



# Getting Started with OCLC WorldShare® Interlibrary Loan

## Introduction

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

Please refer to the [OCLC WorldShare Interlibrary Loan Web page](#) for more details.

## Preparing and planning

There are a few things you can do to prepare for your use of WorldShare Interlibrary Loan.

### OCLC® Policies Directory

Add or update your library's information in the [OCLC Policies Directory](#). Some key areas to review include Contacts and Policies for copy, loan and deflections. For further information, see the [OCLC Policies Directory Quick Reference](#).

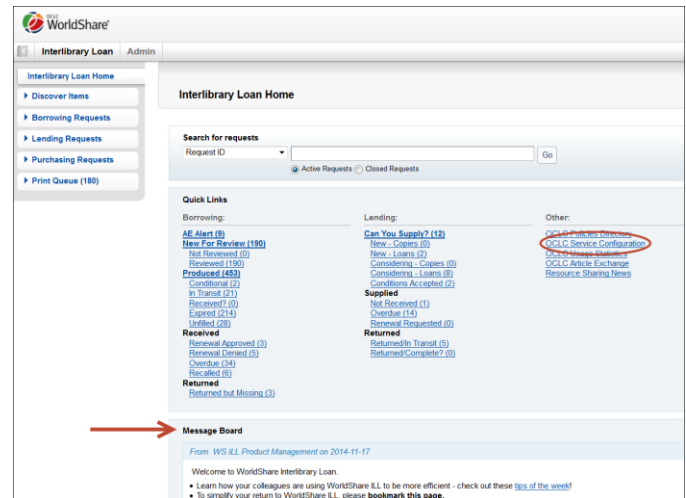
Once logged in to WorldShare Interlibrary Loan, click the link from the WorldShare Interlibrary Loan Home screen to go to the [OCLC Policies Directory](#).

### Constant Data

Administrative settings for WorldShare Interlibrary Loan, such as constant data, are maintained in [OCLC Service Configuration](#). Make sure to add your constant data in the **WorldShare ILL** module under **Borrower Data** and **Lender Data**.

### OCLC® Service Configuration

Administrative settings for WorldShare Interlibrary Loan are maintained in [OCLC Service Configuration](#). Click the link from the WorldShare Interlibrary Loan Home screen to go to OCLC Service Configuration.



## Message Board

Below the quick links, you will find the WorldShare Interlibrary Loan Message Board. This space is updated regularly, in real time by OCLC staff with information about scheduled system maintenance, training opportunities, ILL-related webinars, and other information about the ILL system.

## Browser requirements

**PLEASE NOTE:** Functionality in the WorldShare Interlibrary Loan service is updated periodically. During these updates, the service is tested with specific browser versions to ensure the service functions correctly when used with different browsers. Please see the browser versions used to test the most recent release on this [Web page](#).

Please see [OCLC WorldShare® Interlibrary Loan Support](#) for other valuable documentation and training resources.

## Support

Contact [OCLC Support in your region](#).

## Creating an account

If you already use WMS, WorldShare Collection Manager, or WorldShare License Manager, you have an existing OCLC Services account that gives you access to several services in the new platform. Before you log on to WorldShare Interlibrary Loan for the first time, you will need to work with someone at your institution who has administrative rights to add WorldShare ILL permissions to your account. If you need assistance, please contact [OCLC Support in your region](#).

If you have a 9-digit ILL authorization number and password but do not have an OCLC Services account in the WorldShare platform, follow the steps below.

To create an account:

Step	Action	Result
1	Go to <a href="https://share.worldcat.org/myaccount">https://share.worldcat.org/myaccount</a> . <b>Note:</b> The URL is case-sensitive.	The Welcome screen appears.
2	Click <b>Create account</b> .	The Create an OCLC Services account screen appears.
3	Type your 9-digit WorldCat Resource Sharing <b>Authorization and Password</b> .	
4	Click <b>Next</b> .	The Confirm your institution screen expands.
5	Confirm your institution and service(s) used.	
6	Click <b>Confirm</b> . <b>Note:</b> If this is not your institution, click <b>Not my institution</b> to return to the Welcome screen.	The Create your new account screen expands.
7	Fill out all fields. <b>Note:</b> If the user name you choose is already in use, you will get an error message.	

8	Click <b>Create account</b> .	A confirmation message appears and a list of available services appears.
9	Click <b>WorldShare Interlibrary Loan</b> .	You are redirected to your institution's custom Sign In screen.
10	Type the <b>User Name</b> and <b>Password</b> you just created.	
11	Click <b>Sign In</b> .	You are signed into WorldShare Interlibrary Loan.

If you have neither a 9-digit ILL authorization number and password nor an OCLC Services account in the WorldShare platform, please contact [OCLC Support in your region](#).

### Best practices for creating an account:

- Each user should have his or her own account to allow for improved security and addition of other services in the future.
- E-mail address should be an individual's e-mail address, and not an e-mail address for the institution itself.

Once you are in the interface, bookmark the home page for future use.

### To create accounts for other users at your institution:

**Note:** You should first obtain the preferred user names and e-mail addresses of users at your institution.

Step	Action	Result
1	Click the <b>Admin</b> tab at the top of the screen.	The User Management screen appears.
2	Click <b>New User</b> .	The screen expands.
3	Fill out the fields on the screen. <b>Note:</b> Required fields are marked with an asterisk (*). A physical address, an e-	

	mail address, or a phone number is also required.	
4	Click <b>Create</b> .	A confirmation message appears, and additional menus appear on the screen.

Once a new user account has been created, use the additional screens to configure additional settings.

**To edit user privileges:**

Step	Action	Result
1	Click <b>Edit</b> next to the <b>Roles</b> menu.	The screen expands.
2	To change privileges, click the check box next to desired level of <b>privileges</b> .	
3	Click <b>Save</b> to save your changes, or click <b>Cancel</b> to start over.	A confirmation message appears.

