

**Instructions for *Borrower: How to create a loan request, Part 1***  
**simulation**  
 10 May 2013

Because you will be using a simulation there are a few actions you will take that you will not need to do in the real system:

- Delete existing text before typing in the text box.
- Use the numeric keypad on your keyboard to enter numerals.
- When instructed to type, do so. Do not copy/paste the text into the simulation

The numbers in the first column of the instructions are slide numbers. Before taking an action, compare the slide number in this column to the one that that appears in the lower right corner of the simulation.

**Borrower: How to Create a Loan Request Part 1 Exercise Simulation link:**

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/borrower-request-loan-pt1.htm>

Slide	Action														
<b>Title</b>	Click <b>Skip</b> to go to the next slide.														
<b>2.</b>	Follow the instructions on the screen.														
<b>3.</b>	From the left panel, select <b>Discover Items</b> .														
<b>4.</b>	<p>Click the drop-down <b>arrow</b> to right of Keyword to see a list of basic search indexes.</p> <table border="1" style="margin-left: 40px;"> <thead> <tr> <th>Index</th> <th>Description/Notes</th> </tr> </thead> <tbody> <tr> <td>Author</td> <td>Use last name or first name or <b>last name, first name</b></td> </tr> <tr> <td>ISBN</td> <td>International Standard Book Number. Enter all digits.</td> </tr> <tr> <td>ISSN</td> <td>International Standard Serial Number. Enter all digits.</td> </tr> <tr> <td>Keyword</td> <td>One or more words</td> </tr> <tr> <td>OCLC Number</td> <td>Unique identifier assigned to WorldCat records</td> </tr> <tr> <td>Title</td> <td>Significant title words</td> </tr> </tbody> </table>	Index	Description/Notes	Author	Use last name or first name or <b>last name, first name</b>	ISBN	International Standard Book Number. Enter all digits.	ISSN	International Standard Serial Number. Enter all digits.	Keyword	One or more words	OCLC Number	Unique identifier assigned to WorldCat records	Title	Significant title words
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Title	Significant title words														
<b>5.</b>	Click the <b>arrow</b> again to close the list.														
<b>6.</b>	Click the <b>Advanced Search</b> link.														
<b>7.</b>	Click the drop-down <b>arrow</b> to right of Keyword to see a list of search indexes.														

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8.	Select <b>Title (ti:)</b>
9.	<ol style="list-style-type: none"> <li>1. Type <b>civil war</b> in the search box.</li> <li>2. Click the <b>drop-down arrow</b> of the next index list.</li> </ol>
10.	Select <b>Author (au:)</b>
11.	In the search below the Author index, type <b>burns</b> . Click the <b>plus sign ( + )</b> to add an additional search box.
12.	Click the drop-down <b>arrow</b> of this newly added index list.
13.	Select <b>Publisher (pb:)</b>
14.	Type <b>pbs</b> in the newly added search box. Open the Formats drop-down list by clicking the <b>down arrow</b> .
15.	You want to select DVD. To view the rest of the list, click the <b>down arrow</b> located in the bottom right corner of the list.
16.	Select <b>DVD</b> .
17.	Click the <b>Search</b> button.
18.	<ol style="list-style-type: none"> <li>1. To help determine which WorldCat record to use, move your mouse over the information icon (  ) to see brief bibliographic information.</li> <li>2. For this simulation, you will work with the first record in the list.</li> <li>3. To narrow the holdings display to libraries that are members of one of your custom holdings paths, click the <b>down arrow</b> for the second drop-down list in the <i>Filter by</i> section.</li> <li>4. A list of custom holdings paths displays.</li> </ol>
19.	<ol style="list-style-type: none"> <li>1. For this simulation, you will not select a custom holdings path.</li> <li>2. Click the <b>down arrow</b> again to close the list of custom holdings groups.</li> </ol>
20.	<ol style="list-style-type: none"> <li>1. To narrow the holdings display to libraries that are members of one of your profiled groups, change the <i>Filter by</i> selection to Profiled Groups.</li> </ol>

