

Good morning everyone! Today is Thursday, May 6<sup>th</sup>. My name is Helen Pinder, I'm the resource sharing consultant here at SWAN, and I'd like to welcome you to the first session of our Interlibrary Loan Boot Camp. Today we'll be going through the basic functions of WorldShare ILL.

Getting to	o know WorldShare	
Log-in and dashb	oard	
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It's always best to begin at the beginning so let's start by logging in and taking a look at our dashboard.

Ŭ	OCLC WorldShare Man WorldShare ILL (WSIL	0
		SIGN IN
	t.swanlibraries.net/node/66643 mark your instance	User Name*
	ave a login or have forgotten your d in a support ticket to SWAN	Password*
		SET/RESET PASSWORD
		CANCEL
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If you don't have your instance bookmarked already- or if you're on a new or borrowed workstation, you can find your url on our Swan Support site. We can also help you with your login.

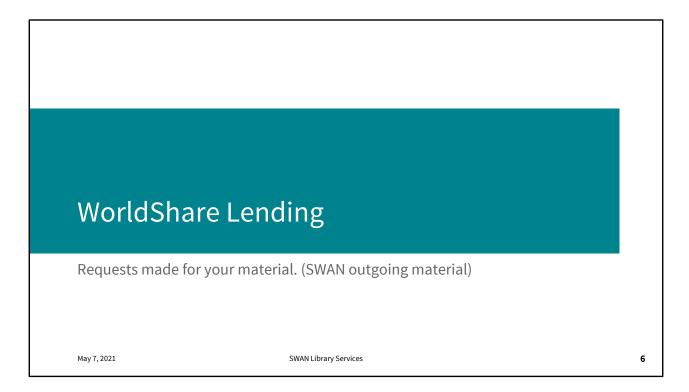
Log in with your username and password

WorldShare			Need Help? 🐱 SWAN Support 🐱 User support who
Interlibrary Loan Adm Interlibrary Loan Home Discover Items	n Interlibrary Loan Home		128 Reg ID: 9718
Borrowing Requests Lending Requests Purchasing Requests Print Queue (0)	Search for requests  Request ID  Request ID  Received  Received	the default for this workstation	Be sure your location is selected and blue before clicking OK. This can take a few seconds.

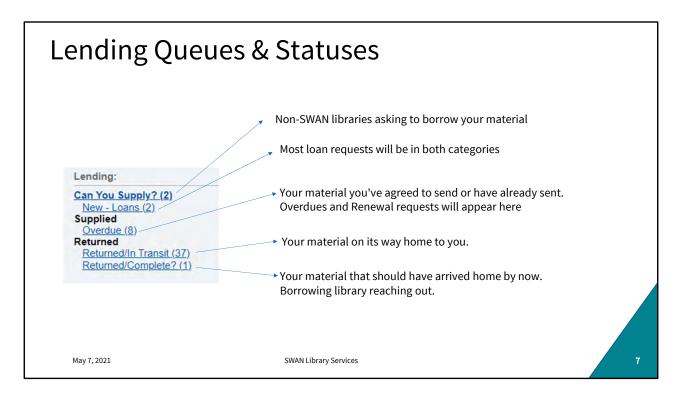
And be patient with this step. This box will appear and your dashboard will populate after a few moments behind that shading. Wait a few seconds before selecting your branch and clicking OK. I'm not sure why it's finicky like this, I just know it to be true.

WorldShare"			
Interlibrary Loan Admin			
Interlibrary Loan Home	Interlibrary Loan Home		
Borrowing Requests	Search for requests		
Lending Requests	Request ID V		Go
Purchasing Requests	•	Active Requests 🔘 Closed Requests	
Print Queue (0)	Quick Links Borrowing: Produced (3) In Transit (2) Received Returned	Lending: Can You Supply? (13) New - Loans (13) Supplied Returned/In Transit (15) Returned/Complete? (1)	Other: OCLC Policies Directory OCLC Service Configuration OCLC Usage Statistics OCLC Article Exchange Resource Sharing News WS ILL Training Resources
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There's a lot going on here on the dashboard. But most of your interactions will fall into these three categories Lending, Borrowing, and Discover Items.



