WorldShare Interlibrary Loan
User Guide

Facilitating access to information
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Creating an account

If you already use WorldShare Management Services, WorldShare Collection Manager, or WorldShare License Manager, you have an existing OCLC Services account that gives you access to several services in the WorldShare 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 Interlibrary Loan permissions to your account.

If you DO NOT have any of the WorldShare Management Services; you will need your institutional 9-digit OCLC Cataloguing (eg:100-xxx-xxx) authorization number and password, and follow the 3 steps below.

Create an account (New WorldShare Management Clients)

https://share.worldcat.org/myaccount

If you need assistance creating your new account please contact the OCLC Order Services department via email at orders@oclc.org and we can help you set up your new account.
Follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Go to <a href="https://share.worldcat.org/myaccount">https://share.worldcat.org/myaccount</a></td>
<td>The Welcome screen appears.</td>
</tr>
<tr>
<td>2</td>
<td>Click Create account.</td>
<td>The Create an OCLC Services account screen appears.</td>
</tr>
<tr>
<td>3</td>
<td>Type your 9-digit Authorization and Password.</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Click Next.</td>
<td>The Confirm your institution screen expands.</td>
</tr>
<tr>
<td>5</td>
<td>Confirm your institution and service(s) used.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Click Confirm. Note: If this is not your institution, click Not my institution to return to the Welcome screen.</td>
<td>The Create your new account screen expands.</td>
</tr>
<tr>
<td>7</td>
<td>Fill out all fields. Note: If the user name you choose is already in use, you will get an error message.</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Click Create account.</td>
<td>A confirmation message appears and a list of available services appears.</td>
</tr>
<tr>
<td>9</td>
<td>Click WorldShare Interlibrary Loan.</td>
<td>You are redirected to your institution’s custom Sign In screen.</td>
</tr>
<tr>
<td>10</td>
<td>Type the User Name and Password you just created.</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Click Sign In.</td>
<td>You are signed into WorldShare Interlibrary Loan.</td>
</tr>
</tbody>
</table>

Best practices for creating an account:

- Each user should have their own account to allow for improved security and addition of other services in the future.
- Email addresses should be an individual’s email address, and not an email address for the institution itself.
Create accounts for other users at your institution (Existing WorldShare Clients)

Follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the <strong>Admin</strong> tab at the top of the screen.</td>
<td>The User Management screen appears.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>New User</strong>.</td>
<td>The screen expands.</td>
</tr>
<tr>
<td>3</td>
<td>Fill out the fields on the screen. <strong>Note</strong>: Required fields are marked with an asterisk (*).</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Click <strong>Create</strong>.</td>
<td>A confirmation message appears, and additional menus appear on the screen.</td>
</tr>
</tbody>
</table>
Edit user privileges

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Edit</strong> next to the <strong>Roles</strong> menu.</td>
<td>The screen expands.</td>
</tr>
<tr>
<td>2</td>
<td>To change privileges, click the check box next to desired level of privileges (see below).</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click Save to save your changes, or click <strong>Cancel</strong> to start over.</td>
<td>A confirmation message appears.</td>
</tr>
</tbody>
</table>

WorldShare Interlibrary Loan user privilege levels

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

Set/reset passwords

Click Set/reset password under Basic User Data for the system to send an email to that user with instructions for creating a new password.

<table>
<thead>
<tr>
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<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click the link provided in the email. <strong>Note:</strong> This link will expire 24 hours after being sent.</td>
<td>The Change Password screen appears.</td>
</tr>
<tr>
<td>2</td>
<td>Fill out the fields to provide the <strong>User Name</strong>, a <strong>New Password</strong>, and <strong>Confirm New Password</strong>.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Click <strong>Change Password</strong>.</td>
<td>A confirmation screen appears.</td>
</tr>
</tbody>
</table>
Accessing the **system**

Go to your institutional WorldShare Interlibrary Loan URL and sign in with your user name and password. You may also see a branch selection pop-up window. Select your branch and click OK to proceed. If you have access to other WorldShare Services, ensure to click on the Interlibrary Loan tab (as shown in the image).
Homepage: WorldShare Interlibrary Loan

WorldShare Interlibrary Loan provides new functionality that speeds fulfilment of interlibrary loan requests to save time for your staff and users.
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 records in the OCLC Policies Directory. Some key areas to review include Contacts and Policies for copy, loan and deflections.

Once logged in to WorldShare Interlibrary Loan, on the WorldShare Interlibrary Loan Home, under Quick Links, click OCLC Policies Directory.

OCLC Service Configuration

Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. On the WorldShare Interlibrary Loan Home, under Quick Links, click OCLC Service Configuration to go to Service Configuration.
OCLC Policies Directory

The OCLC Policies Directory is the repository of lending and copying policies of libraries participating in WorldShare Interlibrary Loan. The location of the OCLC Policies Directory is: https://illpolicies.oclc.org. There is also a link to the Policies Directory from WorldShare Interlibrary Loan. Using your institutional 9-digit OCLC Cataloguing (eg:100-xxx-xxx), and click the Policies Directory link.
Overview

The function of the Policies Directory is to enable you to enter and display information about:

- Your lending, copying and deflection policies
- Your resource sharing supplier status
- Your library collections
- Your library schedules
- Contacts at your library

Searching the Policies Directory

Choose the type of search from the Search By list, then type the corresponding name of the institution or group or the symbol of the institution or group.

When searching by the name of the institution or group, wildcards are recommended when searching by name, due to the variety of abbreviations used in names.

When searching by the Institution Symbol (three-five character OCLC symbol of the institution) or the Group Symbol (four-character OCLC symbol of the OCLC-profiled group) only exact matches are retrieved.

Search guidelines

Search phrases are case-insensitive. Articles and most punctuation are ignored. Special characters (such as (and&)) are treated as spaces.
## Searching Options:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Search By</strong></td>
<td>Choose what you want to search for (institution symbol or name, group symbol or name). Note: Symbol searches retrieve exact matches only. If a group symbol is found, all its members are listed on the search results screen. Type the <strong>name</strong> or <strong>symbol</strong> of the institution or group.</td>
</tr>
<tr>
<td><strong>Geography</strong></td>
<td>Country; State (USA)/province (Australia, Canada); City</td>
</tr>
<tr>
<td><strong>Institution Types</strong></td>
<td>Each library can choose a single type to describe itself.</td>
</tr>
<tr>
<td><strong>OCLC Supplier</strong></td>
<td>Libraries that lend using the OCLC ILL system.</td>
</tr>
<tr>
<td><strong>Days To Respond</strong></td>
<td>Number of days needed to respond to a request (4, 8, 12, 16 or 2)</td>
</tr>
<tr>
<td><strong>Rush Supported</strong></td>
<td>Libraries that will expedite requests. Note: Rush handling often costs more than normal handling.</td>
</tr>
<tr>
<td><strong>International Lender</strong></td>
<td>Libraries that lend to countries other than their own.</td>
</tr>
<tr>
<td><strong>Group Affiliation</strong></td>
<td>To limit search by group, the group must be profiled by OCLC. Note: These options do not apply to group name searches.</td>
</tr>
</tbody>
</table>

### Policy Information options

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fee</strong></td>
<td>Limit search by fee charged. The search will return institutions with policies that indicate a fee of less than or equal to the search amount. Must be numeric.</td>
</tr>
<tr>
<td><strong>Currency</strong></td>
<td>Specify the currency defined in the policy.</td>
</tr>
<tr>
<td><strong>Format</strong></td>
<td>Limit search by material type or physical manifestation of the item.</td>
</tr>
<tr>
<td><strong>Request Method</strong></td>
<td>Limit search by request method (means by which ILL requests are accepted by the library).</td>
</tr>
<tr>
<td><strong>Delivery Method</strong></td>
<td>Limit search by delivery method (service used or means by which items are delivered to a library).</td>
</tr>
<tr>
<td><strong>Billing Method</strong></td>
<td>Limit search by billing method (service used or means by which a library will request payment for ILL transactions). Note: These options do not apply to group name searches.</td>
</tr>
</tbody>
</table>
Note: Click the Search button.
Click Reset to clear all data you entered.
The Search Results screen displays. Note: The maximum number of search results is 5000.

Search results
Display symbols
Search results screens that list institution symbols have a Display Symbols button (above and below the search results table) that displays all retrieved institution symbols in a window from which you can copy them.

Create copy or loan policies
Use the OCLC Policies Directory to explain your lending policies.

Tip: If you are a reciprocal lender, enter Reciprocal Lender as the policy name so that other lenders can find this information easily.

When entering your policies, have the following information available:
• The different groups to whom you lend. Only groups that have been profiled by OCLC will display.
• The fees that you charge to libraries for your ILL services. These may include flat or per item/page/exposure charges, taxes, shipping, service or rush fees. Enter 0.00 in the fee field if there is no fee.
• The billing methods that you support. This includes IFM. If you have more than one method, they are listed in order of preference, with the first being the most preferred.
• The delivery methods that you support. These could include physical methods, such as courier services, or electronic methods such as email, or OCLC Article Exchange.
• Specific loan and renewal periods.

To add or edit a copy or loan policy:
1. Click the Policies tab.
2. Click either Copies or Loans.
3. Click Add or Edit. The workform appears.
4. Type the Policy Name (required field).
5. Copies:
   a. **Copy Type.** The type of copy the policy applies to.

Loans:
   a. **Loan Item Maximum.** The maximum number of items loaned.
   b. **Loan period.** The length of the loan. Renewal Maximum. The maximum number of times a loan can be renewed
   c. **Renewal Period.** The length of the renewal period.

6. Fees (required field):
   - **Increment.** The unit of measurement (page, exposure, item)
   - **Minimum/maximum.** The number of copies available per Fee. Note: To indicate a flat fee, fill in Fee, but leave Minimum and Maximum blank.
   - **Currency.** The monetary unit used.
   - **Tax included.** Indicates if tax is part of fee or not.
   - **Tax type.** Rate (per cent) or fee.
   - **Tax.** The amount of the tax.
   - **Reciprocal Type.** The kind of reciprocal agreement (fee vs. free), if any.
     - **Example:** A policy for copying the first 10 pages at R35.00 and the next 10 at R75.00 would be recorded in two rows:
       - **Increment:** Item; min: 1; max: 10; fee: R35.00
       - **Increment:** Item; min: 11; max: 20; fee: R75.00
7. Borrowers:
   • OCLC Group. The groups the policy applies to and any exceptions.
   • Library Categories. A description chosen by the library.
   • Locations. The locations the policy applies to and any exceptions.

8. Items:
   • Collections. The collections the policy applies to and any exceptions.
   • Formats. The formats the policy applies to and any exceptions.
   • Restrictions. Any conditions that restrict the use of the item.

