Getting Started with OCLC WorldShare™ Interlibrary Loan

Introduction

OCLC WorldShare™ Interlibrary Loan provides significant enhancements to functionality now present in WorldCat Resource Sharing.

Please refer to the **OCLC WorldShare Interlibrary Loan migration Web page** for more details.

Preparing and planning

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

OCLC™ Policies Directory

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*.

Constant Data

Review and update your constant data records in the **WorldCat® Services Administrative module** to ensure consistency and streamline processes for your staff.

In particular, review the format of your address fields to make sure they accommodate changes implemented in March 2012. The previous "SHIP TO" and "RETURN TO" fields are now the following distinct address fields: Attention, Address 1, Address 2, City, State/Province, Country, Postal Code. The new "Address 1" field contains data previously included in the "SHIP TO" field on the ILL workform. Please see *WorldCat Resource Sharing Quick Reference: New Constant Data Fields* for detailed instructions for updating address information in constant data records.

Browser requirements

Make sure interlibrary loan staff use one of the following browsers that will work with WorldShare Interlibrary Loan:

- Mozilla Firefox® version 17.0.1 ((preferred browser)
- Google Chrome version 23.0.1271.97 m
- Microsoft® Internet Explorer versions 8.0 and 9.0*
  Note: WorldShare Interlibrary Loan cannot be used with Microsoft Internet Explorer version 7.0. Internet Explorer version 10 is not currently supported.

Newer browser versions are needed to enable use of the new and expanded features of WorldShare™ Interlibrary Loan. The new service will not work with other browsers or browser versions. Library staffs will probably find that these newer, more secure browsers will also enhance their use of other Web sites and services used by library staff and users.

If library staffs are not sure which browser is in use at their library, they can use **this online tool** to find out: **http://www.thismachine.info/**.

*A **Windows lifecycle fact sheet** is available on the Microsoft website: **http://windows.microsoft.com/en-US/windows/products/lifecycle**.

Please see **WorldShare™ Interlibrary Loan Migration Resources** for other valuable documentation and training resources.

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).

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.
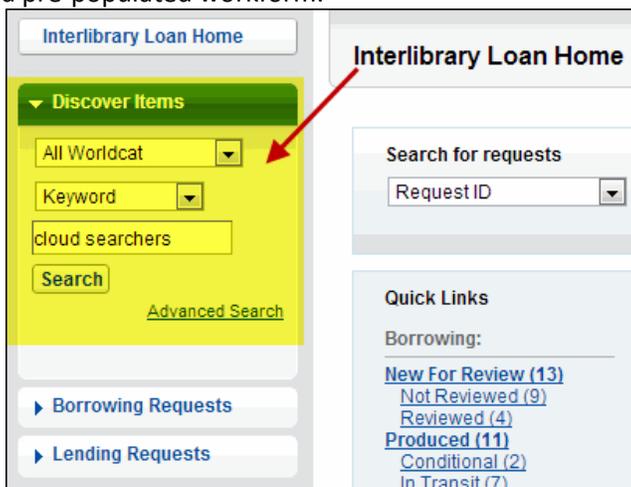
Navigating the system

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. The **Discover Items** feature results in a pre-populated workform.

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 **Search**.	Matching results appear, along with holdings display options.
4	On the Results screen, display holdings by clicking **State Holdings**, **Regional Holdings** or **All Library Holdings**. **Note:** Regional Holdings includes all holdings in contiguous states.	The holdings screen appears.
5	Click **Yes** in the **Supplier** column to choose a lender.	The lender is added to your **Lender String**.
6	*Optional:* Click the library name or the blue question mark logo to see the lender's policies.	The Lender's Profile screen in the **OCLC Policies Directory** opens in a new window.
7	Click **Create Request**.	The request workform appears.
8	Choose your constant data record from the **Apply constant data** drop-down list.	The fields on the workform are populated with your constant data.
9	Provide a **Needed By:** date. Under **Borrowing Library**, the **Address** field is required for both **Shipping** and **Billing**.	
10	Under **Lending Libraries**, 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 **Lender String** field, separated by commas.	
11	Provide **Patron** information.	
12	Click **Send Request**. **Note:** If you wish to save the request to submit in the future, click Save For Review.	A confirmation message appears and the request appears under the category **Borrowing Requests > Produced > Awaiting Response**.