The Lending request queue is something you'll want to check every day. Not only will frequent checking keep your queues small, but it will expedite fulfilment or rejection for the waiting patron.



This will look slightly different day to day. Check regularly and respond to loan requests, renewal requests, and Returned/Complete inquiries.

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g requests. Out rod ou	pp() . (v)				
tch respond to "Can You S results 1 - 3 of 3 🛛	supply" items Yes No			Rows 20 V	
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esults 1 - 3 of 3 🔅				Rows 20 🗸	
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	Request Staff Notes				
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Expand the request to view the details. Click "search my library's online catalog" to search availability. You can also search in WorkFlows. If the item appears on-shelf and is an item your library would lend (e.g. not a restricted or high-demand item like a Hot Spot or a Lucky Day.) Click "Print Now" and "add to request print queue." Pull the items from the shelves.

Can	Can you supply?									
@WorldShare	rlibrary Loan Admin								Need Help?	<ul> <li>SWAN Support</li> </ul>
Interlibrary Loan Home	Print Queue: Lending	Requests (2)								JCX Reg ID: 9855
Discover items     Borrowing Requests     Lending Requests	Results 1 - 2 of 2	ø								Roma 20 💌
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+ Print Queue (2)		207920084				Dark rider Victory's price i		Submitted Submitted		
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Print you	ur requests	from the	Print Que	ue when you	u're ready to p	ull the items fro	m the shelve	25.		
May 7,	,2021			SWA	N Library Services					9
May /,	, 2021			SWA	IN LIDFARY Services					9

You can print your requests from the Print Queue. I like to print them and jot down the call number. Use the printouts to make sure you're pulling the exact item requested. (Serials, classics, and other titles can be tricky with multiple editions.)

207813499:	Collapse	
Can you supp	Iy? Yes Print Shipping Labels Print Book Straps/Stickers No - No reason given	Group
	No - No reason given No - In use/On Ioan	-
Request Staff N		
Status Type Source OCLC Lenders	No - Not on shelf/Missing Consid No - Policy problem Loan No - Item too new to Ioan WCDIS No - On reserve 11336 FDB, Jrc, No - Publisher embargo	•

If the item requested is not something you'd be willing to lend, is checked out, is not found on the shelf, or was found in poor condition, etc.; use the dropdown to reject the request. You are not required to provide a reason for the rejection, however it may help the requesting library understand what sorts of items your library will supply.

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User Information									~
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Identify user									
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Identify item Item ID:	Т								
	1								
List of checkouts		1.000	1.20					Low control	_
Title	Call number	Item ID	Dat	te Due	Billed	Amount Paid Auto T	ype	Set ID	
									~
		Get User Ch nformation	eck Out Item To User	Check Out To New User	Email All Checkouts Receipt	Email Current Checkouts Receipt (b)	Close		

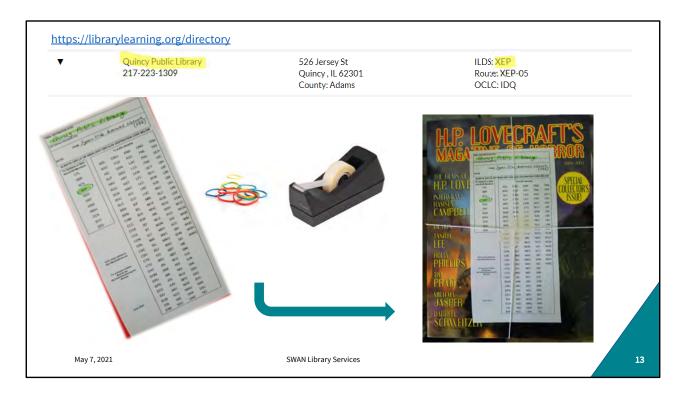
If you find the item on-shelf, check it out to your local In-State or Out-of-State (as appropriate) user. Every library should have one already but if you don't, just open a support ticket and we'll help you set them up.