**WorldShare Interlibrary Loan user privilege levels:**

Privilege Level	Description
<b>Everyone</b>	This is the default account level, but does not allow access to WorldShare Interlibrary Loan. <b>Note:</b> This check box should remain checked.
<b>WORLDSHARE_ILL_ADMIN</b>	This type of account is designed for library staff members who are responsible for creating or modifying other staff accounts for WorldShare Interlibrary Loan.
<b>WORLDSHARE_ILL_USER</b>	This type of account is designed for most library staff using WorldShare Interlibrary Loan.

**To set/reset passwords:**

Click **Set/reset password** under **Basic User Data** for that user to send an e-mail with instructions for creating a new password.

**When the user receives the e-mail, the following steps should be taken:**

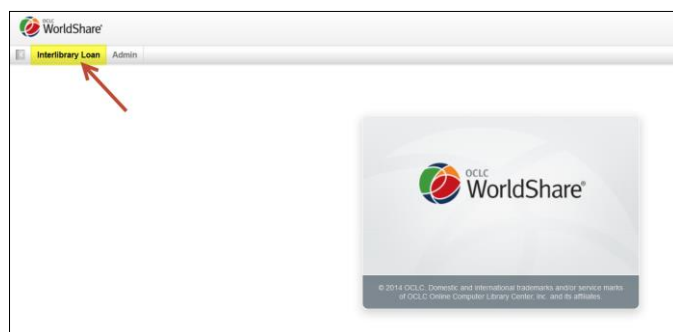
Step	Action	Result
1	Click the link provided in the e-mail. <b>Note:</b> This link will expire 24 hours after being sent.	The Change Password screen appears.
2	Fill out the fields to provide the <b>User Name</b> , a <b>New Password</b> , and <b>Confirm New Password</b> .	
3	Click <b>Change Password</b> .	A confirmation screen appears.

**Accessing the WorldShare ILL system**

To access the site, go to the URL you bookmarked after creating your account, and sign in with your user name and password. You will be directed to WorldShare Interlibrary Loan (there may be a slight delay before the screen refreshes).

You may also see a branch selection pop-up window. Select your branch and click **OK** to proceed.

**Note:** If you are not immediately directed to the WorldShare Interlibrary Loan Home screen, click the **Interlibrary Loan** tab (as shown in the image).



The Home screen lists all of your borrowing, lending and other requests, a search option for finding requests, and the ability to search WorldCat and create requests.

**Navigating the system**

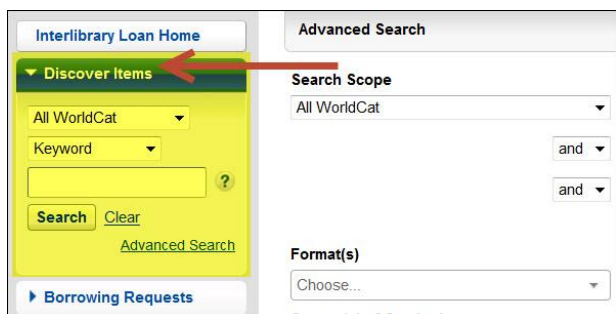
For best performance, **please do not use the browser Back button**. Instead, click a link on the screen to return to a previous page.

## Creating requests

### Discover Items to create requests

You may search for items and create a request under the **Discover Items** heading in OCLC WorldShare Interlibrary Loan.

**Note:** When you open the Discover Items tab, an Advanced Search form also opens in the main panel of the screen. See [Advanced Search](#) below for more information about using this function.



To discover items:

Step	Action	Result
1	Choose the type of search from the drop-down lists.	
2	Type your search terms in the box provided.	
3	Click <b>Search</b> . <b>Note:</b> When you click <b>Search</b> , the Advanced Search form collapses at the top of the screen. Click <b>Advanced Search</b> to expand or collapse the form.	Matching results appear, along with holdings display options.
4	On the Results screen, you may search or view items using one of the following options:	
A	If available, click the <b>View Now</b> link for open access resources.	The resource opens in a separate window.
B	<b>Search for versions with the same title and author</b> by clicking the link.	A new search is launched, based on title/author.

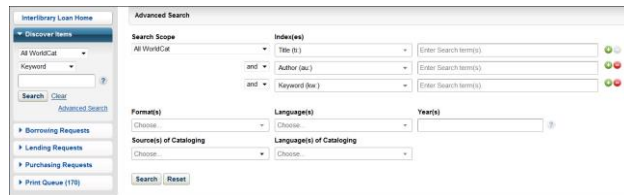
5	To display holdings, use one of the following options:	
A	Click <b>State Holdings</b> , <b>Regional Holdings</b> or <b>All Holdings</b> . <b>Note:</b> Regional Holdings includes all holdings in contiguous states.	The Holdings screen appears.
B	Filter results by <b>Custom Holdings</b> , <b>Profiled Group</b> , <b>Year</b> or <b>Volume</b> and click <b>Go</b> .	The Holdings screen appears.
6	On the Holdings screen, you also have several options:	
A	Click <b>Yes</b> in the <b>Supplier</b> column to choose a lender.	The lender is added to your <b>Lender String</b> .
B	Click the blue information logo to see the lender's policies.	The Lender's Profile screen in the <a href="#">OCLC Policies Directory</a> opens in a new window.
C	Click the library name to go to the library's online catalog.	The library's catalog opens in a new window.
D	View suppliers' <b>Days To Respond</b> . <b>Note:</b> For more information about Days To Respond, see <a href="#">OCLC WorldShare Interlibrary Loan: Days To Respond</a> .	
7	Click <b>Create Request</b> .	The request workform appears.
8	Choose your constant data record from the <b>Apply constant data</b> drop-down list. <b>Note:</b> When a different Constant Data is applied to a record, the fields are briefly highlighted in green as a visual indicator of the change.	The fields on the workform are populated with your constant data. <b>Note:</b> Borrower and Lender constant data always over-write the value shown in the request.

