WorldShare Interlibrary Loan

WorldShare Interlibrary Loan provides functionality that speeds fulfillment of interlibrary loan requests to save time for your staff and users.

• Get started

  Get started with WorldShare Interlibrary Loan.

  ◦ WorldShare ILL account roles
  ◦ Add a privacy notice
  ◦ Create a WorldShare ILL account
  ◦ ILL for management centers
  ◦ Prepare and plan
  ◦ Set or reset your password
  ◦ Sign in to Interlibrary Loan

• Article Exchange

  Article Exchange provides a single secure location where lending libraries can place requested articles for interlibrary loan. It allows users to upload files for pickup anywhere in the world. Only authorized users will be able to download the file.

  ◦ Article Exchange workflow
  ◦ Technical requirements

• Batch processing

  Use batch processing to receive, return, and complete requests for multiple items.

  ◦ Batch processing for borrowers
  ◦ Batch processing for lenders

• Borrowing Requests

  }
Create, manage and process borrowing requests.

- Borrowing Request fields
- Create and edit requests
- Email a copy of a request
- Process requests-Borrower
- Return items
- Search for requests

• Configuration

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Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. In Service Configuration, you can set your interlibrary loan options, print settings, borrower and lender constant data, custom holdings groups, direct request profiles, and purchase options.

- Interlibrary Loan Options
- Borrower Data
- Lender Data
- Custom Holdings Groups
- Custom Holdings Paths
- Direct Request Profiles
- Purchase Options
- Patron Request Workforms
- Print Settings
- Advanced Workflows
- Patron Settings
- Notifications
- External System Settings
- Tipasa WMS Integration

• Constant data

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This guide provides an overview of product features and related technologies. In addition, it contains recommendations on best practices, tutorials for getting started, and troubleshooting information for common situations.

- Constant data

• Discover Items

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When you click Discover Items on the left navigation, an Advanced Search form will open on the screen. Completing a basic search will pre-populate the Advanced Search form with the terms from the original search. You can also conduct a search using only the Advanced Search form.

- Search

- **Document suppliers**

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  The documentation in this section explains how to receive articles from document suppliers such as the British Library, Get It Now, and MyBib.

  - Get It Now (mediated service)
  - Use MyBib eL for delivering documents

- **Purchasing Requests**

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  The Purchase option allows you to track items you may wish to purchase, instead of borrowing via interlibrary loan.

  - Purchasing Requests

- **Interlibrary Loan Fee Management**

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  The Interlibrary Loan Fee Management (IFM) feature lets libraries reconcile resource-sharing charges and payments through their monthly OCLC invoice. IFM helps libraries save money on fee-based transactions and simplify the transaction process.

  - Configure IFM
  - Manage IFM

- **Lending Requests**

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  Create, manage and respond to lending requests.

  - Complete requests
  - Deflections
  - Edit lending requests
  - Email a copy of a request
  - Respond to requests
  - Search for requests

- **Print**

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With WorldShare Interlibrary Loan, you can print individual requests, all requests in a queue, add requests to the print queue to print out later, and queue book straps and shipping and return labels to be printed.

- Printing for Borrowers
- Printing for Lenders
- Printing for Purchasing Requests
- Print requests and manage print queue

- **WorldShare Circulation Integration**

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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.

- Exception Processing
- Integration Workflow
- Policy Considerations
- Set up integration

- **Reference**

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Additional resources for WorldShare ILL users.

- Categories and queues
- Days To Respond
- Formats
- ILL sources
- Notes
- Reports
- Request Aging
- Resource sharing features
- Search my library’s online catalog

- **WorldShare Interlibrary Loan release notes and known issues**

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Find WorldShare Interlibrary Loan release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

- 2019 WorldShare Interlibrary Loan release notes
- 2018 WorldShare Interlibrary Loan release notes

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan

Updated: Tue, 30 Jul 2019 02:16:13 GMT

Powered by
2017 WorldShare Interlibrary Loan release notes

- **Known issues**

- **WorldShare Interlibrary Loan training**
  
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  Find training on WorldShare Interlibrary Loan.

  - Live classes
  - Introduction to OCLC Interlibrary Loan
  - WorldShare ILL - Borrowing
  - WorldShare ILL - Lending
  - Workflow integration: ILL and Circulation
  - Exercises
  - Videos

- **Troubleshooting**
  
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  Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