07813499)					
56099	ß	Borrower Max Cost Need Before Requested on Due Date Shipped Date Borrowing Notes	CQ6 USD 0.00 05/28/2021 04/27/2021 05/29/2021 04/29/2021 TELC FLIN AND SOLINE	T MEMBER: PLEASE CONTACT B	ILLING
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	Orland Park Publ	ic Library	Attention		Coralville Public Library
	14921 Ravinia Av	enue	Address		1401 5th St
	Orland Park				Coralville
	Illinois		State/Province		lowa
	United States		Country		United States
	60462				52241-1813
	708-428-5104		Fax/Phone		319-248-1850
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	ν 66096 56096 JFL, *JCX. ΟΕΜ, QQ3	SC SEGUE	SC 56099 56099 JFL, VICX, OEM, QQ3 ILL Orland Park Public Library 14921 Ravinia Avenue Orland Park Illinois United States 60462	SC SG299 SG299 FFL, SCX. OEM, QQ3 IFL, SCX	SC 56099 56099 FFL, JCX. OEM. QQ3 FFL, JCX. OEM. QQ3 FFL, JCX. OEM. QQ3 FFL, JCX. OEM. QQ3

Once the item is checked out to your OCLC user in WorkFlows, review the Borrower information in WorldShare. Look for special due date requests and delivery needs. Some libraries will request return mailing labels to ensure your item is correctly routed back to you.

Typically in-state loans are sent with a RAILS or ILDS label. Out-of-state loans are generally sent US Mail.

Click "Yes" when you're ready to send the item.



ILDS label instructions should be in the loan request. But you can always confirm in L2. Neatly and clearly address your route tag and include return route information (this may be helpful for delivery personnel!) As you can see here, my label is not self adhesive. So, to ensure the tag stays in place, I've crisscrossed the rubber bands and taped the label where they intersect. Tape should never touch the item! Tape the label to the packaging never the item.



WorldShare and WorkFlows steps are now complete and it's labeled for ILDS or mailing. It's time to send the item out into the world.



Remember this scenario is best case. At no point does the item go missing in transit or become overdue. The item goes out and comes back without need of further intervention or communication. The "ifs" "whens" "unlesses" will be covered in a future session. 80% or your loans will be uneventful.

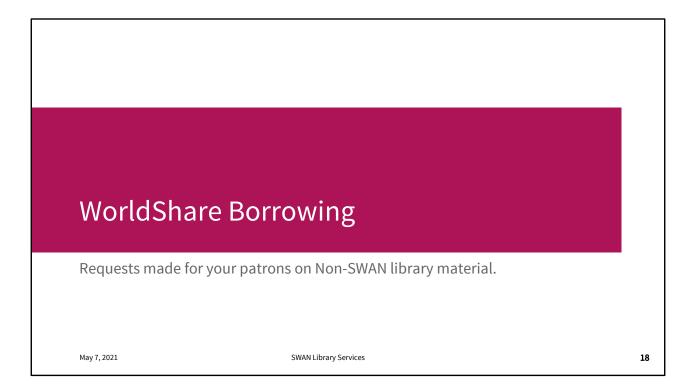
Closing a loan Checked-in/Complete	Interlibrary Loan Home Search for requests Request ID R
Find the loan in WSILL with one of several methods 1. Search by Request ID (preferred) 2. Search by title 3. Find in "Returned/In-Transit"	Request ID <pre></pre>
Mark the request checked-in/Complete in WSILL	WorldShare'  Interlibrary Lean Admin  Interlibrary Lean Admin  Discover items  Borrowing Requests  Lending Requests  Can Not Supply? (14)  Request Staff Notes (6)
Lastly, discharge/checkin the item in WorkFlows and follow the routing instructions.	New - Loans (14) - Request Details (Reguest ID 207561628)
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You will most likely be alerted when the item is on its way home. It will appear in your "Returned/In-Transit" Returned queue when the borrowing library marks it returned. Sometimes, however, your item will just turn back up. It's important to look at route tags when sorting your incoming deliveries to intercept and correctly process these returning items.