9. Details:
   • Methods and their fees are listed in order of preference.

10. Notes:
    • Additional notes about the policy.

Click Save.

Create deflection policies

Deflection is applied to the lender string to ensure that an unfilled request does not remain in WorldShare Interlibrary Loan as Pending, waiting for potential lenders to manually deny the request.

It takes place before the lender string is built. The Policies Directory is not involved with this processing.

If the borrower returns to the request after it has been placed, the asterisk indicating the current lender will have moved to the next lender. The Request History will indicate the Reason for No:
   • Auto-Deflection: Format Type
   • Auto-Deflection: Profiled Group (covers profiled groups and Custom Holding Groups)
   • Auto Deflection: Maximum Cost
   • Auto Deflection: Age of Material
   • Auto Deflection: Multiple Reasons
   • Auto Deflection: Request Type

The hierarchy for deflection

• Non-supplier status—if a lender is a non-supplier, nothing can be loaned or copied
• Local Holdings Record (LHR)—bytes 20 and 21 override deflection settings
• Deflection Type—enabled or disabled
• Deflection Profile—deflection by policies set up in the Policies Directory
How it works

A simple scenario for deflection by format would be:

1. The borrowing library creates a request choosing lenders that appear to be suppliers for the material.
2. WorldShare Interlibrary Loan searches the first lender's policies in the Policies Directory to see if they will loan that format.
3. Instead of the lender getting the request as Pending, it skips that lender and automatically deflects to the next lender.
4. The request moves through the string until it identifies a lender that might supply it.

Deflection Includes/Excludes

This feature allows your institution to be very specific about what groups and items a deflection policy pertains to, and those that it does not pertain to. If you want to deflect a group or one or two items, use the Include feature. If you want to deflect everything except a group or one or two items, use the Exclude feature.

Examples:

- To deflect everything except books, use Exclude and click Book (instead of using Include, where you would have to click all the other formats except Book).
- My library does not loan DVDs, but I want to allow other libraries in my group to borrow. For this policy, you would Exclude your group, and Include Visual Material – DVD.
On the Deflections screen, a green check mark ( ) indicates that the group or item is included in the deflection (in my library’s policies), meaning that the requests from those groups or for those items will be deflected. A red X ( ) indicates that the group or item is not included in the deflection. See image below:
In Service Configuration, you can set your interlibrary loan options, print settings, borrower and lender constant data, custom holdings groups, direct request profiles, and purchase options.

There are twelve WorldShare ILL modules in Service Configuration:
**Interlibrary Loan Options**

Use this screen to select your settings for WorldShare Interlibrary Loan.

**Persistence Setting**

This setting allows you to select whether you want constant data records (Borrower Data and Lender Data) to be automatically applied to each request.

- **On** - The DEFAULT constant data record is automatically applied to requests. Note: If you select a different constant data record to be applied to a request in WorldShare Interlibrary Loan, that constant data record will be applied to all future requests until you select another constant data record.
- **Off** - Users must manually select a constant data record for each resource sharing request

To select a Persistence setting:

1. Select the On check box to turn persistence on.
2. Optionally, deselect the On check box to turn persistence off. See below image

3. Click **Save**.

**Knowledge Base Active Link** *(for WMS & Discovery libraries ONLY)*

As a borrower, when this setting is turned on, and the following is true: a patron submits a request, the request matches a Direct Request Profile, and the requested item is held by your library, as indicated by your holdings in the WorldCat knowledge base, then the request is routed to your New for Review queue and a link to the item is included in the Request Details accordion.
As a lender, when this setting is turned on, when you receive a lending request, and the requested item is held by your library, as indicated by your holdings in WorldCat knowledge base, you will see a link to the item in the Request Details accordion.

Note: You should only turn on the Knowledge Base Active Link setting if your library has already added metadata about its electronic collections to the WorldCat knowledge base and set your ILL License terms.

**Primary Symbol**

This setting allows you to change your primary symbol used for WorldShare Interlibrary Loan. Your current symbol is shown.

To change your primary symbol:
1. Click Change Primary Symbol.
2. On the Select Primary Symbol screen, select the symbol you want to use.

3. Click Save.

**WorldShare Circulation Integration (for WMS Libraries Only)**

Use this setting to activate the WorldShare Interlibrary Loan and WorldShare Circulation integration. Activating integration is the final step in configuring this feature.

**To activate integration:**
1. Complete all steps as described in Set up WorldShare Interlibrary Loan and WorldShare Circulation integration.
2. Select the On check box to activate the integration (the final step in the process).

Note: If all other configuration steps described in the document have not been completed, selecting the On check box here will not activate the WorldShare Circulation integration. See image below:
Constant **data**

Constant data allows you to create data records that can be saved and applied to both borrowing and lending requests. Once you have entered constant data and saved it, you can select any of your saved records and instantly populate your borrowing or lending fields with this information.

**Configure Borrower Constant Data**

Use this screen to configure Borrower constant data. Constant data is stored information that your staff can use to ensure consistency when they initiate or respond to requests.

Follow the instructions below to add, edit, or delete a constant data record.

**To add a constant data record:**
1. Click **Create New CD** record.
2. Fill in the fields. See Borrowing Library Information fields and Patron fields for details.
3. Click **Save as New.**
Borrowing Constant Data fields

Note: Required fields are marked with an asterisk (*)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constant Data Record Name</td>
<td>The name of this record (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of this record.</td>
</tr>
<tr>
<td>Need Before</td>
<td>Date by which you want to receive the item. Note: To assign a period of up to 99 days, type +DD for the system to calculate a date that is 1-99 calendar days from today's date.</td>
</tr>
<tr>
<td>Request Type</td>
<td>• Loan - Only requests for loans will match.</td>
</tr>
<tr>
<td></td>
<td>• Copy - Only requests for nonreturnable copies will match.</td>
</tr>
<tr>
<td>Shipping and Constant Info</td>
<td>Complete mailing address and contact information.</td>
</tr>
<tr>
<td>Bill to</td>
<td>Billing address. Click Copy From Shipping Info. to use the same information from the Shipping and Contact Info fields. Otherwise, provide new information.</td>
</tr>
<tr>
<td><strong>Ship Via</strong></td>
<td>Preferred method of shipment.</td>
</tr>
<tr>
<td><strong>Electronic Delivery</strong></td>
<td>A brief description of this record.</td>
</tr>
<tr>
<td><strong>Need Before</strong></td>
<td>Choose your preferred method of electronic delivery:</td>
</tr>
<tr>
<td></td>
<td><strong>Field</strong></td>
</tr>
<tr>
<td></td>
<td>Ariel (FTP)</td>
</tr>
<tr>
<td></td>
<td>Article Exchange</td>
</tr>
<tr>
<td></td>
<td>Electronic</td>
</tr>
</tbody>
</table>

**Note:** Electronic Delivery is defined in the OCLC Policies Directory. Log in to the Policies Directory to make changes.

| **ILL Fee Management (IFM)** | Select the ILL Fee Management (IFM) check box to turn IFM on. For more information on IFM, see Interlibrary Loan Fee Management (IFM). |
| **Maximum Cost** | • Maximum amount that you will pay for the item. Type the amount you will pay, and check the IFM check box to apply IFM. **Note:** This reflects the total cost, not the cost per page. |
| | • If you will not pay, leave the check box empty and type 0.00 in the box. **Note:** If you do not provide a value, you are responsible for whatever the Lender charges. If both the IFM and Maximum Cost boxes are empty, the Lender is able to specify a Maximum Cost amount when the request is returned to you. You automatically agree to pay the specified amount when you update the request. |

| **Copyright Compliance** | Indicates your compliance for photocopy requests. There are 2 valid codes: |
| | • CCG Conforms to CONTU Guidelines |
| | • CCL Conforms to U.S. Copyright law |

| **Affiliations** | Symbols, names, or acronyms of your reciprocal or local groups. **Example:** LIASA |
| **Billing Notes** | Additional billing information, if needed. |
| **Borrowing Notes** | Type here any additional information needed to clarify the request. |

To copy a constant data record:
1. From the Constant Data Record list, select the constant data record you want to copy.
2. Edit the Constant Data Record Name.
3. Make any additional edits to the record, if needed.
4. Click **Save as New**
To edit a constant data record:
1. From the **Constant Data Record** list, select the constant data record you want to edit.
2. Edit the record.
3. **Click Save.**

To delete a constant data record:
1. From the Constant Data Record list, select the constant data record you want to delete.
2. At the bottom of the screen, click Delete Record.
3. On the confirmation window, click OK.

**Configure Lender Constant Data**

Follow the instructions below to add, edit, or delete a constant data record.

---

To add a constant data record:
1. Click **Create New** CD record.
2. Fill in the fields.
3. **Click Save as New.**

To copy a constant data record:
1. From the **Constant Data Record** list, select the constant data record you want to copy.
2. Edit the **Constant Data Record Name**.
3. Make any additional edits to the record, if needed.
4. **Click Save as New.**
To edit a constant data record:
1. From the Constant Data Record list, select the constant data record you want to edit.
2. Edit the record.
3. Click Save.

To delete a constant data record:
4. From the Constant Data Record list, select the constant data record you want to delete.
5. At the bottom of the screen, click Delete Record.
6. On the confirmation window, click OK.

Lending Constant Data fields

Note: Required fields are marked with an asterisk (*)

<table>
<thead>
<tr>
<th>Field</th>
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<tbody>
<tr>
<td>Constant Data Record Name</td>
<td>The name of this record (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of this record.</td>
</tr>
</tbody>
</table>
| Due Date                     | • The date on which the Borrower should return the item, not the date on which the item should arrive at your library.  
   • When editing a request, type the specific date or specify a time span of 1-999 days from today’s date using the format +DDD.  
   • For copy requests, type N/A for the Due Date |
| Shipped Date                 | The date on which the item leaves your library (past or current), using the format -DD.  
   Example: (-10) |
| Add ILL Management Fee (IFM) | Select the Add ILL Management Fee (IFM) check box to turn IFM on.  
   For more information on IFM, see Interlibrary Loan Fee Management (IFM). |
| Lending Charges              | • All costs: handling, photocopying, postage, etc. Numeric data only.  
   Type 0.00 if there are no charges.  
   • To accept a Borrower’s IFM offer, enter a numeric value, and check the IFM check box.  
   Examples: 0 or 8 |
| Insurance Amount             | The amount of insurance, if applicable.                                    |
| Lending Notes                | • Required only for Conditional responses.  
   Type additional information or a Conditional query.  
   • Optional for non-Conditional responses. Use for notes about method of payment, invoicing, no-renewal responses, etc. |
Note: Required fields are marked with an asterisk (*)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Patron Name</strong></td>
<td>The patron’s name.</td>
</tr>
<tr>
<td><strong>Patron ID</strong></td>
<td>A number used for patron identification.</td>
</tr>
<tr>
<td><strong>Patron Department</strong></td>
<td>The patron’s department. Be consistent in the use of department names</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>The patron’s status.</td>
</tr>
<tr>
<td><strong>Email</strong></td>
<td>The patron’s email address.</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td>The patron’s address.</td>
</tr>
<tr>
<td><strong>Insurance Amount</strong></td>
<td>The amount of insurance, if applicable.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Any relevant information about the patron.</td>
</tr>
</tbody>
</table>

**Examples:**
- Smith, Bob, CompSci Dept.
- 123-45-6789 or ALI/6496KRTXX/0001
- Department of Chemistry
- Executive or Undergraduate
- Can pick-up from East Branch on Tuesdays

**Lending Restrictions**

Restrictions that apply to loans.
*Example:* Library use only.