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	2. Click the <b>down arrow</b> to the right of Custom Holdings Path to open the list.
<b>21.</b>	Select <b>Profiled Group</b> .
<b>22.</b>	Click the down <b>arrow</b> of the second drop-down list.
<b>23.</b>	1. For this simulation, you will not select a custom holdings path. 2. Click the down <b>arrow</b> again to close the list.
<b>24.</b>	Click <b>Regional Holdings</b> to see the regional holdings display.
<b>25.</b>	You have completed the simulation. To go to the next slide, click <b>Forward</b> button located on the playback controls.
<b>26.</b>	No action needed for this slide. Click the check mark located at the bottom of the Participants panel, and then please wait for further instructions.

Instructions for *Borrower: How to create a loan request, Part 2*  
simulation  
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**Borrower: How to Create a Loan Request Part 2 Exercise Simulation Link:**

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/borrower-request-loan-pt2.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Press the <b>Page Down</b> key located on your keyboard twice to see the list of libraries or click the down arrow on the scroll bar to view.
<b>3.</b>	<ol style="list-style-type: none"> <li>1. The default order for libraries listed on the holdings display screen is by location, then by library name in alphabetical order.</li> <li>2. Click the <b>Supplier</b> column heading to change the sort order.</li> </ol>
<b>4.</b>	<p>Click the <b>Supplier</b> column heading again.</p> <p>Libraries that are active lenders appear at the top of the holdings display.</p>
<b>5.</b>	Click the <b>Location</b> column heading to see libraries listed by their location, and then in alphabetical order by name.
<b>6.</b>	Click the <b>information icon ( i )</b> to the left of <b>CARNEGIE STOUT PUB LIB</b> to open the Policies Directory in a new window.
<b>7.</b>	<ol style="list-style-type: none"> <li>1. The Policies Directory record for Carnegie Stout Public Library displays.</li> <li>2. Review the library's policies information.</li> <li>3. Close this window by clicking the <b>close button (X)</b> in the upper right corner of the screen.</li> </ol>
<b>8.</b>	Click the <b>CEDAR FALLS PUB LIB</b> name to access the library's online catalog. The catalog opens in a separate window.
<b>9.</b>	Click the <b>close button (X)</b> in the upper right corner to close this window.
<b>10.</b>	<ol style="list-style-type: none"> <li>1. You are returned to the WorldShare Interlibrary Loan display.</li> <li>2. Click the <b>All Holdings</b> tab.</li> </ol>
<b>11.</b>	<ol style="list-style-type: none"> <li>1. You may narrow the holdings display to libraries from your own custom holdings path or to libraries from a profiled group.</li> <li>2. Open the <b>second Filter by drop-down list</b> to see a list of custom holdings paths.</li> </ol>