You can look the item up by Request ID, title, or one of several other options in that search term dropdown. When you find it, mark it Checked in/ Complete with the button. Once the loan is closed you can discharge/check-in in WorkFlows and route accordingly.

Questions o	on Lending?	
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9:30



Moving on to borrowing. This process is typically initiated by more people. Public Service staff, some libraries even allow their patrons to create non-SWAN loans. It's important to check the SWAN catalog first. You'll only use WorldShare where item availability either doesn't exist in SWAN, or doesn't exist in sufficient quantity- like for Book Discussions.

WorldShare'					
Interlibrary Loan Admi	in				
Interlibrary Loan Home	Advanced Search				
- Discover Items	Search Scope	Index(es)			
Search	All WorldCat 🗸	Title (ti:) 🔫	Enter search term(s)		00
Scope	AND 🗸	Author (au:) -	Enter search term(s)		00
Index	AND V	Keyword (kw:)	Enter search term(s)		00
Keyword  V Term(s)		Noymord (NP.)	Enter sector territory		
0	Format(s) (Starts with)	Language(s) (Starts with)	Year(s)		
Search Clear	Select one or more 👻	Select one or more 👻		0	
Advanced Search	Source of Cataloging (Starts with)	Language(s) of Cataloging (Starts with)	Limit Results to:		
Borrowing Requests	Select one or more 👻	Select one or more 🖛	Abbreviated-level records		
Lending Requests					
Purchasing Requests	Search Reset				
<ul> <li>Print Queue (0)</li> </ul>					

From your WorldShare dashboard, click on Discover Items. You can do a quick search in that left hand search pane, but I always prefer to use the advanced search in the middle of the page.

•	a loan requ			
WorldShare'				
Interlibrary Loan				
Interlibrary Loan Home	Advanced Search			
Discover Items	Search Scope	Index(es)		
Search	All WorldCat	Title (ti:)	H.P. Lovecraft's magazine of horror	00
Scope	AND V	Author (au:)	Enter search term(s)	00
Index	AND V			00
Keyword V	(1015-1)	Keyword (kw:)	blustery	
Term(s)	Format(s) (Starts with)	Language(s) (Starts with)	Year(s)	
Search Clear	Select one or more 🔹	Select one or more 👻	2004	0
Advanced Search	Source of Cataloging (Starts with)	Language(s) of Cataloging (Starts with)	Limit Results to:	
	Select one of more +	Select one or more	Abbreviated-level records	
Borrowing Requests				
Lending Requests	Search Reset			
Purchasing Requests				
Print Queue (0)				

Enter your search terms and click search.

