

WorldCat Resource Sharing Quick Reference

Introduction

WorldCat Resource Sharing enables OCLC libraries to create, send, manage and track requests and document orders.

With WorldCat Resource Sharing, the same Web-based interface is used to make requests and to fulfill them: OCLC's FirstSearch service. Borrowers can fill out a customized form, while staff log into a special "Staff View" within FirstSearch.

Logging On

Log on to [WorldCat Resource Sharing](#) using your authorization and password. You may link your authorization to a FirstSearch authorization to access non-WorldCat databases available on your FirstSearch account. See **Administrative Functions** on page 7 for more information.

Non-referral Days

OCLC does not count Saturdays, Sundays and the following as working days for aging requests:

- New Year's Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve
- Christmas Day
- New Year's Eve

Request Aging

Every time your symbol appears in the Lender string, you have up to four working days from the time a request appears in your Pending file (**not** from the time you first look at it) to update as **Yes, No, Conditional** or **Future Date**.

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 *Unfilled* request. Sending a *Conditional* response resets the clock and gives the requesting library four days to respond to your *Conditional* or *Conditional/Pending* message.

Creating Requests

Step	Action
1	Complete a search in WorldCat Resource Sharing .
2	Select a record from the List of Records.
3	On the Detailed Record screen, click the type of holdings display that would give you the best Lender choices (Libraries Worldwide, Regional Holdings, State Holdings or Custom Group Holdings), based on the type of item. If the item requested is a serial or continuing resource, include the year requested for both group and custom holdings displays.
4	On the Libraries that Own Item screen, click ? in the Code column to access the Lender's policies in the Policies Directory . After checking policies, you can prioritize potential Lenders based on your needs. Libraries that have the word "yes" in the Supplier column participate in WorldCat Resource Sharing.
5	Select 1–5 potential Lenders. Select a code by clicking on it, or type codes into the Lenders fields.
6	For Custom Holdings Paths only: The system-created Lender string for custom holdings paths for serials/articles will only choose libraries with Local Data Record (LDR) data that matches the year. <ul style="list-style-type: none"> • If fewer than five libraries have matching LDR year data, the rest of the inputs are blank. • If no libraries have matching LDR year data, the entire Lender string is blank. • If no year is input by the user, no system-created Lender string will be created. Note: A Lender string will be generated for group holdings with or without LDR data.
7	Click Transfer to ILL Staff workform .
8	The data on the workform comes from the Constant Data record listed at the top of the screen. Use the Apply Constant Data select box to choose a different Constant Data record.
9	Review the information on the workform for accuracy, and edit any necessary information. Required fields are marked with an asterisk (*). Note: The Borrower is not responsible for charges above the Maximum Cost by a Lender who disregards the amount.
10	To submit the request, click Submit .
11	If you forgot to enter information into required boxes, the system will tell you which fields are missing data. Correct the data; click Submit again.
12	Following a successful submission, a confirmation message appears at the top of the screen. If the submission was not successful, an error message will appear. Correct any errors and submit again.
13	A unique request identifier is assigned to the request. Use this ID to search for requests in Request Manager. It also can be used in Batch Updating (see page 5).

Borrowing Tasks

Borrower Required Fields

When you are borrowing an item from another institution, the following fields must be filled in on the workform:

- **Need Before** in YYYYMMDD format
- **Lenders** (1–5 OCLC symbols)
- **Title** (transfers from WorldCat or other database record)
- **Verified** (from WorldCat record, default is OCLC)
- **Ship To** (500 characters maximum; separate lines of address with slashes; if possible, format the address as 5 lines, 27 characters each, including spaces)
- **Bill To** (default has the same parameters as **Ship To** field)

Updating Requests

To update requests, click the **Resource Sharing** tab to get to the Request Manager screen.

Receiving Loans

Step	Action
1	On the Request Manager screen, retrieve a request with the status of <i>Shipped</i> by clicking the number in the Qty column. If there is more than one request, select the request from the Summary screen.
2	When the item arrives, update the request to <i>Received</i> (see steps 3 and 4).
3	On the Display screen, choose Receive with Today's Date . Or click Edit to change the Receive Date .
4	Click Update .