		Pre-existing patron data will not be overwritten.
9	Provide a <b>Needed By:</b> date. Under <b>Borrowing Library</b> , the <b>Address</b> field is required for both <b>Shipping</b> and <b>Billing</b> .	
10	Under <b>Lending Libraries</b> , lender policies are listed for any lenders you chose on the Holdings screen. To add more lenders, type the institution symbol(s) of up to 15 of your preferred lender(s) in the <b>Lender String</b> field, separated by commas.	
11	<b>Optional.</b> Provide <b>Patron</b> information.	
12	Click <b>Send Request</b> . <b>Note:</b> If you wish to save the request to submit in the future, click <b>Save For Review</b> . <b>Optional.</b> If Open Access links are available, a <b>View Now</b> link will display. If you wish to fill a request with an open access resource, click the <b>View Now</b> link to see if the resource is available. Click <b>Email</b> to send the link of the item to your patron. Then select <b>Open Access</b> from the Change Fulfillment Type drop-down list to close the request as Closed/OpenAccess. <b>Note:</b> Requests filled via Open Access will be included in monthly statistical reporting.	The request is sent and a confirmation message appears.
13	Click the hot linked <b>Request ID</b> in the confirmation message to	The request is re-displayed.

search that request ID number.

### Advanced Search

When you click the **Discover Items** heading, an **Advanced Search** form will open in the main panel of 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.



With advanced search you can:

- Use multiple search boxes to do Boolean operators searches
- Use more Index types than basic search allows

### Search by these additional criteria:


Criteria	Description
<b>Format</b>	The format of the item for which you are performing the advanced search. <b>Examples:</b> book, audiobook For a complete list, please see <a href="#">Item Formats</a> .
<b>Language</b>	The language of the item.
<b>Year(s)</b>	The years of publication. <b>Example:</b> single year (1980)
<b>Source of Cataloging</b>	Whether or not the item was cataloged by the Library of Congress.
<b>Language of Cataloging</b>	Language in which the item was originally cataloged.

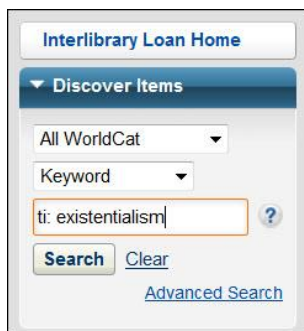
### To perform an advanced search:

Step	Action
1	Limit your search to: <ul style="list-style-type: none"> <li>• <b>My Library Holdings:</b> searches for records in your local holdings.</li> <li>• <b>My Group Holdings:</b> searches for records in your group's holdings.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>All Worldcat:</b> searches for records in WorldCat.</li> </ul>
2	Select one of the <b>index types</b> .
3	Based on the <b>index type</b> selected, enter the appropriate text in the search box.
4	Select up to three combinations of <b>boolean operators</b> and index types, and search text by clicking the plus sign (+) to add additional form fields.
5	Fill out any relevant search form fields: <ul style="list-style-type: none"> <li>• Format</li> <li>• Language</li> <li>• Year(s)</li> <li>• Source of Cataloging</li> <li>• Language of Cataloging</li> </ul>
6	When you click <b>Search</b> , the Advanced Search form collapses at the top of the screen to allow for easier browsing of items. Click <b>Advanced Search</b> at the top of the screen to expand or collapse the form, or click the <b>Advanced Search</b> link in the Discover Items tab.

### Expert Search

Expert searching is when you perform a complete, full text search in a single string. Expert searches consist of a combination of an index label and search terms. These combinations can be lined by **boolean operators** that are capitalized (AND, NOT, OR). Hover your cursor over the  next to the search box for examples of how to use Boolean operators and a link to expert searching instructions. Enter an expert search in the Basic search text box:



### Types of indexes:

Type	Description
<b>Word</b>  <i>examples:</i> au: su: ti:	A word search typically uses a combination of an index label, a colon (:), and a single complete word that is contained anywhere in the item's record, including: titles, notes, abstracts, summaries, descriptions and subjects.  When entering a keyword search, you can enter the word in uppercase or lowercase.
<b>Word phrase</b>  <i>examples:</i> au= se= ti=	A word phrase search typically uses a combination of an index label, equal sign (=) and multiple complete words that are contained anywhere in the item's record, including: titles, notes, abstracts, summaries, descriptions and subjects.  When entering a phrase search, you can: <ul style="list-style-type: none"> <li>• Enter words in uppercase or lowercase.</li> <li>• Enter multiple words in any order.</li> </ul>
<b>Number</b>  <i>examples:</i> gn: bn: in: nl:	A numeric search typically uses a combination of an index label, a colon (:), and numbers that are contained in the item's record. <ul style="list-style-type: none"> <li>• For numbers only, use a colon (:)</li> <li>• For number phrases, use an equal sign (=)</li> <li>• In class number searches:                             <ul style="list-style-type: none"> <li>○ Include periods.</li> <li>○ Omit all other punctuation in class numbers</li> <li>○ Omit spaces</li> </ul> </li> </ul> <b>Example:</b> gn:dd:616.46
<b>Number phrase</b>  <i>examples:</i> bn= in= nl=	A numeric phrase search typically uses a combination of an index label, an equal sign (=) and numbers that are contained in the item's record. <ul style="list-style-type: none"> <li>• In class number searches:                             <ul style="list-style-type: none"> <li>○ Include periods.</li> <li>○ Omit all other punctuation in class numbers</li> <li>○ Omit spaces</li> </ul> </li> </ul> <b>Example:</b> bn=dd:616.46