  - After logging into WorldShare ILL, I do not see anything on the page
  - An article is listed as supplied from article exchange, but we have not received the article.
  - An ILL book I loaned came back damaged. What are the rules on damaged books?
  - Article is stuck in transit from article exchange, why is this happening?
  - As a borrower, should I cancel an unfilled request?
  - A request has a status of “Submitted,” what does that mean?
  - A request has this message: "This is an ISO-ILL request and cannot be processed in WorldShare ILL. Processing of this request must be completed in your local ISO-ILL management system." What does that mean?
  - Can an Unfilled request be removed from the Expired queue?
  - Can I change my Shipping Address for ILL?
  - Can I change the Currency and/or ILL fee after I have supplied the request?
  - Can the Borrower Resource Sharing Stats Report be run so it covers more than one month?
  - Can we retrieve a conditional message from a closed ILL request?
  - Can we return items from libraries in other states, that didn’t originate as a request WorldShare Interlibrary Loan?
  - Can WorldShare ILL Direct Request process requests automatically without going through the New for Review queue?
  - Can you block Interlibrary Loans by shelving location, and limit to just our WMS group?
  - Does OCLC have a OpenURL compatible webform that would allow our patrons to place WorldShare requests directly from the metadata search results in our ILS?
- Do I always ship InterLibrary Loan items back in their bags?
- Do I have to be a Lending Library in order to Borrow?
- Do I need to act on the requests that appear under "Borrowing" and "Lending in Quick Links to make them disappear?
- Do requests ever time out?
- Do we have to follow any OCLC Policies about places that do not return items to us?
- Failed to find item error when searching in WorldShare ILL
- How can I access my article after marking it received?
- How can I find Interlibrary loan contact information for another library
- How can I get my authorization number and password for Interlibrary Loan?
- How can I get past an Unable to load YUI error?
- How can I keep fines from accumulating on my WMS Interlibrary loan transactions?
- How can I renew my WSKeys
- How can I sort the loan request lists?
- How can I update the copyright compliance to CCG?
- How does the Schedule work with the ILL Policies Directory and if you choose a supplier status of yes or no?
- How do I become a Lender in Interlibrary Loan?
- How do I change a lending request status to lost?
- How do I change the name of my library in the Policies Directory?
- How do I create an overview of all my closed requests?
- How do I create a request if I can't use the request button?
- How do I find and delete barcodes created for temporary items?
- How do I find my WSKey?
- How do I get an IFM fee if the request was originally sent in an other currency?
- How do I produce a report itemizing the cost of each request processed in my local currency?
- How do I get IFLA vouchers?
- How do I get information about OCLC Reciprocal Faculty Borrowing?
- How do I log into OCLC Usage Statistics?
- How do I obtain OCLC ILL authorization credentials?
- How do I request a Book Chapter?
- How do I search for and create an article request?
- How do I see what ILL groups my library is affiliated with?
- How do I set up Usage Statistic Reports to be emailed to me?
- How do I stop my library from getting International Borrowing Requests?
- How do I stop requests when I'm out of the office for a while?
- How do I turn off email notifications?
How do I update the default borrowing library information?
◦ How do I update the email address and contact name for WorldShare ILL?
◦ How do we avoid getting any ILL requests sent over a break?
◦ How do we get Service Configuration accounts set up?
◦ How do we turn off all ILL lending requests?
◦ How do you deflect items with a Material Age of less than a year?
◦ How do you make a certain location non circulating for ILL?
◦ How is the shipped date determined?
◦ How long does an Unfilled request remain in the Expired queue?
◦ How to become a Non-Supplier in the ILL Policies Directory?
◦ How to configure IFM for lost book billing?
◦ How to create an eBook ILL request?
◦ How to edit Request Methods and Delivery Methods in the Policies Directory?
◦ Is it possible for the lender to edit the borrower’s shipping address on a submitted request?
◦ Is it possible to create a deflection policy to only loan to others in my region or state?
◦ Is it possible to have EBSCO ILL requests funnel directly into WorldShare ILL?
◦ Is it possible to reopen a Closed request to click the IFM checkbox so the charges go to IFM instead of being sent by invoice?
◦ Is there a way in WorldShare to refund an institution for a closed request?
◦ Is there a way to reply to a conditional request note from a potential lending library?
◦ Is there a way to retrieve a request that was inadvertently deleted?
◦ I accidentally clicked ‘returned’ instead of ‘renew’ on a request, how can I fix this?
◦ I accidentally hit “Yes” on an article request before I dropped the Article Exchange Article
◦ I accidentally hit the wrong reason for “No” when answering “can you supply” can I go back and change it?
◦ I accidentally marked a Book request as a Copy and the Borrower received it as closed and complete
◦ I accidentally recalled a request. Is it possible to un-recall an ILL request?
◦ I accidentally removed a book strap from my print queue. How do I add it back?
◦ I accidentally told a library I would lend an item but I am not able to, what should I do?