Returning Loans/Responding to a Recall

Step	Action
1	Retrieve a request with the status of <i>Received</i> , <i>Renewal Request</i> , <i>Renewal Granted</i> , <i>Renewal Denied</i> , or <i>Recalled</i> .
2	To update the request to <i>Returned</i> : On the Display screen, choose Return with Today's Date . Or click Edit to change the Returned date. Note: If you do not indicate <i>Returned</i> within 14 system days (loans) or 7 system days (copies) after the Due Date , the status automatically changes to <i>Special Messages/Borrower: Overdue</i> .
3	Click Update .

Acting on Alerts

Alerts are notes, provided by the Lender, containing information that needs your immediate attention.

Step	Action
1	Retrieve a request with the status of <i>Alert</i> .
2	Read the Alert field.
3	Take appropriate action.

Responding to Conditionals

Step	Action
1	Retrieve a <i>Conditional</i> request.
2	Consider conditions in Lending Notes .
3	Click your desired response, to accept or not accept the Lender's conditions.
4	Click Update . Note: Once you select a radio button and then Update, the request becomes <i>Cond/Pend</i> and the Edit button disappears. Editing is only possible before the borrower updates.
5	Make any necessary changes or corrections.
6	Click Update again.

Requesting Renewal

Step	Action
1	Retrieve a request with the status of <i>Received</i> , <i>Renewal Granted</i> , or <i>Renewal Request</i> from Request Manager.
2	On the Display screen, choose Renewal Request and enter the New Due Date , or "ANY."
3	Optional: Select Edit to change any other information.
4	Click Update .

Saving Requests

Step	Action
1	Retrieve a request with the status of <i>Unfilled</i> , <i>Expired</i> , <i>Conditional</i> , or <i>Retry</i> .
2	On the Display screen, click Save . Note: Saved requests are retained for a maximum of 14 system days.

Deleting Requests

Step	Action
1	Retrieve a request with the status of <i>Pending</i> , <i>Conditional/Pending</i> , <i>Conditional</i> , <i>Retry/Pending</i> , <i>In Process</i> , <i>Review</i> , <i>Review In Process</i> , <i>Save</i> , <i>Retry</i> , <i>Unfilled</i> or <i>Expired</i> .
2	Click Delete Record .
3	Click Update .

Request History

In an *Unfilled* or *Expired* record, The Request History displays throughout the request cycle. It contains the following:

- The date of the response or system action
 - The Lenders' symbols and reasons for not supplying the item
 - The Reason/Response
- The system generates a Request History when:
- A potential Lender responds "No"
 - The request is forwarded to another Lender in the Lender string
 - The Borrower responds "No" to a Conditional request

Custom Holdings

Custom Holdings enable you to speed up the process of selecting Lender strings for requests. Custom holdings groups are groups of libraries that are preferred Lenders. To create custom holdings, you should gather the OCLC symbols of libraries that meet the criteria of the custom holdings group you are creating, e.g., public libraries within your state.

A Custom Holdings Path is a record that contains the names of holdings groups appropriate to a set of requests. Within the holdings path record are holdings group records in order of borrowing preference.

See **Administrative Functions** on page 7.

Selecting a Custom Holdings Path

After searching in **WorldCat Resource Sharing**, select a Custom Holdings Path from the List of Records screen or the Detailed Record screen, then click **Select**. If a library in the custom holdings path owns the item, it will appear on the Libraries that Own Item screen. If not, an error message will appear.

Constant Data

Constant Data is stored information that your institution's staff can use to save keystrokes, reduce errors, and ensure consistency when they initiate or respond to requests. Constant data allows you to create standard workforms that include recurring information such as the requesting library's name, address, and notes you want to appear on all requests.

See **Administrative Functions** on page 7.

Applying Constant Data

On a Blank Workform in **WorldCat Resource Sharing**, select the Constant Data from the Apply Constant Data drop-down menu. Fields on the workform will be automatically filled in with the constant data selected.

Direct Request Profiles

Direct Request Profiles allow your patrons to place requests through WorldCat Resource Sharing without staff intervention. Direct request profiles define acceptable requests for direct processing. Any requests that do not meet the profile are sent to Request Manager for your staff to review.