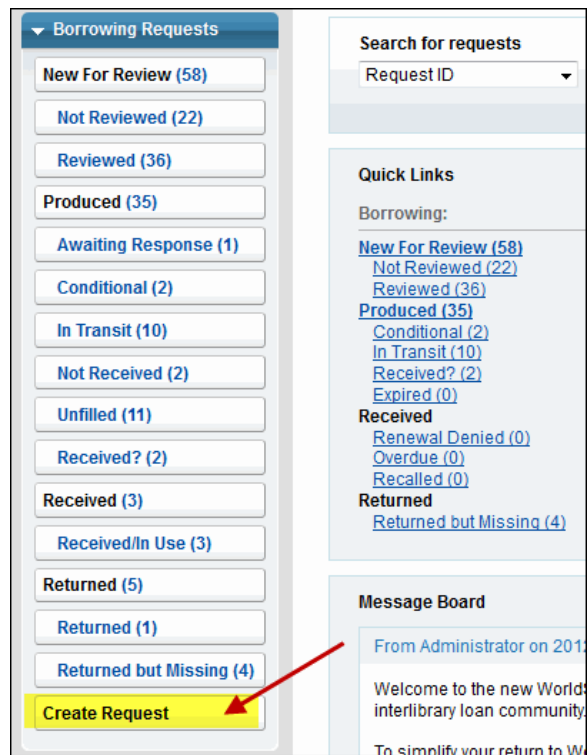
### Boolean operators

Use Boolean operators to combine search terms.

Operator	Description	Examples
<b>AND</b>	Finds all term anywhere in a record.	woman AND history AND 1970-
<b>OR</b>	Finds any single term or all terms.	woolf, virginia OR woolf, leonard AND 1900
<b>NOT</b>	Excludes the term that follows NOT.	civil war NOT battle NOT united states

### Create Request (from a blank workflow)

You may also create requests by using the **Create Request** heading. Clicking **Create Request** produces a blank workflow.



### To create a request:

Step	Action	Result
1	Type the details of your request in the fields provided.	
2	Choose the request <b>Type</b> and <b>Format</b> .	
3	Provide a <b>Needed By:</b> date.	
4	Apply your constant data record.	
5	Provide a lender in the <b>Lender String</b> .	
6	Click <b>Send Request</b> .	A confirmation message appears and the request appears under the category <b>Borrowing Requests &gt; New For Review</b> .
7	Click <b>Borrowing Requests</b> from the left navigation bar.	The list of Borrowing categories expands.
8	Click <b>New For Review</b> .	
9	Click your request ID.	The request opens.
10	Click <b>Send Request</b> .	A confirmation message appears.
11	Choose either <b>View Next Request</b> or <b>Return to list</b> .	Your request is sent to the lender and you are returned to the screen of your choice.

### Create a request from an existing request

You may also create requests by accessing an existing request with one of the following statuses:

- Conditional
- Considering
- Conditions Accepted
- Submitted
- Not Received
- Complete
- Closed: any disposition
- Unfilled
- Expired

#### To create a request from an existing request:

Step	Action	Result
1	Click on one of the statuses listed above, either on the Interlibrary Loan Home page or in the left navigation bar. <b>Note:</b> Requests with submitted or considering statuses can be found under the <b>Awaiting Response</b> and <b>Direct Produced</b> headings.	A list of requests with the given status appears.
2	Click on the <b>Request ID</b> of the item you would like to use to create a request.	The request details screen opens.
3	Click the <b>New</b> button in the upper right corner of the request.	A new request form opens, prepopulated with the information from the original request.
4	Confirm that the information is the same and make changes where necessary.	
5	Click <b>Save for Review</b> .	A confirming the request was created will appear at the top of the page with a hot linked Request ID.

**Note:** All requests created from existing requests will contain a note in the **Request History** with a link to the original request so you can easily access the original request.

### Searching for requests

From the Interlibrary Loan Home screen, you may search **Active** and **Closed Requests** by:

- Request ID
- Borrower Symbol
- Lender Symbol
- Author
- Title
- Article Title (active requests only)
- Patron Name (borrower active requests only)
- Patron ID (borrower active requests only)
- Patron Department
- Local ID (borrower active requests only)

Results are limited to the 500 most recent requests.

**Note:** After patron requests have been closed, all patron information that could identify an individual is discarded for privacy and legal reasons. Only Borrower Active Requests can be searched by Patron Name, Patron ID, and Local ID.

#### To search for requests:

Step	Action	Result
1	Choose a search option from the drop-down list.	
2	Type a keyword or number in the field provided.	
3	Click the circle next to either <b>Active Requests</b> or <b>Closed Requests</b> .	
4	Click <b>Go</b> .	The system responds with any matching requests, divided into <b>Borrower</b> and <b>Lender</b> requests.



5	Click the request you would like to view.	The request details screen opens.
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Click a category name to see all requests in that category.

**Note:** Categories with no current requests will not appear in the list.

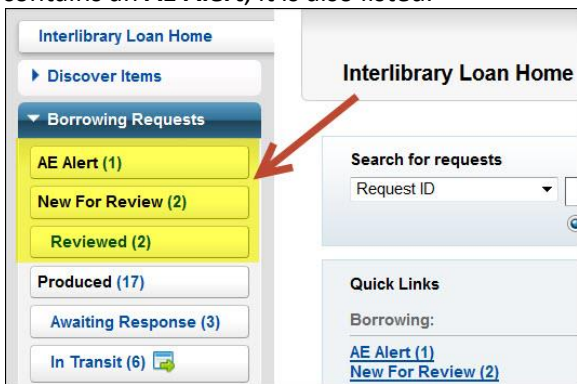
## Managing requests

Click the **Borrowing Requests** or **Lending Requests** headings in the left navigation bar to see all requests. **Note:** See the **Categories** chart (below) for a detailed description of each category.