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12.	Click the <b>down arrow</b> again to close the list.
13.	Open the <b>first Filter by drop-down list</b> to see available options.
14.	Select <b>Profiled Group</b> .
15.	Open the <b>second Filter by drop-down list</b> to see available profiled groups.
16.	Click the <b>down arrow</b> again to close the list.
17.	Click the <b>Yes</b> link in the Supplier column for <b>BETTENDORF PUB LIB</b> . The OCLC symbol appears in the Lender String box.
18.	Click the <b>Yes</b> link in the Supplier column for <b>CEDAR FALLS PUB LIB</b> . The OCLC symbol appears in the Lender String box.
19.	Click the <b>Yes</b> link in the Supplier column for <b>CLARKE UNIV</b> . The OCLC symbol appears in the Lender String box.
20.	Click the <b>Yes</b> link in the Supplier column for <b>DAVENPORT PUB LIB</b> . The OCLC symbol appears in the Lender String box.
21.	Click the <b>Yes</b> link in the Supplier column for <b>DES MOINES PUB LIB</b> . The OCLC symbol appears in the Lender String box.
22.	<ol style="list-style-type: none"> <li>1. Verify that the symbols you selected transferred to the Lender String box.</li> <li>2. Click the <b>Create Request</b> button located in the upper right area of the screen.</li> </ol>
23.	Click the <b>down arrow</b> on the <i>Apply constant data</i> button to reveal a list of constant data records that can be applied to the request.
24.	<ol style="list-style-type: none"> <li>1. Select <b>CESTESTLOAN</b> from the drop-down list.</li> <li>2. Because this constant data record is set up for a loan, the Type changes to Loan.</li> </ol>
25.	Press the <b>Page Down</b> key on your keyboard twice to view the rest of the Request Details section or click the down arrow on the scroll bar to view.
26.	<ol style="list-style-type: none"> <li>1. Verify that a <i>Needed By</i> date has been added.</li> <li>2. Click the <b>calendar</b> icon to the right of the Needed By box to open it.</li> </ol>
27.	<ol style="list-style-type: none"> <li>1. If no date is present in the Needed By box or if the date needs to be changed, use the calendar to select a date.</li> </ol>

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	2. For this simulation, the date does not need to be changed. Click the <b>calendar</b> to close it.
<b>28.</b>	Press the <b>Page Up</b> key or click the up arrow on the scroll bar.
<b>29.</b>	Click the <b>Request Details</b> heading to collapse the section.
<b>30.</b>	Click the <b>Borrowing Library</b> heading to expand that section.
<b>31.</b>	<ol style="list-style-type: none"> <li>1. Verify all of your address information has been added to the Borrowing Library section.</li> <li>2. Press the <b>Page Down</b> key twice to view the rest of the Borrowing Library section or click the down arrow on the scroll bar.</li> </ol>
<b>32.</b>	Press the <b>Page Up</b> key or click the up arrow on the scroll bar to go back to the top of this section.
<b>33.</b>	Click the <b>Borrowing Library</b> heading to collapse this section.
<b>34.</b>	Click the <b>Lending Libraries</b> heading to expand this section.
<b>35.</b>	<ol style="list-style-type: none"> <li>1. Verify all of the Lender information.</li> <li>2. Click the <b>Lending Libraries</b> heading again to collapse this section.</li> </ol>
<b>36.</b>	Click the <b>Buy It Options</b> heading to expand this section.
<b>37.</b>	<ol style="list-style-type: none"> <li>1. Review any links to copies of the items for sale online.</li> <li>2. Click the <b>Buy It Options</b> heading again to collapse this section.</li> </ol>
<b>38.</b>	Click the <b>Patron</b> heading to expand this section.
<b>39.</b>	<ol style="list-style-type: none"> <li>1. You may optionally add patron info to the request.</li> <li>2. Click the <b>Patron</b> heading again to collapse this section.</li> </ol>
<b>40.</b>	Click <b>Request History</b> to expand this section.
<b>41.</b>	Click <b>Request History</b> to collapse this section.
<b>42.</b>	Click the <b>Send Request</b> button.
<b>43.</b>	<ol style="list-style-type: none"> <li>1. Confirmation message will display above workform. It will disappear after a few seconds.</li> <li>2. Click <b>Borrowing Requests</b> located in the left panel.</li> </ol>

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44.	<ol style="list-style-type: none"><li>1. Click the <b>Awaiting Response</b> category.</li><li>2. Requests will remain in this category until the Lender responds to it or until it times out and returns as unfilled or expired.</li></ol>
45.	<ol style="list-style-type: none"><li>1. The request appears in the list with a status of Submitted.</li><li>2. When ready to continue, click <b>Interlibrary Loan Home</b> located in the left panel.</li></ol>
46.	<p>You have completed the simulation. No action is needed for this slide.</p> <p>Click the check mark located at the bottom of the Participants panel, and then please wait for further instructions.</p>

