

## Instructions for the *Lender: Respond yes to a loan request simulation*

18 June 2013

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.

### Lender: Respond Yes to a Loan Request exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-respond-yes-loan.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Read the instructions that are on the slide, and then click the <b>Forward</b> button in the playback controls.
<b>3.</b>	Click <b>Lending Requests</b> located in the left panel.
<b>4.</b>	Click <b>Can You Supply?</b> from either the left panel or the Quick Links.
<b>5.</b>	Click either the <b>ID number</b> or the title of the first item in the list, <b><i>Krakatoa; the day the world exploded, August 27, 1883.</i></b>
<b>6.</b>	<ol style="list-style-type: none"> <li>1. Review the Request Details section.</li> <li>2. Click the <b>Request Details</b> heading to collapse it.</li> </ol>
<b>7.</b>	Click <b>Borrowing Information</b> to expand this section.
<b>8.</b>	<ol style="list-style-type: none"> <li>1. Review the information about the borrowing library.</li> <li>2. Click <b>Borrowing Information</b> again to collapse the section.</li> </ol>
<b>9.</b>	<p>Click <b>Availability</b> to expand this section.</p> <ul style="list-style-type: none"> <li>• If your library uses an ILS that has NCIP capability, in the future WorldShare ILL will be able to show the Availability info from your catalog here in the "Availability" section of the request.</li> <li>• For now, your library will still need to search your catalog to see if a requested item is currently checked out or not</li> </ul>
<b>10.</b>	Click <b>Availability</b> to collapse the section.
<b>11.</b>	Click the <b>Print</b> button.
<b>12.</b>	<ol style="list-style-type: none"> <li>1. A message appears near the top of the request. It tells you that the request was added to a print queue. In a separate simulation, you will see how to print requests that you will use as pull slips.</li> </ol>

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	2. Click the <b>Lending Information</b> heading to expand the section.
<b>13.</b>	Click the <b>drop-down arrow</b> next to the Apply Constant Data button.
<b>14.</b>	Select <b>JULIELOAN</b> to apply this constant data record to the request.
<b>15.</b>	Click the <b>Lending Information</b> heading to close the section.
<b>16.</b>	Click <b>Request Details</b> to expand the section.
<b>17.</b>	<ol style="list-style-type: none"> <li>1. Verify a due date has been applied to the request. If it has not or if you want to alter the due date, use the calendar to the right of the Due Date box. <ol style="list-style-type: none"> <li>a. For this example, you will change the due date from June 6, 2013 to June 29, 2013.</li> </ol> </li> <li>2. Click the <b>calendar icon</b> to open the calendar.</li> </ol>
<b>18.</b>	Click <b>29</b> on the calendar. The due date is now June 29, 2013.
<b>19.</b>	Click the <b>Print Shipping Labels</b> check box.
<b>20.</b>	Click the <b>Print Book Straps</b> check box.
<b>21.</b>	Click the <b>Yes</b> button.
<b>22.</b>	<p>After clicking the Yes button, a message appears above the list, confirming the action you have just taken. The confirmation message will eventually disappear.</p> <p>You are finished with the request. The system will move the request to the Borrowing Library, and you will have one less request in your “Can You Supply?” queue.</p> <p>Click <b>Interlibrary Loan Home</b> located on the left panel.</p>
<b>23.</b>	<p>You have completed the simulation.</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 *Lender: Respond yes to a copy request simulation*  
18 June 2013