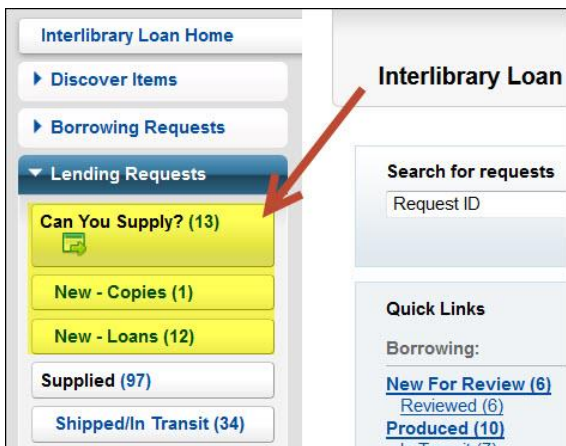
### Reviewing requests

The main categories are listed first, followed by sub-categories for easier organization.

For Borrowing Requests, the initial categories of **Not Reviewed** and **Reviewed** are listed under **New For Review** in the left navigation bar. If any request contains an **AE Alert**, it is also listed.



For Lending Requests, the initial categories of **New**, **Considering** and **Conditions Accepted** are listed under **Can You Supply?** in the left navigation bar. Only the queues that contain requests will appear.



### Responding to requests

The main categories appear at the top, followed by sub-categories for easier organization.

#### To respond to a request:

Step	Action	Result
1	Click a category of request. <b>Note:</b> Results are sortable. Click the column title to sort requests.	The screen expands to list requests in that category. If there are more than 10 requests, you can page forward to view more.
2	Click an <b>ID</b> or <b>Title</b> to see the full request.	Request details appear. <b>Note:</b> Some details are listed in drop-down lists.
3	Complete any desired fields.	
4	Possible actions appear at the top of the request. Click the action you wish to apply.	A confirmation message appears.

## Editing requests

In some cases, it is possible to edit requests once they have been submitted. Following are scenarios where editing is currently allowed.

### New For Review requests

#### Edit bibliographic data via WorldCat:

Step	Action	Result
1	Click <b>New For Review</b> under <b>Borrowing Requests</b> .	
2	Click the request ID.	The request opens.

3	Click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via <b>Discover Items</b> .	A contextual search is launched for the terms selected.
4	Click the item's title, then click <b>Apply data</b> on the bibliographic record. OR Click a link to holdings, or use a Custom Holdings Path or Profiled group. Then click <b>Update request</b> on the Holdings screen.	A confirmation message appears and the request is updated.

### Add lenders based on holdings:

Step	Action	Result
1	Click <b>New For Review</b> under <b>Borrowing Requests</b> .	
2	Click the request ID.	The request opens.
3	Click the <b>View Holdings</b> link.	The Holdings screen appears.
4	Click <b>Yes</b> in the <b>Supplier</b> column to add a lender.	The lender is added to your <b>Lender String</b> .
5	Click <b>Update request</b> .	The request is updated.

### Produced requests

You may edit a **Produced** request that has not yet shipped by a lender in the following queues:

- Awaiting Response
- Direct Produced
- Conditional

### Lending Requests

Lenders may edit some request details once they have responded **Yes**. The following fields are editable:

- Type (Loan/Copy)
- Due Date (a value is required in this field)
- Local ID
- ILL Fee Management (IFM)
- Lending Charges
- Insurance Amount
- Lending Notes

- Lending Restrictions
- Return Via
- Return Address
- Article Exchange

**Note:** Other fields are editable, as necessary.

### To edit fields on a lending request:


Step	Action	Result
1	Open a lending request.	
2	Edit any desired fields by typing in the box provided.	The <b>Save</b> button at the top of the screen becomes active.
3	Click <b>Save</b> .	A confirmation message appears and the request is updated.

**Note:** Editing is not allowed on closed requests.

## Batch processing

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

**Note:** There is a limit of 100 requests at a time.

**Note:** Request queues where batch processing is available include the  icon in the left navigation sidebar.

### Borrowers

#### To use batch processing to receive items:

Step	Action	Result
1	Click <b>Borrowing Requests</b> from the left navigation bar.	The list of Borrowing categories expands.
2	Click <b>In Transit</b> .	
3	At the top of the next screen, click <b>Batch receive "In Transit" items</b> .	The screen refreshes to include the additional batch processing fields.
4	Provide a <b>Date Received</b> .	

5	<b>Optional.</b> Click <b>Print Book Straps</b> .	The selected items are added to the <b>Print Queue</b> .
6	In the <b>Request ID</b> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.	The request is added to the list.
7	Click <b>Receive Items</b> .	A confirmation message appears, and the requests are updated to <b>Received</b> .

#### To use batch processing to return items:

Step	Action	Result
1	Click <b>Borrowing Requests</b> from the left navigation bar.	The list of Borrowing categories expands.
2	Click <b>Received</b> .	
3	At the top of the next screen, click <b>Batch return "Received" items</b> .	The screen refreshes to include the additional batch processing fields. <b>Note:</b> The <b>Date Returned</b> defaults to the current date.
4	<b>Optional.</b> Click <b>Print Return Labels</b> .	The selected items are added to the <b>Print Queue</b> .
5	In the <b>Request ID</b> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.	The request is added to the list.
6	Click <b>Return Items</b> .	A confirmation message appears, and the requests are updated to <b>Returned</b> .

## Lenders

#### To use batch processing to complete requests:

Step	Action	Result
1	Click <b>Lending Requests</b> from the left navigation bar.	The list of Lending categories expands.
2	Click <b>Returned</b> .	
3	At the top of the next screen, click <b>Batch complete "Returned" items</b> .	The screen refreshes to include the additional batch processing fields.
4	In the <b>Request ID</b> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol.	The request is added to the list.
5	Click <b>Complete Items</b> .	A confirmation message appears, and the requests are updated to <b>Closed</b> .