Direct request profiles are based on the borrowing criteria that are most important to your library, e.g., Borrower status, type of material to be borrowed.

See **Administrative Functions** on page 7.

Lending Tasks

Updating Requests

Indicating "In Process"

Step	Action
1	Retrieve a request with the status of <i>Pending</i> , <i>Conditional/Pending</i> or <i>Retry/Pending</i> from Request Manager.
2	Click In Process .
3	Click Update .

Responding Yes

Step	Action
1	Retrieve a request with the status of <i>Pending</i> , <i>In Process</i> , <i>Conditional/ Pending</i> , or <i>Retry/Pending</i> .
2	Optional: Choose a constant data record as the active record.
3	If you can supply item, select Yes .
4	Check the bibliographic citation and these Borrower fields: <ul style="list-style-type: none"> • Need Before • Copyright Compliance • Maximum Cost • Borrowing Notes Note: The Borrower is not responsible for charges above the Maximum Cost by a Lender who disregards the amount.
5	Click Update . The Status changes to <i>Shipped</i> .
6	Supply Lender data; supply ALERT note if request needs Borrower's immediate attention. For photocopy requests, Due Date should be N/A.
7	Click Update .

Erroneous Yes Response

Although you cannot reverse an erroneous **Yes** response, if you later realize that you cannot fill the request, you can:

- **Recall** the request
- Type a note of explanation in **Lending Notes**
- Contact the Borrower about the error

"Shipped" Status

When you respond **Yes** to a *Pending*, *In Process*, *Conditional/Pending* or *Retry/Pending* request, the status is automatically updated to *Shipped* for the Borrower.

Responding No

If you cannot supply item, click **No**. Choose a **Reason for No** (page 10).

WorldCat Resource Sharing supports the full range of required messages. Libraries can choose to interact with WorldCat Resource Sharing using the ISO ILL protocol as Borrowers, as Lenders or as both.

Future Date/Retry Cycle

Step	Action
1	Retrieve a request with the status of <i>Pending</i> , <i>In Process</i> , or <i>Conditional/ Pending</i> .
2	Determine availability within Borrower's Need Before date.
3	If the date is unacceptable, supply a Future Date when you can fill the request (in YYYYMMDD format).
4	Click Update .

If the system retries the request:

Step	Action
1	Retrieve a <i>Retry/Pending</i> request.
2	Click Yes , No , Conditional , or In Process .
3	Click Update .

Responding Conditionally

Step	Action
1	Retrieve a request with the status of <i>Pending</i> , <i>In Process</i> , <i>Conditional/Pending</i> , or <i>Retry/Pending</i> .
2	Determine your ability to supply the item or photocopy. Check these Borrower fields: <ul style="list-style-type: none"> • Need Before • Copyright Compliance • Maximum Cost • Borrowing Notes
3	Select Conditional .
4	Describe conditions in Lending Notes .
5	Supply Alert note if Borrower's immediate attention is needed; for example, an incorrect citation.
6	Click Update .

If the borrower can comply:

Step	Action
1	Retrieve a request with the status of <i>Conditional/ Pending</i> .
2	Click Yes , No , Conditional , or In Process .
3	Click Update .

Completing Requests

Step	Action
1	Retrieve a request with the status of <i>Returned</i> , <i>Received</i> , <i>Renewal Denied</i> , <i>Renewal Granted</i> , <i>Renewal Request</i> , <i>Recalled</i> , <i>Not Received</i> , or <i>Complete?</i> .
2	Click Complete .
3	Click Update .

Responding to Renewal Requests

Step	Action
1	Retrieve a <i>Renewal Request</i> .
2	If the renewal is granted, click Renewal OK and enter New Due Date . If it is denied, click No Renewal .
3	Click Update .

Recalling Loans

Step	Action
1	Retrieve a request with the status of <i>Shipped</i> , <i>Received</i> , <i>Renewal Denied</i> , or <i>Renewal Request</i> .
2	Click Recall .
3	Click Update .

Lender Required Fields

Shipped in YYYYMMDD format

Return To (Lender name)

Lending Notes (for *Conditional* response only)

Printing Requests

Links to viewing or printing requests are located on the Request Manager screen.