**Return to**

Complete return mailing address.
- If you include a **Due Date**, you must supply a return address.
- If you type **N/A**, you need not complete this field.

**Return Via**

A preferred method for returning loaned materials. This field provides tracing information if the item is lost in transit.
Configure Custom Holdings Groups

Use this screen to configure custom holdings groups that contain the OCLC symbols of preferred lenders for a particular category of borrowing activities.

To create a custom holdings group:
1. Click Create New Custom Holdings Group.
2. Enter the Custom Holdings Groups Name, and optionally, a Description.
3. Click Add/Edit symbol(s).
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
   • If you need to look up OCLC symbols, click the link to access the OCLC Policies Directory.
5. Click Update Symbols.
6. Click Save as New.

To add an institution to a custom holdings group (on the by group name screen):
1. From the Custom Holdings Groups lists, select the custom holdings group you want to edit.
2. Enter the Custom Holdings Groups Name, and optionally, a Description.
3. Click Add/Edit symbol(s).
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
   • If you need to look up OCLC symbols, click the link to access the OCLC Policies Directory.
5. Click Update Symbols.
6. Click Save as New.

To delete an institution from a custom holdings group (on the by group name screen):
1. From the Custom Holdings Groups lists, select the custom holdings group you want to edit.
2. You have two options:
   • Select the check box next to the symbol you want to delete and click Clear selected symbols, or
   • Click the delete button ( ) next to the symbol you want to delete.
3. Click Save.

To add or remove an institution to a custom holding group (on the by symbol screen):
1. Under Display groups, click by symbol.
2. On the Custom Holdings Groups Symbol Search screen, enter the symbol you want to add or delete from one or more custom holdings groups.
3. Click Search.
   • A list of all of your custom holdings groups appears, along with an indication of whether or not that symbol is contained in each group that contain that symbols appears, including an indicator of whether that symbol appears in the group.
   • Note: If no results are found, a message will appear the symbol does not exist in any groups, the groups are all displayed with a No indication.
4. Select Yes to add a symbol to the group, or No to remove a symbol from the group.
5. Click Save.
To delete a custom holdings group:
1. From the Custom Holdings Groups lists, select the custom holdings group you want to delete.
2. On the bottom of the screen, click Delete Custom Holdings Record.
3. On the confirmation window, click OK.

**Custom Holdings Groups fields**

**Note:** Required fields are marked with an asterisk (*)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Holdings Groups Name</td>
<td>The name of the custom holdings group (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the group.</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> Institutions that charge for book loans.</td>
</tr>
<tr>
<td>OCLC Symbol(s)</td>
<td>The OCLC symbols for institutions that are part of the custom holdings group.</td>
</tr>
<tr>
<td></td>
<td><strong>Examples:</strong> AAU or ABI</td>
</tr>
</tbody>
</table>

**Configure Custom Holdings Paths**

Use this screen to configure custom holdings paths that contain the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference.

**To add a custom holdings path:**
1. Click **Create New Custom Holdings Path**.
2. Enter the **Custom Holdings Path Name**, and optionally, a Description.
3. Drag and drop the groups you want to include from the Choose from available groups list to the Groups chosen for this path list.
4. Click **Save as New**.

**To edit a custom holdings path:**
1. From the Custom Holdings Path list, select the custom holdings path you want to edit.
2. Drag and drop the groups you want to include from the Choose from available groups list to the Groups chosen for this path list.
3. Click **Save**.

**To delete a custom holdings path:**
1. From the Custom Holdings Path list, select the custom holdings path you want to edit.
2. On the bottom of the screen, click **Delete Custom Holdings Path**.
3. On the confirmation window, click OK.
Custom Holdings Paths fields

**Note:** Required fields are marked with an asterisk (*)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Custom Holdings Path Name          | The name of the custom holdings path (20-character limit, with no special characters).  
**Example:** FREELIBS              |
| Description                        | A brief description of the path.  
**Example:** Libraries that lend for free of charge.                        |
| Choose from available groups       | The names of custom holdings groups that can be included in the group holdings path. |
| Groups chosen for this path        | The names of custom holdings groups that are currently included in the group holdings path or that will be included when changes are saved. |

Print Settings

This setting allows you to select the default paper size for printing. The default paper size you select here applies to all items printed from the Print Queue.

**Printing Default Settings**

Select the default paper size for printing.

- ISO A4
- US Letter

**To select a printing default setting:**
1. Select the ISO A4 radio button or the US Letter radio button.
2. Click **Save.**

Logo Image Settings

This setting allows you to add a logo to your book straps. Note: The logo will only appear on your book straps if you select to use customized book straps.
Use this section to customize your Borrower and Purchasing book strap and Lender book strap. Book straps can be printed from the Print Queue or while processing an individual request.

To select a logo:
1. In the Image URL field, enter the URL of the logo you want to use.
2. Optional. Click Test URL to test the image. Note: The logo image cannot exceed 250 pixels in width and 60 pixels in height.
3. Click Save.

Book Strap Settings

Use this section to customize your Borrower and Purchasing book strap and Lender book strap. Book straps can be printed from the Print Queue or while processing an individual request.

Borrower and Purchasing Strap

This setting allows you to customize your library’s Borrower and Purchasing book strap. The Borrower and Purchasing book strap can be printed out and used when you receive a borrowing request item. A customized book strap includes the logo you selected in the Logo Image Settings, patron data (if selected), and any notes you enter into the Notes field.
To use the default book strap:
1. Select the **Use default book straps** radio button.
2. Optional. Click **Preview Book Strap** to preview the book strap.
3. Click **Save**.

To customize the book strap:
1. Select the **Use customized book straps** radio button.
2. Select the **Show Patron Data on book straps** check box if you want to show information about the patron who requested the item on the book strap.
3. In the Notes field, enter any **notes** you want to include on the book strap.
4. Optional. Click **Preview Book Strap** to preview the book strap.
5. Click **Save**.

**Lender Straps**

This setting allows you to customize the Lender book strap. The Lender book strap can be printed out and used when you are processing lending requests. A customized book strap includes the logo you selected in the Logo Image Settings and any notes you enter into the Notes field.
To use the default book strap:
1. Select the Use default book straps radio button.
2. Optional. Click Preview Book Strap to preview the book strap.
3. Click Save.

To customize the book strap:
1. Select the Use customized book straps radio button.
2. In the Notes field, enter any notes you want to include on the book strap.
3. Optional. Click Preview Book Strap to preview the book strap.
4. Click Save.

Purchase Options

Use this screen to enter institutional account information for content providers that offer purchase options in WorldShare Interlibrary Loan. The content providers displayed on your Purchase Options screen may differ from those described here. Read the description for each content provider for additional details about why you may or may not see them on your Purchase Options screen.

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Availability</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>British Library on Demand</td>
<td>All libraries</td>
<td>To ensure the purchase price you see in the Purchase Option accordion on the request screen reflects the lowest price available from the British Library on Demand, enter your British Library on Demand Account ID. Then click Save.</td>
</tr>
<tr>
<td>Get It Now</td>
<td>Subscribing libraries only</td>
<td>Once you have implemented this service, enter the following information, provided by Get it Now, in Service Configuration to make this option available in WS ILL:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Institute</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Order Source</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• ILL Email Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Bill to Email Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Then click Save.</td>
</tr>
</tbody>
</table>
Searching in WorldShare Interlibrary Loan

When you click Discover Items on the left navigation, an Advanced Search form will open on the screen. You can also conduct a search using only the Advanced Search form.

Basic Search

You can find records quickly using the basic search. For example, the basic search can be useful when you have an ISBN or other standard number.

To perform a basic search:

1. On the left navigation, click Discover Items.
2. From the first list, select a search scope. See Search Scopes below for details.
   - Select My Library Holdings if you already have at least one copy of the item.
   - Select All WorldCat if you do not own any copies of the item.
3. From the second list, select an index. See Indexes below for details.
4. In the search field, enter your search terms. The search field will expand to fit your search terms, if needed.
5. Click Search or press <Enter>. 
Search Scopes

When you search for records, you can limit your search to:

<table>
<thead>
<tr>
<th>Search Scope</th>
<th>Limits Search to</th>
</tr>
</thead>
<tbody>
<tr>
<td>All WorldCat (default)</td>
<td>All records in WorldCat</td>
</tr>
<tr>
<td>My Group Holdings (only available to WMS libraries with group aware)</td>
<td>Records held by institutions in your group</td>
</tr>
<tr>
<td>My LHRs</td>
<td>Your local holdings records</td>
</tr>
<tr>
<td>My Library Holdings</td>
<td>Records held by your library</td>
</tr>
</tbody>
</table>

Indexes

<table>
<thead>
<tr>
<th>Index</th>
<th>Searches for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Author</td>
<td>Terms in the author or author indexed field</td>
</tr>
<tr>
<td>Barcode (option under My LHRs)</td>
<td>Items by barcode.</td>
</tr>
<tr>
<td>Call Number Browse (option under MyLHRs)</td>
<td>Call numbers above and below the call number entered. The call number you enter can be as specific as you want.</td>
</tr>
<tr>
<td>ISBN</td>
<td>International Standard Book Number (ten or thirteen-digit number)</td>
</tr>
<tr>
<td>ISSN</td>
<td>International Standard Serial Number (eight-digit number)</td>
</tr>
<tr>
<td>Keyword (default)</td>
<td>Terms anywhere in the record</td>
</tr>
<tr>
<td>OCLC Number</td>
<td>Unique identifier assigned to WorldCat records. This search will only retrieve a single record.</td>
</tr>
<tr>
<td>Title</td>
<td>Terms in the title or a title indexed field</td>
</tr>
</tbody>
</table>
Advanced search

Use the advanced search to perform a more in-depth search. You can combine up to five indexes and apply limits to retrieve a more precise set of search results.