#### To use batch processing to respond Yes or No in a batch:

Step	Action	Result
1	Click <b>Lending Requests</b> from the left navigation bar.	The list of Lending categories expands.
2	Click <b>Can You Supply?</b> .	The Can You Supply? screen appears.
3	At the top of the next screen, click <b>Yes</b> or <b>No</b> next to <b>Batch respond to "Can You Supply" items</b> .	The screen refreshes to include the additional batch processing fields.
4	<b>Optional for Yes.</b> Click the options to print, and to <b>Apply constant data</b> . <b>Optional for No.</b> Choose a <b>Reason for No</b> from the drop-down list.	

	<b>Note:</b> This Reason for No applies to all requests that you process as No.	
5	In the <b>Request ID</b> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.	The request is added to the list.
6	Click <b>Yes</b> or <b>No</b> .	A confirmation message appears and the requests are updated.

## Printing

You may print certain items, or all items in a queue.

### To print now:

Step	Action	Result
1	From a request screen, click <b>Print Now</b> at the top of the screen. <b>Note:</b> Some requests will show additional print check boxes (for example, <b>Print Book Straps/Stickers</b> or <b>Print Shipping Labels/Return Labels</b> ) if they are available.	The Print Preview screen appears.
2	Print using the printer icons or links.	The item prints.

**Note:** You may print only one request per page.

### To print certain items later:

Step	Action	Result
1	From a request screen, click the <b>Dropdown Arrow</b> on the <b>Print Now</b> button.	A dropdown list of print options appears.
2	Choose <b>Add To Request Print Queue</b> from the dropdown list.	A confirmation message appears, and the request is added to the appropriate print queue.

3	Click <b>Print Queue</b> in the left navigation bar.	The <b>Borrowing, Lending, and Purchasing</b> print queues appear, as well as the option to <b>Print All</b> (see <a href="#">instructions below</a> ).
4	Click the desired print queue to expand the list.	Requests that were marked for that type of printing appear.
5	Click the check box(es) for items you wish to print.	
6	<b>When printing requests,</b> you may choose to print 1 or 2 requests per page. <b>When printing labels,</b> choose any special Instructions or a <b>Label Format</b> .	
7	Click <b>Print</b> .	The Print Preview screen appears.
8	Print using the printer icons or links.	The item prints.
9	Once you have confirmed that your printing was successful, you may choose to delete requests from the <b>Print Queue</b> . Check the check box, and then click <b>Remove</b> . <b>Note:</b> Requests stay in the print queue indefinitely, unless they are removed.	

### To print all items in a print queue:

Step	Action	Result
1	Click <b>Print Queue</b> in the left navigation bar.	The <b>Borrowing, Lending, and Purchasing</b> print queues appear, as well as the <b>Print All</b> option.

2	Click <b>Print All</b> .	The Printing: Request Queues screen appears.
3	Click the check box(es) for items you wish to print.	
4	Click <b>Next</b> . Or click <b>Clear</b> to clear categories and start over.	The Printing: Marked Queues screen appears.
5	Decide if you want any <b>Not Reviewed</b> , <b>New – Loans</b> , or <b>New – Copies</b> to be automatically updated and check or uncheck the auto-update box. <b>Note:</b> The default is to auto-update the items to <b>Reviewed</b> or <b>Considering</b> status. For more information see <a href="#">Auto-update with Print All</a> .	
6	Click the <b>Print</b> button for queues you wish to print.	The Print Preview screen appears.
7	Print using the printer icons or links.	The item prints and a confirmation message appears.

**Note:** There is a limit of printing 500 requests at a time.

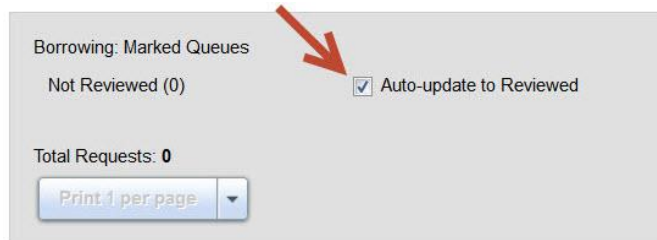
**To remove all items from a print queue:**

Step	Action	Result
1	Click <b>Print Queue</b> in the left navigation bar.	The <b>Borrowing</b> , <b>Lending</b> , and <b>Purchasing</b> print queues appear, as well as the option to <b>Print All</b> .
2	Click <b>Remove All</b> for the appropriate print queue ( <b>Borrowing</b> , <b>Lending</b> , or <b>Purchasing</b> ).	A message appears asking you to confirm that all requests should be removed from the queue.
3	Click <b>Remove All</b> to proceed and remove all requests from the queue.	All items are removed and the counts for each queue return to 0.

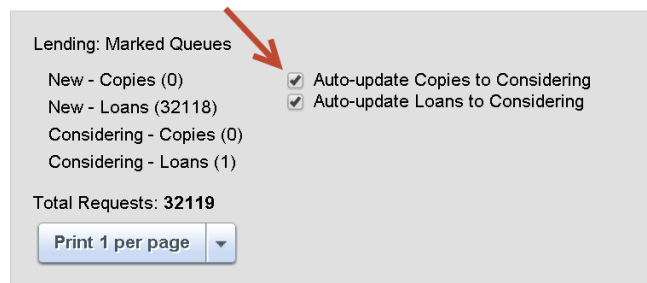
**Auto-Update with Print All**

The auto-update option allows you to control the status of Borrowing **Not Reviewed** requests or Lending **New – Copies** and **New – Loans** requests after they are printed. The system default is to advance these items to an updated status after the **Print All** action is taken. **Not Reviewed** requests will be updated to **Reviewed**. **New – Copies** and **New – Loans** will be updated to **Considering**. If you do not want to advance the request to **Reviewed** or **Considering** status, uncheck the Auto-update box.

**Borrowing Auto-update**



**Lending Auto-update**



**Note:** The system does not retain the setting from the previous print. The update status must be chosen every time you print.