You can print requests from one or more Request Manager categories, up to 100 requests at a time.

To select and print categories:

Step	Action
1	Select View in the Printing area at the bottom of the screen.
2	Check the Select check box for each category you want to print. Or choose Select All . Note: Once printed, <i>Pending</i> requests update to <i>In Process</i> , unless you check the Do not auto-update check box.
3	Under Select Printing Format , choose to print the Full Request , One Request Per Page (default) or Two Requests Per Page . Note: When printing two requests per page, the browser will create a page break between every two requests. A new page is started for each category printed. The barcode is always printed at the top left of the page with the request identifier under it, enclosed by asterisks. Any data cut off should have ellipses at the end. Labels are displayed in capital letters followed by a colon. The Lender will see the Patron Name field, but no other patron information.
4	To print later, use your browser's Back button. Your selections will be saved until you log off this session.
5	To print now, click Print Selected Categories . A dialog box appears, asking if you'd like to Open or Save your file.
6	Click Open to generate a PDF file, or Save to save the file. A new page is started for each category printed. The barcode is always printed at the top left of the page with the request identifier under it enclosed by asterisks. Any data cut off should have ellipses at the end. Labels are displayed in capital letters followed by a colon. Request History , Imprint , Series , and Dissertation are not displayed or printed. When printing two requests per page, the browser will create a page break between every two requests.
7	Print to your selected printer.

Copyright Clearance Center

The Copyright Clearance Center (CCC) is an organization that manages copyright licensing and fee collection. The data provided is for informational purposes only; it does **not** place an order or facilitate payment with the CCC. Follow your local practice to initiate an actual request for materials.

Use this feature to indicate your compliance for photocopy requests. There are two valid codes:

- CCG (Conforms to CONTU Guideline)
- CCL (Conforms to U.S. Copyright law)

ILL Fee Management (IFM)

ILL Fee Management (IFM) provides a means to pay and be paid for WorldCat Resource Sharing requests through your OCLC invoice. It reduces the workload and time spent generating invoices and writing checks. It also supports reciprocal agreements between libraries. Using ILL Fee Management is optional. Any taxes on the WorldCat Resource Sharing charge are the responsibility of the Borrower and Lender.

Process

ILL Fee Management is activated on a request-by-request basis:

Step	Action
1	The Borrower offers to make IFM payment to the Lender by typing a dollar amount in Maximum Cost and clicking the IFM check box.
2	The Lender accepts the offer by entering the same or a lesser dollar amount in Lending Charges and clicking the IFM check box.
3	OCLC matches these two fields and activates IFM when the Borrower updates the request to <i>Received</i> .

Requirements

ILL Fee Management works under these conditions:

Step	Action
1	Both the Borrower and the Lender enter valid ILL Fee Management statements.
2	The Lending Charges amount does not exceed the Maximum Cost amount.
3	The Borrower updates the status of the request to <i>Received</i> .

When a request is received containing the valid ILL Fee Management statements, WorldCat Resource Sharing responds with a confirming message (for example: IFM information supplied.)

Borrower updates to Received

When the Borrower updates an IFM request to *Received*, the system compares **Maximum Cost** and **Lending Charges**. If the IFM statement is valid and the amounts are valid, the system:

- Debits the Borrower for the amount in **Lending Charges**
- Credits the Lender for the amount specified in **Lending Charges**
- May assess the Borrower an administrative fee (covered under the library's resource sharing subscription)

If either statement is invalid or the **Lending Charges** amount exceeds the **Maximum Cost** amount, the item is **not** billed through ILL Fee Management—even if each statement received a confirming message as it was entered.

Cannot Deactivate

Once the Borrower updates a loan request to *Received*, you **cannot** deactivate ILL Fee Management.

IFM in Constant Data

Create constant data records that contain IFM data you use often. For example, create several Borrower constant data records using different IFM values in **Maximum Cost**, and several lender constant data records using different IFM values in **Lending Charges**.

Reports

The ILL Fee Management Monthly Report itemizes the debits and credits listed on your invoice. The report is available at [OCLC Usage Statistics](#) (see page 6).

