



# Get Started with OCLC WorldShare® Interlibrary Loan

## Introduction

OCLC WorldShare Interlibrary Loan provides functionalities that speed fulfillment of interlibrary loan requests to save time for your staff and users.

If your library is new to WorldShare ILL, you will need to set up the functionalities listed in this handout. If your library has been using WorldShare ILL, check your library's information and update it as needed.

## Prepare and Plan

There are a few things you can do to prepare for your use of WorldShare Interlibrary Loan.

For further information, see [Prepare and Plan](#) where you can find documentation and short video tutorials on this topic and **browser compatibility**.

### **OCLC® Policies Directory**

Add or update your library's information in the OCLC Policies Directory. Some key areas to review include Contacts and Policies for copies, loans and deflections.

Once logged in to WorldShare Interlibrary Loan, click the link from the WorldShare Interlibrary Loan Home screen to go to the **OCLC Policies Directory**.

### **Constant Data**

Maintain administrative settings for WorldShare Interlibrary Loan, such as constant data, in OCLC Service Configuration. Click the link from the WorldShare Interlibrary Loan Home screen to go to OCLC Service Configuration.

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

### **OCLC® Interlibrary Loan Fee Management (IFM)**

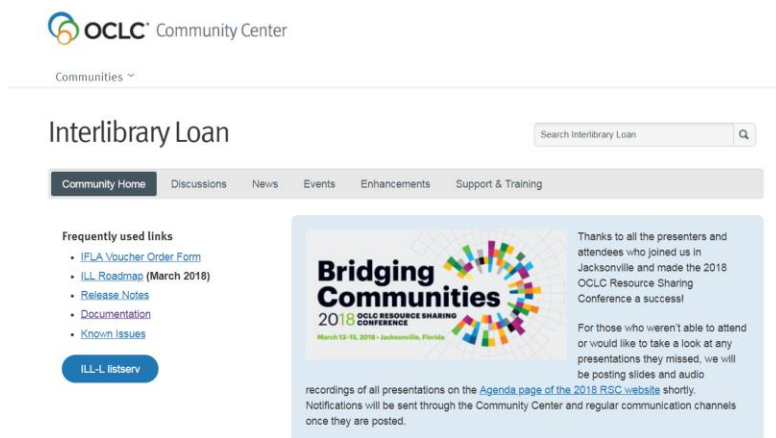
The OCLC® Interlibrary Loan Fee Management (IFM) allows libraries to reconcile resource sharing charges and payments through their OCLC monthly invoice. See how to configure and manage [IFM](#).

### 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 Path](#) for the group(s).

### OCLC® Community Center

Take advantage of the [OCLC Community Center](#) where you can interact with staff at other libraries using WorldShare Interlibrary Loan, learn about updates and training opportunities, and suggest enhancements to the service.



## Create an account

If you already use **WorldShare Management Services**, **WorldShare Collection Manager**, or **WorldShare License Manager**, you have an existing OCLC Services account that gives you access to several services in the WorldShare platform. Before you log on for the first time, you will need to work with someone at your institution who has administrative rights to add permissions to your account. Refer to [Create a WorldShare ILL account](#) for further information.

## Support

See [OCLC WorldShare Interlibrary Loan](#) for OCLC Support, other valuable documentation and training resources.



## Configure IFM

### IFM

In order for an IFM transaction to take place, both the borrowing and lending institutions must have IFM selected in the constant data applied to the request, and the IFM conditions must match (e.g., the borrowers max cost must be greater than or equal to the lender's charge for the request).

To configure IFM, you must access [OCLC Service Configuration](#). To access Service Configuration click the previous hyperlink, or click **OCLC Service Configuration** under the Other Quick Link column on the home screen.

In Service Configuration, you can create Borrower and Lender constant data records with IFM settings. For more information about constant data records, see [Constant data](#). Different IFM settings can be applied to individual constant data records. If you do not select **ILL Fee Management (IFM)** for a constant data record, IFM will not be used to handle charges made using this record.

### Watch a video

OCLC IFM - Interlibrary Loan Fee Management (7:37)

This video provides an overview of IFM and how borrowing and lending libraries can configure IFM as payment method.

Media, iframe, embed and object tags are not supported inside of a PDF.

### Configure IFM in Borrower Constant Data

After logging in to Service Configuration, click **WorldShare ILL > Borrower Data** to configure IFM for borrowing requests. Constant data records with IFM selected should be created for instances where you would like to use IFM to handle transactions where you are willing to pay the lender's requested fee to fulfill a request. Adding a constant data record to a request will not guarantee the use of IFM. IFM will only be used if the borrower and lender IFM settings match.

Follow the instructions on [Borrower Data](#) to add or edit a constant data record. Before saving the record, ensure that you have selected **ILL Fee Management (IFM)** and entered the **Maximum Cost** you are willing to pay for item requests to which you add this constant data record.



## Configure IFM in Lender Constant Data

After logging in to Service Configuration, click **WorldShare ILL > Lender Data** to configure IFM for lending requests. Constant data records with IFM selected can be used in instances where you would like to use IFM to handle for-a-fee lending transactions.

