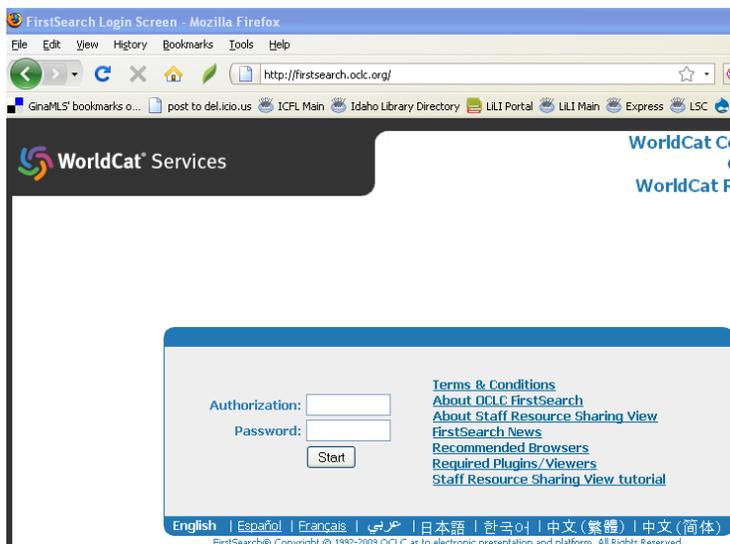


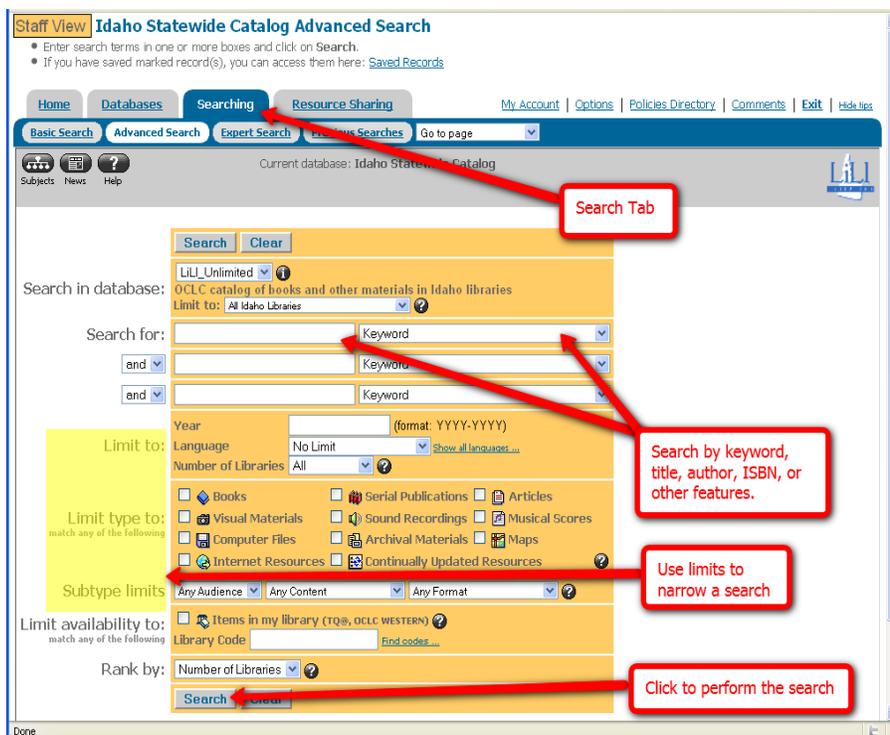
Interlibrary Loan Using OCLC's WorldCat Resource Sharing

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.