**Lender: Respond Yes to a Copy Request exercise simulation link:**

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-respond-yes-copy.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Click <b>Lending Requests</b> located on the left panel.
<b>3.</b>	Click <b>Can You Supply?</b> from either the left panel or the Quick Link.
<b>4.</b>	Click either the <b>ID number</b> or the title of the first item in the list, <i>Information outlook: the monthly magazine of the Special Libraries Association</i>
<b>5.</b>	<ol style="list-style-type: none"> <li>1. Review the Request Details section. Be certain to see if the Borrower included enough article information.</li> <li>2. Click the <b>Request Details</b> section, to collapse it.</li> </ol>
<b>6.</b>	Click <b>Borrowing Information</b> to expand this section.
<b>7.</b>	<ol style="list-style-type: none"> <li>1. Review the information about the borrowing library.</li> <li>2. Click <b>Borrowing Information</b> again to collapse the section.</li> </ol>
<b>8.</b>	<p>Click <b>Availability</b> to expand this section.</p> <ul style="list-style-type: none"> <li>• If your library uses an ILS that has NCIP capability, in the future WorldShare ILL will be able to show the Availability info from your catalog here in the "Availability" section of the request.</li> <li>• For now, your library will still need to search your catalog to see if a requested item is currently checked out or not</li> </ul>
<b>9.</b>	Click <b>Availability</b> to collapse the section.
<b>10.</b>	To print the request as a pull slip, click the <b>Print</b> button.
<b>11.</b>	<ol style="list-style-type: none"> <li>1. A message appears near the top of the request. It tells you that the request was added to a print queue. In a separate simulation, you will see how to print requests that you will use as pull slips.</li> <li>2. Click the <b>Lending Information</b> section to expand it.</li> </ol>
<b>12.</b>	Click the <b>drop-down arrow</b> next to the Apply Constant Data button.
<b>13.</b>	Select <b>MVLENDERIFM</b> to apply this constant data record to the request.

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<b>14.</b>	Click the <b>Lending Information</b> section to collapse it.
<b>15.</b>	Click <b>Request Details</b> to expand the section.
<b>16.</b>	To use the Article Exchange, click the <b>OCLC Article Exchange</b> link.
<b>17.</b>	<ol style="list-style-type: none"> <li>1. Type <b>C:\SLA</b> in the <i>Select a file to drop</i> box.</li> <li>2. Click the <b>Drop file</b> button to upload the digital copy of the photocopied article.</li> </ol>
<b>18.</b>	<ol style="list-style-type: none"> <li>1. The Article Exchange displays a link where the Borrowing Library can obtain the article and a password the Borrower will need to access the file. Copy the web address and password.               <ol style="list-style-type: none"> <li>a. Right click the text, and then click <b>Select All</b> from the right-click menu.</li> <li>b. Press <b>Ctrl + C</b> or right click the text again, and then select <b>Copy</b>.</li> </ol> </li> <li>2. Click the <b>Sign out</b> link.</li> </ol>
<b>19.</b>	Close the Article Exchange window. Click the <b>Close (X)</b> button.
<b>20.</b>	<ol style="list-style-type: none"> <li>1. Paste the link and password in the <b>Alert</b> box in the Request Details section.               <ol style="list-style-type: none"> <li>a. <b>Right click</b> the Alert text box to open the right-click menu</li> <li>b. Click <b>Paste</b></li> </ol> </li> <li>2. Click the <b>Yes</b> button.</li> </ol>
<b>21.</b>	<p>After clicking the Yes button, a message appears above the list confirming the action you have just taken. The confirmation message will eventually disappear.</p> <p>You are finished with the request. The system will move the request to the Borrowing Library, and you will have one less request in your “Can You Supply?” queue.</p> <p>Click <b>Interlibrary Loan Home</b> located in the left panel.</p>
<b>22.</b>	<p>You have completed the simulation.</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 *Lender: Respond no to a request* simulation

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### Lender: Respond No to a Request exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-respond-no.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>Lending Requests</b>
<b>3.</b>	Click <b>Can You Supply?</b> from either the left panel or the Quick Link.
<b>4.</b>	Click either the <b>ID number</b> or the title of the first item in the list, <i>Wolf: the lives of Jack London</i> .
<b>5.</b>	<ol style="list-style-type: none"> <li>1. The Request Details section is opened by default. Review the information in this section.</li> <li>2. Click <b>Request Details</b> to collapse the section.</li> </ol>
<b>6.</b>	Click <b>Borrowing Information</b> to see the information about the borrowing library.
<b>7.</b>	Click <b>Borrowing Information</b> again to collapse the section.
<b>8.</b>	<p>Click <b>Availability</b> to expand this section.</p> <ul style="list-style-type: none"> <li>• If your library uses an ILS that has NCIP capability, in the future WorldShare ILL will be able to show the Availability info from your catalog here in the "Availability" section of the request.</li> <li>• For now, your library will still need to search your catalog to see if a requested item is currently checked out or not.</li> </ul>
<b>9.</b>	Click <b>Availability</b> to collapse the section.
<b>10.</b>	Click the <b>drop-down arrow</b> on the No button to open a list of reasons for no.
<b>11.</b>	For this example, select <b>No – In use/On loan</b> .
<b>12.</b>	<p>After clicking the No button or selecting a reason for no, you return to the list of "Can You Supply?" items.</p> <p>A message appears above the list, confirming the action you have just taken. The confirmation message will eventually disappear.</p>

