



# ILL Boot Camp Borrowing

May 2021

Good morning everyone! Today is Thursday, May 27<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 second session of our Interlibrary Loan Boot Camp. Today we'll be going through the borrowing functions and possible hiccoughs in WorldShare ILL.

# WorldShare Borrowing

Discovery and Circulation

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Since this is the second session, we're not going to go into too much detail on the Dashboard. If you need a review, the first recording is posted. Today we're going to focus on discovering items and the requesting and circulation processes.

# WorldShare ILL Home Page

WorldShare®

Interlibrary Loan Admin

Interlibrary Loan Home

Discover Items

Borrowing Requests

Lending Requests

Purchasing Requests

Print Queue (0)

Interlibrary Loan Home

Search for requests

Request ID

Active Requests  Closed Requests

Quick Links

**Borrowing:**

- [Produced \(3\)](#)
- [In Transit \(2\)](#)
- Received**
- Returned**

**Lending:**

- Can You Supply? (13)**
- [New - Loans \(13\)](#)
- Supplied**
- Returned**
- [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](#)
- [OCLC Community Center](#)

Message Board

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There's a lot going on here on the dashboard. Most of your WorldShare interactions will fall into these three categories Lending, Borrowing, and Discover Items. For this Borrowing deep dive we'll start by creating a request in Discover Items, then track and manage it in Borrowing.

# Creating a loan request

The screenshot displays the WorldShare Interlibrary Loan dashboard. At the top, there is a navigation bar with 'Interlibrary Loan' and 'Admin' tabs. Below this, a sidebar on the left contains a 'Discover Items' button, which is highlighted with a blue arrow. The main content area is titled 'Advanced Search' and features a search form with the following fields and options:

- Search Scope:** A dropdown menu set to 'All WorldCat'.
- Index(es):** A dropdown menu set to 'Title (ti:)', with two input fields for search terms and green/red status indicators.
- AND:** A dropdown menu set to 'AND', with two input fields for search terms and green/red status indicators.
- AND:** A dropdown menu set to 'AND', with one input field for search terms and green/red status indicators.
- Format(s) (Starts with):** A dropdown menu set to 'Select one or more'.
- Language(s) (Starts with):** A dropdown menu set to 'Select one or more'.
- Year(s):** An input field with a help icon.
- Source of Cataloging (Starts with):** A dropdown menu set to 'Select one or more'.
- Language(s) of Cataloging (Starts with):** A dropdown menu set to 'Select one or more'.
- Limit Results to:** A checkbox for 'Abbreviated-level records'.

At the bottom of the search form, there are 'Search' and 'Reset' buttons. Below the search form, there are links for 'Borrowing Requests', 'Lending Requests', 'Purchasing Requests', and 'Print Queue (0)'.

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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

The screenshot shows the WorldShare Interlibrary Loan Advanced Search page. On the left is a navigation sidebar with options like 'Interlibrary Loan Home', 'Discover Items', and 'Borrowing Requests'. The main area is titled 'Advanced Search' and contains several search criteria sections: 'Search Scope' (set to 'All WorldCat'), 'Index(es)' (with three rows: 'Title (ti.)' containing 'H.P. Lovecraft's magazine of horror', 'Author (au.)' containing 'Enter search term(s)', and 'Keyword (kw.)' containing 'blustery'), 'Format(s)', 'Language(s)', 'Year(s)' (set to '2004'), 'Source of Cataloging', and 'Language(s) of Cataloging'. There are also 'Search' and 'Reset' buttons at the bottom of the search area.

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If you use the advanced search, you can use the Boolean operators, change the indexes, and add search term rows. You can get really granular, which is helpful if you're looking for a particular edition. Enter your search terms and click search.

# Creating a loan request

The screenshot displays the WorldShare Interlibrary Loan interface. At the top, the search criteria are: "Search: Title = H.P. Lovecraft's magazine of horror (All WorldCat)". The results are sorted by "Library Count (Highest First)" and show 4 results. The first result is "H.P. Lovecraft's magazine of horror", which is "Not Held by my library" and has 5 holdings. The second result is "Pulp Fiction of the '20s and '30s", also "Not Held by my library" with 4 holdings. The third result is "H.P. Lovecraft's Magazine of Horror", "Not Held by my library" with 1 holding. Each result includes a "Create Request" button and a "Filter by" dropdown menu. The interface also features a sidebar with navigation options like "Discover Items", "Borrowing Requests", "Lending Requests", "Purchasing Requests", and "Print Queue (6)".