1. [Take the cannoli : stories from the New World /](#)
 Author: Vowell, Sarah, 1969-
 Publication: New York : Simon & Schuster, 2000
 Document: English : Book
 Libraries: All Idaho Libraries: 2 Worldwide: 633 | [Regional Holdings](#) | [State Holdings](#)
 Group Holdings Custom Holdings Path
 Accession No: OCLC: 42861943 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)
[See more details for locating this item](#)

2. [Take the cannoli : stories from the New World /](#)
 Author: Vowell, Sarah, 1969-
 Publication: New York : Simon & Schuster, 2001
 Edition: 1st Touchstone ed.
 Document: English : Book
 Libraries: All Idaho Libraries: 1 Worldwide: 126 | [Regional Holdings](#) | [State Holdings](#)
 Group Holdings Custom Holdings Path
 Accession No: OCLC: 46778753
 More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)
[See more details for locating this item](#)

3. [Take the cannoli : stories from the New World /](#)
 Author: Vowell, Sarah, 1969- Publication: New York : Simon & Schuster Paperbacks, 2000
 Document: English : Book
 Libraries: All Idaho Libraries: 1 Worldwide: 33 | [Regional Holdings](#) | [State Holdings](#)
 Group Holdings Custom Holdings Path
 Accession No: OCLC: 62090923 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)
[See more details for locating this item](#)

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

1. [Take the cannoli : stories from the New World /](#)
 Author: Vowell, Sarah, 1969-
 Publication: New York : Simon & Schuster, 2000
 Document: English : Book
 Libraries: All Idaho Libraries: 2 Worldwide: 633 | [Regional Holdings](#) | [State Holdings](#)
 Group Holdings Custom Holdings Path
 Accession No: OCLC: 42861943 National Library Cataloging: Library of Congress (DLC)
 More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)
[See more details for locating this item](#)

- 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**

The screenshot shows a web interface for selecting lenders. At the top, there are input fields for lender codes: Y#4, OEK, UAG, Y35, and WSN. Below these are buttons for "Transfer to ILL Staff workform" and "Clear". A red callout box with an arrow points to the "Y#4" field, containing the text: "Click the symbol of a lending library to enter it into the lender string above". Below the callout is a table of lenders with columns for Location, Library, and Code. The table lists various libraries such as EVERETT PUB LIBR, FORT VANCOUVER REG LIBR, GREEN RIVER COMMUN COL, etc.

Location	Library	Suppl	Code
US,WA	EVERETT PUB LIBR	yes	UEB ?
US,WA	FORT VANCOUVER REG LIBR	yes	YEP ?
US,WA	GREEN RIVER COMMUN COL	yes	GRN ?
US,WA	KING CNTY LIBR SYST	yes	NTG ?
US,WA	KITSAP REG LIBR	yes	YEO ?
US,WA	MID-COLUMBIA LIBR	yes	UAH ?
US,WA	NORTH CENT REG LIBR	yes	CEI ?
US,WA	NORTH OLYMPIC LIBR SYST	yes	NOO ?
US,WA	PACIFIC LUTHERAN UNIV	yes	CPV ?
US,WA	PIERCE CNTY LIBR SYST	yes	BLG ?
US,WA	PIERCE COL LIBR	yes	Z88 ?
US,WA	SEATTLE PUB LIBR	yes	UCK ?
US,WA	SNO-ISLE REG LIBR	yes	CEM ?
US,WA	SPOKANE CNTY LIBR DIST	yes	WSN ?
US,WA	SPOKANE PUB LIBR	yes	UAG ?
US,WA	TACOMA PUB LIBR	yes	TAW ?
US,WA	TIMBERLAND REG LIBR	yes	UCJ ?
US,WA	WASHINGTON STATE UNIV	yes	NTE ?
US,WA	WHATCOM CNTY LIBR SYST	yes	WCH ?
US,AK	FAIRBANKS N STAR BOROUGH LIBR	yes	X#4 ?
US,ID	BOISE PUB LIBR	yes	OEK ?
US,ID	TWIN FALLS PUB LIBR	yes	Y#4 ?

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.

The screenshot shows the "GENERAL RECORD INFORMATION" section of a request form. It includes fields for Request Identifier (NEW), Request Date (20090226), OCLC Number (42861943), Borrower (TQ@), and Need Before date (20090328). There are also fields for Lenders (TQ@, TQ@, TQ@, TQ@, TQ@) and Request Type (Loan).