## Instructions for the *Lender: Respond no to a request* simulation

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	<p>The system will move the request to the next lender, and you will have one less request in your “Can You Supply?” queue. You are finished with the request</p> <p>Click <b>Interlibrary Loan Home</b> located in the left panel.</p>
<b>13.</b>	<p>You have completed the simulation.</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 *Lender: Conditional response simulation*

18 June 2013

### Lender: Conditional Response exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-respond-conditional.htm>

Slide	Action
<b>Title slide</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Click <b>Lending Requests</b> located in the left panel.
<b>3.</b>	Click <b>Can You Supply?</b> from either the left panel or the Quick Links area.
<b>4.</b>	Click either the <b>ID number</b> or the title of the first item in the list, <b><i>Younger next year the new science of aging.</i></b>
<b>5.</b>	<ol style="list-style-type: none"> <li>1. The Request Details section is open by default. Review the Request Details.</li> <li>2. Click the <b>Request Details</b> heading to collapse this section.</li> </ol>
<b>6.</b>	Click <b>Borrowing Information</b> heading to expand this section.
<b>7.</b>	<ol style="list-style-type: none"> <li>1. Review the information about the borrowing library. Note the Use ILL Fee Management (IFM) box is checked and the Max Cost field is five dollars. <ol style="list-style-type: none"> <li>a. Your library charges \$10. You are able to lend the item if the borrowing library is willing to pay the higher cost.</li> <li>b. You will use the Conditional response to let the Borrower know about the lending charges.</li> </ol> </li> <li>2. Click <b>Borrowing Information</b> again to collapse the section.</li> </ol>
<b>8.</b>	Click the <b>drop-down arrow</b> located on the Conditional button.
<b>9.</b>	Select <b>Conditional – Cost exceeds limit.</b>
<b>10.</b>	<ol style="list-style-type: none"> <li>1. Type <b>Lending charge is \$10</b> in the Send Conditional response box.</li> <li>2. Click the <b>Send Response</b> button.</li> </ol>
<b>11.</b>	<ol style="list-style-type: none"> <li>1. A message appears above the list, confirming the action you have just taken. The confirmation message will eventually disappear.</li> <li>2. You are finished with the request at this time. The system will move the request</li> </ol>

## Instructions for the *Lender: Conditional response simulation*

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	<p>to the Borrowing Library.</p> <p>3. Click <b>Interlibrary Loan Home</b> located on left panel.</p>
<b>12.</b>	<p>You have completed the simulation. Click the check mark located at the bottom of the Participants panel, and then please wait for further instructions.</p>

## Instructions for the *Lender: Renewal Response* simulation

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### Lender: Renewal response exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-renewal-response.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Click <b>Lending Requests</b> located on the left panel of the Interlibrary Loan Home.
<b>3.</b>	Click <b>Renewal Requested</b> located on the left panel or in the Quick Links area.
<b>4.</b>	<ol style="list-style-type: none"> <li>For this simulation you will respond to the renewal request for first title in the Renewal Requested list.</li> <li>Click either the <b>title</b> or <b>ID number</b> for <i>How Music Works</i>.</li> </ol>
<b>5.</b>	<ol style="list-style-type: none"> <li>In the Request Details section, look at the Renewal Requested (Desired Due Date). Determine if you can renew this item. For this example, you can.</li> <li>Click the <b>calendar icon</b> (  ) to select a new date.</li> </ol>
<b>6.</b>	Select <b>May 31, 2013</b>
<b>7.</b>	Click the <b>Accept Renewal</b> button.
<b>8.</b>	<p>A confirmation message will appear above list of Renewal Requested items. The confirmation message will disappear after a few seconds. The request will move to Received/In Use status.</p> <p>You have completed the simulation.</p> <p>To go to the next slide, click <b>Interlibrary Loan Home</b> in the left panel.</p>
<b>9.</b>	<p>No action 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 *Lender: Complete and check-in* simulation

