Objectives

The objectives of the *OCLC WorldShare Interlibrary Loan Borrowing* course are to guide you through the functionalities available for borrowing libraries and to provide options that speed fulfillment of interlibrary loan requests to save time for your staff and users.

Set up for borrowing

**OCLC® Policies Directory**

Add or update your library’s information in the OCLC Policies Directory. Some key areas to review include Contacts and Schedule.

Once logged in to WorldShare Interlibrary loan, click the link from the WorldShare Interlibrary Loan Home screen to go to the **OCLC Policies Directory**. Refer to [Prepare and Plan](#) for further information.

**Constant data**

Constant data allows you to create data records, including your library’s information, that can be saved and applied to your borrowing requests. See [Constant Data](#) to find documentation and a short video tutorial on this topic.

**Custom Holdings**

Custom Holdings feature allows you to pre-select the lending libraries of your preference to be applied to your requests. Custom Holdings uses your criteria to automatically populate the lender string on your requests. First you create your [Custom Holdings Group(s)](#) to select the libraries, then you define your [Custom Holdings Paths](#) for the group(s).

Create and edit requests

Staff can manually create requests in WorldShare ILL using **Discover Items**. Requests that originate outside of WorldShare ILL will be in **New For Review** queue.
Discover Items to create requests

Search for items and create a request under **Discover Items** in OCLC WorldShare® Interlibrary Loan. You can perform either a Basic, Advanced, or expert search using indexes. Refer to **Search** for more details.

After searching for items using **Discover Items** and finding the item of your interest then selecting your lenders, create your request form when clicking the **Create Request** button then completing the workflow.

Create either an individual request or multiple requests (i.e., book clubs). You may also create requests from an existing request depending on its status.

**New For Review requests**

**New For Review** requests have the initial categories of **Not Reviewed** and **Reviewed**. Requests under **Not Reviewed** are requests that have not been seen by your staff. These requests originate from a source outside of WorldShare ILL. Requests with a status of **Reviewed** have been saved by your staff, using the Save for Review feature.

Refer to **Process Request-Borrower** to see instructions and watch short video tutorials on how to process **New For Review** requests.
Open Access fulfillment

Open Access fulfillment is used for copy requests of items available in the open web. Instead of sending requests to a lender, your library can fulfill the request directly in WorldShare ILL. Refer to Process Requests-Borrower to learn how to process Open Access requests.

Edit requests

You may edit a Produced request that has not yet been shipped by a lender in the following queues:

- Awaiting Response
- Direct Produced
- Conditional

Note: Editing is not allowed on closed requests.

Find further instructions and short video tutorials on how to create and edit requests on Create and edit requests.

Manage requests

After creating requests, they appear in the left navigation menu and under Quick Links on the Home screen. The main categories are listed first, followed by sub-categories for easier organization. Click a category to see all requests in that category.

Note: Categories with no current requests will not appear in the list.
Updating requests

It is important to update the requests in the system as they change status. Refer to Process Request-Borrower to see instructions and watch short video tutorials on how to Receive and Renew items and Respond to Conditionals from Lenders as well. Refer to Return items to see instructions on how to Return items.

For details on how to batch Receive or Return requests, see Batch processing for borrowers.

Printing options

Add and customize book straps, stickers, and shipping labels for printing. Refer to Printing for Borrowers for instructions and short tutorial videos.

Statistics reports, OCLC Support and documentation

You can learn more on how to generate statistics reports here. See OCLC WorldShare Interlibrary Loan for OCLC Support, other valuable documentation and training resources.

Test your knowledge

Try this quiz: WSILL Borrowing quiz