WorldShare'				Need Help? SWAN Support User support info
Interlibrary Loan				
Interlibrary Loan Home	Search: Title	= H.P. Lovecraft's magazine of horror (All WorldCat)		Þ
Discover Items	+ Advanced	Search		*5
earch Scope All WorldCat ✓ ndex Keyword ✓	Results 1 - 4 o	r4 ② ay Count (Highest First) ▼		Rows 10 V
Search Clear Advanced Search X Close All Tabs		H.P. Loveraft's magazine of horror.     Penodical, English Publisher Holicong, PA: Woldsde Press, c2003- ISSN# 1552-26421 (OCI.CF 5667876 Satch for versions with same tife and auftor	C Not Held by my library State Holdings Regional Holdings All Holdings (5)	Create Request Filter by Custom Holdings Path • Select • Year Volume. Go
Search: Title = H.P. Lovecrafts magazine of Borrowing Requests Lending Requests Purchasing Requests	2	Pulp fistion of the '20s and '30s     ty Hoppenstand, Gary     Pint book, Rigish     Publisher (psych, Massachusetts: Salem Press, a division of EBSCO Publishing, [2013]     ISBN: 142803834 (ebc.)   OCLC#: 875896483     Saarch for version with same tife and author	Not Held by my library Slate Holdings Regional Holdings All Holdings (4)	Create Request Filter by: Coustom Holdings Path V Select * Year Volume: Go
Print Queue (0)		H.P. Lowscrafts's Magazine of Horror.     Periodical, English     Publisher: Widside Press.     OCJCR 3179741804     Search for versions with same Mile and author	Not Held by my library State Holdings Regional Holdings All Holdings (1)	Create Request Filter by Clustom Holdings Path v Select v Year: Volume: Go

Search results are sorted in descending order by holdings. Click on the title to get item detail and holdings to determine availability and lender rules.

🤣 WorldShare'							Need I User suppo		SWAN Support
Interlibrary Loan							Court copport		
Interlibrary Loan Home	H.P. Lovecraft's magazine of horror. (565787	56)							
✓ Discover Items  Search Scope [All WorldCat ♥] Index [Keyword ♥] Tem(s)	Autor Type Penotical Publisher Holicong, PA Wildside Press, c2 OCLC Number 56578756 Search my.lbtary's.online.catalog	103-							
Search Clear Advanced Search X Close All Tabs X Search Title = H.P.	Lender String 3 1 2 All Holdings State Holdings Regional Holding Filter by: Custom Holdings Pan 2 Select	5	• Yes	r: Vol	ume:	Go	Quantity 1 v		Create Request
Lovecraft's magazine of	Results 1 - 5 of 5 💭								Rows 100 V
Holdings: H.P. Lovecraft's magazine of horror. (56	UNIV OF CALIFORNIA LOS ANGELES	Supplier =	Days To Respond Copies: 4 days Loans: 16 days	US, CA	Symbol = C		Cost Copies: 0.75 - 15.00 USD Loans: 0.00 - 30.00 USD	IFM Yes	Holdings = no.3(2006)-no.4(2007)
<ul> <li>Borrowing Requests</li> <li>Lending Requests</li> </ul>	MONROE COMMUNICOL LIBR	Yes	Copies: 2 days Loans: 2 days	US, NY	VQT		Copies: 0.00 USD Loans: 10.00 USD	Yes	
Purchasing Requests	BROWN UNIV	Yes	Coples: 4 days Loans: 4 days	US, RI	RBN		Copies: 11.00 - 15.00 USD	Yes	
Print Queue (0)		Yes	Copies: 4 days	US. TX	ТХА	-	Copies: 15.00 - 20.00 USD	Yes	
	TEXAS A&M UNIV	105	Loans: 4 days				Loans: 15.00 - 20.00 USD		

Loan fulfilment is generally best when locally sourced. As a rule, it's best to try to find instate holdings. If none are available regional holdings should be explored followed by all holdings.

You can see supplier statuses, response times, and cost information here.

If availability exists and cost terms are agreeable, build your lender string by clicking the "YES" in the supplier column and click "create request"

	ing a loan re		Crea	ate Request
H.P. Lovecraft	's magazine of horror.			TZ8 Reg ID: 9718
Send Request -	Save For Review			Apply constant data: Actions:
Multiple Requests				
- Request Details (Re	equest ID NEW)			
B Patron Summary			Search my library's online c	atalog
Title / Journal	H.P. Lovecraft's magazine of horror.		Local ID	
Uniform Title			Open Access	
Author			No links found Apply Citation	
Publisher	Holicong, PA : Wildside Press, c2003-		Apply Gradion	
ISBN			Search Google Scholar	
ISSN	1552-8642		Search Google Books	
OCLC	56578756	View Holdings	Search Google	
DOI				
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Series				
Туре	Loan 🗸			
Format	Periodical/Article V			
Language	English (eng) 3 *			×

