WorldShare Interlibrary Loan

Last updated: Thu, 30 Nov 2017 21:39:40 GMT

WorldShare 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
◦ Contact OCLC Order Services
◦ 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

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

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

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

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**

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**

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**

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**

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

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

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

Additional resources for WorldShare ILL users.

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

• WorldShare Interlibrary Loan release notes and known issues

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.

○ 2018 WorldShare Interlibrary Loan release notes
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).

  - 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?
  - Can I change my Shipping Address for ILL?
  - Can you give me an overview of the WorldShare Interlibrary Loan interface?
  - 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 we have to follow any OCLC Policies about places that do not return items to us?
  - How can I update the copyright compliance to CCG?
  - How does an ILL request become "expired"?
  - How do I access and create constant data?
  - 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 find and delete barcodes created for temporary items?
  - How do I find my WSKey?
  - How do I fix the problem I am getting a message when I try to logon to WorldShare ILL that my account is expired?
  - 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 log in to OCLC Usage Statistics?
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 update the email address and contact name for WorldShare ILL?
How do we avoid getting any ILL requests sent over a break?
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?
I've updated my loan period in the Policies Directory. Why is the updated loan period not showing in lending requests?
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 there a way in WorldShare to refund an institution for a closed request?
Is there a way to retrieve a request that was inadvertently deleted?
I accidentally marked a Book request as a Copy and the Borrower received it as closed as complete
I accidentally removed a book strap from my print queue. How do I add it back?
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 having issues with the copy request process. How can I confirm my settings for IFM and article processing?
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 can't print from WorldShare Interlibrary Loan
I clicked Set/reset password but have not received the password reminder email
I found an item in Worldcat.org, but I cannot find it in WorldShare ILL
I see only a blank screen when I login to WorldShare Interlibrary Loan
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
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

- Article Exchange Error: "Failed to load PDF document"
- The library homepage URL listed in our Policies Directory is wrong, how do we change that?
- 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 does WorldShare ILL do with my patron’s data after a request has been closed?
- What do I do if 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 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?
- 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 can I find an overview of all IFM transactions?
- 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?
- 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 seeing circulation-related form boxes when creating an account?
- Why does my Custom Holdings Group for copies not auto-populate the lender string?
- Why does my supplier status change to no overnight?
- 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 interoperable with WorldShare Interlibrary Loan?
- Will my ILS interoperate with WorldShare Interlibrary Loan?