WorldShare Interlibrary Loan

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

- **Get started**
  
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  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**
  
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  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**
  
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  Use batch processing to receive, return, and complete requests for multiple items.

  ◦ Batch processing for borrowers
  ◦ Batch processing for lenders

- **Borrowing Requests**
  
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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, automations, and purchase options.

- **Interlibrary Loan Options**
- **Borrower Data**
- **Lender Data**
- **Custom Holdings Groups**
- **Custom Holdings Paths**
- **Automated Request Manager (formerly Direct Request)**
- **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**

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

**Purchasing Requests**

- **Purchasing Requests**

**Interlibrary Loan Fee Management**

- **Configure IFM**
- **Manage IFM**

**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**

**Reports**

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Reports are available to WorldShare ILL users through OCLC Usage Statistics.

- **OCLC Usage Statistics**

**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**
- **Request Aging**
- **Resource sharing features**
- **Search my library's online catalog**
- **Use the Reasons for No Reports to optimize borrowing and lending**

**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.

- 2020 WorldShare Interlibrary Loan release notes
- 2019 WorldShare Interlibrary Loan release notes
- 2018 WorldShare Interlibrary Loan release notes
- Known issues

- **WorldShare Interlibrary Loan training**

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  Find training on WorldShare Interlibrary Loan.

- **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't see sign out or edit buttons in the Policies Directory
  - 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 I get an overview of all libraries in a Resource Sharing Group?
  - Can I get a list of all books that were requested via ILL this year?
  - As a lender, can I put an open access link into the Article Exchange field?
  - Can I request an item from OCLC for Interlibrary Loan
  - Can I reuse a request?
  - Can the Article Exchange notification be sent directly to the patron?
  - 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 the 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
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?

Does OCLC provide data on the number of libraries that charge their patrons for ILL?

Does the status 'Considering' influence the Days to Respond?

Do deflection policies prevent items from being borrowed?

Do ILL requests ever time out?

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 a deposit account for IFM in case I turn out to be a net borrower?

Do I need to act on the requests that appear under "Borrowing" and "Lending in Quick Links to make them disappear?

Do the ILL reports pull from the request date or the received date?

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 join the LVIS Resource Sharing Group?

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 or CCL?

How does the Schedule work with the ILL Policies Directory and if you choose a supplier status of yes or no?

What populates the holdings information column within an item I searched for in WorldShare ILL and can a custom note be added?

How do I add a new ILL group to my library's group affiliations on the OCLC Policies Directory?

How do I become a Lender in Interlibrary Loan?

How do I become a Non-Supplier in the OCLC Policies Directory?

How do I change a lending request status to lost?

How do I change the currency in my request?

How do I change the IFM amount for one item?