To perform an advanced search:

1. On the left navigation, click Discover Items.
2. Click Advanced Search (below image)

On the Advanced Search window, select the Search Scope:

- Select My Library Holdings if you already have at least one copy of the item.
- Select My Group Holdings to search for items held by any institution in your group (only available to WMS libraries with group aware).
- Select All WorldCat if you do not own any copies of the item.

3. Select an Index from the list. For a list of all indexes, see Indexes.
4. Based on the index you selected, enter your search terms into the search field.
5. Optional. Enter up to five combinations of indexes and search terms:
   - Click the plus sign (+) to add an index and the minus sign (-) to remove an index.
   - Select a Boolean operator (AND, OR, NOT) for each index that you add.
6. Fill out the remaining fields.
7. Click Search.

Advanced search settings

This table describes all of the fields you can use on the Advanced Search window (you are not required to fill in all the fields):
Expert search

Use the expert search to perform a complete search in a single string. An expert search is made up of a combination of index labels and search terms. With the use of Boolean operators (AND, OR, NOT), you can search through several indexes at once and apply limits at the same time. Expert searches can be performed in the basic search area or the advanced search window.

To perform an expert search in the basic search area:
1. On the left navigation, click Discover Items.
2. From the first list, select a search scope.
   - Select My Library Holdings if you already have at least one copy of the item.
   - Select All WorldCat if you do not own any copies of the item.
3. From the second list, select any index other than OCLC Number. An expert search will not work if this index is selected.
4. In the search field, enter your expert search in this format: [Index label][Search terms]
   - For example: ti:girl dragon tattoo mt:nsr pb=random house
   - When you are performing an expert search with multiple indexes, the Boolean AND is implied. If you are using the Boolean operators OR or NOT, you must type the operator and use capital letters.
5. Click Search.
Searching in Southern African Libraries

You can limit your search scope to southern African libraries by conducting an advanced search in the following manner:

**Database:** SACat

Southern African Libraries (SABINET GROUP):
zu:SABI in any index
(lower case ‘z’ and ‘u’, no spaces, and ‘SABI’ in upper case)

Example:

```html
<Advanced Search Form>

Search Scope: All WorldCat

Index(es): Title (ti)
          Author (au)
          Keyword (kw)

Language(s) (Starts with):

Source of Cataloging (Starts with):

Year(s):

Limit Results to:

Search Reset

```
Viewing item holdings:

1. To view item holdings, use one of the following options:
   - To filter by Profiled Group, use the dropdown filters or type SABI. Click Go to see results from Sabinet libraries which have a holding on the item on WorldCat.

Example:
Select the Profiled Group **SABI**. Click GO.
Results will only display the SABI group holdings:
Borrower **Actions**

After creating requests, they appear in the left navigation under Borrowing Requests and under Quick Links on the WorldShare Interlibrary Loan Home. The major queues are listed first, followed by minor queues for easier organization. Click a queue to see all requests in that queue.

Create borrowing requests using Discover Items

You can search for items and create a request under Discover Items.

To discover items and create requests:

1. Click **Discover Items** in the left navigation. When you open the Discover Items tab, an **Advanced Search** form also opens in the main panel of the screen.
2. For a basic search, choose where you would like to search and the type of search from the drop-down lists at the top of the tab.
3. Type your search terms in the box provided.
4. Click **Search**. Matching results appear, along with holdings display options. When you click **Search**, the Advanced Search form collapses at the top of the screen. Click **Advanced Search** to expand or collapse the form.
5. On the Results screen, you may search or view items using one of the following options:
   - If available, click the **View Now** link for open access resources. The resource will open in a new window.
   - **Search for versions with the same title and author** by clicking the link. This will launch a new search based on title and author.
6. To display holdings, use one of the following options:
   - Click **State Holdings, Regional Holdings or All Holdings**. Note: Regional Holdings includes all holdings in contiguous states.
   - To filter by **Custom Holdings Path, Profiled Group, Year, or Volume**, use the dropdown filters and the text boxes to enter filters. Click Go to see results based on the selected filters.

7. On the Holdings screen, you also have several options:
   - Hover your cursor over the **information icon (i)** next to the title to see brief bibliographic data.
   - Click **Yes** (or anywhere in the Yes box) to add a Supplier to your lender string. **Note:** Once a lender has been added to the lender string, the hyperlink in the Supplier column will no longer be clickable. If a lender is removed from the lender string, your ability to click on Yes in the Supplier column is restored. This selection status will be maintained as you move through all holdings lists.
   - Click the **information icon (i)** next to the library’s name to go to the **OCLC Policies Directory** and confirm a lender’s policies. The OCLC Policies Directory for the lender will open in a new window.
   - Click the library name to go to the library’s online catalog.

   - View suppliers’ **Days To Respond**. **Note:** If an item is Held by your library, you will see the **Held by my library** icon at the top of the Holdings screen, indicating that your library has a holding set on that item in WorldCat. You will also see this icon on the top of the Request work form. **Note:** If an item is Held by your library, you will see the **Held by my library** icon at the top of the Holdings screen, indicating that your library has a holding set on that item in WorldCat. You will also see this icon on the top of the Request work form.
   - View suppliers’ **Holdings** information. This data is populated from the lending library’s local holdings record. If the information has been provided by the library, the column will display “Local holdings available” or the specific volumes and dates held. Click on the text in the column to view additional holdings details.
8. Click **Create Request**. The request workform appears. (below image)

9. Apply your constant data record in the Request work form using the **Apply constant data** dropdown. Data in a field of a constant data record will always overwrite the value shown in the request; however, pre-existing patron data will not be overwritten. When a different Constant Data is applied to a record, the fields are briefly highlighted in green as a visual indicator of the change.

10. On the request workform, provide a **Need Before** date (required).

11. Under **Borrowing Library**, the Address field is required for both Shipping and Billing.

12. 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.


14. If applicable, direct notes and supplier history, including reasons for no, will appear under **Request History** after the request is sent.

15. Click **Send Request** if the request is complete. A confirmation message appears and the request appears under the category Borrowing Requests > Produced > Awaiting Response. If you wish to save the request to submit in the future, click Save For Review.

16. Click **Request ID** in the confirmation message to search that request ID number.

The request is re-displayed.
Create request from an existing request: Borrower Actions

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:

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

Edit borrowing requests

In some cases, it is possible to edit requests once they have been submitted.
Note: Editing is not allowed on closed requests.
New for Review requests

Edit bibliographic data via WorldCat:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>New For Review</strong> under <strong>Borrowing Requests.</strong></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Click the request ID.</td>
<td>The request opens.</td>
</tr>
<tr>
<td>3</td>
<td>Click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via <strong>Discover Items.</strong></td>
<td>A contextual search is launched for the terms selected.</td>
</tr>
<tr>
<td>4</td>
<td>Click the item’s title, then click <strong>Apply data</strong> on the bibliographic record. OR Click a link to holdings, or use a Custom Holdings Path or Profiled group. Then click <strong>Update request</strong> on the Holdings screen.</td>
<td>A confirmation message appears and the request is updated.</td>
</tr>
</tbody>
</table>

Add lenders based on holdings:

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

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
Process New For Review requests

Follow the instructions below to process New for Review requests.

To process New for Review requests:

1. From the Borrowing Requests category, click **New For Review**. The initial categories of Not Reviewed and Reviewed are listed.
   - **Note:** Requests under Not Reviewed are requests that have not been seen by your staff. These requests originate from a source outside of WorldShare ILL.
   - Requests with a status of Reviewed have been saved by your staff, using the Save For Review feature.
2. Click the request ID or Title to display a request.
3. Review and confirm the information in the Request Details section.
4. If the citation needs to be verified, click the magnifying glass icon, next to the Title, Author or standard number fields, to search WorldCat via Discover Items. A contextual search is launched for the terms selected, and the Results screen appears.
5. On the Results screen, you have two options:
   - Click the item you want to request. Bibliographic information appears. If applicable, click **Apply data**, OR
   - Click a link to holdings, or use a Custom Holdings Path or Profiled Group. On the Holdings screen, add lenders to the Lender String, then click **Update request**.
6. The request form appears, and the bibliographic data is updated.
7. Apply your constant data, and click **Send Request**.
8. A confirmation message appears and the request is updated.
Receive items (from In Transit status)

Follow the instructions below to mark an item as received.

To mark an item as received:
1. From the Borrowing Requests category, click In Transit.
2. Click the request ID or Title to display a request. Note: Request queues where batch processing is available include an icon in the left navigation sidebar.
3. Click Mark as received.
4. A confirmation message appears and the request appears under the category Borrowing Requests > Received > Received/In Use.
Follow the instructions below to renew a request item.

To renew an item:

1. From the Borrowing Requests category, click **Received**.
2. Click the request **ID** or **Title** to display a request.
3. Enter a **Desired due date**.
4. Click **Renew item**. **Note:** When suggesting a desired due date, be sure to consult the lender's renewal policies by scrolling down in the request form and clicking the question mark icon (⚙️) to open the lender's Policies Directory profile.
5. A confirmation message appears and the request appears under Borrowing Requests > Received > Renewal Requested.
Respond to conditionals from lenders (from Produced status)

Follow the instructions below to respond to conditionals.

To respond to conditionals:

1. On the left navigation, click **Borrowing Requests**.
2. Click **Conditional**.
3. On the Conditional screen, review the Conditions column to see the lender's conditions.
4. Click the request **ID** or **Title** to display a request.
5. Respond to the Lender's condition with **Yes**, **No**, or **Cancel Request**.
   - If you click **Yes**, the request returns to the Lender and appears under Lending Requests > Can You Supply? > Conditions Accepted.
   - If you click **No**, the request goes to the next Lender in the lender string.
   - If you click **Cancel Request**, the request is cancelled.
6. A confirmation message appears.
Return item (from Received status)

Follow the instructions below to return an item to a Lender.

To return an item:
1. On the left navigation, click **Borrowing Requests**.
2. Click **Received**.
3. Click the request **ID** or **Title** to display a request.
   - **Note:** Request queues where batch processing is available include an icon in the left navigation.
4. Click **Return item**.
5. A confirmation message appears and the request appears under the category **Borrowing Requests > Returned**.
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:

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

Your requests appear in the left navigation menu and under Quick Links on the Home screen. Click a queue to see all requests in that queue.

Note: Queues with no current requests will not appear in the list.
Respond Yes to a Loan Request

Follow the instructions below to respond yes to a loan request.