Batch Updating

The Batch Update function allows you to process multiple WorldCat Resource Sharing requests or multiple sets of requests by:

- Choosing a Resource Sharing action
- Choosing one or more requests to be assigned to that action
- Updating requests

The Batch screen allows you to choose an action, to which you can then assign one or more requests.

Each action has its own screen with relevant associated functions. Use the Batch screen to select actions.

Process

Step	Action
1	Log on to WorldCat Resource Sharing using your authorization and password.
2	Click the Resource Sharing tab.
3	Click the Batch button.
4	Choose the borrowing or lending category to which you want to assign one or more WorldCat Resource Sharing requests.
5	Type request identifiers and other pertinent information in the spaces/boxes provided.
6	Select the Add button to place the request in the update list.
7	Optional: Return to the Batch screen and select another action.
8	Click the Update All Categories button to send all responses at once in their respective categories. When you perform this action, you update <i>all</i> requests in <i>all</i> categories for which you have chosen requests since your last update, not just the category whose Batch Processing screen is currently displayed. Note: Click Clear Successfully Processed Items to clear the screen.

Results

WorldCat Resource Sharing stores the results of your most recent update only. Results from previous updates are not stored and cannot be retrieved. The Batch Processing Results Summary screen displays the Borrowing and Lending category lists and the number of successful and failed requests. The requests are linked to the actual requests for easy access.

Reports

Printing

Click the **Print Report** button to print a report showing detailed results for all categories using your browser's print function.

Exporting

Click the **Export Results** button to export a detailed report in the form of a tab-delimited text file (.txt) that can be imported into a spreadsheet such as Microsoft® Excel or displayed via a text file editor, such as Microsoft® WordPad or Notepad.

Other Features

OCLC Usage Statistics

Log on to [OCLC Usage Statistics](#) with any of your institution's OCLC authorizations to access reports for your institution.

Borrower Reasons for NO and Lender Reasons for NO Reports

Monthly reports for both Borrower and Lender activity help Lenders evaluate their fill rate and Borrowers refine their custom holdings groups.

ILL Fee Management (IFM) Reports

Monthly detailed reports itemize library-to-library borrowing debits and library-to-library lending credits listed on your OCLC bill.

Strategic Union List Report

The Strategic Union List Report gives libraries a jump start on entering union list holdings data by providing a list of serial titles requested from their library, and the number of requests that were filled.

Borrower ILL Management Stats Report and Lender ILL Management Stats Report

Detailed monthly data about your WorldCat Resource Sharing activity that can be viewed online or exported and customized via your own spreadsheet program.

High-level overview of your WorldCat Resource Sharing activity including your borrowing-to-lending ratio, filled versus unfilled requests, and average monthly turnaround time for receiving items.

Borrower Overview Report and Lender Overview Report

Borrower Detail Report

The Resource Sharing monthly report that details by institution requests sent from the library. A single request may be counted more than once on this report depending on how many Lenders it was routed to.

Lender Detail Report

The Resource Sharing monthly report that includes institution level detail about requests sent to the library. A single request may be counted more than once on this report depending on how many times it was routed to the library.

Administrative Functions

Logging On

Log on to the [WorldCat Services Administrative Module](#) using your authorization and password.

Linking a WorldCat Resource Sharing Authorization to a FirstSearch Authorization

Linking your authorization to a FirstSearch authorization gives you access to additional features, including customization of the resource sharing interface used by patrons and staff. Linked authorizations also allow you to access any additional databases available on your FirstSearch account.

A resource sharing administrator must work with your library's FirstSearch administrator to link the authorizations. This task is completed in the [WorldCat Services Administrative Module](#).

Process

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Authorizations from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Staff ILL Authorization field, type in an ILL authorization for your institution, then click the Add button.
3	Click Save Changes .

Constant Data

Constant Data Options

The Constant Data Options screen in the [WorldCat Services Administrative Module](#) allows you to set persistence for your constant data records, and to choose electronic delivery options.

- **Persistence:** If the checkbox is checked, the selected default constant data record will automatically be applied. If a modified constant data record is selected, that record will be applied to future requests. If the checkbox is not checked, users must manually select a constant data record for each resource sharing request.
- **Electronic Delivery:** Choose your preferred method of electronic delivery, and enter a URL in the field provided.