Title and borrowing information will populate for your library.

	oan request		
Lending Libraries	H.P. Lovecraft's mag	azine of horror.	
Lender String CLU, VQT	Send Request + Save	For Review	
	n you uo not enter an amot	ini, you will be responsible for whatever i	ie ieniuer charges.
	+ Patron		
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	Postal Code		
	Email		Ex: 777-555-1010
	Fax		
	Pickup Location		Ex 777-555-1010
	Notes	Select or add	tend due date to 11/1 -HWP
	HOLES	DOOK DISCUSSION: Please e	and due date to 11/1 -HVVP

Review your lender string, borrower information, and populate some (not all) of your patron's information. Really only name and User barcode is helpful because someone at your library will be using this request to continue the loan process when the item arrives. Include special due date requests in the Notes field.

At most libraries, multiple staff members are placing requests so it may be helpful to include staff initials in case there are questions or follow-up is needed. When you're ready you can click "Send request" or "save for review" if you'd like to come back to it or have someone else review before submitting.

WorldShare	your loan		
e vvoridsnare	63		
Metadata Inter	library Loan Admin		
Interlibrary Loan Home			
Discover Items	Interlibrary Loan Home		
Borrowing Requests	Search for requests		
Lending Requests	Request ID V		Go
Purchasing Requests	• Act	ive Requests 🔘 Closed Requests	
Print Queue (0)	Quick Links		
	Borrowing:	Lending:	Other:
	Produced (11) In Transit (4)	Can You Supply? (17) New - Loans (11)	OCLC Policies Directory OCLC Service Configuration
	Received Renewal Approved (3)	Considering - Loans (6) Supplied	OCLC Usage Statistics OCLC Article Exchange
	Overdue (3) Recalled (2)	Overdue (9) Returned	Resource Sharing News WS ILL Training Resources
	Returned	Returned/In Transit (34) Returned/Complete? (1)	OCLC Community Center

Once you create your request, you can track the progress under your Borrowing quick links. Immediately after creation, the loan will be under "produced." In-transit, rejected, and unfilled rows will appear later.

WorldShare'						
Metadata Interi	ibrary Loan Admin					
terlibrary Loan Home	207838976: Por	rtraits from nature : 35 studies	for dimensional quilt	s		
Discover Items Borrowing Requests	Did you receive th	iis item?				
w For Review roduced (11)	Date received: 05/03/2021	Options:				
Awaiting Response (7)						
In Transit (4) 🔁	Mark as received	Not Received				
Portraits from nature : 35 studies for dimensional guilts	Request Staff Notes	0				
eceived (70) 🗔	- Request Details (Rec	quest ID 207838976)				
Received/In Use (68)	Patron Summary					
Renewal Approved (3)	Source Status	WSILL In Transit				
Overdue (3)	Lenders	*LD4, ZCV				
Recalled (2)	Title Author	Portraits from nature : 35 studies for Wells, Jean	dimensional quilts			
eturned (14)	Publisher	Lafayette, CA : C & T Pub., ©2006.				
Returned (14)	ISBN OCLC	9781571203557 (pbk. alk. paper) 15 64592143	571203559			
reate Request	Туре	Loan				
	Format Language	English				
Lending Requests	Preferred edition	Any edition				
Purchasing Requests	Supplier	LD4	an de la compañía de			
Print Queue (0)	Requested on Need Before	04/29/2021	Shipped Date	04/29/2021		
		05/29/2021				

Once your item arrives, find the loan in WorldShare and mark it "Received." Again, you can search by Request ID, Title, lender, and more.