To respond yes to a loan request:
1. On the left navigation, under Lending Requests, click Can You Supply?
2. On the Can You Supply? screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion.
4. From the Apply constant data list at the top of the screen, select your constant data for loans.
5. Review the information in the Borrowing Information accordion.
   Note: Click the information icon ( ) next to the Borrower’s symbol to view their profile in the Policies Directory.
6. Review the information in the Lending Information accordion.
7. In the Request Details accordion, confirm the Due Date.
8. Optional. Enter a Local ID. The Local ID can be any local identifier number (for example, a call number or barcode number).
9. At the top of the screen, click Save.
11. To respond yes to the request, click Yes.
12. Optional. If you have specified an ILL or IFM charge for the item you are lending, you will receive an alert if your IFM charges exceed the maximum cost set by the borrower or the borrower has not selected IFM payment. If you click Update to proceed and update the status to Shipped, you are agreeing to the Borrower’s terms, which include their maximum cost and method of processing that payment. If you click Cancel, you have the option to respond no or conditionally to the request.
13. A confirmation message appears and the request appears under the category Lending Requests > Supplied > Shipped/In Transit.
Respond Yes to a Copy Request

Follow the instructions below to respond yes to a copy request.

To respond yes to a copy request:
1. On the left navigation, under Lending Requests, click Can You Supply? Note: Request queues where batch processing is available include an icon () in the left navigation.
2. On the Can You Supply? screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion.
4. From the Apply constant data list at the top of the screen, select your constant data for loans. Note: When a different Constant Data is applied to a request, the fields are briefly highlighted in green as a visual indicator of the change. Data in a field of a constant data record will always overwrite the value shown in the request.
5. Optional. If you can supply an electronic copy of the article, use the OCLC Article Exchange link to upload the copy to share with the borrower. Note: You are automatically signed into Article Exchange when using WorldShare Interlibrary Loan.
   - Click OCLC Article Exchange (under URL).
   - Locate the file on your computer.
   - Click Open. Note: For a list of file formats supported by OCLC Article Exchange.
   - Click Drop File. The URL and Password fields are respectively updated with the URL and password for the document. A Preview button also appears. Click Preview to preview the uploaded document before sending the document to the borrower.
   - Once the file has been picked up for the first time, it will remain available on the site for 30 days. After 30 days, the file will be removed. A file can be picked up a maximum of five times for each URL/password combination. Files that are never picked up will be removed in 30 days.
6. Review the delivery information in the Borrowing Information accordion.
7. Review the information in the Lending Information accordion.
8. Optional. Select Print Shipping Labels and/or Print Book Straps/Stickers to create labels that you can print later, or click Print Now to print a copy of the request immediately. Note: If you are using Article Exchange, no shipping labels or book straps/stickers are needed.
9. Click Yes to respond yes to the request.
10. Optional. If you have specified an ILL or IFM charge for the item you are lending, you will receive an alert if your IFM charges exceed the maximum cost set by the borrower or the borrower has not selected IFM payment. If you click Update to proceed and update the status to Shipped, you are agreeing to the borrower's terms, which include their maximum cost and method of processing that payment. If you click Cancel, you have the option to respond no or conditionally to the request.
11. A confirmation message appears and the request appears under the category Lending Requests > Supplied > Shipped/In Transit.
No to Requests as a Lender

If you have received a lending request and cannot supply the borrower with the item, follow the instructions below to respond no to the request.

To respond no to a request:
1. On the left navigation, under Lending Requests, click Can You Supply?
2. On the Can You Supply? screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion.
4. Review and confirm the information in the Borrowing Information accordion.
5. To respond no to the request, click No.
6. Optional. Click the down arrow to select a reason for saying no.
7. A confirmation message appears, and the request goes to the next Lender in the lender string.
Respond Conditionally to a Request

If you have received a request, but need more information to decide whether you can fulfil it, you can respond conditionally.

To respond conditionally to a request:

1. On the left navigation, under Lending Requests, click **Can You Supply?**
2. On the Can You Supply? screen, click the request **ID or Title** to display the request.
3. In the request, review and confirm the information in the **Request Details** accordion.
4. In the **Borrowing Information** accordion, confirm the delivery and payment information.
5. To respond conditionally to the request, click **Conditional**.
6. Optional. Click the **down arrow** to select a reason for the conditional.
7. On the Send Conditional window, enter any **additional information** you want to send to the Borrower, if needed.
8. Click **Send Response**.
9. A confirmation message appears and the request is returned to the Borrowing library. If the conditions are accepted, the request appears on the left navigation under **Lending Requests > Can You Supply? Conditions Accepted**.
Respond to a Renewal Request

To respond to a renewal request:
1. On the left navigation, under Lending Requests, click Supplied > Renewal Requested.
2. On the Renewal Requested screen, click the request ID or Title to display the request.
3. In the request, review and confirm the information in the Request Details accordion. Note the Borrower’s desired Due Date and Renewal Requested date (if applicable).
4. If you are willing to grant the renewal, edit the Due Date to reflect the new due date you wish to give.
5. Click an action:
   • Accept Renewal to accept the request
   • Deny Renewal to reject the request
   • Recall item to request the return of an item
6. A confirmation message appears and the request appears on the left navigation under Supplied > Received/In Use.

Completing Requests

When an item you have lent to a borrowing library is returned back to you, you can close the request and mark it as complete.

To complete a request:
1. On the left navigation, under Lending Requests, click Returned > Returned/In Transit.
2. On the Returned/In Transit screen, click the request ID or Title to display the request. Note: Request queues where batch processing is available include a batch processing icon ( ) in the left navigation.
3. In the request, review and confirm the information in the Request Details accordion.
4. To complete the request, click Checked-in/Complete.

A confirmation message appears and the request is complete. Note: If the item is marked Not Returned, it appears in the left navigation under Returned > Returned but Missing and ages out of the system after 180 days.
Edit 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
- Lending Charges
- Insurance Amount
- Lending Notes
- Lending Restrictions
- Return Via
- Return Address

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

To edit fields on a lending request:

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

Search for requests

You can search for active and closed requests from the Interlibrary Loan Home screen.

- 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)
To search for requests:

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, divided into Borrower and Lender requests. The system responds with any matching requests.
4. Click Go. Click the request you would like to view. The request details screen opens.

Article Exchange

The OCLC Article Exchange document-sharing site is accessible from within WorldShare Interlibrary Loan. Article Exchange provides a single secure location where lending libraries can place requested articles for interlibrary loan. It allows users to upload files for pickup anywhere in the world. Only authorized users will be able to download the file.

Once a user drops off a file, they will receive a URL and password with which the file can be retrieved anywhere in the world.

Once the file has been picked up for the first time, it will remain available on this site for 30 days. After 30 days, the file will be removed. A file can be picked up a maximum of five times for each URL/password combination. Files that are never picked up will be removed after 30 days.
Technical Requirements

Files should be no larger than 60 MB, including high resolution documents. Users may upload up to 1000 files per day per authorization.

<table>
<thead>
<tr>
<th>BMP</th>
<th>GIF</th>
<th>J2K</th>
</tr>
</thead>
<tbody>
<tr>
<td>JIF</td>
<td>JFI</td>
<td></td>
</tr>
<tr>
<td>JP2</td>
<td>JPE</td>
<td>JPEG</td>
</tr>
<tr>
<td>JPEG2000</td>
<td>JPF</td>
<td>JPG</td>
</tr>
<tr>
<td>JPM</td>
<td>JPX</td>
<td>MDI</td>
</tr>
<tr>
<td>MJ2</td>
<td>PEG/JFIF</td>
<td>PDF</td>
</tr>
<tr>
<td>PNG</td>
<td>PSD</td>
<td>TGA</td>
</tr>
<tr>
<td>TIF</td>
<td>TIFF</td>
<td>TPIC</td>
</tr>
<tr>
<td>WEBP</td>
<td>ZIP</td>
<td></td>
</tr>
</tbody>
</table>

Article Exchange workflow

1. A borrowing institution sends a Copy request to a lending institution.
2. The lending institution staff checks to determine if they can supply the article.
3. If the lending institution has the document, they save it to the appropriate location on their workstation, network drive, etc., as determined by the library’s policy, in one of the file formats supported.
4. The lending institution staff person logs into WorldShare Interlibrary Loan with their custom Web address, authorization and password.
Once logged in, the Lender should:

1. In the request, click OCLC Article Exchange under the URL field.
2. Locate the article file on your computer.
3. Click Open.
1. Click Drop file.

2. The URL field is updated with the URL, the Password field is updated with the password, and a Preview button appears.

3. Update the request status to Shipped.

**Once logged in, the Borrower should:**

1. On the left navigation, click **Borrowing Requests > AE Alert**.

2. On the AE Alert screen, click the request **ID or Title** to display the request.

3. The request appears, and the AE Alert information appears to the right under the Request Details accordion.

4. Click **Preview** to preview the item.

5. Click Email doc to patron to send an email to let the patron know there is a document available for pick-up. The Email Request screen appears.

6. If needed, change the data in the fields.

7. Click Send.

8. A confirmation message appears, and an email is sent to the patron.

9. Click OK.

**After receiving the email, the patron should:**

1. Open the email, which includes a tiny URL and password for the article.

2. Click the URL to see the article online. The OCLC Article Exchange screen appears, asking for the password.

3. Type the password in the field provided.
5. Choose to either Open or Save the document.

## Categories and queues

The following tables describe the queues that make up the categories in WorldShare Interlibrary Loan and the actions you can take from the respective queues.

### Borrowing Requests

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Borrower Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>AE Alert</strong></td>
<td>Borrower alert category is present when a lender has entered text into the <strong>AE Alert</strong> field on the workform.</td>
<td>Mark as received Not Received</td>
</tr>
<tr>
<td><strong>NEW FOR REVIEW</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Not Reviewed</strong></td>
<td>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. Note: 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 Reviewed or to turn auto-update off and retain the Not Reviewed status.</td>
<td>Send Request Mark Unread Cancel Request</td>
</tr>
<tr>
<td><strong>Reviewed</strong></td>
<td>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.</td>
<td>Send Request Purchase Request Open Access Cancel Request</td>
</tr>
<tr>
<td><strong>PRODUCED</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Awaiting Response</strong></td>
<td>The request has been submitted by the borrowing library, and is awaiting a response from a potential lender.</td>
<td>Cancel Request</td>
</tr>
<tr>
<td><strong>Direct Produced</strong></td>
<td>These requests have been successfully forwarded through Direct Request for Direct-to Profile processing during the past 4 system days.</td>
<td>Depends on the request’s status.</td>
</tr>
<tr>
<td>Conditional</td>
<td>Lender has stated conditions for lending in Lending Notes.</td>
<td>Yes</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------</td>
<td>-----</td>
</tr>
<tr>
<td>In Transit</td>
<td>The lender has sent the item.</td>
<td>Mark as received</td>
</tr>
<tr>
<td>Not Received</td>
<td>The Borrower has not received an item sent by Lender and responded No to Received?</td>
<td>Mark as received New</td>
</tr>
<tr>
<td>Unfilled</td>
<td>No Lender could supply the item.</td>
<td>New</td>
</tr>
<tr>
<td>Received?</td>
<td>The borrower has not yet marked an item as received and the system is asking if it’s an oversight.</td>
<td>Mark as received Not Received</td>
</tr>
<tr>
<td>Expired</td>
<td>No Lender could supply the item prior to the Need Before date.</td>
<td>Cancel Request</td>
</tr>
</tbody>
</table>