7b. Bibliographic information

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

The screenshot shows the "BIBLIOGRAPHIC INFORMATION" section of the request form. It includes fields for Author (Vowell, Sarah), Uniform Title, Title (Take the cannoli : stories from the New World /), ISBN (0684867974 9780684867977 0743205405 (pbk.) 97), ISSN, Edition, Imprint (New York : Simon & Schuster, 2000), Series, Dissertation, Article, Volume, Number, Date, Pages, and Verified (LiLi_Unlimited Desc: 219 p. : Type: Book).

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-returns 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.

BORROWING INFORMATION

Patron: [text box] ?

* Ship To: Interlibrary loan/OCLC Western Service Center/4224 6TH AVE SE BLDG 3/LACEY WA 98503-1040 ?

* Bill To: same ?

Ship Via: Library Mail ?

Electronic Delivery: [dropdown] [dropdown] [dropdown] ?

ILL Fee Management (IFM): ?

Maximum Cost: 0.00 ?

Copyright Compliance: None [dropdown] ?

Billing Notes: [text box] ?

Fax: 866.485.5753 ?

Email: western@oclc.org ?

Affiliation: LiLI, NWGA, LVIS ?

Locations: [text box] ?

Borrowing Notes: [text box] ?

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.

PATRON INFORMATION

ID: 000123456789 ?

Department: [text box] ?

Status: [text box] ?

Address: 123 Elm Street
Anycity, ID 12345

Phone: 208-123-4567 ?

Email: patron@email.address.com ?

Fax: [text box] ?

Pickup Location: Main Branch ?

Notes: [text box]

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.

The screenshot shows the 'Request Manager' interface with the 'Resource Sharing' tab selected. A red box highlights the 'Resource Sharing Tab to manage ILL transactions'. Below, a table lists 'Action Items' with quantities: Pending (1), In Process (1), Renewal Request (45), Returned (1), and Special Messages/Lender (8). A red box points to the 'Pending' row, with text: 'Messages for items requested from other libraries are on the left. Message regarding items being requested from the library are on the right.' Another red box points to the 'In Process' row, with text: 'Message regarding items being requested from the library are on the right.'

The screenshot shows the 'In Process' form with radio buttons for 'Yes', 'No', 'Conditional', and 'Future Date'. The 'Yes' option is selected. Below the form, the 'GENERAL RECORD INFORMATION' section displays: Request Identifier: 51405212, Request Date: 20090226, OCLC Number: 42861943, Borrower: TQ@, Receive Date: Due Date: Lenders: *T@W, Request Type: Loan. A red box highlights the 'Lender string' field.

The screenshot shows the 'Request Manager' interface with the 'Printing' option selected. A red arrow points to the 'Printing' button.

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.

Borrowing	
Action Items	Qty
Conditional	1
Work in Progress	Qty
Review	1
Save	2
Information	Qty
Online Produced	1
Special Messages/Borrower	27

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.

<input checked="" type="radio"/> I accept the Lender's condition: Fee of \$10.00 is needed
<input type="radio"/> I do <u>not</u> accept the Lender's condition
<input type="radio"/> Delete Record
<input type="button" value="Update"/> <input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="New"/> <input type="button" value="Reset"/>

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.

The Request Manager is the central location of all messages between borrowing and lending libraries. All ILL transactions can be tracked from here.

Borrowing	
Work in Progress	Qty
Review	1
Save	2
Information	Qty
Online Production	1
Shipped	1
Special Messages/Borrower	27

Lending	
Action Items	Qty
Renewal Request	14
Information	Qty
Special Messages/Lender	1

Printing	
Categories	View Print
Mailing Labels (0 shipping, 0 return)	Print
Book Straps (0 Available)	Print

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.

