WorldShare Interlibrary Loan

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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.
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

- British Library On Demand
- 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**

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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
  ◦ 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.
- 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?
  - How does an ILL request become "expired"?
  - How do I access and create constant data?
  - 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 produce a report itemizing the cost of each request processed in my local currency?
  - How do I log in to OCLC Usage Statistics?
  - 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 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 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 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?
◦ 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 am having issues with the copy request process. How can I confirm my settings for IFM and article processing?
◦ 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
◦ 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"
◦ We've changed our contact / address information. How can we fix it on new requests that we add?
◦ What does WorldShare ILL do with my patron’s data after a request has been closed?
◦ 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 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?
◦ Who entered the WorldShare Interlibrary Loan request into the system?
◦ 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 is the line for the Borrower Activity Overview Report missing in my ILL statistics?