column after the item is received. Otherwise, the status of the request will be Received by Library.

Library users can also access Article Exchange, knowledge base, or open access links. To view a copy, users should click Click here to view item.

The user's preferred pickup location displays when an item is ready for pick up or In Transit. 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.

Renew Request

If the renew option is enabled, and the request is a loan request, the renew button appears on loan requests if status of the request is Received by Library or Due. To renew a request, click Renew request.

- Once the Patron Due Date has passed, the request will appear as Overdue in My Account and the Renew request 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.
- For information on configuring the renew option, see Patron Request Management.
Request Again

When a library user wants to request an item they have previously requested or a similar item, they can select Request again from the Status column. For example, users may want to recreate a request when the request went unfilled or to request a different edition of a previously requested item.

1. From the Requests tab, locate the request and select Request again from the Status column.
2. A new request form will be generated with the details of the existing request cloned.
3. Update fields as needed. See Create Request for more information.
4. Select Submit request.

Cancel Request

Library users are able to cancel hold requests while the request is Not ready for pickup. If the item is in transit to the pickup location or Ready for pickup, hold requests cannot be cancelled.

If enabled, library users are able to cancel ILL requests until they have been shipped by the lender. To display the Cancel requests button and allow users to cancel their requests, enable the Allow patrons to cancel ILL requests online setting in the Patron Request Management module of the OCLC Service Configuration.

To cancel a request:

1. Select the individual request or use the Select All option to cancel all requests.
   - Select All selects all the items available for selection that are visible on the page. If you have more than 25 items, select the Show More option to display the next 25 items and click the Select All checkbox. Only selected items visible on the page will be processed for cancellation.
2. Select Cancel requests.

OR

1. Select Request Details from the individual request's Submitted Date column.
2. Select Cancel request.

Note: Requests with a status of Submitted can be canceled. Requests that are not in this status cannot be selected individually and will not be selected if the Select All option is checked.

Create Request

To create a new request, library users click Create request. The forms that you configure in Service Configuration on the Patron Request Workforms screen will be accessible to the users on the Create Request screen. Users can use the forms you have enabled to submit a request. The Article request form is the default form. Users must click Book or Other in order to fill out a different request form.

See Patron Request Workforms for information about setting up the Article, Book, and Other request workforms.
Note: If your library has set a limit for user's active requests, a message will appear on the Create Request screen. The below message indicates users cannot have more than 50 active requests. If they have 50 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 that have been returned to the borrowing library by the library user are not counted against the active request limit. These include requests with a status of Complete, Returned, Returned Missing, or Shipped Missing.

You may have 50 active Interlibrary loan requests. You will be unable to submit more requests upon reaching this limit.

- See Patron Request Management for information on configuring patron request limits.
- If patron request limits are enabled, and a user 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.

Copyright compliance for non-US Libraries

Libraries in the Australia, Canada, New Zealand, Spain, and the United Kingdom can track patron acceptance of local copyright terms. Patron's must acknowledge the copyright terms in order to submit their request. To add copyright compliance and acceptance information to your patron request workform, please see Add copyright compliance and acceptance for non-US Libraries.

Closed requests

By default, requests will remain in My Account 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 user data.
   - The maximum time for retention is 60 months.

Once a request is closed for the specified amount of time, the user data associated with the request will be purged and the closed request will no longer be available to the user in My Account. Please see Patron Data Retention for more information.
Note: ILL Requests dated prior to August 2018 are not linked to the patron and are not retrievable by patron name, ID, or department.