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### Lender: Complete and check-in exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-complete-checkin.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2.</b>	Click <b>Lending Requests</b> located on the left panel of the Interlibrary Loan Home.
<b>3.</b>	Click <b>Returned/In Transit</b> located on the left panel or in the Quick Links area.
<b>4.</b>	<ol style="list-style-type: none"> <li>1. For this simulation you will complete and check-in the first title in the Returned/In Transit list.</li> <li>2. Click either the <b>title</b> or <b>ID number</b> for <i>Krakatoa: the day the world exploded, August 27, 1883</i>.</li> </ol>
<b>5.</b>	Click the <b>Checked-in/Complete</b> button.
<b>6.</b>	<p>A confirmation message will appear above list of Returned/In Transit items. The confirmation message will disappear after a few seconds. The request will move to the Closed status.</p> <p>You have completed the simulation.</p> <p>To go to the next slide, click <b>Interlibrary Loan Home</b> in the left panel.</p>
<b>7.</b>	<p>No action 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 *Lender: Print Shipping labels* simulation

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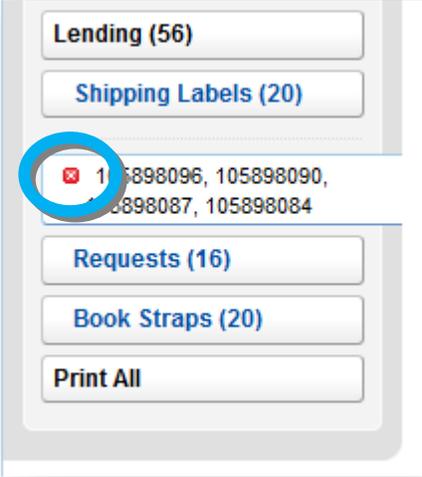
### Lender: Print shipping labels exercise simulation link:

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-print-shipping-labels.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2</b>	Click <b>Print Queue</b> located on the left panel.
<b>4</b>	Click <b>Shipping Labels</b> under Lending queue.
<b>4-7</b>	<p>For this simulation, you will select 4 requests to print. From the Print Shipping Labels list, check the boxes for the following titles:</p> <ul style="list-style-type: none"> <li>• <i>Fodor's 2013 London</i></li> <li>• <i>The bonsai handbook</i></li> <li>• <i>Bonsai for beginners</i></li> <li>• <i>The bonsai workshop</i></li> </ul> <p>Because you are using a simulation, you will need to select the titles in the order listed above.</p>
<b>8</b>	Open the <b>Label format</b> list by clicking the <b>down arrow</b> .
<b>9</b>	<p>Select <b>Avery 5164/5264/8164 (6 labels per page)</b>.</p> <p>The label template changed to a 6 label format.</p>
<b>10 - 12</b>	<p>Check the three boxes under the <i>Include on labels</i> heading.</p> <p>For this simulation click the boxes starting from top to bottom.</p>
<b>13</b>	<p>If you need to start printing the labels at a position other than the first one, use the numbers of the label sheet template to tell the printer where to start printing. Click the number of the label where you want the printing to begin.</p> <p>For this example, click the <b>second (2) label box</b>.</p> <p>The template changes. The label 1 is not longer bold font. The printing will start at label 2.</p>

## Instructions for the *Lender: Print Shipping labels* simulation

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14	Move your mouse pointer over the Print button to see a note about printing. After reading the note, click the <b>Print</b> button.
15	The Print Preview screen shows you the labels you selected. To print the labels, click the <b>print icon</b> (  ) located at the top of the preview.
16	Click the <b>OK</b> button.  The simulation does not send a print job to your printer. When using WorldShare Interlibrary Loan the requests you selected will print.
17	To close the Print Preview, click the <b>X</b> located at the bottom of the left panel, below Print Queue.  
18- 21	To remove from the list the requests you printed, check the boxes of the following titles:  <ul style="list-style-type: none"> <li>• <i>Fodor's 2013 London</i></li> <li>• <i>The bonsai handbook</i></li> <li>• <i>Bonsai for beginners</i></li> <li>• <i>The bonsai workshop</i></li> </ul> <p>Because you are using a simulation, you will need to select the titles in the order they appear.</p>
22	Click the <b>down arrow</b> located at the bottom of the right scroll bar to scroll down.