Follow the instructions on [Lender Data](#) to add or edit a constant data record. Before saving the record, ensure that you have selected **Add ILL Management Fee (IFM)** and entered the **Lending Charges** for requests to which you will apply this constant data record.

## In-Currency IFM

Until the September 2016 system release, all IFM transactions had to be conducted using United States Dollars (USD). If you are in Australia, Canada, the Eurozone, South Africa, or the United Kingdom, you can now conduct IFM transactions with other libraries in your region in your local currency. In-Currency IFM determines the local currency used by your library based on your library's settings in the [OCLC WorldCat Registry](#) and gives you the option of using your local currency or USD when applying IFM to requests.

If you live in a region where one of the following currencies is used, you can switch between it and USD in the Maximum Cost and Lending Charges fields in a request:

- Australian Dollar (AUD)
- British Pound (GBP)
- Canadian Dollars (CAD)
- Euro (EUR)
- South African Rand (ZAR)

For example, in a borrowing request, you can select the preferred currency for the IFM transaction from the Maximum Cost currency list. The image below is from a British library, so their options are GBP or USD:



**Billing** Copy from shipping

**Bill To**

**Address**

**City**

**State/Province**

**Country**

**Postal Code**

**Billing Notes**

**Use ILL Fee Management (IFM) for payment**

**Maximum Cost**

*If you only want items that are free, enter 0.00*  
*If you do not enter an amount, you will be responsible for whatever the lender charges.*

**Copyright Compliance**  CCG: Conforms to CONTU Guidelines  CCL: Conforms to U.S. Copyright Law  None

## Set up In-Currency IFM

If you have been using USD as your IFM currency but want to begin using your local currency, you need to update your constant data records so that you do not have to manually apply the currency on every individual request.

OCLC recommends creating two sets of constant data records:

- One with your local currency
- One with USD

For example, if your library uses CAD, you should create two Borrower and two Lender constant data records. For the Borrower constant data records, you should have one record with the Maximum Cost in CAD and another with the Maximum Cost in USD. For the Lender constant data records, you should have one record with the Lending Charges in CAD and another with the Lending Charges in USD. When you have the two sets of constant data records set up, when creating or responding to requests, you can select the respective record based on the currency you want to use.

For information on creating, copying, and editing constant data records, see [Borrower Data](#) and [Lender Data](#).

## Requesting items (Borrowers)

IFM will not be applied if the Lender uses a currency different than the one you selected for your Maximum Cost. If you are using a currency specific to your region, OCLC recommends doing the following in order to avoid any complications between different currencies:

1. Send the request to the libraries in your region that also use the same local currency.
2. If the request goes unfilled by libraries in your region:



1. In the unfilled request, under Actions, click **New**.
2. In the new request, add **libraries that are not in your region** to the Lender String.
3. Apply your **borrower constant data record** that defines Maximum Cost.

## Responding to requests (Lenders)

IFM will not be applied if you do not select the same currency in your Lending Charges as the Borrower has indicated in their Max Cost. If you try to apply a different currency than what the Borrower selected, you will receive a warning message. If you proceed to update the request, IFM will not be applied. Note: If your library uses ILLiad, and you receive a request from a library in another country, you should verify that the borrowing library specified USD. If you are not using the same currency as the borrower, then the IFM transaction cannot occur.

As a lender, you have the following options when the borrower has supplied a different currency:

- Change the **currency** to the currency the borrower selected (only applicable if it is USD).
- Respond **No** to the request.
- Deselect **Use ILL Fee Management (IFM)** and change the **Lending Charge**. Supply the item for free, if possible.





## Manage IFM

### Borrow with IFM

When using IFM with Borrowing in WorldShare Interlibrary Loan, it is important to keep the following considerations in mind:

#### IFM Borrowing Fees Are Charged When Item Ships

When a lending library receives your request and fulfills it, your IFM account will be charged when the lending library clicks **Shipped**. This will only occur when an IFM-enabled lending library supplies your request.

#### IFM History Displays in Individual Requests

After a request has been filled, you can review the IFM payments associated with the request in the **Request History, ILL Fee Management (IFM) History** section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including the amount debited from the borrower for the request and the supplier. See IFM Borrowing Messages below for more detail about these messages.

### IFM Borrowing Message

The following messages may be displayed in the ILL Fee Management (IFM) History section of a borrowing request.

TRANSACTION MEANING	MEANING
IFM Payment - #.##	The amount in the currency that has been charged to your account by the lender. This message will appear after the lender has clicked Shipped. After the payment has succeeded, a supplier column will be added to the History panel with the lending library's OCLC symbol.

**If you are an ILLiad library:** Borrowers who use ILLiad to process interlibrary loans with IFM may also see a message alerting the borrower that the supplier has changed the request's status from **Shipped** to **Unshipped**. This change in status will result in an automatic IFM refund by the system.



# Lend with IFM

When using IFM with Lending in WorldShare Interlibrary Loan, it is important to keep the following considerations in mind:

## Payments Are Triggered on Ship Action

When a lending library updates a request's status to **Shipped**, by responding **Yes** to Can You Supply?, the borrowing library will automatically be charged for that item.