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 another 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 sign in to OCLC Usage Statistics
How do I obtain OCLC ILL authorization credentials?
How do I prevent a request from being sent to additional lenders in lender string after one lender accepts
How do I print a return label?
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 ILL to only loan electronic material, and not physical books that must be shipped and returned?
How do I set up Usage Statistic Reports to be emailed to me?
How do I stop my library from getting International 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 turn on ILL lending requests?
How do I turn on notifications?
How do I undo accidentally marking an item In Transit when it has not yet been shipped?
How do I undo a renewal rejection?
How do I unsubscribe from the Usage Statistic Reports that are emailed to me?
How do I update the default borrowing library information?
How do I update the default lending 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 let a lending library know we want to use IFLA vouchers?
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 a request remain in the Unfilled or Expired queue?
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?
If I try to create a new automation with the "Age of Material" match to be "0 but no older than 0" years I get an error message and I can't successfully save the new automation.
I'm an ILL referral member user, why can't I access Service Configuration?
I'm having trouble downloading a file from the Article Exchange server
Is it possible for the lender to edit the borrower's shipping address on a submitted request?
Is it possible for the lender to edit the Due Date field without a request from the borrower?
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 lend ebooks through 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 I can tell how many libraries are borrowing and lending through ILL?
- 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 charged a borrowing library too much, how do I partially refund them?
- 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 marked a request as 'Returned'.
- 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 received an item. How do I correct this?
- I accidentally told the system that I returned an item. How do I correct this?
- I am seeing a null relay error when logging into WorldShare ILL.
- I am trying to get usage stats but I get an error message.
- 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 deflected a record on item-level for ILL, but my library still appears on the list of suppliers?
- I didn't check the box for IFM billing. Will I get an invoice?
- I don't see the renewal button anywhere on my request.
- I found an item in Worldcat.org, but I cannot find it in WorldShare ILL.
- I get an error message: "The document you are trying to retrieve is no longer available. All files are deleted after 5 views or 30 days” when I try to retrieve a PDF from Article Exchange. What is causing this?
- I got a request for an item that I own but the OCLC number doesn't match my...
I've updated my loan period in the Policies Directory. Why is the updated loan period not showing in lending requests?
I received the wrong article from the lending library, what should I do?
I see only a blank screen when I login to WorldShare.
I want to block all incoming loan requests.
I want to change usernames on a WorldShare account, but the username field is grayed out.
Why does my lending request only show the recall button?
My active ILL requests aren't appearing in WorldShare.
My copy request was answered as Conditional - Lacks copyright. What does this mean?
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?
My request comes into WorldShare as a copy/loan request even though I mark it as a loan/copy request.
Not authorized to use ILL error upon sign in.
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.
Patron did not return book, but lending library decided not to charge, what do I do?
Article Exchange Error: "Failed to load PDF document"
The 'From' email address is not automatically filled in the email form.
The lending library responded no to ILL request, but sent the item.
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 are finding some ILL requests with a status of Closed (Cancelled), but we don’t remember cancelling them.
We've changed our contact / address information. How can we fix it on new requests that we add?
What are all the reasons for no in the "Resource Sharing Lender Reasons for No Report"?
What are the Holidays of the year that requests do not age?
What are the IP addresses associated with OCLC ILL so I can whitelist them?
What barcode format do book strap labels use?
• What does it mean when I get a message in WorldShare that my request is Expired?
• What does referral date mean when processing ILL requests?
• What do I do if a lending library sent the wrong item?
• 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 I do when I completed the request before sending the Document to the patron?
• What do the different types of 'reasons for no' in the request history mean?
• What do the holdings statements in the holdings column mean?
• What is OCLC's lost in transit payment policy?
• 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 difference between Recall Item and Deny Renewal?
• What is the needed information to whitelist OCLC ILL emails?
• What is the policy for Interlibrary Loans overdue fines?
• What is used to define Material age in ILL requests?
• 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 print from ILL, the screen is blank. How do I fix this?
• When using Automated Requests, 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 can I find a list of libraries currently supplying physical materials and accepting returns of physical materials?
• Where can I find the request history?
• Where can I find the roadmaps for WorldShare Management Services?
• 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 about invalid symbols when I try to submit a request?
- 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 getting the error message "The Constant Data Record Name can only contain letters and numbers" when I try to update Borrower Data for WorldShare ILL?
- Why am I receiving a 'Need Before' contains invalid data for request error in my Purchase Request?
- Why am I receiving requests for articles outside of our coverage dates?
- Why am I receiving a 'Lending Charges' contains invalid data for request error in my Purchase Request?
- Why am I unable to Check-In an ILL Request that has been sent back?
- Why are interloan requests being autodeflected when we have holdings?
- Why are duplicates appearing on my ILL reports?
- Why are ILL Request numbers not incremental?
- Why are multiple notification emails being delivered for every Article Exchange delivery?
- Why are some IFM requests not 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 borrowing request come back as unfilled?
- Why did my lending request disappear?
- Why did we get an invoice from the Lending Library?
- 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 do our ILL labels continue to show our old address?
- Why is constant data being applied to multiple request?
- 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 interoperare with WorldShare Interlibrary Loan?
- Will my ILS interoperare with WorldShare Interlibrary Loan?
- WorldShare ILL does not select the expected OCN for a request I started in my group catalogue