### RECEIVED

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Borrower Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received/In Use</td>
<td>The Borrower received item from Lender, and it is with the requesting patron.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Renewal Requested</td>
<td>The Borrower wants to renew the loan, and is awaiting a response from the lender.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Renewal Approved</td>
<td>The Lender agreed to renew a loan.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Renewal Denied</td>
<td>The Lender did not renew the loan.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Overdue</td>
<td>The item is 14 or more system days overdue.</td>
<td>Return item Renew item Lost</td>
</tr>
<tr>
<td>Recalled</td>
<td>The Lender wants the item returned immediately, or the Lender has sent you an erroneous Yes.</td>
<td>Return item Lost</td>
</tr>
<tr>
<td>Received but Missing</td>
<td>The Lender has marked this item as missing. The request will age after 180 days.</td>
<td></td>
</tr>
</tbody>
</table>
## Returned

<table>
<thead>
<tr>
<th>Returned</th>
<th>The Borrower has returned the item.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returned but Missing</td>
<td>The Borrower has returned the item, but the Lender did not receive it.</td>
</tr>
</tbody>
</table>

## Lending Requests

### Queues and Description

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Can You Supply?</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New - Copies</td>
<td>Copy requests that were created when a Borrower submitted a completed workform, and the request moved through the Lender string sequentially.</td>
<td>Yes No Conditional</td>
</tr>
<tr>
<td></td>
<td>Note: 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 Considering or to turn auto-update off and retain the New status.</td>
<td></td>
</tr>
<tr>
<td>New - Loans</td>
<td>Loan requests that were created when a Borrower submitted a completed workform, and the request moved through the Lender string sequentially.</td>
<td>Yes No Conditional</td>
</tr>
<tr>
<td></td>
<td>Note: 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 Considering or to turn auto-update off and retain the New status.</td>
<td></td>
</tr>
<tr>
<td>Considering - Copies</td>
<td>Copy requests that you have already reviewed.</td>
<td>Yes No Conditional</td>
</tr>
<tr>
<td>Considering - Loans</td>
<td>Loan requests that you have already reviewed.</td>
<td>Yes No Conditional</td>
</tr>
</tbody>
</table>

### Conditions

<table>
<thead>
<tr>
<th>Conditions Accepted</th>
<th>The Borrower has agreed to the condition stipulated.</th>
<th>Lender Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Yes No</td>
</tr>
<tr>
<td><strong>SUPPLIED</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td><strong>Shipped/ In Transit</strong></td>
<td>The Lender has sent the item.</td>
<td></td>
</tr>
<tr>
<td><strong>Not Received</strong></td>
<td>The Borrower has not received an item sent by Lender and responded No to Received?</td>
<td></td>
</tr>
<tr>
<td><strong>Recalled</strong></td>
<td>The Lender wants the item returned immediately, or the Lender has sent you an erroneous Yes.</td>
<td></td>
</tr>
<tr>
<td><strong>Overdue</strong></td>
<td>Item is 14 or more system days overdue.</td>
<td></td>
</tr>
<tr>
<td><strong>Renewal Requested</strong></td>
<td>The Borrower wants to renew the loan.</td>
<td></td>
</tr>
<tr>
<td><strong>Received/ In Use</strong></td>
<td>Request has been updated to Received within 7 days of Shipped date for copies, and 14 days for loans.</td>
<td></td>
</tr>
<tr>
<td><strong>Received but Missing</strong></td>
<td>The Borrower has received the item, but the Patron has lost it.</td>
<td></td>
</tr>
</tbody>
</table>

| **RETURNED** |
|-----------------|-----------------|
| **Returned/ In Transit** | The Borrower has returned the item. |
| **Returned/ Complete** | Request has shown a status of Returned for 30 system days or longer. |
| **Returned but Missing** | The Borrower has returned the item, but the Lender did not receive it. |

Options for action:
- Accept Renewal
- Deny Renewal
- Recall item
- Return item
- Renew item

Options for status:
- Checked in/ Complete Not Returned
- Checked in/ Complete Not Returned
- Checked in/ Complete
Purchasing Requests

<table>
<thead>
<tr>
<th>Queue</th>
<th>Description</th>
<th>Lender Action(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PURCHASING</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review for Purchase</td>
<td>Lists items the Borrower is considering purchasing.</td>
<td></td>
</tr>
<tr>
<td>On Order</td>
<td>Lists items the Borrower wishes to purchase.</td>
<td>Mark as Received, Cancel Request</td>
</tr>
<tr>
<td>Received?</td>
<td>The Borrower has not received an item sent by a vendor and responded No to Received?</td>
<td>Yes, No</td>
</tr>
</tbody>
</table>

Use batch processing to receive, return, and complete requests for multiple items. There is a limit of 100 requests at a time. The batch icon appears on queues in the left navigation where batch processing is available.

**Batch processing for borrowers**

Follow the below procedures to perform batch processing as a borrower.

**Borrowing Requests: In Transit (2)**

![Image of Borrowing Requests: In Transit (2)]
To use batch processing to receive items:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Borrowing Requests</strong> from the left navigation bar.</td>
<td>The list of Borrowing categories expands.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>In Transit</strong>.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>At the top of the next screen, click <strong>Batch receive “In Transit” items.</strong></td>
<td>The screen refreshes to include the additional batch processing fields.</td>
</tr>
<tr>
<td>4</td>
<td>Provide a <strong>Date Received</strong>.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Optional. Click <strong>Print Book Straps</strong>.</td>
<td>The selected items are added to the <strong>Print Queue</strong>.</td>
</tr>
<tr>
<td>6</td>
<td>In the <strong>Request ID</strong> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request</td>
<td>The request is added to the list.</td>
</tr>
<tr>
<td>7</td>
<td>Click <strong>Receive Items</strong>.</td>
<td>A confirmation message appears, and the requests are updated to Received.</td>
</tr>
</tbody>
</table>

To use batch processing to return items:

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

Follow the below procedures to perform batch processing as a lender.

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Lending Requests</strong> from the left navigation bar.</td>
<td>The list of Lending categories expands.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Can You Supply?</strong></td>
<td>The Can You Supply? screen appears.</td>
</tr>
<tr>
<td>3</td>
<td>At the top of the next screen, click <strong>Yes</strong> or <strong>No</strong> next to <strong>Batch respond to “Can You Supply” items.</strong></td>
<td>The screen refreshes to include the additional batch processing fields.</td>
</tr>
<tr>
<td>4</td>
<td><strong>Optional for Yes.</strong> Click any desired print options, and to Apply constant data. <strong>Optional for No.</strong> Choose a <strong>Reason for No</strong> from the drop-down list. Note: This Reason for No applies to all requests that you process as No.</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Request ID</strong> field, you may either manually enter a request ID number, scan a barcode, or click the green plus symbol to add a request.</td>
<td>The selected items are added to the <strong>Print Queue.</strong></td>
</tr>
<tr>
<td>6</td>
<td>Click <strong>Yes</strong> or <strong>No.</strong></td>
<td>A confirmation message appears, and the requests are updated.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Lending Requests</strong> from the left navigation bar.</td>
<td>The list of Lending categories expands.</td>
</tr>
<tr>
<td>2</td>
<td>Click <strong>Returned.</strong></td>
<td>The Can You Supply? screen appears.</td>
</tr>
<tr>
<td>3</td>
<td>At the top of the next screen, click <strong>Batch complete “Returned” items.</strong></td>
<td>The screen refreshes to include the additional batch processing fields.</td>
</tr>
</tbody>
</table>
In the **Request ID** 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 **Complete Items**. | A confirmation message appears, and the requests are updated to **Closed**. |

---

**Print an individual request (print now)**

You can print individual requests from the request screen.

- **Borrowers:** You must save or submit a request first before you can print it. The request must be in any of the following queues to print now: New for Review, Received, Produced, Returned.
- **Lenders:** You can print a request from any queue.

**To print an individual request:**
1. Open the request you want to print.
2. In the request, on the upper right side of the screen, click Print Now.
   - **Note:** Some requests will show additional print check boxes (for example, Print Book Straps/Stickers or Print Shipping Labels/Return Labels) if they are available.
3. On the Print Preview window, use the printer icon or links to print the request.
4. Click done or the X (❌) at the top of the window to close it.

**Add requests to the print queue (print later)**

You can add requests to the print queue to print them later.

- **Borrowers:** You must save or submit a request first before you can print it. The request must be in any of the following queues to add it to the print queue: New for Review, Received, Produced, Returned.
- **Lenders:** You can print a request from any queue
To add a request to the print queue

1. Open the request you want to print.
2. In the request, on the upper right side of the screen, click the down arrow next to Print Now.
3. Select Add to Request Print Queue.
4. A confirmation message appears, and the request is added to the appropriate print queue.
5. On the left navigation, click Print Queue.
6. Click Requests (either under Borrowing, Lending, or Purchasing, depending on the request).
7. On the Print Queue screen, select the check boxes for the requests you want to print.
   - To print all requests in the table, select the check box at the top of the first column of the table.
   - To change the number of rows you see in the table, select a number from the Rows list.
8. When printing requests, you may select to print 1 or 2 requests per page. Click either Print 1 per page or Print 2 per page, depending on how many requests you want to print per page.
9. On the Print Preview screen, use the printer icon or links to print the request.
10. Once you have confirmed your printing was successful, you can delete requests from requests print queue. Requests stay in the print queue until they are removed.
11. Go back to the Requests queue, select the check boxes for the requests you printed, and click Remove.

Print all items in a request queue
You can print all items in a request queue at once.
Print all items in a queue

Follow the below instructions to print all items in a queue.

To print all items in a request queue:
1. On the left navigation, click Print Queue.
2. Click Print All.
3. The Request Queues screen appears and displays all the request queues.
4. Select the check boxes for the request queues you want to print. Note: There is a limit of printing 500 requests at a time.
5. Click Next.
6. On the Marked Queues screen, click Print 1 per page or Print 2 per page for the marked queues you want to print, depending on how many requests you want to print per page.
7. The Auto-update check box is automatically selected. If you do not want the status of the request to automatically update, deselect the check box.
8. On the Print Preview screen, use the printer icon or links to print the requests.
9. The requests print and a confirmation message appears.

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, deselect the Auto-update check box.

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

Items are not removed from a print queue until you remove them.

To remove all items from a print queue:
1. On the left navigation, click Print Queue.
2. Select the queue from which you want to remove items.
3. Select the check boxes for the items you want to remove. To select all items, select the check box at the top of the first column in the table.
4. Click Remove.
5. The items are removed from the queue.