Receive with Today's Date Print Book Straps

[Update](#) [Edit](#) [Reset](#)

GENERAL RECORD INFORMATION

Request Identifier: 51405212	Status: SHIPPED
Request Date: 20090226	Source: FSILLSTF
OCLC Number: 42861943	
Borrower: TQ@	Need Before: 20090328
Receive Date:	Renewal Request:
Due Date: 20090329	New Due Date:
Lenders: *T@W	
Request Type: Loan	

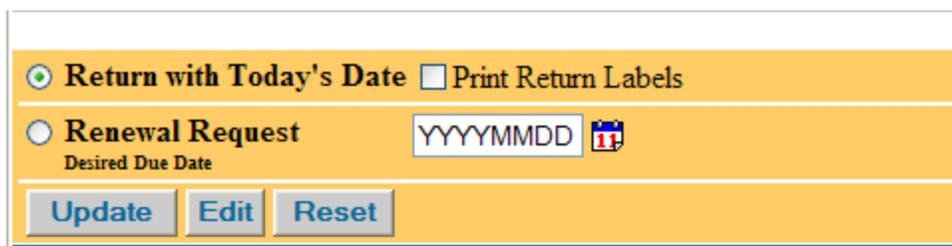
BIBLIOGRAPHIC INFORMATION

Author: Vowell, Sarah,
Title: Take the cannoli : stories from the New World /
ISBN: 9780684867977 0743205405 (pbk.) 9780743205405
Imprint: New York : Simon & Schuster, 2000
Verified: LILL_Unlimited Desc: 219 p. : Type: Book

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.

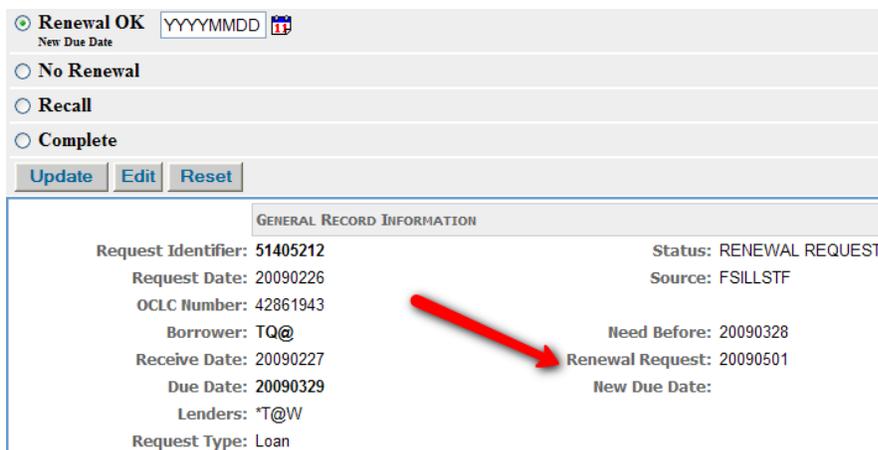
1. Log in to WorldCat Resource Sharing and view the Request Manager
2. Retrieve the request record by searching for it by request number, title or other search characteristic. Be sure to use the drop-down box to identify the field(s) to search. Records may also be found by selecting from the “Online Produced” list.
3. Once the request record has been identified, select “Renewal Request” and specify the desired new due date, then click UPDATE.



The screenshot shows a form with two radio button options: "Return with Today's Date" (selected) and "Renewal Request". The "Renewal Request" option is active, and a date field labeled "Desired Due Date" contains the text "YYYYMMDD" and a calendar icon. Below the form are three buttons: "Update", "Edit", and "Reset".

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 screenshot shows the same form as above, but with the "Renewal OK" radio button selected. The "New Due Date" field is empty. Below the form are three buttons: "Update", "Edit", and "Reset".