Note: The active record is always the default constant data record unless it is changed when a request is made by the Borrower, or updated by the Lender.

Creating a Constant Data Record

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Constant Data Records from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Click New Blank Record .
3	Enter the CD (Constant Data) Name for the new constant data record, and any other desired data in each field. Required fields are marked with an asterisk (*).
4	Click Save Changes .

Editing a Constant Data Record

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Constant Data Records from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the constant data record you want to edit.
3	Click Go .
4	Edit the fields as you desire. Required fields are marked with an asterisk (*).
5	Click Save Changes .

Deleting a Constant Data Record

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Constant Data Records from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the constant data record you want to delete.
3	Click Go .
4	Click Delete Record .
5	Click OK to delete the record or Cancel to cancel the deletion.

Custom Holdings

Creating a Custom Holdings Group

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Groups from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Click New Blank Record .
3	Enter the Group Name for the custom holdings group you want to create, and optionally, the Group Description .
4	In the Symbols to be added or removed field, enter the OCLC symbols for the institutions to be included in the custom holdings group. Note: To find symbols, click the Look Up Symbols button to go to the Policies Directory .

5	Enter a maximum of 2,500 symbols in a holdings group record.
6	Click Add Symbols .
7	Click Save Changes .

Editing a Custom Holdings Group

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Groups from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the custom holdings group you want to edit. Note: If you want to view a description of the custom holdings group before you edit it, click View/Print Group Descriptions .
3	Click Go .
4	Edit the Group Name , Group Description , or Symbols to be added or removed fields as you desire.
5	To add or remove symbols, type the symbol, then click Add Symbols or Remove Symbols .
6	Click Save Changes .

Deleting a Custom Holdings Group

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Groups from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the custom holdings group you want to delete.
3	Click Go .
4	Click Delete Record .
5	Click OK to delete the group or Cancel to cancel the deletion.

Creating a Custom Holdings Path

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Paths from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Click New Blank Record .
3	Enter the Path Name for the custom holdings path you want to create, and optionally, the Path Description .
4	In the Groups available to be included in the path field, click the group(s) you want to include in the custom holdings path.
5	The system can use 5,000 institutions from a holdings path to create a holdings display. If the holdings groups that make up the holdings path exceed 5,000, the system displays the following message: <i>Truncated because of institution limit. Randomly selected [N of N] institutions.</i>
6	Click Add .
7	Click Save Changes .

Editing a Custom Holdings Path

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Paths from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the custom holdings path you want to edit.
3	Click Go .
4	Edit the Path Name , Path Description , or Groups fields as you desire.
5	To add or remove groups, click the symbol then click Add or Remove .
6	Click Save Changes .

Deleting a Custom Holdings Path

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Custom Holdings Paths from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the custom holdings path you want to delete.
3	Click Go .
4	Click Delete Record .
5	Click OK to delete the path or Cancel to cancel the deletion.

Direct Request Profiles

Creating a Direct Request Profile

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Direct Request Profiles from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Enter the Profile Name for the profile you wish to create, and any other desired data in each field. Required fields are marked with an asterisk (*).
3	Click Save Changes .

Editing a Direct Request Profile

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Direct Request Profiles from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the direct request profile you want to edit. Note: If you want to view a description of the custom holdings path before you edit it, click View/Print Path Descriptions .
3	Click the Go button.
4	Edit the fields as you desire.
5	Click Save Changes .

Deleting a Direct Request Profile

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Direct Request Profiles from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Select drop-down box, select the direct request profile you want to delete.
3	Click Go .
4	Click Delete Record .
5	Click OK to delete the record or Cancel to cancel the deletion.

Saved/Conditional Notes

Conditional notes are used to set any borrowing or lending conditions. Special library hours, library lending practices or general information may be noted here.

Conditional notes will appear as a *Pending* or *In Process* request in Staff View. You may select text to add as a message to the Borrower outlining your conditions for loans.

The order of conditional notes can be changed depending on the “popularity” of the notes used.

Note: You may create a maximum of 20 conditional saved notes.