Instructions for the *Borrower: how to create a copy request* simulation  
13 May 2013

**Borrower: How to Create a Copy Request Exercise Simulation Link:**

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/borrower-request-copy.htm>

Slide	Action														
<b>Title</b>	Click <b>Skip</b> to go to the next slide.														
<b>2.</b>	From the left panel, select <b>Discover Items</b> .														
<b>3.</b>	Click the drop-down <b>arrow</b> to right of Title to see a list of basic search indexes. <table border="1" data-bbox="391 703 1333 1024"> <thead> <tr> <th>Index</th> <th>Description/Notes</th> </tr> </thead> <tbody> <tr> <td>Author</td> <td>Use last name or first name or <b>last name, first name</b></td> </tr> <tr> <td>ISBN</td> <td>International Standard Book Number. Enter all digits.</td> </tr> <tr> <td>ISSN</td> <td>International Standard Serial Number. Enter all digits.</td> </tr> <tr> <td>Keyword</td> <td>One or more words</td> </tr> <tr> <td>OCLC Number</td> <td>Unique identifier assigned to WorldCat records</td> </tr> <tr> <td>Title</td> <td>Significant title words</td> </tr> </tbody> </table>	Index	Description/Notes	Author	Use last name or first name or <b>last name, first name</b>	ISBN	International Standard Book Number. Enter all digits.	ISSN	International Standard Serial Number. Enter all digits.	Keyword	One or more words	OCLC Number	Unique identifier assigned to WorldCat records	Title	Significant title words
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Keyword	One or more words														
OCLC Number	Unique identifier assigned to WorldCat records														
Title	Significant title words														
<b>4.</b>	Click the <b>arrow</b> again to close the list.														
<b>5.</b>	Click the <b>Advanced Search</b> link.														
<b>6.</b>	Click the drop-down <b>arrow</b> to right of Keyword to see a list of advanced search indexes.														
<b>7.</b>	Select <b>Title (ti:)</b>														
<b>8.</b>	Type <b>information outlook</b> in the Title search box.														
<b>9.</b>	Open the Formats drop-down list by clicking the <b>down arrow</b> .														
<b>10.</b>	You want to select Journal/Magazine. To view the rest of the list, click the <b>down arrow</b> located in the bottom right corner of the list.														
<b>11.</b>	Select <b>Journal/Magazine</b> .														
<b>12.</b>	Click the <b>Search</b> button.														
<b>13.</b>	<ol style="list-style-type: none"> <li>For this simulation, you will work with the second record in the list because it has the highest number of holdings.</li> <li>To help determine which WorldCat record to use, move your mouse over the information icon (  ) to see brief bibliographic information.</li> </ol>														

Instructions for the *Borrower: how to create a copy request* simulation  
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Slide	Action
	3. To narrow the holdings display to libraries that are members of a custom holdings path, click the down <b>arrow</b> for the second drop-down list in the <i>Filter by</i> section. A list of custom holdings paths from which to choose displays.
14.	For this simulation, you will not select a custom holdings path. Click the down <b>arrow</b> again to close the list of custom holdings paths.
15.	1. To narrow the holdings display to libraries that are members of one of your profile groups, change the <i>Filter by</i> selection to Profiled Groups.  2. To change the selection, click the down <b>arrow</b> to the right of Profiled Group.
16.	Select <b>Profiled Groups</b> .
17.	Click the down <b>arrow</b> for the second drop-down list.
18.	1. You may select a profiled group you would like to apply to the request from the second drop-down list. For this simulation, you will not select a profiled group.  2. Click the down <b>arrow</b> again to close the list.
19.	Click <b>Regional Holdings</b> to see the regional holdings display.
20.	1. The default order for libraries listed on the holdings display screen is by location, then by library name in alphabetical order.  2. Click the <b>Supplier</b> column heading to change the sort order.
21.	Click the <b>Supplier</b> column heading again.  Libraries that are active lenders appear at the top of the holdings display.
22.	Click the <b>Location</b> column heading to see libraries listed by their location, and then in alphabetical order by name.
23.	To view more holdings, press the <b>Page Down</b> key on your keyboard twice or click the down arrow at the bottom of the scroll bar.
24.	Click the <b>information icon</b> (  ) to the left of <b>IOWA STATE UNIV</b> in the list.