Print book straps or stickers

Follow the below instructions to add book straps and stickers to the print queue and to print book straps/stickers for items you are lending.

To add book straps or stickers to the Print Queue:
1. On the left navigation, click Lending Requests.
2. Click Can You Supply?
3. On the Can You Supply? screen, click the request ID or Title to display the request.
4. Process the request as normal.
5. At the top of the request, select Print Book Straps/Stickers and, optionally, Print Shipping Labels.
6. Click Yes to respond yes to the request.

To print book straps or stickers:
1. On the left navigation, click Print Queue.
2. Click Book Straps/Stickers.
3. On the Lending Book Straps / Stickers screen, select the check boxes next to the items you want to print book straps or stickers for. Select the check box at the top of the table to select all items in the table.
4. In the Format list, select 2 per page to print book straps, or select 6 per page to print stickers.
5. If you have selected to print stickers, a template appears underneath the table. To start at a different label position, select the number in the template, or enter the number in the Start at label position field.
6. Click Print.
7. On the Print Preview window, click the Print icon or links to print the book straps or stickers.

Customize book straps

Borrowers and Lenders can have customized book straps. Customized book straps can include your library’s logo and any notes. You can customize your book straps in OCLC Service Configuration.

To customize borrower and lender book straps:
1. Sign in to Service Configuration.
2. On the left navigation, click WorldShare ILL > Print Settings.
3. On the Print Settings page, under Logo Image Settings, enter the URL of the logo you want to appear on your books straps.
5. Enter any notes you want to include on the book strap in the Notes field.
6. Click **Save**.

**Print return labels as a borrower**

Return labels can be printed for items you are returning back to the lender. Follow the below instructions to add return labels to the Print Queue and print the return labels.

---

**To add return labels to the Print Queue:**
1. On the left navigation, click **Borrowing Requests**.
2. Click **Received**.
3. On the Received screen, click the request **ID or Title** to display the request.
4. Process the request as normal.
5. At the top of the request, select **Print Return Labels**.
6. Click **Return item**.

**To print return labels:**
1. On the left navigation, click **Print Queue**.
2. Under Borrowing, click **Return Labels**.
3. On the Borrowing Return Labels screen, select the check boxes next to the requests you want to print return labels for. Select the **check box** at the top of the table to select all items in the table.
4. In the Format list, select 6 per page or 30 per page.
5. A template is displayed underneath the table. To start at a different label position, select the number in the template, or enter the number in the Start at label position field.
6. Optional, when 6 per page is selected. Select the check boxes under Include on labels to include the following on the labels:
   - Request ID barcode
   - LIBRARY MAIL DMM: 173.5.0
   - RETURN SERVICE REQUESTED
7. Click Print.
8. On the Print Preview window, click the print icon or links to print the return labels.

Print shipping labels as a lender

Shipping labels can be printed for items you are lending to another library. Follow the instructions below to add shipping labels to the Print Queue and print the shipping labels.

To add book straps or stickers to the Print Queue:
1. On the left navigation, click Lending Requests.
2. Click Can You Supply?
3. On the Can You Supply? screen, click the request ID or Title to display the request.
4. Process the request as normal.
5. At the top of the request, select Print Shipping Labels and, optionally Print Book Straps/Stickers.
6. Click Yes to respond yes to the request.

To print shipping labels:
1. On the left navigation, click Print Queue.
2. Under Lending, click Shipping Labels.
3. On the Lending Shipping Labels screen, select the check boxes next to the requests you want to print shipping labels for. Select the check box at the top of the table to select all items in the table.
4. In the Format list, select 6 per page or 30 per page.
5. A template is displayed underneath the table. To start at a different label position, select the number in the template, or enter the number in the Start at label position field.
6. Optional, when 6 per page is selected. Select the check boxes under Include on labels to include the following on the labels:
   - Request ID barcode
   - LIBRARY MAIL DMM: 173.5.0
   - RETURN SERVICE REQUESTED
7. Click Print.
8. On the Print Preview window, click the print icon or links to print the return labels.
### Request Aging

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

<table>
<thead>
<tr>
<th>Type of request</th>
<th>Aging days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expired</td>
<td>7</td>
</tr>
<tr>
<td>Any problem status (Complete? Not Received, etc.)</td>
<td>180</td>
</tr>
<tr>
<td>Review</td>
<td>24</td>
</tr>
<tr>
<td>Unfilled</td>
<td>7</td>
</tr>
<tr>
<td>From Returned to Complete?</td>
<td>30</td>
</tr>
<tr>
<td>From Received to Overdue (only applicable to Loans)</td>
<td>14 days after Due Date</td>
</tr>
<tr>
<td>From In Transit to Received? (Copy)</td>
<td>7</td>
</tr>
<tr>
<td>From In Transit to Received? (Loan)</td>
<td>14</td>
</tr>
<tr>
<td>From On Order to Received?</td>
<td>21</td>
</tr>
<tr>
<td>Conditional</td>
<td>4</td>
</tr>
<tr>
<td><strong>Note:</strong> Sending a Conditional response resets the clock and gives the requesting library four days to respond.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Standard request: update to Yes, No or Conditional</th>
<th>Number of days specified in Days To Respond</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong> WorldShare Interlibrary Loan will not age a request to the next lender until the current lender’s Days To Respond 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 Unfilled request.</td>
<td></td>
</tr>
</tbody>
</table>
### Purchasing articles from British Library On Demand

This topic outlines the procedures for purchasing articles from the British Library On Demand using WorldShare Interlibrary Loan.

### Setting up a British Library account

Before you begin purchasing documents from the British Library On Demand, using WorldShare Interlibrary Loan, you must register for a personal British Library Account. If your library orders or plans to order more than 100 documents/year from the British Library, you should consider setting up a Business Account as well.

### Registering

You can register for an Individual Account or Business Account.

**To register for an Individual Account:**

1. Go to the British Library on Demand page.
2. Click the **Register** button in the top right corner of the screen.
3. Follow the steps to register for an individual account.
4. After your account is confirmed, you will be given an Online Account ID number. Make sure to save this number if you plan to register for a Business Account. You will need to provide it along with your Document Supply Business Account Registration form.

### Requests processed on weekends (non-referral days)

<table>
<thead>
<tr>
<th>Requests processed on weekends (non-referral days)</th>
<th>Next working day/system day</th>
</tr>
</thead>
</table>

### Requests process on holidays (non-referral days)

Next working day/system day

**Note:** 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
To register for a Business Account:
1. Visit the Regular users/Organizations page.
2. From here, open the Document Supply Registration Form PDF using the link at the bottom of the screen.
3. Complete this form and return it according to the instructions at the end of the form.
4. The British Library will confirm your registration by email within one working day.

Signing in
Sign in to the British Library Service with your British Library Username and Password. You can log in at any time before ordering by visiting the British Library On Demand page and clicking Login at the top of the page. By logging in, you may review account specific pricing.
You can also wait to log in until you are ready to complete the purchase of a document.

How to get the most from the British Library on Demand
These tables provide definitions of the different options available for purchasing a document through the British Library on Demand through WorldShare Interlibrary Loan.

Delivery format

<table>
<thead>
<tr>
<th>Option</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Encrypted Download</td>
<td>Some publishers ask the British Library to apply technical protection measures to documents to ensure that only the person receiving the document can view it. The document will be viewable for 3 years and can be printed once. You will need a FileOpen plug-in installed on your computer to view an encrypted document.</td>
</tr>
<tr>
<td>Unencrypted Download</td>
<td>Many publishers allow the British Library to supply without encryption. You do not need any software to view these documents other than Adobe Reader. Note: Select Unencrypted Download whenever it is available.</td>
</tr>
</tbody>
</table>
**Interlibrary Loan Fee Management (IFM)**

The Interlibrary Loan Fee Management (IFM) feature of WorldShare Interlibrary Loan lets libraries reconcile resource-sharing charges and payments through their monthly OCLC invoice.

IFM helps libraries save money on fee-based transactions that take place within WorldShare Interlibrary Loan and simplify the transaction process.

**Set up IFM**

In order for an IFM transaction to take place, both the borrowing and lending institutions must have IFM selected in the constant data applied to the request, and the IFM conditions must match (e.g., the borrowers max cost must be greater than or equal to the lender's charge for the request).

To configure IFM for use with WorldShare Interlibrary Loan, you must access OCLC Service Configuration. To access Service Configuration click the previous hyperlink, or click OCLC Service Configuration under the Other Quick Link column on the WorldShare Interlibrary Loan homepage.

---

### Registration types

<table>
<thead>
<tr>
<th>Registration Type</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Individual</strong></td>
<td>If you don’t expect to order more than 100 items from BL on Demand per year, you only need to register as an individual. You only need to register once. There is a registration link at the top right of the order screen. Once registered, you can quickly log in and order requests at any time. Payment is via IFM.</td>
</tr>
<tr>
<td><strong>Business account</strong></td>
<td>This option is available to customers who intend to purchase over 100 documents a year. To open a Business Account, register by downloading and completing the Registration Form. Then, visit BL on Demand to set up an Online Account for use in conjunction with your Business Account. Provide us with your Online Account ID number when sending us your completed form. The advantages in registering are:</td>
</tr>
</tbody>
</table>

- Wider delivery options
- Custom price lists
- If you already have a Business Account with the British Library, visit BL on Demand to set up an Online Account. Send us your Online Account ID number and Customer Code to link both accounts.

Contact email: customer-services-accounts@bl.uk
After logging in to Service Configuration, click WorldShare ILL > Borrower Data to configure IFM for borrowing requests. Constant data records with IFM selected should be created for instances where you would like to use IFM to handle transactions where you are willing to pay the lender’s requested fee to fulfill a request. Adding a constant data record to a request will not guarantee the use of IFM. IFM will only be used if the borrower and lender IFM settings match.
After logging in to Service Configuration, click WorldShare ILL > Lender Data to configure IFM for lending requests. Constant data records with IFM selected can be used in instances where you would like to use IFM to handle for-a-fee lending transactions.

Borrowing with IFM

When using IFM with WorldShare Interlibrary Loan Borrowing, it is important to keep the following considerations in mind:

**IFM Borrowing Fees Are Charged When Item Ships**

When a lending library receives your request and fulfils it, your IFM account will be charged when the lending library clicks Shipped. This will only occur when an IFM-enabled lending library supplies your request.

**IFM History Displays in Individual Requests**

After a request has been filled, you can review the IFM payments associated with the request in the Request History, ILL Fee Management (IFM) History section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including the amount debited from the borrower for the request and the supplier.

**IFM Borrowing Message**

The following messages may be displayed in the ILL Fee Management (IFM) History section of a borrowing request.

