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

  No image available

  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

• Borrowing Requests

  No image available

  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

• Lending Requests

  No image available

  Manage and respond to lending requests.

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

- **Configuration**

  No image available

  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
  ◦ Article Exchange Retention Settings
  ◦ Purchase Options
  ◦ Patron Request Workforms
  ◦ Print Settings
  ◦ Advanced Workflows
  ◦ Patron Settings
  ◦ Notifications
  ◦ External System Settings
  ◦ Tipasa WMS Integration

- **Smart fulfillment**

  No image available

  Find information about Smart fulfillment features, which increase the speed of delivery of materials based on policy data, lending history, licensing agreements, format preferences, and more.

  ◦ Real-time availability for ILL
  ◦ Automated Request Manager
  ◦ Smart lender strings through the Automated Request Manager
  ◦ Express program
  ◦ Improve turnaround time
  ◦ Other OCLC services that interact with smart fulfillment
  ◦ Turnaround Time dashboards

- **Article Exchange**

  No image available
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**

[No image available]

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

- Batch processing for borrowers
- Batch processing for lenders

**Constant data**

[No image available]

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**

[No image available]

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**

[No image available]

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

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

**Purchasing Requests**

[No image available]

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

---

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan
Printed: Fri, 25 Mar 2022 14:12:08 GMT
Purchasing Requests

• **Interlibrary Loan Fee Management**

  No image available

  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

• **Print**

  No image available

  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**

  No image available

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

  ◦ OCLC Usage Statistics
  ◦ Use the Reasons for No Reports to optimize borrowing and lending

• **WorldShare Circulation Integration**

  No image available

  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**

  No image available
Additional resources for WorldShare ILL users.

◦ Categories and queues
◦ Days To Respond
◦ Formats
◦ ILL request transfer service
◦ ILL sources
◦ Notes
◦ Request Aging
◦ Resource sharing features
◦ Search my library’s online catalog

• WorldShare Interlibrary Loan release notes and known issues

No image available

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.

◦ 2022 WorldShare Interlibrary Loan release notes
◦ 2021 WorldShare Interlibrary Loan release notes
◦ 2020 WorldShare Interlibrary Loan release notes
◦ 2019 WorldShare Interlibrary Loan release notes
◦ Known issues

• WorldShare Interlibrary Loan training

No image available

Find training on WorldShare Interlibrary Loan.

◦ Formación en español

• Troubleshooting

No image available

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?
◦ 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 I reuse IFLA vouchers or do they expire?
- Can I send and receive documents to and from ILLiad libraries?
- 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 the borrowing library view conditional notes from lending library after they are accepted?
- Can the lender string be updated after a request is submitted?
- Can the Reasons for No in CLIO be updated to match WorldShare?
- Can we have unfilled request notifications sent directly to patron emails?
- 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 group?
- Does a library have to be a supplier in order to process a request to them in WorldShare?
- 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 any OCLC reports include IFM refund transactions?
- 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 pay for a renewal?
- 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 join the LVIS Resource Sharing Group?
- How can I keep fines from accumulating on my WMS Interlibrary loan transactions?
- How can I print a label for a request I've already set to returned?
- How can I renew my WSKeys?
- How can I set a default language for WorldShare ILL or Tipasa?
- How can I sort the loan request lists?
- How can I update the copyright compliance to CCG or CCL?
- How can we define our article exchange in Policies Directory?
- 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 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 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 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 that was 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 sell back IFLA vouchers to OCLC?
- How do I set up a Custom Holding Group and Path for the Express Digital Delivery Program?
- 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?
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 my Supplier status for ILL in the OCLC Policies Directory?
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 we turn off all ILL lending requests?
How do we update our ILL groups?
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
The display of date formats in Google Chrome is incorrect for non-American English speakers.
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 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 an OpenURL request form that would allow our patrons to place WorldShare ILL requests from our
Is there a fee to use IFM?
Is there a way 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?
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 unrecall an ILL request?
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
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 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 holding
I've updated my loan period in the Policies Directory. Why is the updated loan period not showing in lending requests?
I only see half the calendar when updating loan policies, why?
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 copy requests
I want to block all incoming loan requests.
I want to change usernames on a WorldShare account, but the username field is grayed out.

- Lender not seeing the renew button
- Lender String contains the following invalid symbols error
- 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 LHRs are correctly set up to deflect lending requests, but requests for the items still get through.
- 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 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"
- Why is there no button to clear a completed borrowing request?
- The ‘From’ email address is not automatically filled in the email form
- The Lending library changed the IFM charge. Do we have to pay the additional cost?
- The lending library responded no to ILL request, but sent the item
- How do we change our library homepage URL listed in our Policies Directory?
- 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
- 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 holidays does OCLC not count toward ILL aging?
- What are the IP addresses associated with OCLC ILL?
- 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 if I marked an item as shipped accidentally?
- 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?

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan
Printed: Fri, 25 Mar 2022 14:12:08 GMT
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 include and exclude in my library’s deflection policies?
- 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 did OCLC first roll out the IFM program?
- When I try to create a new Custom Holdings Path, I receive an error: “We are unable to process your request at this moment” / “HTTP Status 500.”
- When I try to print from ILL, the screen is blank. How do I fix this?
- 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 list of libraries participating in the OCLC Express Program?
- 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 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, “An error has occurred loading the Custom Holdings Paths. Please try again later.”?
- 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 seeing Open Access View Now links within an ILL record?
- 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 make edits to our scheduled closures in the OCLC Policies Directory?
- 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 our ILL labels continue to show our old address?
- Why do so many of my automated requests end up in "New for Review"?
- Why is constant data being applied to multiple request?
- Why is my Overdue Request not in the Quick Links section?
- 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?
- WorldShare ILL does not select the expected OCN for a request I started in my group catalogue