## **Brief Item Record**

A temporary record is needed in WorkFlows to circulate the Non-SWAN item to your patron

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Use the documentation on the Swan Support Site to create a brief item record for the borrowed non-SWAN item:

https://support.swanlibraries.net/ documentation/64875

SWAN Library Services

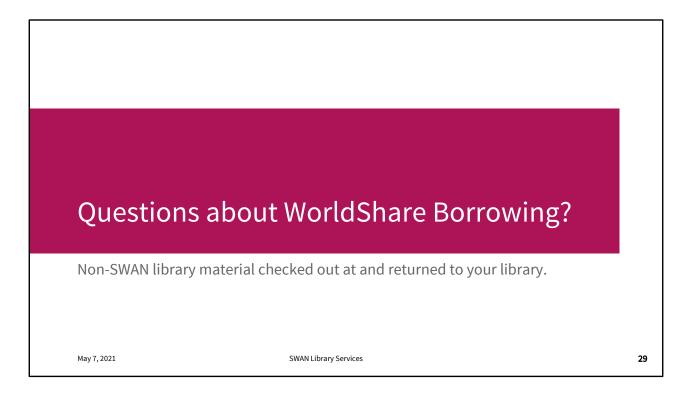
27

		w Place Hold
equest Staff Notes 0		8 4 4 6 0 b 4 9 m
Patron		Name: BOOK DISCUSSION, SWAN Status: OK Library: SWS ^
		Profile name: BOOK_DISC Amount owed: \$0.00 Available holds: 0 Artiv
ame	A. Random Patron	User categories: NONE Overdues: 0 Group ID: Privilege expires: NEVER
	21140000123456	KitKeeper book club kit. The splendid and the vile : a saga of Churchill, fa / Larson, Erik, 1954-
tatus		KIRKEEPER BOOK Club Kit, The spienoid and the vie : a saga of churchill, Ta / Larson, Erik, 1934- KITKEEPER LARSON Copy: 1 ID:31140000240966
epartment		Identify User
		User ID: 21140000240966
		Identify item
		Item ID: 31140000240966 2
		Hold Info
		Pickup at: SWS V Expires: 5/3/2022 🚸
		Date unsuspended:
		Level/Range Recall status
		3 Level:  Copy  Title Allow Recall  No Recall  Recall now (RUSI
		Range: O Library O Group O System
		Make hold first in queue
		۲ <u>۲</u>
		Get-User Get-Ttem Place Place Hold Close

Look up the loan in WorldShare and scroll down to find your patron's information.

Create and place a copy-level hold in WorkFlows on the brief item record you just created. Libraries have different ways to identify a non-SWAN loan. Bookstraps, Spine label tape, Restick labels... anything to set this item apart as needing special handling upon return in case it's dropped off at another library.

Trap the hold as you would a regular SWAN item, put it on your hold shelf. Check it out to the patron as you would a regular SWAN item.



We'll talk about what happens when the item returns in just a moment but are there any questions so far? 17:00



Again, we're assuming a best case scenario. Your patron borrowed this item and returned it to you in good condition and in a timely manner. Most non-SWAN loans are uneventful.

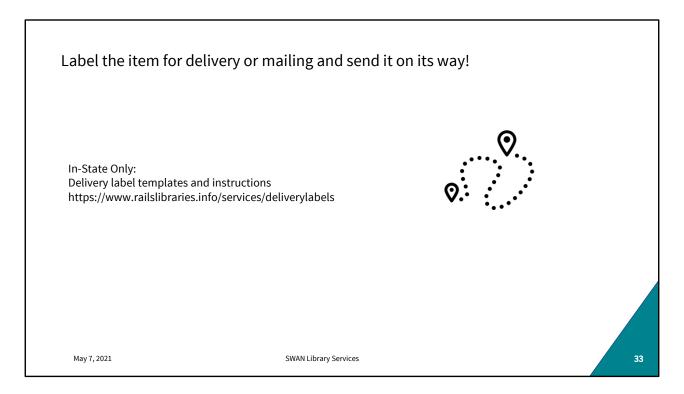


Step one is to Discharge/checkin the item in WorkFlows if it hasn't been already. Get that item off the patron's record.