## IFM Lending Charges Must Match the Borrower's Settings

When a lender submits an IFM eligible request as **Shipped**, the system will perform IFM validation checks and warn the lender if an expected IFM charge cannot be processed due to one of the following problems:

1. The lender has set their IFM flag but the borrower has not.
2. The lender's ILL charge is greater than the borrower's state max cost.

The lender can take two actions if this warning is generated:

1. Proceed with the **Ship** action (click **Update** twice), agreeing to the Borrower's terms, which include the maximum cost and method of processing payment for that request.
2. Abandon the current **Ship** action (click **Cancel**), and respond **No** or **Conditional** to the request.

These checks are also performed when a lender performs a **Bulk Shipping** action. Any requests that fail the IFM validation checks will not be included in the Bulk Action and will be listed in the post-bulk action status report that appears on screen after a bulk action has been performed.

## IFM History Displays in Individual Requests

After a request has been filled, you can review the IFM notifications associated with the request in the **Request History, ILL Fee Management (IFM) History** section of the given request. The IFM history section of the screen will show notifications about the IFM payment, including whether the payment has cleared, the amount of the payment, and error messages if the payment cannot be completed. See IFM Lending Messages below for more detail about these messages.

## IFM Lending Messages

The following messages may be displayed in the ILL Fee Management (IFM) History section of a lending request:

MESSAGE	MEANING
IFM Payment Pending	The system is processing an IFM payment in response to the recent Ship action.





MESSAGE	MEANING
IFM Payment	The system has successfully processed the IFM payment for this request—this includes the amount credited to the lender.
IFM Error	<p>Something has prevented the system from completing the IFM Payment successfully. Possible reasons for an IFM payment not to proceed as expected are:</p> <ul style="list-style-type: none"> <li>• The borrower had not set their IFM flag in the request.</li> <li>• The lender's charge exceeds the borrower's max cost.</li> <li>• The system has been unable to contact the IFM service so an IFM payment could not be made for this request.</li> </ul>

## Issue an IFM refund

As a Lender, you can issue refunds for IFM transactions that were made in error. Refunds can be issued for requests with any status after Considering, including Closed requests. For example, if you (the Lender) billed a Borrower by accident, you can go into your closed requests and refund the amount. Refunds can only be issued for the total amount of the lending charge. Lenders cannot issue partial refunds. If you are a Borrower and have been charged by accident, you can send an email to the Lender to ask them to refund the charge. See [Issue a refund \(Lender\)](#) and [Request a refund \(Borrower\)](#) below for more information.

### You may want to issue a refund if:

- You responded Yes to a request, but then discovered you could not supply the item.
- You used the wrong constant data for a request.
- You accidentally charged the Borrower (for example, you did not realize the Borrower is part of your mutual reciprocal program).

**Note:** You can only issue refunds through the system interface. Refunds must be issued within 180 system days of the original transaction.

- **If you are an ILLiad library** - You can continue to use the Undo Shipped functionality within the ILLiad interface. However, if you have inadvertently charged a library outside of the Undo Shipped scenario, you need to log into your WorldShare Interlibrary Loan account in order to issue a refund.
- **If you are an ISO ILL lending library (e.g., those using Auto-Graphics SHAREit™, Relais ILL, VDX®, WorldCat Navigator®)** - You need to "de-ISO" the request in order to issue a refund. Note that if you "de-ISO" an ILL transaction, you will no longer be able to use your ISO ILL system to update that request.



## Issue a refund (Lender)

Follow the below instructions to refund a request in WorldShare Interlibrary Loan. The Refund button only appears on requests that can be refunded (when IFM has been invoked). **Note:** You cannot undo a refund.

### To issue a refund:

1. Locate the request you want to refund.
2. Send an email to the Borrower to let them know you are refunding the request.
3. At the top of the request, under Actions, click **Refund**.
4. Click **Refund**.
5. A confirmation message appears and the Refund button turns gray.
6. To confirm the refund, click the **Request History** accordion at the bottom of the request to view the ILL Fee Management (IFM) History details.

## Request a refund (Borrower)

If you have been erroneously charged for a requested item, you can request a refund from the Lender by using the Email button on the request.

### To request a refund:

1. Locate the request you want to request a refund for.
2. At the top of the request, under Actions, click **Email**.
3. On the Send Message window, fill in the fields.
4. Click **Send**.





## How do I change a lending request status to lost?

### Applies to

- WorldShare Interlibrary Loan
- Tipasa

### Answer

You cannot change a lending status to lost on the lending side. Please email the borrowing library and request that they change the status of the item to lost.

### Additional information

- More information about [Lending Requests](#).

### Page ID

10307





## How to configure IFM for lost book billing?

### Applies to

- WorldShare Interlibrary Loan
- Tipasa

### Answer

You can configure IFM for a lost book by creating a dummy request. The institution who lost the book will need to send a dummy request to the institution that owns the book. The IFM charge on this request should be the amount of the charge for the lost book. The only institution who should be selected in the lender string on this request is the institution who owns the lost book.

### Page ID

14374