<table>
<thead>
<tr>
<th>Transaction Meaning</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment</td>
<td>The amount in the currency that has been charged to your account by the lender. This message will appear after the lender has clicked Shipped. After the payment has succeeded, a supplier column will be added to the History panel with the lending library’s OCLC symbol.</td>
</tr>
</tbody>
</table>

Lending with IFM

When using IFM with WorldShare Interlibrary Loan Lending, it is important to keep the following considerations in mind:

**Payments Are Triggered on Ship Action**

When a lending library updates a request’s status to Shipped, by responding Yes to Can You Supply?, the borrowing library will automatically be charged for that item.

**IFM Lending Charges Must Match the Borrower’s Settings**

When a lender submits an IFM eligible request as Shipped, the system will perform IFM validation checks and warn the lender if an expected IFM charge cannot be processed due to one of the following problems:
1. The lender has set their IFM flag but the borrower has not.
2. The lender’s ILL charge is greater than the borrower’s state max cost.
The lender can take two actions if this warning is generated:
1. Proceed with the Ship action (click Update twice), agreeing to the Borrower’s terms, which include the maximum cost and method of processing payment for that request.
2. Abandon the current Ship action (click Cancel), and respond No or Conditional to the request.

These checks are also performed when a lender performs a Bulk Shipping action. Any requests that fail the IFM validation checks will not be included in the Bulk Action and will be listed in the post-bulk action status report that appears on screen after a bulk action has been performed.

**IFM History Displays in Individual Requests**

After a request has been filled, you can review the IFM notifications associated with the request in the Request History, ILL Fee Management (IFM) History section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including whether the payment has cleared, the amount of the payment, and error messages if the payment cannot be completed.

**IFM Lending Message**

The following messages may be displayed in the ILL Fee Management (IFM) History section of a lending request:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFM Payment Pending</td>
<td>The system is processing an IFM payment in response to the recent Ship action.</td>
</tr>
<tr>
<td>IFM Payment</td>
<td>The system has successfully processed the IFM payment for this request—this includes the amount credited to the lender.</td>
</tr>
</tbody>
</table>
| IFM Error             | Something has prevented the system from completing the IFM Payment successfully. Possible reasons for an IFM payment not to proceed as expected are:  
  • The borrower had not set their IFM flag in the request.  
  • The lender’s charge exceeds the borrower’s max cost.  
  • WorldShare Interlibrary Loan has been unable to contact the IFM service so an IFM payment could not be made for this request. |

**Issue an IFM refund**

In WorldShare Interlibrary Loan, as a Lender, you can issue refunds for IFM transactions that were made in error. Refunds can be issued for requests with any status after Considering, including Closed requests.

**You may want to issue a refund if:**
- You responded Yes to a request, but then discovered you could not supply the item.
- You used the wrong constant data for a request.
- You accidentally charged the Borrower (for example, you did not realize the Borrower is part of your mutual reciprocal program).
Issue a refund (Lender)

Follow the below instructions to refund a request in WorldShare Interlibrary Loan. The Refund button only appears on requests that can be refunded (when IFM has been invoked). **Note:** You cannot undo a refund.

**To issue a refund:**
1. Locate the request you want to refund.
2. Send an email to the Borrower to let them know you are refunding the request.
3. At the top of the request, under Actions, click Refund.
4. **Click** Refund.
5. A confirmation message appears and the Refund button turns grey.
6. To confirm the refund, click the Request History accordion at the bottom of the request to view the ILL Fee Management (IFM) History details.

Request a refund (Borrower)

If you have been erroneously charged for a requested item, you can request a refund from the Lender by using the Email button on the request.

1. Locate the request you want to request a refund for.
2. At the top of the request, under Actions, click Email.
3. On the Send Message window, fill in the fields.
4. Click Send.

In-Currency IFM

In-Currency IFM determines the local currency used by your library based on your library’s settings in the OCLC WorldCat Registry and gives you the option of using your local currency ZAR or USD when applying IFM to requests.

If you live in a region where one of the following currencies is used, you can switch between it and USD in the Maximum Cost and Lending Charges fields in a request:

- Australian Dollar (AUD)
- British Pound (GBP)
- Canadian Dollars (CAD)
- Euro (EUR)
- South African Rand (ZAR)
The lender can take two actions if this warning is generated: For example, in a borrowing request in WorldShare Interlibrary Loan, you can select the preferred currency for the IFM transaction from the Maximum Cost currency list. The image below is from a British library, so their options are ZAR or USD:

Set up In-Currency IFM

If you have been using USD as your IFM currency but want to begin using your local currency, you need to update your constant data records so that you do not have to manually apply the currency on every individual request. OCLC recommends creating two sets of constant data records:

- One with your local currency ZAR
- One with USD
Requesting items (Borrowers)

IFM will not be applied if the Lender uses a currency different than the one you selected for your Maximum Cost. If you are using a currency specific to your region, OCLC recommends doing the following in order to avoid any complications between different currencies:

1. Send the request to the libraries in your region that also use the same local currency.
2. If the request goes unfilled by libraries in your region:
   - In the unfilled request, under Actions, click New.
   - In the new request, add libraries that are not in your region to the Lender String.
   - Apply your borrower constant data record that defines Maximum Cost in USD.

Responding to requests (Lenders)

IFM will not be applied if you do not select the same currency in your Lending Charges as the Borrower has indicated in their Max Cost. If you try to apply a different currency than what the Borrower selected, you will receive a warning message. If you proceed to update the request, IFM will not be applied. If you are not using the same currency as the borrower, then the IFM transaction cannot occur.

As a lender, you have the following options when the borrower has supplied a different currency:

- Change the currency to the currency the borrower selected (only applicable if it is USD).
- Respond No to the request.
- Deselect Use ILL Fee Management (IFM) and change the Lending Charge. Supply the item for free, if possible.
WorldShare® Interlibrary Loan Reports

WorldShare Interlibrary Loan reports are available via the OCLC Usage Statistics interface. From the Interlibrary Loan Home page, navigate to OCLC Usage Statistics under the Quick Links.

Login with your 9-digit OCLC admin authorization and password
You will find a list of the following reports:

**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. There is a Summary view featuring totals by institution with the institution symbols linked. Clicking on the institution symbol shows the transaction details for that particular institution. There is also a Detail report showing all transaction detail for each institution.


Monthly reports for both Borrower and Lender activity help Lenders evaluate their fill rate and borrowers to refine their Custom Holdings Groups. The Reasons for No report shows details for requests that were refused, including ILL Record Number, Title, OCLC Number, the lender’s name and OCLC symbol the reported reason for not filling the request, and the date the request was refused and imprint date of the material. Your library can use this data to determine whether the age of the requested material falls into any pattern that may allow for further refinement of deflection rules. The Resource Sharing Lender Reasons for No Report shows similar information, but does not include the lending institution’s position in the lender string.

**Borrower Resource Sharing Stats Report and Lender Resource Sharing Stats Report**

These reports provide a detailed look at all the requests that pass through a library’s system in a given month, and are organized by transaction. A record appears in this report for any month during which action was taken on the request, so a request may appear in multiple months. Because of the depth of this report, only one month of statistics can be displayed at a time.

**Borrower Activity Overview Report and Lender Activity Overview Report**

These reports show the number of requests initiated by your library in a specified month, the number of requests cancelled in that month, and the number of requests reported as filled for that month. For the Borrower Activity Overview Report, unfilled requests may show up in future months as being filled, so they would appear in two months’ Activity Overview reports. Turnaround time in this report represents the cumulative time that a request was passed along through the lender string, so is generally longer than in the Borrower/Lender Transaction-Level Detail Report, which looks at just one institution’s contact with a given request. The Lender Turnaround time is shorter than the Borrower time because as a lender, your institution handles the request once and either fills or passes along a request in a relatively short time frame; the report only measures your institution’s touch on that request.
**Borrower Transaction-Level Detail Report and Lender Transaction-Level Detail Report**

These reports provide details of requests to or from specific institutions within a given month. The Requests to Lender/Borrower total represents each time a request was passed along to an institution. In the Borrower Transaction Level Detail Report, because one request can be handled multiple times, the number of requests is higher than the number represented in the Borrower Activity Overview Report.

**eSerials Request by Journal Title Report**

This is one of two new reports developed as part of OCLC’s eSerials program. This report displays the OCLC number, Journal Title, ISSN (where available), and the total number of requests for electronic journals received and filled for each electronic journal requested.

**Serials Request Overview Report**

This is the other new report developed as part of OCLC’s eSerials program. This report shows your library the total number of requests for serials received, and then breaks this total down into print and electronic journals. It also shows the number of requests deflected, the number of requests filled by journal type, and the percentage of requests received and filled for electronic journals.

**Article Exchange Reports**

(For libraries that use Article Exchange): Daily and monthly reports that include data about the borrowing library, the file name, when it was uploaded, when it was first viewed and turnaround time.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requests Initiated</td>
<td>Total requests generated by the library from both the Staff interface and Patrons via Direct Request.</td>
</tr>
<tr>
<td>Requests from WorldCat</td>
<td>ILL Requests that were created from an OCLC WorldCat Record (not created from a blank workform).</td>
</tr>
<tr>
<td>Requests Cancelled</td>
<td>Requests cancelled before the Lender could say Yes/No.</td>
</tr>
<tr>
<td>Requests Filled</td>
<td>Requests where the Lender indicated they could supply by saying Yes.</td>
</tr>
<tr>
<td>Requests Filled - Loan</td>
<td>Requests where the Lender indicated they could supply by saying Yes with the “loan” designation present in the workform.</td>
</tr>
<tr>
<td>Requests Filled - Copy</td>
<td>Requests where the Lender indicated they could supply by saying Yes with the “copy” designation present in the workform.</td>
</tr>
<tr>
<td>Requests Unfilled</td>
<td>When the request was not filled by any Lenders.</td>
</tr>
<tr>
<td>Request Initiated Date</td>
<td>The date the request was created by the Borrower.</td>
</tr>
<tr>
<td>Borrower Filled Date</td>
<td>The date the Borrower updated the request to Received.</td>
</tr>
<tr>
<td>Borrower Cancelled Date</td>
<td>The date the Borrower updated the request to Cancel.</td>
</tr>
</tbody>
</table>
Export of WSILL Usage Statistics to Excel

Select the Borrower Resource Sharing Stats Report

Click to export
In the Excel document, highlight the row with the column headers. Then click on Data > Filter.

This will add filters to the column headings.
Click on the filter of the Lender State column and then select Sort A to Z or Sort Z to A.

This will sort the whole document according to Lender State and in the example below all the ZZ entries are at the top. All institutions that belong to the SABI group are incorporated into the ZZ state, therefore once you have sorted the report like this, all the local transactions will be at the top and the international ones below.