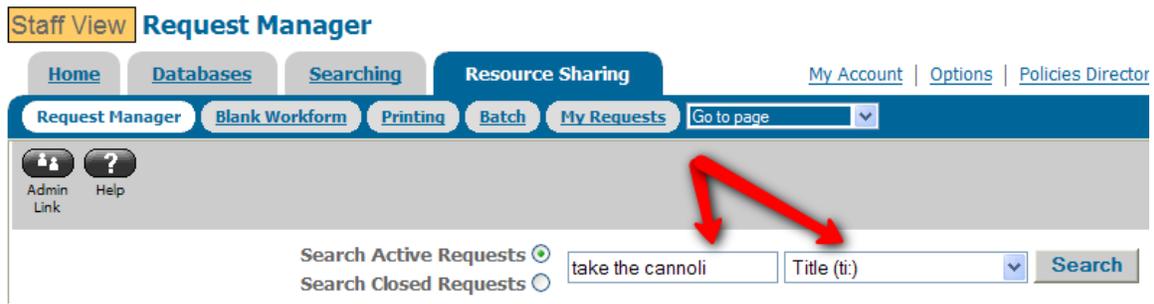
GENERAL RECORD INFORMATION

Request Identifier: 51405212	Status: RENEWAL REQUEST
Request Date: 20090226	Source: FSILLSTF
OCLC Number: 42861943	
Borrower: TQ@	Need Before: 20090328
Receive Date: 20090227	Renewal Request: 20090501
Due Date: 20090329	New Due Date:
Lenders: *T@W	
Request Type: Loan	

- 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.

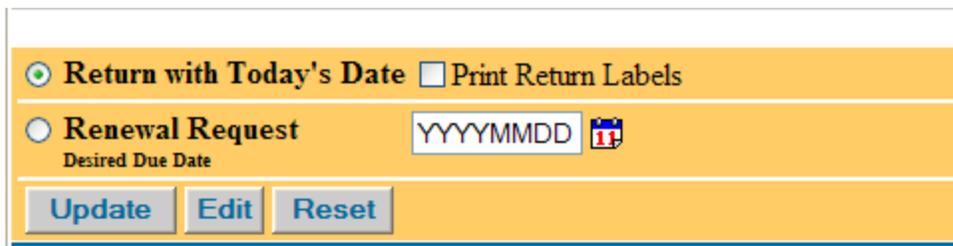
Returning a Requested Item to the Lending Library

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.



The screenshot shows the WorldCat Request Manager interface. At the top, there are navigation tabs: Home, Databases, Searching, and Resource Sharing. Below these are sub-tabs: Request Manager, Blank Workform, Printing, Batch, and My Requests. A search bar is visible with the text "take the cannoli" and a dropdown menu set to "Title (ti:)". A red arrow points to the search bar. Below the search bar, there are radio buttons for "Search Active Requests" (selected) and "Search Closed Requests".

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



The screenshot shows the WorldCat Request Manager interface with the "Return with Today's Date" option selected. The "Renewal Request" option is also visible, with a date field set to "YYYYMMDD" and a calendar icon. Below the options are buttons for "Update", "Edit", and "Reset".

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.

Lending	
Action Items	Qty
In Process	1
Renewal Request	45
Information	Qty
Returned	1
Special Messages/Lender	8

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.

Complete

GENERAL RECORD INFORMATION

Request Identifier: 50681578 Status: RETURNED
Request Date: 20090209 Source: FSILLSTF
OCLC Number: 9323842
Borrower: TQ@ Need Before: 20090226
Receive Date: 20090210
Due Date: 20090312
Lenders: *T@W
Request Type: Loan

BIBLIOGRAPHIC INFORMATION

Author: Harbin, E. O.; Sessoms, Bob.; Harbin, E. O.
Title: The new fun encyclopedia /
ISBN: 9780687277599 (set) 0687277558 (v. 2) 9780687277551 0687277
Edition: Rev. ed. /
Imprint: Nashville : Abingdon Press, 1983 9999
Verified: WorldCat Desc: v. <1, 3-5> : Type: Book

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:

Borrowing	
Action Items	Qty
Unfilled	1
Work in Progress	Qty
Review	1
Save	2
Information	Qty
Online Produced	1
Special Messages/Borrower	27



- 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.”

Delete Record

GENERAL RECORD INFORMATION

Request Identifier: 51241800
Request Date: 20090223

