ILL Boot Camp Basics

May 2021

Good morning everyone! Today is Thursday, May 6th. 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.
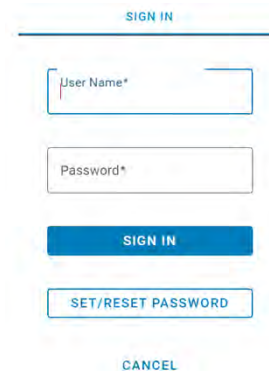
Getting to know WorldShare

Log-in and dashboard

It's always best to begin at the beginning so let's start by logging in and taking a look at our dashboard.

Log in to OCLC WorldShare Management Services – WorldShare ILL (WSILL)

- https://support.swanlibraries.net/node/66643
- Find and bookmark your instance
- If you do not have a login or have forgotten your password, send in a support ticket to SWAN

SIGN IN

User Name*

Password*

SIGN IN

SET/RESET PASSWORD

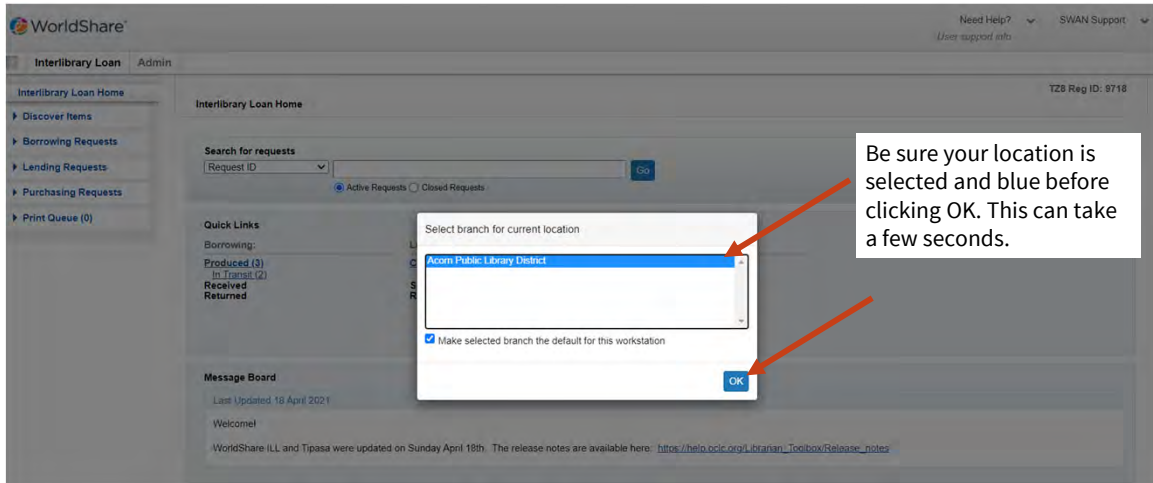CANCEL

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 ILL Home Page – Set Location

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 ILL Home Page

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.

WorldShare Lending

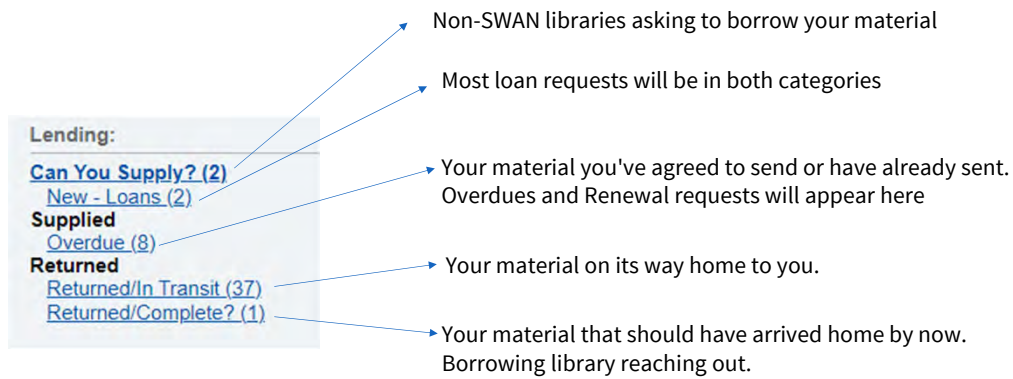Requests made for your material. (SWAN outgoing material)

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.

Lending Queues & Statuses

Lending:

Can You Supply? (2) → Non-SWAN libraries asking to borrow your material

New - Loans (2) → Most loan requests will be in both categories

Supplied

Overdue (8) → Your material you've agreed to send or have already sent. Overdues and Renewal requests will appear here

Returned

Returned/In Transit (37) → Your material on its way home to you.

Returned/Complete? (1) → Your material that should have arrived home by now. Borrowing library reaching out.

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

Can you supply? Click to expand, review, and respond to requests

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 you supply?

Print your requests from the Print Queue when you're ready to pull the items from the shelves.

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.)

Can you supply? Respond "No" to requests

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.

Can you supply?

Check out in WorkFlows

Can you supply?   Yes

Use your XXX In-State and XXX Out-of-State OCLC Users to checkout.

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.