Advanced Search

From the **Discover Items** heading, click **Advanced Search** to see the Advanced Search screen:

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
Format	The format of the item for which you are performing the advanced search. *Examples:* book, audiobook
Language	The language of the item. Click the **Show more** option to view the complete list of languages available.
Year(s)	The years of publication. *Example:* single year (1980)

To perform an advanced search:

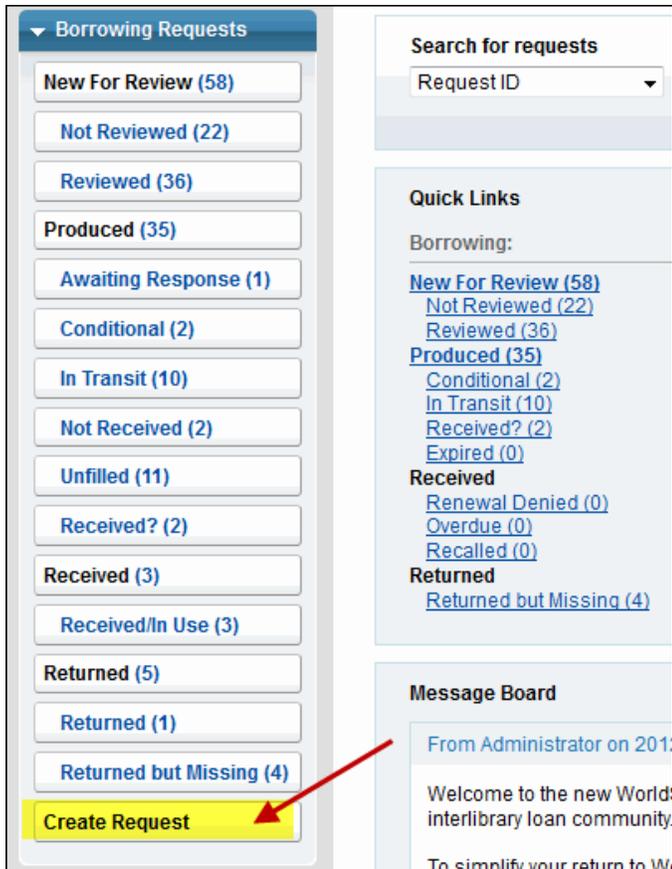| Step	Action
1	Limit your search to: **My Library Holdings:** searches for records in your local holdings. **Group Holdings:** searches for records in your group's holdings. **All Worldcat:** searches for records in WorldCat.
2	Select one of the **index types**.
3	Based on the **index type** selected, enter the appropriate text in the search box.
4	Select up to three combinations of **boolean operators** and index types, and search text by clicking the plus sign (+) to add additional form fields.
5	Fill out the remaining search form fields: - Format - Language - Year(s)

Boolean operators

Use Boolean operators to combine search terms.

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

Create Request (from a blank workform)

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

To create a request:

Step	Action	Result
1	Type the details of your request in the fields provided.	
2	Choose the request **Type**, **Media Type** and **Edition**.	
3	Provide a **Needed By:** date.	
4	Apply your constant data record.	
5	Click **Create**.	A confirmation message appears and the request appears under the

		category **Borrowing Requests > New For Review**.
6	Click **Borrowing Requests** from the left navigation bar.	The list of Borrowing categories expands.
7	Click **New For Review**.	
8	Click your request ID.	The request opens.
9	Click **Send request**.	A confirmation message appears.
10	Choose either **View Next Request** or **Return to list**.	Your request is sent to the lender and you are returned to the screen of your choice.

Searching for requests

From the Interlibrary Loan Home screen, you may search active and closed requests by:

- Request ID
- WCRS ID
- Borrower Symbol
- Lender Symbol
- Author
- Title
- Article Title
- Patron Name

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	*Optional.* Un-check the check box to deselect **Active Requests** or **Closed Requests**.	
4	Click **Go**.	The system responds with any matching requests.
5	Click a request.	