There's Support Site instructions for deleting the brief record, but it's best to wait until the item is safely returned to the lending library in case anything goes wrong and you need to track what happened on the SWAN system.

🧿 WorldShare'	
Metadata Int	terlibrary Loan Admin
Interlibrary Loan Home	
Discover Items	207057966: The high frontier : human colonies in space
- Borrowing Requests	Ready to return this item? Date returned: Options: Desired due date:
New For Review	05/03/2021
Produced (11)	
Awaiting Response (7)	Return item Lost
In Transit (4) 🔀	
Portraits from nature : 35 studies for dimensional	Request Staff Notes 0
Received (57) 🗔	Request Details (Request ID 207057966)
Received/In Use (55)	Patron Summary Source WSILL
Received/in Ose (00)	Source WSILL

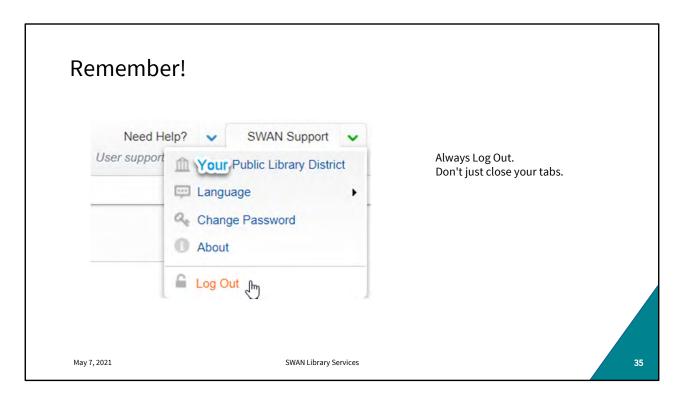
Look up the loan in WorldShare using the Item Title if the Loan number isn't available. Click the Return Item button.



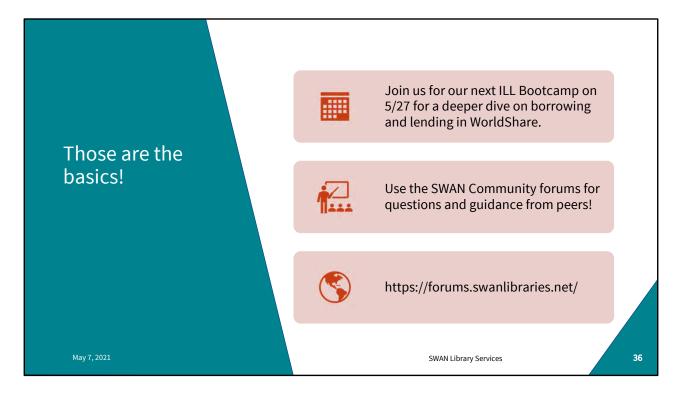
WorldShare and WorkFlows steps are now complete. Prepare the item for delivery with appropriate ILDS or RAILS labels (in-state) or mailing labels. It's time to send the item home.



Any questions about borrowing? 18:30



Whenever you're in WorldShare (borrowing, lending, reviewing, etc.) It's important to Log Out of each open WorldShare tab before closing the tab or browser.



Our next boot camp is May 27th



Next ILL Users Group meeting is June 2<sup>nd</sup>. Please join us for that.

WorldShare has a wealth of training material! Use your WorldShare login to access the community resources, register for webinars, view recordings etc.

Questions?		
help@swanlibraries.ne	et	
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Questions?

If you have any questions about your Worldshare instance, your login, your configuration, anything at all, please open a support ticket. We'll see you on the 27<sup>th</sup>!