Adding a Conditional Note:

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Saved Notes from the drop-down list under Staff ILL Settings in the sidebar menu.
2	In the Conditional Note Name field, type in a name. Each note can contain up to 30 characters and blank spaces.
3	In the Conditional Note Text field, type in any information to identify the note. Text can contain up to 500 characters/ spaces.
4	Click Save Changes .
5	The note name displays in the Conditional Note Name field, and the text displays in the Conditional Note Text field. The note name also is listed in the Select a Conditional Note field.
6	To clear the form and start over, click New Blank Record .
7	Click View/Print to see more information about conditional notes.

Deleting a Conditional Note:

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Saved Notes from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Select the note to be deleted by clicking it in the Select a Conditional Note field.
3	The system fills in the Conditional Note Name and Conditional Note Text fields, and highlights the note name in the Select a Conditional Note list.
4	Click Delete Record .
5	Click OK to delete the record or Cancel to cancel the request.
6	The Conditional Note Name and Conditional Note Text fields are cleared, and the note name is cleared from the Select a Conditional Note list.

Changing the display order of Conditional Notes:

Step	Action
1	In the WorldCat Services Administrative Module , click the Resource Sharing tab, then choose Saved Notes from the drop-down list under Staff ILL Settings in the sidebar menu.
2	Select the desired note by clicking it in the Select a Conditional Note field.
3	The system fills in the Conditional Note Name and Conditional Note Text fields, and highlights the note name in the Select a Conditional Note list.
4	Click Move Up or Move Down .
5	Click Save Changes . The order of the list in the Select a Conditional Note field will not be permanently changed until you click Save Changes . If you do not click Save Changes , an error message will display in a pop-up window.

Reasons for Saying No (optional)

Allows Lender to give a reason for not supplying item.

Click **No** and choose a reason from the drop-down list. The following are the available Reasons for No:

WCRS Code	WCRS Text	Maps to ISO Code
1	in use on loan	1
2	non-circulating	4
3	not on shelf/missing	3
4	not owned	5
5	lacking volume/issue	9
6	branch policy problem	18
7	on order	6
8	cost exceeds limit	13
9	technical processing	2
10	preferred delivery time not possible	24
11	poor condition	12
12	at bindery	8
13	volume issue not available	7
14	not licensed to fill	27
15	requested delivery services not supported	23
16	prepayment required	15
17	other	27
Unspecified	Lender gave no reason	Unspecified

Discontinued Reasons	
charges	Not used in WCRS
lacks copyright compliance	Respond Conditional (see <i>WCRS User Guide</i> , sec 13.5)
locations not found	Now: branch policy problem
not found as cited	Respond Conditional (see <i>WCRS User Guide</i> , sec 13.5)
on hold	Now: in use/on loan
on reserve	Now: in use/on loan

Support

OCLC support staff:

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682 (7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–Friday)

Ordering copies of this publication

Step	Action
1	To order additional copies of this publication, send an e-mail request to orders@oclc.org . Include the product code (REF1101).
2	You may also use the OCLC Index of Documentation at https://www3.oclc.org/documentation/ . If the Order hard copy link is available, you may use it to request a printed copy.

Request Searching

Search	Search Type	Notes/Example Searches
Author	Wild card match, case insensitive	Enter the author's name the same way you believe it is stored in the database; include punctuation but ignore leading and trailing spaces. Example: rob* Will retrieve: Robert Ludlum; Robert James Waller; Robin McKinley Will not retrieve: McKinley, Robin; Ludlum, Robert
Author/Title; Review Number		<i>obsolete</i>
Borrowing Library	Exact match, case insensitive	Enter the institution symbol to list requests from a particular institution
Call Number	Exact match, case insensitive	Enter the call number of the item in the request you want to retrieve.
Lending Library	Exact match, case insensitive	Enter the institution symbol to list requests from a particular institution.
Patron Department	Wild card match, case insensitive	Enter the department of the patron in the request you want to retrieve. Example: medic* Will retrieve: Medical; Medical Department; Medicine
Patron Identifier	Exact match, case insensitive	Enter the ID number of the patron in the request you want to retrieve.
Patron Name	Wild card match, case insensitive	Enter the name of the patron in the request you want to retrieve. Example: smith Will retrieve: Gene Smith Example: *smith Will retrieve: Gene Smith; Jack Hammersmith Example: * smith* Will retrieve: Kate Smithson
Request Identifier	Exact match	Enter the system-generated identification number of the request you want to retrieve.
Title	Wild card match, case insensitive	Enter the title of the item in the request you want to retrieve.