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Slide	Action
25.	<ol style="list-style-type: none"> <li>1. The OCLC Policies Directory opens in a new window, displaying the record of the Iowa State University Library.</li> <li>2. Review the library's policies information.</li> <li>3. Close this window by clicking the <b>close button (X)</b> in the upper right corner of the screen.</li> </ol>
26.	<ol style="list-style-type: none"> <li>1. You are returned to the WorldShare Interlibrary Loan display.</li> <li>2. To view the online catalog of a library, click the name of that library. For this example, click <b>UNIV OF NORTHERN IOWA</b>.</li> </ol>
27.	<ol style="list-style-type: none"> <li>1. The library's online record for this item displays. You can see the availability of their copy.</li> <li>2. When you are finished viewing the library's online catalog, click the <b>close button (X)</b> in the upper right corner of the screen.</li> </ol>
28.	Click the <b>All Holdings</b> tab.
29.	<ol style="list-style-type: none"> <li>1. You may narrow the holdings display to libraries from your own custom holdings paths or from a profiled group.</li> <li>2. Open the <b>second Filter by drop-down list</b> to see available custom holdings paths.</li> </ol>
30.	Click the <b>down arrow</b> again to close the list.
31.	Open the <b>first Filter by drop-down list</b> to see available options.
32.	Select <b>Profiled Group</b> .
33.	Open the <b>second Filter by drop-down list</b> to see available profile groups.
34.	Click the <b>down arrow</b> again to close the list.
35.	To view more holdings, press the <b>Page Down</b> key on your keyboard twice or click the down arrow at the bottom of the scroll bar.
36.	<ol style="list-style-type: none"> <li>1. Click the <b>Yes</b> link in the Supplier column for <b>IOWA STATE UNIV</b>.</li> <li>2. The OCLC symbol appears in the Lender String box.</li> </ol>
37.	<ol style="list-style-type: none"> <li>1. Click the <b>Yes</b> link in the Supplier column for <b>ALASKA RES LIBR &amp; INFO SERV</b>.</li> <li>2. The OCLC symbol appears in the Lender String box.</li> </ol>
38.	<ol style="list-style-type: none"> <li>1. Click the <b>Yes</b> link in the Supplier column for <b>AIR UNIV LIBR</b>.</li> <li>2. The OCLC symbol appears in the Lender String box.</li> </ol>