◦ I accidentally told the system that I did not fill a request. How do I correct this?
◦ I accidentally told the system that I returned an item. How do I correct this?
◦ I am trying to send a request in ILL and I am getting an error message about the Address
◦ When logging into WorldShare, I am unable to get past the branch screen because the ok button is grayed out
◦ I am unable to log in even after I have changed my password
◦ I can't access my OCLC site?
◦ I cannot complete a request in WorldShare ILL that is showing as Overdue
◦ I can't print from WorldShare Interlibrary Loan
I clicked Set/reset password but have not received the password reminder email
◦ I didn't check the box for IFM billing. Will I get an invoice?
◦ I found an item in Worldcat.org, but I cannot find it in WorldShare ILL
◦ I've updated my loan period in the Policies Directory. Why is the updated loan period not showing in lending requests?
◦ I see only a blank screen when I login to WorldShare Interlibrary Loan
◦ Lending Requests that only show the "Recall" option
◦ Lost in Transit Payment policy
◦ My borrowing request comes back as unfilled
◦ My ILS is not on the list of systems that interoperate with WorldShare Interlibrary loan
◦ My Lender library has altered the IFM charge to more than my specified Max Cost and then changed the status to Shipped. Will we have to pay the additional cost?
◦ Our library is under renovation and we need to deflect requests
◦ Our library turned off lending for Interlibrary Loan and now we need to know how to turn it back on
◦ Our pickup locations are not displaying on requests, how do we set that up?
◦ Patrons getting an error message "This search cannot be retrieved at this time" when they attempt to Request an Interlibrary Loan
◦ Article Exchange Error: "Failed to load PDF document"
◦ The library homepage URL listed in our Policies Directory is wrong, how do we change that?
◦ The list of libraries that own the book in WorldShare Interlibrary Loan is often not the same as the libraries shown to own the book in WorldCat.
◦ The sidebar is missing in WorldShare ILL
◦ Unable to access ILL policies directory when you have the role as a WorldShare ILL Admin
◦ Under the details section of our profile, Article Exchange is listed as Not Defined. How can we define our article exchange?
◦ We've changed our contact / address information. How can we fix it on new requests that we add?
◦ What are the Holidays of the year that requests do not age?
◦ What do I do In WorldShare ILL when I marked an item as shipped, but we do not have it?
◦ What do I do when I accidentally closed a request when the Borrowing library still has the book?
◦ What do the different types of 'reasons for no' in the request history mean?
◦ What is the base URL for WorldShare Interlibrary Loan so I can put it in another discovery system?
◦ What is the difference between a copy and a loan?
◦ What is the needed information to whitelist OCLC ILL emails?
◦ What kinds of general statistics are publicly available for WorldShare ILL?
◦ What should I do if my subscription to WorldShare ILL is inactive, but I want to restart my access
◦ When I try to logon to WorldShare, it says password or username is invalid, how do I fix this?
◦ When using Direct Request, what is the search order used for the ISBN, ISSN, and the OCLC Number to make a match?
When using IFM are there any guidelines on how to allow users to pay by check or money order?
◦ When does the clock start ticking on requests we get from another library?
◦ When we reset the password for WorldShare ILL, we do not get an email
◦ Where are the ILL statistics for last month?
◦ Where can I change the max cost for items that we would like to borrow?
◦ Where can I find and change my IFM invoice address?
◦ Where can I find an overview of all IFM transactions?
◦ Where does the Photocopy Flag field in the Lender Resource Sharing Stats report report come from
◦ Where do I get my subscription price information for WorldShare ILL?
◦ Where do I go in the Service Configuration to edit the Constant Data Records?
◦ Where do I go to schedule library closures for ILL?
◦ Where do I update the lending URL in the Profile section of the Policies Directory?
◦ Which OCLC usage statistics report should I use if I am trying to get the number of in state and out of state requests we get for Borrowing requests?
◦ Who entered the WorldShare Interlibrary Loan request into the system?
◦ Why am I getting an error message stating the address is incorrect when processing ILL borrowing requests?
◦ Why am I getting a "Request Status contains invalid data for the request" error in WorldShare ILL?
◦ Why am I getting the 'Field 'Lender String' cannot be empty' error message?
◦ Why am I unable to Check-In an ILL Request that has been sent back?
◦ Why are duplicates appearing on my ILL reports?
◦ Why are some IFM requests showing up on the ILL Fee Management Program Borrower Report?
◦ Why are the results different between the Borrower Resource and Borrower Activity Report?
◦ Why can't I select certain libraries as supplier for my request?
◦ Why did my lending request disappear?
◦ Why does my Custom Holdings Path for copies not auto-populate the lender string?
◦ Why does my supplier status change to no overnight?
◦ Why does the email field duplicate when I setup a notification
◦ Why do I see the same request number across several months in the Borrower Resource Sharing Stats report
◦ Why is my library not receiving any lending requests?
◦ Why is the line for the Borrower Activity Overview Report missing in my ILL statistics?
◦ Will Ex Libris Alma interoperate with WorldShare Interlibrary Loan?
◦ Will my ILS interoperate with WorldShare Interlibrary Loan?