Can you supply? Respond "Yes" to requests **Can you supply?** Yes

Request | Staff Notes 0

Request Details (Request ID 207813499)

Status	Considering
Type	Loan
Source	WCDISC
OCLC	1133656099
Lenders	FDB, JFL, *JCX, OEM, QQ3

Borrower	CQ6
Max Cost	USD 0.00
Need Before	05/28/2021
Requested on	04/27/2021
Due Date	05/29/2021
Shipped Date	04/29/2021
Borrowing Notes	TBLC,FLIN AND SOLINET MEMBER; PLEASE CONTACT BILLING ADDRESS OR 352-746-9077 WITH ANY QUESTIONS OR PROBLEMS (maxCost: FREE) show more

Title   College

Ship to

Attention	ILL
Address	Orland Park Public Library
	14921 Ravinia Avenue
City	Orland Park
State/Province	Illinois
Country	United States
Postal Code	60462
Fax/Phone	708-428-5104
Ship Via	ILDS XBR, Library Rate

Ship to

Attention	Coralville Public Library
Address	1401 5th St
City	Coralville
State/Province	Iowa
Country	United States
Postal Code	52241-1813
Fax/Phone	319-248-1850
Ship Via	Library Mail
Electronic Delivery	

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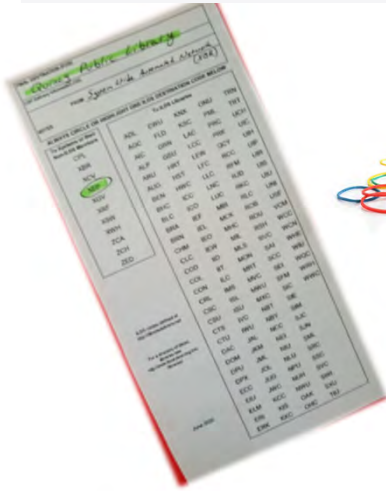Click "Yes" when you're ready to send the item.

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.

Label the item for delivery or mailing and send it on its way!

- In-State Only

Delivery label templates and instructions

https://www.railslibraries.info/services/deliverylabels

- Out-of-state

US Mail or specified carrier

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.

Time passes

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

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"

Mark the request checked-in/Complete in WSILL

Lastly, discharge/checkin the item in WorkFlows and follow the routing instructions.
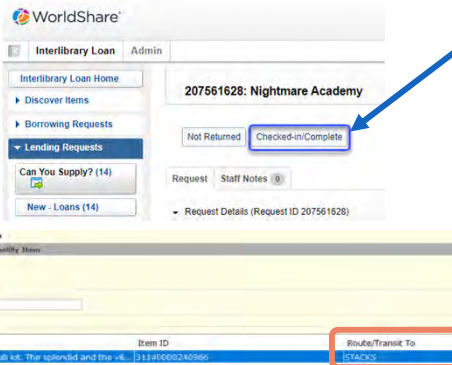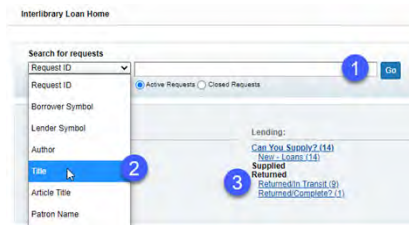
You will most likely be alerted when the item is on its way home. It will appear in your "Returned/In-Transit" Returned queue when the borrowing library marks it returned. Sometimes, however, your item will just turn back up. It's important to look at route tags when sorting your incoming deliveries 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 on Lending?

9:30

WorldShare Borrowing

Requests made for your patrons on Non-SWAN library material.

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.

Creating a loan request

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.

Creating a loan request

SWAN Library Services

Enter your search terms and click search.

Creating a loan request

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.

Creating a loan request

Loan fulfilment is generally best when locally sourced. As a rule, it's best to try to find in-state 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"

Title and borrowing information will populate for your library.

Creating a loan request

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.

Tracking your loan

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.

Receiving your loan

SWAN Library Services

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

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

Circulating the loaned item

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.

Questions about WorldShare Borrowing?

Non-SWAN library material checked out at and returned to your library.

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

Returning a WorldShare Loan

Non-SWAN library material checked out at and returned to your library.

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.

Brief Item Record

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

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

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

SWAN Library Services

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.

Mark Item Returned

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

Label the item for delivery or mailing and send it on its way!

In-State Only:
Delivery label templates and instructions
https://www.railslibraries.info/services/deliverylabels

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.

Questions about WorldShare Borrowing?

Non-SWAN library material checked out at and returned to your library.

Any questions about borrowing?
18:30

Remember!

Need Help? ∨   SWAN Support ∨

User support

🏛 **Your** Public Library District

💬 Language   ▶

🔑 Change Password

ⓘ About
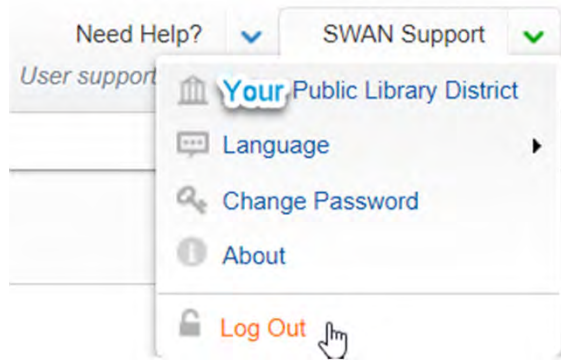
🔒 Log Out

Always Log Out.
Don't just close your tabs.

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.

Those are the basics!

Join us for our next ILL Bootcamp on 5/27 for a deeper dive on borrowing and lending in WorldShare.

Use the SWAN Community forums for questions and guidance from peers!
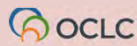
https://forums.swanlibraries.net/

SWAN Library Services

Our next boot camp is May 27th

Keep going!

ILL Users Group

OCLC WorldShare Training Resources

Next ILL Users Group meeting is June 2nd. 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.net

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 27th!