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Slide	Action
39.	<ol style="list-style-type: none"> <li>1. Click the <b>Yes</b> link in the Supplier column for <b>AUBURN UNIV AT MONTGOMERY</b>.</li> <li>2. The OCLC symbol appears in the Lender String box.</li> </ol>
40.	<ol style="list-style-type: none"> <li>1. Click the <b>Yes</b> link in the Supplier column for <b>HUNTSVILLE MADISON CNTY PUB LIBR</b>.</li> <li>2. The OCLC symbol appears in the Lender String box.</li> </ol>
41.	<ol style="list-style-type: none"> <li>1. Verify that the symbols you selected transferred to the Lender String box.</li> <li>2. Click the <b>Create Request</b> button located in the upper right area of the screen.</li> </ol>
42.	Click the <b>down arrow</b> on the <i>Apply constant data</i> button to reveal a list of constant data records that can be applied to the request.
43.	Select <b>CESTESTCOPY</b> from the drop-down list.
44.	Press the <b>Page Down</b> key on your keyboard twice to view the rest of the Request Details section or click the down arrow at the bottom of the scroll bar.
45.	<ol style="list-style-type: none"> <li>1. Verify that a Needed By date has been added.</li> <li>2. Click the <b>calendar icon</b> to the right of the Needed By box to open it.</li> </ol>
46.	<ol style="list-style-type: none"> <li>1. If no date is present in the Needed By box or if the date needs to be changed, use the calendar to select a date.</li> <li>2. For this simulation, the date does not need to be changed. Click the calendar to close it.</li> </ol>
47.	<ol style="list-style-type: none"> <li>1. Type <b>special libraries in flux</b> in the Article Title box.</li> <li>2. Use the <b>Tab</b> key to advance to the next text box.</li> </ol>
48.	<ol style="list-style-type: none"> <li>1. Type <b>14</b> in the Volume text box.</li> <li>2. Use the Tab key to advance to the next text box.</li> </ol>
49.	<ol style="list-style-type: none"> <li>1. Type <b>2</b> in the Volume text box.</li> <li>2. Use the Tab key to advance to the next text box.</li> </ol>
50.	<ol style="list-style-type: none"> <li>1. Type <b>April 2010</b> in the Issue/Date text box.</li> <li>2. Use the Tab key to advance to the next text box.</li> </ol>
51.	Type <b>45-59</b> in the Pages box.

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Slide	Action
	(Use the Forward button in the playback controls to go to the next slide if this slide does not automatically advance.)
52.	Press the <b>Page Up</b> key on your keyboard twice or click the up arrow on the scroll bar.
53.	Click the <b>Request Details</b> heading to close this section.
54.	Click the <b>Borrowing Library</b> heading to expand that section.
55.	<ol style="list-style-type: none"> <li>1. Verify your address information has been added to the Borrowing Library section.</li> <li>2. Press the Page Down key twice or click the down arrow on the scroll bar.</li> </ol>
56.	<ol style="list-style-type: none"> <li>1. Verify your billing information has been added.</li> <li>2. Press the <b>Page Up</b> key twice on your keyboard or click the up arrow on the scroll bar.</li> </ol>
57.	Click the <b>Borrowing Library</b> heading to collapse this section.
58.	Click the <b>Lending Libraries</b> heading to expand this section.
59.	<ol style="list-style-type: none"> <li>1. Verify all of the Lender information.</li> <li>2. Click the <b>Lending Libraries</b> heading again to collapse this section.</li> </ol>
60.	Click the <b>Buy It Options</b> heading to expand this section.
61.	<ol style="list-style-type: none"> <li>1. Review any links to copies of the items for sale online.</li> <li>2. Click the <b>Buy It Options</b> heading again to collapse this section.</li> </ol>
62.	Click the <b>Patron</b> heading to expand this section.
63.	<ol style="list-style-type: none"> <li>1. You may optionally add patron info to the request, if you wish.</li> <li>2. Click the <b>Patron</b> heading again to collapse this section.</li> </ol>
64.	Click the <b>Request History</b> heading to expand this section.
65.	Click the <b>Request History</b> again to collapse this section.
66.	Click the <b>Send Request</b> button.
67.	<ol style="list-style-type: none"> <li>1. A confirmation message will display above the request. It will disappear after a few seconds.</li> <li>2. Click <b>Borrowing Requests</b> located in the left panel.</li> </ol>

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Slide	Action
68.	<ol style="list-style-type: none"><li>1. Click the <b>Awaiting Response</b> category.<ol style="list-style-type: none"><li>a. Requests will remain in this category until the Lender responds to it or until it times out and returns as unfilled or expired.</li></ol></li></ol>
69.	<ol style="list-style-type: none"><li>1. The request appears in the list with a status of Submitted.</li><li>2. When ready to continue, click <b>Interlibrary Loan Home</b> located in the left panel.</li></ol>
70.	<p>You have completed the simulation. No action is needed for this slide.</p> <p>Click the check mark located at the bottom of the Participants panel, and then please wait for further instructions.</p>