**Other functions**

**E-mail a copy of a request**

Send a formatted e-mail of the request details to any e-mail address using the **Email** button at the top right of any request screen.

**Note:** When a library sends an e-mail, the e-mail address in the **From** field will also receive a copy.

### Buy it/Purchasing Requests

The Purchase option allows you to track items you may wish to purchase, instead of borrowing via interlibrary loan. This feature allows you to input relevant data about the item you're purchasing and tracks usage in [OCLC Usage Statistics](#).

**Note:** Currently, the functionality allows **tracking only**, but future enhancements are planned.

#### To purchase items:

Step	Action	Result
1	Click <b>New For Review</b> under <b>Borrowing Requests</b> .	A list of <b>Borrowing Requests</b> opens.
2	Click the request ID.	The request opens.
3	Select <b>Purchase Request</b> from the Change Fulfillment Type drop-down list.	A pop-up window appears.
4	Complete any desired fields. <b>Note: Vendor</b> is mandatory.	
5	Click <b>Save</b> .	A confirmation message appears and the request appears under the category <b>Purchasing Requests &gt; On Order</b> .

As they become available, links to partner suppliers will appear under **Buy It Options**. Links to suppliers such as Amazon.com, Barnes & Noble or Better World Books will be available.

### Request aging

OCLC counts standard working days (Monday-Friday) as system days/working days. OCLC does not count Saturdays and Sundays as system days/working days.

Type of request	Aging days
Expired	7
Any problem status (Complete?, Not Received, etc.)	180
Review	14
Unfilled	7
From Returned to Complete?	30
From Received to Overdue (only applicable to Loans)	14 days after Due Date
From In Transit to Received? (Copy)	7
From In Transit to Received? (Loan)	14
From On Order to Received?	21
Conditional	4 <b>Note:</b> Sending a <b>Conditional</b> response resets the clock and gives the requesting library four days to respond.
Standard request: update to Yes, No or Conditional	Number of days specified in <b>Days To Respond</b> <b>Note:</b> WorldShare ILL will not age a request to the next lender until the current lender's <b>Days To Respond</b> have passed. If you don't act on a request in that time, the system will automatically send it on to the next library in the string or, if there aren't other libraries, it will become an <b>Unfilled</b> request.
Requests processed on weekends (non-referral days)	Next working day/system day
Requests process on holidays (non-referral days)	Next working day/system day <b>Note:</b> OCLC does not count the following holidays for aging requests: New Year's Day Thanksgiving Day

Day after Thanksgiving Christmas Eve Christmas Day New Year's Eve
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## OCLC Usage Statistics

Use [OCLC Usage Statistics](#) to access reports for your institution. Once logged in to WorldShare Interlibrary Loan, click the link from the WorldShare Interlibrary Loan Home screen to go to OCLC Usage Statistics.

## Borrowing Requests

Category	Description	Borrower Action(s)
<b>AE Alert</b>	Borrower alert category is present when a lender has entered text into the <b>AE Alert</b> field on the workform.	Mark as received Not Received
<b>NEW FOR REVIEW</b>		
<b>Not Reviewed</b>	All requests that are brand new to the system. No one in your library has yet viewed these requests. <b>Note:</b> When a user views a request in this category, its status changes to <i>Reviewed</i> . <b>Note:</b> When using the Print All feature to print Not Reviewed requests, a user has the option to use the default setting and auto-update all requests printed to <i>Reviewed</i> or to turn auto-update off and retain the <i>Not Reviewed</i> status. For more information see <a href="#">Auto-Update with Print All</a> .	Send Request Mark Unread Cancel Request
<b>Reviewed</b>	All requests that are new to the system, but have been viewed (reviewed) by your staff. These requests are electronically-generated, waiting for evaluation and/or further processing.	Send Request Purchase Request Open Access Cancel Request
<b>PRODUCED</b>		
<b>Awaiting Response</b>	The request has been submitted by the borrowing library, and is awaiting a response from a potential lender.	Cancel Request
<b>Direct Produced</b>	These requests have been successfully forwarded through Direct Request for Direct-to-Profile processing during the past 4 system days.	Depends on the request's status.
<b>Conditional</b>	Lender has stated conditions for lending in <b>Lending Notes</b> .	Yes No Cancel Request
<b>In Transit</b>	The lender has sent the item.	Mark as received Not Received
<b>Not Received</b>	Borrower has not received an item and responded <b>No</b> to <i>Received?</i>	Mark as received New
<b>Unfilled</b>	No Lender could supply the item.	New Cancel Request
<b>Received?</b>	The borrower has not yet marked an item as received and the system is asking if it's an oversight.	Mark as received Not Received

## Getting Started with OCLC WorldShare® Interlibrary Loan

<b>Expired</b>	No Lender could supply the item prior to the <b>Need Before</b> date.	Cancel Request
<b>RECEIVED</b>		
<b>Received/In Use</b>	Borrower received the item from Lender, and it is with the requesting patron.	Return item Renew item Lost
<b>Renewal Requested</b>	The Borrower wants to renew the loan, and is awaiting a response from the Lender.	Return item Lost
<b>Renewal Approved</b>	The Lender agreed to renew a loan.	Return item Renew item Lost
<b>Renewal Denied</b>	The Lender did not renew the loan.	Return item Lost
<b>Overdue</b>	Item is 14 or more system days overdue.	Return item Renew item Lost
<b>Recalled</b>	The Lender wants the item returned immediately, or the Lender has sent an erroneous <b>Yes</b> .	Return item Lost
<b>Received but Missing</b>	The Lender has marked this item as missing. The request will age after 180 days.	
<b>RETURNED</b>		
<b>Returned</b>	The Borrower has returned the item.	
<b>Returned but Missing</b>	The Borrower has returned the item, but the Lender did not receive it.	