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 requests contain an **Alert,** it is also listed.
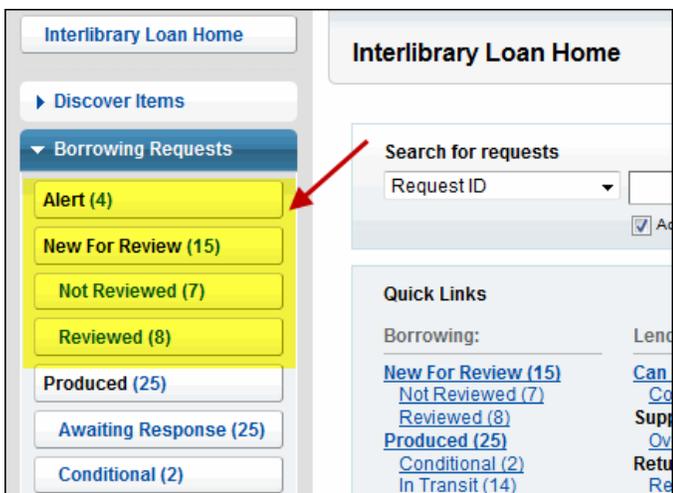
For Lending Requests, the initial categories of **New**, **Considering** and **Conditions Accepted** are listed under **Can You Supply?** in the left navigation bar.
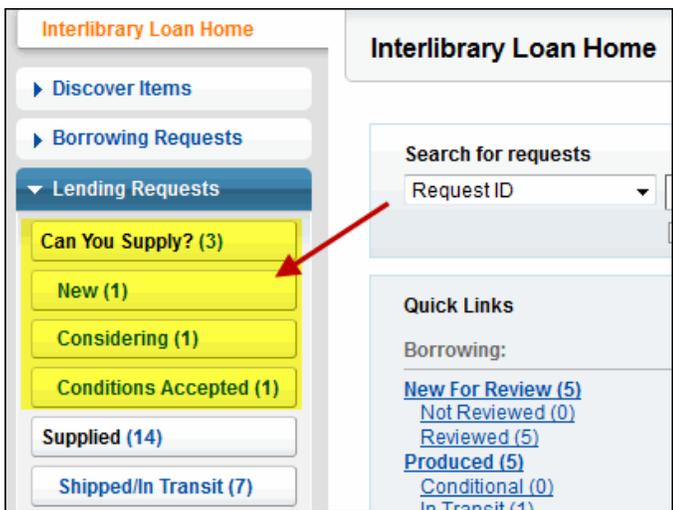
Click a category name to see all requests in that category.
Note: Categories with no current requests will not appear in the list.

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. **Note:** 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 **ID** or **Title** to see the full request.	Request details appear. **Note:** Some details are listed in drop-down lists.
3	Possible actions appear at the top of the request. Click the action you wish to apply.	A confirmation message appears.

Batch processing (Borrowers)

Borrowing libraries can use batch processing to receive and return multiple items.

To use batch processing to receive items:

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

Step	Action	Result
5	In the **Request ID** field, you may either manually enter a request ID number, scan a barcode, or click a field in the list of requests that is NOT hot linked (e.g. Media Type).	The request is added to the list.
6	Click **Receive Items**.	The requests are updated to **Received**.

To use batch processing to return items:

Step	Action	Result
1	Click **Borrowing Requests** from the left navigation bar.	The list of Borrowing categories expands.
2	Click **Received**.	
3	At the top of the next screen, click **Batch return "Received" items.**	The screen refreshes to include the additional batch processing fields. **Note:** The **Date Returned** defaults to the current date.
4	In the **Request ID** field, you may either manually enter a request ID number, scan a barcode, or click a field in the list of requests that is NOT hot linked (e.g. Media Type).	The request is added to the list.
5	Click **Return Items**.	The requests are updated to **Returned**.

Batch processing (Lenders)

Lending libraries can now complete requests for items that have been returned by borrowing libraries using batch functionality.

To use batch processing to complete the request process:

Step	Action	Result
1	Click **Lending Requests** from the left navigation bar.	The list of Lending categories expands.
2	Click **Returned.**	
3	At the top of the next screen, click **Batch complete "Returned" items**.	The screen refreshes to include the additional batch processing fields.
4	In the **Request ID** field, you may either manually enter a request ID number, scan a barcode, or click a field in the list of requests that is NOT hot linked (e.g. Media Type).	The request is added to the list.
5	Click **Complete Items**.	The requests are updated to **Closed.**

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.

Printing

Currently, the following printing options are available:
Lender: Shipping labels, pull slips and book straps from certain categories of Lending requests (**Can You Supply?, Considering** and **Conditional**).
Note: Lenders can print pull slips before responding to requests.

Borrower: Return shipping labels, full requests (1 per page) and book straps.

In the future, more printing functionality will be added.