Request Manager Categories

This category...	Displays to:	Notes	L: Lender Action(s) B: Borrower Action(s)
Alert	B	The lender added an alert to a request to provide information that needs immediate attention by the Borrower.	B: Actions depend upon the information in the alert.
Conditional	B	Lender has stated conditions for lending in Lending Notes .	B: Yes, No, Delete, Save, Edit, New
Conditional/Pending	L	The Borrower can comply with the condition stipulated.	L: In Process, Yes, No, Conditional, Future Date B: Delete, Edit, New
Direct Produced	B	These requests have been successfully forwarded through Direct Request for Direct-to-Profile processing during the past 4 system days.	Actions depend upon an individual request's status.
Expired	B	No Lender could supply the item prior to the Need Before date.	B: New, Save, Delete
In Process	L	These are requests that you have already reviewed. This category has two parts: In Process - Loans and In Process – Copies. If a request does not contain a request type, it is included in In Process - Loans.	L: Yes, No, Conditional, Future Date B: Delete
Lost	L	The Lender reports the item as Lost.	L:
New	B	New ILL workform.	B: Save
Online Produced	B	Requests created using WorldCat Resource Sharing during the past 4 system days.	Actions depend upon an individual request's status.
Pending	L	These requests were created when a Borrower submitted a completed workform, and move through the Lender string sequentially. This category has two parts: Pending - Loans and Pending – Copies. If a request does not contain a request type, it is included in Pending - Loans.	L: In Process, Yes, No, Conditional, Future Date B: Delete, Edit, New
Recalled	B	The Lender wants the item returned immediately, or the Lender has sent you an erroneous Yes .	B: Return, Edit L: Complete, Edit
Received	B	Borrower received item from Lender.	B: Return, Renewal Request, Edit L: Recall, Complete, Edit, Lost
Renewal Denied	B	The Lender did not renew the loan.	B: Return L: Recall, Complete
Renewal Granted	B	The Lender agreed to renew a loan.	B: Return, Renewal Request, Edit L: Recall, Complete, Edit, Lost
Renewal Request	L	The Borrower wants to renew the loan.	L: Renewal OK, No Renewal, Recall, Complete, Edit B: Return, Renewal Request, Edit
Retry	B	No Lender could fill the request now, but a Lender indicated a future date at which the request could be filled.	B: Change Need Before Date, Save, Delete
Retry/Pending	L	A previously specified Future Date has arrived and the Borrower still wants the item.	L: In Process, Yes, No, Conditional B: Delete, Edit
Returned	L	The Borrower has returned the item.	L: Complete, Edit
Review	B	Electronically-generated requests that are waiting for evaluation and/or further processing, or that have already been processed by Direct Request.	B: Review in Process, Delete
Review in Process	B	The Borrower has already looked at or printed this request.	B: Submit, Update, Reset
Save	B	These requests have been set aside for further review.	B: Delete
Shipped	B L	The Lender has sent the item.	B: Receive, Edit L: Recall, Edit, Lost
Unfilled	B	No Lender could supply the item.	B: Save, Delete, New
Special Messages/ Borrower OVERDUE	B	Due Date or New Due Date is 14 or more system days overdue.	B: Return item, Renewal Request, Edit L: Recall, Edit
Special Messages/ Borrower RECEIVED?	B	Request has not been updated to <i>Received</i> within 7 days of Shipped date for copies, and 14 days for loans.	B: Yes, No, Edit L: Recall, Edit
Special Messages/ Lender COMPLETE?	L	Request has shown a status of <i>Returned</i> for 30 system days or longer.	L: Complete, Edit B: Edit
Special Messages/ Lender NOT RECEIVED	L	Borrower has not received an item sent by Lender and responded No to <i>Received?</i> .	L: Complete, Edit B: Receive, Edit