Interlibrary Loan Using OCLC’s WorldCat Resource Sharing

Requesting a Book

1. Log in: Direct the web browser to http://firstsearch.oclc.org, enter the WorldCat Resource Sharing authorization and password, then click START.

2. In the Searching tab, enter information about the item, then click SEARCH.

The drop-down boxes next to “Search in database” may be used to switch databases and to expand a search to libraries worldwide or limit it to regional groups within Idaho.
3. In the search results, check the publication information to determine the best fit for the user’s needs. More details about an item are available by clicking on a title.

4. Select the item to borrow by clicking on the title. To improve chances of finding an available lender, choose items with large numbers of libraries holding the item.

5. Display Library Holdings, doing one of the following:

- Click the appropriate link to see the list of libraries that own the item:
  - “Libraries: All Idaho Libraries” shows the libraries in the sub-section of the database search which own the item. Depending on which sub-group was chosen at the time of the search, this might also read “Libraries: Worldwide.”
  - “Regional Holdings” identifies libraries in and near Idaho with the item.
  - “State Holdings” shows libraries in Idaho with the item.
- Enter a Group Holdings Symbol and click SELECT to see that group’s holdings. Search for OCLC profiled groups in the Policies Directory at http://illpolicies.oclc.org. Groups might include:
  - NWGA for Northwest Libraries
  - LVIS for members of Library Very Interested in Sharing
- Enter a Custom Holdings Path for your library and click SELECT to see a select group. Refer to Section 8 for more information on Custom Holdings and to learn how to set up those groups.
6. Select potential lenders by clicking on the symbol of the libraries from which you want to request the item. Only libraries actively loaning will have clickable symbols.

- Balance requests to avoid using the same lenders each time.
- Consider libraries that are a part of regional courier services if available.
- Choose multiple lenders in case an item is not available at the first choice(s).

When done selecting lenders, click TRANSFER TO ILL STAFF WORKFORM

Clicking hyperlinked library names shows the library’s catalog to check for availability. However, requests for items should be made in the WorldCat Resource Sharing system and not in the library’s catalog, which is reserved for home users.

7. In the workform, complete the information that will be sent to the lending library:

7a. General Record Information

- Lender symbols will be automatically transferred from the previous step
- Verify the “Need Before” date. This is the date by which the borrower needs the item.

7b. Bibliographic information

- Information from the item record will be filled in by the system. Verify the information is correct.
7c. Borrowing Information

- Enter the patron’s name (Lastname, Firstname works best)
- **Ship To** should contain the complete address to which the item should be sent.
- **Bill to** should indicate the address or contact information if different from the **Ship to**.
- **Ship Via** should indicate the preferred shipping method. If nothing is entered “Library Mail” will be the default.
- **Electronic Delivery** may be used when requesting non-returnables like journal articles.
- **ILL Fee Management** should be left Unchecked unless the library participates in that program with OCLC.
- **Maximum Cost** should indicate the maximum amount the library is willing to pay to receive the requested item.
- **Copyright Compliance** is used to indicate the borrowing library’s compliance with copyright for photocopies of articles.
- Include the library’s **Fax** number and **Email** address for contact purposes.
- **Affiliations** should be indicated to note a library’s membership with various resource sharing groups.
  - LiLI libraries agree to lend at no cost to other Idaho libraries.
  - LVIS libraries agree to lend books at no cost to other LVIS members
- **Borrowing Notes** may be used to add any additional information that the borrowing library would like to convey to the potential lending libraries.

*Much of the Borrowing Information may be set up as “Constant Data” to avoid entering it with each use. Refer to the Constant Data Records instructions in Section 8 for the steps to create it.*

7d. Patron Information

- Enter the patron ID (often part of the barcode) or some information to link the patron to the item when it arrives.
- Include patron contact information for ease of notifying the patron when the item is available for pickup.

8. When all information is entered, click SUBMIT to send the request.
Filling a Request from Another Library

1. Login to http://firstsearch.oclc.org with the WorldCat Resource Sharing authorization and password.

2. Click the Resource Sharing tab to view the Request Manager.

3. Pending items are new requests awaiting a response. To view a pending request, click the number listed under “Qty.” When more than one item is pending, a list will be provided. Select an item by clicking the Request link. When only one item is pending, that request will be displayed.

4. Review the bibliographic information, Need-by date, and verify if the item is available for loan to the requesting library. Then respond to the request by selecting one of the five available options:
   - In Process: This is the default for any request while it is being considered by the lending library.
   - Yes: Choose “yes” if the library will fill the request. Select the Printing options for use later. The drop-down box next to “yes” allows the lending library to select a constant data record with information for the form pre-populated. Refer to Constant Data Record information in Section 8 for details.
   - No: If unable to fill the request, check “no,” then choose a reason from the drop-down box.
   - Conditional: Use this option if the library will fill the request, but only with conditions. Be sure to identify the conditions by selecting from the drop-down box and/or writing them in the space provided. The borrowing library will need to accept or reject the conditions before the transaction continues.
   - Future Date: Use for items that are not currently available. Indicate the expected availability date. Note the library’s position in the lender string. If other symbols follow, then requests will be forwarded to those libraries when responses of “No” and “Future Date” are used.

