



Knowledge Check

WorldShare ILL Lending

Test Your Knowledge

- 1) How do you log in to WorldShare ILL?
- 2) Where do you set up Constant Data for WorldShare ILL?
- 3) Name two of the three ways Borrowing libraries find out about items you own in order to request them from you.
- 4) When do you have to switch to WorldShare ILL?
- 5) Can you check-in more than one item at once in WorldShare?

Test Your Skills

- 1) Create a WorldShare account
- 2) Set up a loan policy in policies directory
- 3) Print a Request from your Can You Supply? queue.
- 4) Establish "Loan" and "Copy" Constant Data records in Service Config
- 5) Apply a Constant Data record to a request in WorldShare ILL.

See next page for answers

Answers

Test Your Knowledge

1) With a new User Name, Password, and Custom Web Address that can be set up by registering at this link: <http://www.oclc.org/en-US/worldshare-ill/getting-started.html>

2) In the OCLC Service Configuration (Service Config) module, accessible from a link on ILL Home Screen in WorldShare ILL.

Until December 31, 2013, Constant Data can also be edited and maintained in the WorldCat Services Administrative Module (<http://firstsearch.oclc.org/admin>), by logging in with your 9-digit authorization number and password from Resource Sharing.

3) Borrowing libraries find potential Lenders via:

- Lending library's holdings in WorldCat (maintained with a cataloging subscription)
- Availability in Lending library's local catalog/OPAC
- Lending library's Profile on the ILL Policies Directory

4) By the end of December 2013. The ability to create new requests in WorldCat Resource Sharing ends in November 2013. It is recommended you set up your new account info and begin using WorldShare ILL as soon as you can.

5) Yes, by using Batch functionality for processing items.

In WorldShare ILL, click the sub-category marked "Returned" in the expanded Lending Requests section in the left-hand panel.

Just above the list of titles in Returned category, click on the link that reads "Batch complete "Returned" items". This link will open a Batch section above the list of items in the queue. Next to the list of items in the queue, you'll see a Green circle with a plus sign. Clicking on this plus sign for an item will add that item to the

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Batch section above the list. Alternatively, if you have a barcode, you may scan the barcode in to the Batch section to add an item that way.

To remove an item from the Batch section, click on the Red X next to it.

Click the Complete/Check In Items button at the bottom of the Batch section.

A confirmation message will display for each item.

The items that have been processed will move to Closed status in the system.

Test Your Skills

1) Watch the video posted on this page:

http://www.oclc.org/support/worldwide/en_us/training/portfolios/resource-sharing/worldshare-ill/tutorials/creating-your-wsill-account.html

Set up new User Name & Password, obtain Custom Web Address here:

<https://share.worldcat.org/myaccount>.

2) To access ILL Policies Directory, click on Policies Directory link on ILL Home Page in WorldShare ILL.

A new window will open in your browser with the Policies Directory page.

You will see 5 tabs near the top of the Policies Directory page: Profile, Collections, Policies, Schedule, Contacts. Click on the Policies tab.

Scroll down and find the heading for Loans in the dark gray bar. On the far right-hand side of the page, click on the Add button inside the dark gray bar for Loan.

A new, smaller window will open with a Loan policy form. Go through this form and indicate your library's policies for loan period, fees, restrictions on specific borrowers or items from your collection, and details for request methods, handling methods, delivery methods, billing methods.

This piece of documentation will help provide context for how to set up loan policies: http://www.oclc.org/content/dam/support/resource-sharing/documentation/libpolicies/getstart/policies_ref_card.pdf

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Be aware that a green check mark ("Include") next to any Borrowers or Items from your collection indicates that group of libraries or items is subject to your restriction or policy. A red X ("Exclude") next to any borrowers or items means that your restriction does not apply to those libraries or items/they are exempt from your restriction.

3) To Print a request, click the Lending Requests heading from the left-hand panel in WorldShare ILL.

Click on the Can You Supply? category.

Click on the title or ID number for an item, to look at the workform for the request.

Click on the Print button located on the right hand side of the page above the workform for the request.

A confirmation message will appear, confirming item has been added to Print queue.

Collapse the Lending Requests section in the left hand panel by clicking on Lending Requests text.

Click on Print Queue section in left-hand panel to expand it; then click on the Lending sub-heading.

Expand the Print Requests section of Lending Print Queue.

Check the box for the item you'd like to print; then click the Print button below the list of items.

Print Preview will display.

Scroll down and locate the Print icon in the lower right-hand corner of Print Preview. Click on it to open Printer dialog box for your local printer.

Send item to local printer.

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4) Constant Data records store the information about your library that gets added to ILL requests- information that doesn't change, and would be tedious to add over and over again to requests (for example, your library's return to address).

It is recommended that your library have separate Constant Data records for your Lending requests for Loan (returnable) items and Copy (non-returnable items). But it is up to you how many and what type of Constant Data records you'll want to set up.

The subtle differences between the two would be:

Loan Constant Data	Copy Constant Data
Request Type: Loan	Request Type: Copy
Charges for a loan (optional)	Charges for a copy (optional)
Loan Period/due date	<i>Loan period not applicable</i>
Unique return to address for loans (if applicable)	<i>Return to address not applicable</i>

To access Constant Data, click on link for 'OCLC Service Configuration' on ILL Home Screen in WorldShare ILL.

Then click WorldShare ILL link from left hand panel in Service Config. Then select Lender Data from left hand panel.

Constant data form mimics the request form you send for a request in WorldShare ILL. Go through form and make appropriate selections. Save your records when complete.

5) Click on Lending Requests from left-hand panel in WorldShare ILL, then open Can You Supply? subcategory to see items in list. Open an individual request from Can You Supply? by clicking on its title or Request ID number.

Once Constant Data records are created/saved in Service Config (or the Admin Module), they should be available in the Apply Constant Data button above the Request Details section of the workform, on the right.

Click the dropdown arrow within that button to select the Constant Data record you'd like to apply to the request.

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Verify info added by Constant Data to Request Details section (Due date) and Lending Library section (Shipping Address, charges, etc) of the workform.



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