## Lending Requests

Category	Description	Lender Action(s)
<b>CAN YOU SUPPLY?</b>		
<b>New - Copies</b>	<p>Copy requests that were created when a Borrower submitted a completed workflow, and the request moved through the Lender string sequentially.</p> <p><b>Note:</b> When a user views a request in this category, its status changes to <i>Considering</i>.</p> <p><b>Note:</b> When using the Print All feature to print New - Copies requests, a user has the option to use the default setting and auto-update all requests printed to <i>Considering</i> or to turn auto-update off and retain the <i>New</i> status. For more information see <a href="#">Auto-Update with Print All</a>.</p>	Yes No Conditional
<b>New - Loans</b>	<p>Loan requests that were created when a Borrower submitted a completed workflow, and the request moved through the Lender string sequentially.</p> <p><b>Note:</b> When using the Print All feature to print New - Loans requests, a user has the option to use the default setting and auto-update all requests printed to <i>Considering</i> or to turn auto-update off and retain the <i>New</i> status. For more information see <a href="#">Auto-Update with Print All</a>.</p>	Yes No Conditional
<b>Considering - Copies</b>	Copy requests that you have already reviewed.	Yes



		No Conditional
<b>Considering - Loans</b>	Loan requests that you have already reviewed.	Yes No Conditional
<b>Conditions Accepted</b>	The Borrower has agreed to the condition stipulated.	Yes No
<b>SUPPLIED</b>		
<b>Shipped/In Transit</b>	The Lender has sent the item.	Recall item
<b>Not Received</b>	The Borrower has not received an item sent by Lender and responded <b>No</b> to <i>Received?</i>	
<b>Recalled</b>	The Lender wants the item returned immediately, or the Lender has sent you an erroneous <b>Yes</b> .	
<b>Overdue</b>	Item is 14 or more system days overdue.	Accept Renewal Deny Renewal Recall item Return item
<b>Renewal Requested</b>	The Borrower wants to renew the loan.	Accept Renewal Deny Renewal Recall item
<b>Received/In Use</b>	Request has been updated to <i>Received</i> within 7 days of <b>Shipped date</b> for copies, and 14 days for loans.	Recall item
<b>Received but Missing</b>	The Borrower has received the item, but the Patron has lost it.	Return item Renew item
<b>RETURNED</b>		
<b>Returned/In Transit</b>	The Borrower has returned the item.	Checked-in/Complete Not Returned
<b>Returned/Complete?</b>	Request has shown a status of <i>Returned</i> for 30 system days or longer.	Checked-in/Complete
<b>Returned but Missing</b>	The Borrower returned the item, but the Lender did not receive it.	Checked-in/Complete

## Purchasing Requests

Category	Description	Lender Action(s)
<b>PURCHASING</b>		
<b>Review for Purchase</b>	Lists items the Borrower is considering purchasing.	
<b>On Order</b>	Lists items the Borrower wishes to purchase.	Mark as Received Cancel Request
<b>Received?</b>	The Borrower has not received an item sent by a vendor and responded <b>No</b> to <i>Received?</i>	Yes No

**Item Formats**

<b>Format</b>	<b>Examples</b>
<b>Archival Material</b>	Materials in two or more forms that are usually related by virtue of their having been accumulated by or about a person or body. This category includes comprehensive archives and manuscript collections of mixed forms of materials, such as text, photographs, and sound recordings.
<b>Article</b>	Text that is part of a larger item such as conference papers, chapters, or articles.
<b>Audiobook</b>	Books for use on audio devices. Includes CD, eAudiobook, LP and cassette.
<b>Book</b>	Books, pamphlets, technical reports, typescripts, theses, dissertations, manuscripts and other written works. Includes braille, continually updated resource, eBook, large print, microform and thesis/dissertation.
<b>Computer File</b>	Items in the following classes of electronic resources: computer software (including programs, games, images, graphics, sounds, and fonts), numeric data, computer-oriented multimedia, interactive multimedia, computer-oriented documents.
<b>Game</b>	Items or sets of items designed for play according to prescribed rules and intended for recreation or instruction. Includes video games, puzzles and simulations.
<b>Image</b>	A physical likeness or representation in either print or electronic format.
<b>Interactive Multimedia</b>	A multimedia system in which related items of information are connected and can be presented together.
<b>Internet Resource</b>	Websites with online documents, graphics, systems or services. Includes downloadable images.
<b>Journal/Magazine</b>	Serial publications such as periodicals, annuals, journals, memoirs, proceedings, monographs, eJournals or eMagazines.
<b>Kit</b>	Mixture of various components issues as a unit and intended primarily for instructional purposes. No one component is identifiable as the predominant component of the item. Examples are: packages of assorted materials, such as a set of K-12 social studies curriculum material (books, workbooks, guides, activities, etc.), or packages of educational test materials (tests, answer sheets, scoring guides, score charts, interpretative manuals, etc.).
<b>Map</b>	Maps, map manuscripts, globes, atlases, aeronautical charts, navigational charts, celestial charts, remote-sensing images, computer-generated maps, eMaps, and other cartographic material.
<b>Music</b>	Forms of music such as CD, eMusic, LP, or cassette.
<b>Musical Score</b>	Music materials, including downloadable musical scores, full score, choirs score, close score, condensed score, miniature score, part, music manuscript, books of musical studies and exercises.
<b>Newspaper</b>	Serial newspaper publications. Includes eNewspaper.
<b>Object</b>	Physical item, either tangible or visible.
<b>Toy</b>	Material objects for children or others to play with, often an imitation of some familiar object (e.g., a plaything or something contrived for amusement rather than for practical use). Use for puppets.
<b>Video</b>	Includes Bluray, eVideo, DVD, Film, VHS.
<b>Visual Material</b>	Items in the following classes: Motion pictures, video recordings, graphic materials, three dimensional artifacts, downloadable visual material.



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