5. Click UPDATE to update the request. This changes the request status to SHIPPED. Click UPDATE a second time to complete this process.

6. Click the PRINTING option to print mailing labels and/or book straps for the items being shipped out. From the printing page, click PRINT next to the items for printing. Items will print from Adobe Reader using Avery formats.
Conditional Responses

On occasion, a lending library may respond with a conditional response. Conditions will vary, but may include fees for loans, a request for additional information to identify an item, different editions of an item, etc. Conditional responses will show in the Request Manager under “Action Items” when viewing the Resource Sharing tab.

<table>
<thead>
<tr>
<th>Borrowing</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
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</tr>
<tr>
<td>Conditional</td>
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</tr>
<tr>
<td>Work in Progress</td>
<td>Qty</td>
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<tr>
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<td>Save</td>
<td>2</td>
</tr>
<tr>
<td>Information</td>
<td>Qty</td>
</tr>
<tr>
<td>Online Produced</td>
<td>1</td>
</tr>
<tr>
<td>Special Messages/Borrower</td>
<td>27</td>
</tr>
</tbody>
</table>

When responding to a conditional request, choose one of the 3 options and then click UPDATE.

- Accept the condition by selecting “I accept the Lender’s condition.” This will update the lender, who will then fill the request.
- Decline the condition by selecting “I do not accept the Lender’s condition.” If this is selected, the request will move to the next lender in the list.
- Delete Record. Deleting the record is only used to stop the request entirely, possibly if the requesting user has changed his/her mind.

After making the selection and updating, click UPDATE again to confirm the request.
Receiving an ILL Request from the Lending Library

When an item arrives from the lending library, it is important to indicate that in the ILL system to alert the lending library that the item was safely received.

1. After logging in to WorldCat Resource Sharing, click the Resource Sharing tab to view the Request Manager.

2. Select the linked number next to “Shipped” to view all shipped items, match the item received with a record in the list, then click that item to view the transaction record.

3. Check the box by “Receive with Today’s Date” then click UPDATE. This action notifies the lending library that the item was received as intended.
Renewing a Borrowed Item

Sometimes a patron may wish to keep an item they have borrowed through interlibrary loan for longer than the original loan period. Requests to renew the loan period are sent through the WorldCat Resource Sharing system.

1. Log in to WorldCat Resource Sharing and view the Request Manager

2. Retrieve the request record by searching for it by request number, title or other search characteristic. Be sure to use the drop-down box to identify the field(s) to search. Records may also be found by selecting from the “Online Produced” list.

3. Once the request record has been identified, select “Renewal Request” and specify the desired new due date, then click UPDATE.

4. The renewal request will be reviewed by the lending library. The lending library may select one of the options provided, and then click UPDATE.

- Approve the renewal by checking “Renewal OK” and indicating the new due date
- Deny the request by selecting “No Renewal”
- Recall the item, indicating a need for the item to be returned immediately.
- The option to “Complete” would rarely be used in this situation. That option exists for situations where a renewal was sent in error or the patron has changed his/her mind on the request. It allows the lending library to close out the transaction if a step has been missed in the process.
Returning a Requested Item to the Lending Library

1. Log in to WorldCat Resource Sharing, and view the Request Manager.

2. Search for the request record by the request number, title, patron, or other characteristic. Use the drop-down box to identify the variety of search methods. Or, select the record from the list of “Online Produced” records.

3. Select “Return with Today’s Date” then click UPDATE.

This action alerts the lending library that the item is on the way and will soon be arriving. Then the lending library will close out the transaction when the item arrives.
Receiving a Returned Item from the Borrowing Library

When an item has been returned to the lending library, the borrowing library will have indicated that status in the ILL system. Upon receiving an item, look for the item in the list labeled RETURNED.

Match the returned item to the bibliographic information in the transaction record, check the “Complete” box to complete and close the transaction, then click UPDATE. The interlibrary loan transaction is then complete.
Unfilled Requests

Unfilled Requests result when none of the lenders selected are able to provide the item. If the borrowing library has unfilled requests, the record will be identified in the Request Manager with “Action Items.” Select the record for an unfilled request, then do one of the following:

- Select “Delete,” then click UPDATE to delete the request. This will close the request completely.
- Select “New,” to create a new request workform and select new lending libraries using the bibliographic information from the current record.
- Select “Save,” to save the record to work on at a later time. Saved records can be found in the Request Manager under “Work in Progress.”