To print:

Step	Action	Result
1	From a request screen, click the **Print** button at the top right corner of any screen. **Note:** Some requests will show additional print options, if they are available.	A confirmation message appears, and the request is added to the appropriate print queue.
2	Click **Print Queue** in the left navigation bar.	The list of print queues appears.
3	Click the desired print queue to expand the list.	Requests that were marked for that type of printing appear.
4	Click the check box(es).	
5	*When printing labels,* choose any special Instructions or a **Label Format**.	
6	Click **Print.**	The Print Preview screen appears.
7	Print using the printer icons or links.	The item prints.
8	Once you have confirmed that your printing was successful, you may choose to delete requests from the **Print Queue** by checking the check box, and then clicking **Remove**. **Note:** Requests stay in the print queue indefinitely, unless they are removed.	

Buy it

If your library's policies permit it, you can purchase a book by clicking the **Buy It Options** on new requests. If an item is available for purchase, links to partner suppliers such as Amazon.com, Barnes & Noble or Better World Books will appear. Click the link to take you to the supplier's web site.

Note: The ability to manage these requests through new work queues has not yet been implemented.

Request aging

Every time your symbol appears in the Lender string, you have up to four working days from the time a request appears under **Can You Supply?** (**not** from the time you first look at it) to update as **Yes, No** or **Conditional**.

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.

Non-referral days

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

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

Support and feedback

E-mail: **support@oclc.org**
Telephone: 1-800-848-5800 (USA) or
+1-614-793-8682
(7:00 am to 9:00 pm, US Eastern time, Monday–Friday)

Borrowing Categories

Category	Description	Borrower Action(s)
Alert	Borrower alert category is present when a lender has entered text into the **Alert** field on the workform.	Mark as received Not Received
NEW FOR REVIEW		
Not Reviewed	All requests that are brand new to the system. No one in your library has yet viewed these requests. **Note:** When a user views a request in this category, its status changes to *Reviewed*.	Send Request Mark Unread Cancel Request
Reviewed	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 Mark Unread Cancel Request

PRODUCED		
Awaiting Response	The request has been submitted by the borrowing library, and is awaiting a response from a potential lender.	Cancel Request
Conditional	Lender has stated conditions for lending in **Lending Notes**.	Yes No Cancel Request
In Transit	The lender has sent the item.	Mark as received Not Received
Not Received	Borrower has not received an item and responded **No** to *Received?*	Mark as received
Unfilled	No Lender could supply the item.	New Cancel Request
Received?	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
Expired	No Lender could supply the item prior to the **Need Before** date.	

RECEIVED		
Received/In Use	Borrower received item from Lender, and it is with the requesting patron.	Return item Renew item
Renewal Requested	The Borrower wants to renew the loan, and is awaiting a response from the Lender.	Return item
Renewal Approved	The Lender agreed to renew a loan.	Return item Renew item
Renewal Denied	The Lender did not renew the loan.	Return item
Overdue	Item is 14 or more system days overdue.	Return item Renew item
Recalled	The Lender wants the item returned immediately, or the Lender has sent an erroneous **Yes**.	Return item
Received but Missing	The Lender has marked this item as missing. The request will age after 180 days.	

RETURNED		
Returned	The Borrower has returned the item.	
Returned but Missing	The Borrower has returned the item, but the Lender did not receive it.	

Print Queue	Any requests selected for printing show here.	

Lending Categories

Category	Description	Lender Action(s)
CAN YOU SUPPLY?		
New	These requests were created when a Borrower submitted a completed workform, and the request moved through the Lender string sequentially. **Note:** When a user views a request in this category, its status changes to *Considering*.	Yes No Conditional Mark Unread
Considering	These are requests that you have already reviewed.	Yes No Conditional Mark Unread
Conditions Accepted	The Borrower has agreed to the condition stipulated.	Yes No

Category	Description	Lender Action(s)
SUPPLIED		
Shipped/In Transit	The Lender has sent the item.	Recall item
Not Received	Borrower has not received an item sent by Lender and responded **No** to *Received?*	
Recalled	The Lender wants the item returned immediately, or the Lender has sent you an erroneous **Yes**.	
Overdue	Item is 14 or more system days overdue.	Return item
Renewal Requested	The Borrower wants to renew the loan.	Accept Renewal Deny Renewal Recall item
Received/In Use	Request has been updated to *Received* within 7 days of **Shipped date** for copies, and 14 days for loans.	Recall item

Category	Description	Lender Action(s)
RETURNED		
Returned/In Transit	The Borrower has returned the item.	Checked-in/Complete Not Returned
Returned/Complete?	Request has shown a status of *Returned* for 30 system days or longer.	Checked-in/Complete Not Returned
Returned but Missing	The Borrower has returned the item, but the Lender did not receive it.	Checked-in/Complete

Print Queue	Any requests selected for printing show here.

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