## Instructions for the *Lender: Print Shipping labels* simulation

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23	Click the <b>Remove</b> button. The titles you selected will be removed from the list.
24	Click the up arrow located at the top of the scroll bar to scroll up.
25	You have completed the simulation. To go to the next slide, click <b>Interlibrary Loan Home</b> located in the left panel.
26	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 the *Lender: Print Requests* simulation

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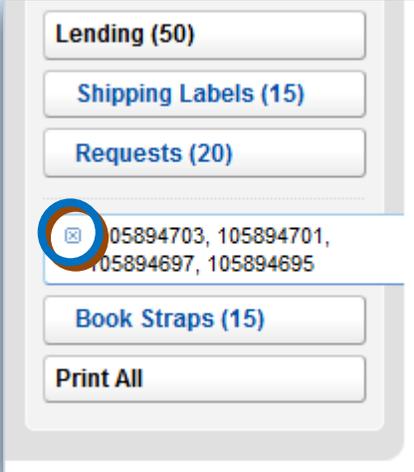
**Lender : Print requests exercise simulation link:**

<http://www5.oclc.org/downloads/tutorials/worldshare-interlibrary-loan/sims/lender-print-requests.htm>

Slide	Action
<b>Title</b>	Click <b>Skip</b> to go to the next slide.
<b>2</b>	Click <b>Print Queue</b> located on the left panel.
<b>3</b>	Click <b>Requests</b> located under Lending queue.
<b>4-7</b>	<p>For this simulation, you will select 4 requests to print. Check the boxes for the following titles:</p> <ul style="list-style-type: none"> <li>• <i>The prince of tides</i></li> <li>• <i>Ahab's wife, or, The star-gazer: a novel</i></li> <li>• <i>Cowgirl Kate and Cocoa: partners</i></li> <li>• <i>Pippi Longstocking</i></li> </ul> <p>Because you are using a simulation, you will need to select the titles in the order they appear.</p>
<b>8</b>	Click the <b>Print drop-down button</b> to select 2 requests per page printing.
<b>9</b>	Click <b>Print 2 per page</b> .
<b>10-11</b>	<ol style="list-style-type: none"> <li>1. The Print Preview screen shows you the requests you selected.</li> <li>2. Use the <b>up and down arrows</b> (  ) located in the toolbar at the top to preview the individual requests.</li> <li>3. At any time when you are ready, click the <b>print icon</b> (  ).</li> </ol>
<b>12</b>	<p>The Print dialog box opens. Click the <b>OK</b> button.</p> <p>The simulation does not send a print job to your printer. When using WorldShare® Interlibrary Loan the requests you selected will print.</p>
<b>13</b>	To close the Print Preview, click the <b>X</b> located near the bottom of the left panel.

## Instructions for the *Lender: Print Requests* simulation

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<p><b>14 - 17</b></p>	<p>To remove from the list the requests you printed, check the boxes of the following titles.</p> <ul style="list-style-type: none"> <li>• <i>The prince of tides</i></li> <li>• <i>Ahab's wife, or, The star-gazer: a novel</i></li> <li>• <i>Cowgirl Kate and Cocoa: partners</i></li> <li>• <i>Pippi Longstocking</i></li> </ul> <p>Because you are using a simulation, you will need to select the titles in the order they appear.</p>
<p><b>18</b></p>	<p>Click the <b>Remove</b> button.</p> <p>The requests will be removed from the list.</p>
<p><b>19</b></p>	<p>You have completed the simulation.</p> <p>To proceed to the next slide, click <b>Interlibrary Loan Home</b> located in the left panel.</p>
<p><b>20</b></p>	<p>No action 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>