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Search results are sorted in descending order by holdings. You'll also be able to see at a glance whether the item is held at your library. Click on the title to get item detail and holdings to determine availability and lender rules.

# Creating a loan request

WorldShare® Need Help? SWAN Support  
User support info

Interlibrary Loan

Interlibrary Loan Home

Discover Items

Search Scope: All WorldCat

Index: Keyword

Search: H.P. Lovecraft's magazine of horror (56578756)

Author: H.P. Lovecraft's magazine of horror (56578756)

Type: Periodical

Publisher: Hollicong, PA : Wildside Press, c2003-

OCLC Number: 56578756

Search my library's online catalog

Lender String: [ ] clear Quantity: 1 Create Request

All Holdings State Holdings Regional Holdings

Filter by: Custom Holdings Path Select Year: Volume: Go

Library	Supplier	Days To Respond	Location	Symbol	Group	Cost	IFM	Holdings
UNIV OF CALIFORNIA, LOS ANGELES	Yes	Copies: 4 days Loans: 16 days	US, CA	CLU		Copies: 0.75 - 15.00 USD Loans: 0.00 - 30.00 USD	Yes	no.3/(2005)-no.4/(2007)
MONROE COMMUN COLLIBR	Yes	Copies: 2 days Loans: 2 days	US, NY	VQT		Copies: 0.00 USD Loans: 10.00 USD	Yes	
BROWN UNIV	Yes	Copies: 4 days Loans: 4 days	US, RI	RBN		Copies: 11.00 - 15.00 USD Loans: 15.00 USD	Yes	
TEXAS A&M UNIV	Yes	Copies: 4 days Loans: 4 days	US, TX	TXA		Copies: 15.00 - 20.00 USD Loans: 15.00 - 20.00 USD	Yes	
BRITISH LIBR REFERENCE COLLECTIONS	-	-	GB, EU	BLSTP		-	-	

Results 1 - 5 of 5 Rows [100]

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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"

Requests made of a fellow SWAN library will automatically deflect. Don't put SWAN libraries in your lender string.

You can also filter by a Custom Holdings Path. This is an advanced concept we'll cover in the final boot camp, but custom holdings can be a big time saver when it comes to finding lenders and expediting delivery.

# Creating a loan request

Create Request

TZ8 Reg ID: 9718

H.P. Lovecraft's magazine of horror.

Send Request Save For Review

Apply constant data: Actions:  
DEFAULT Reset

Multiple Requests

Request Details (Request ID NEW)

Patron Summary

Title / Journal	H.P. Lovecraft's magazine of horror.
Uniform Title	
Author	
Publisher	Holicong, PA : Wildside Press, c2003-
ISBN	
ISSN	1552-8642
OCLC	56578756
DOI	
PMID	
Dissertation	
Series	
Type	Loan
Format	Periodical/Article
Language	English (eng)
Edition	

Search my library's online catalog

Local ID

Open Access  
No links found  
Apply Citation

[Search Google Scholar](#)  
[Search Google Books](#)  
[Search Google](#)

View Holdings

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Once you create that request, title and borrowing information will populate for your library. Scroll through to make sure everything is accurate. If it's not; you can fix it here for this one loan, but you'll also want to go back later to update your constant data. We'll show you how to do that in a little bit. Click Create Request when you're done.



# Creating a loan request

▼ Lending Libraries

Lender String  
CLU, VQT

H.P. Lovecraft's magazine of horror.

Send Request Save For Review

If you do not enter an amount, you will be responsible for whatever the lender charges.

▼ Patron

Name A Random Patron 1

ID 21140000123456 2

Status

Department

Address

City

State/Province

Country United States

Postal Code

Phone Ex: 777-555-1010

Email

Fax Ex: 777-555-1010

Pickup Location Select or add

Notes Book Discussion: Please extend due date to 11/11 -HWP 3

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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. Only your library and the supplier see this, so don't feel like you're broadcasting patron data. 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. If this request comes back unfilled, generally whoever initiated the loan follows up with the patron. 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.

At this point, some libraries create a brief title record for the anticipated loan and place a copy hold for the patron. This allows the patron and other staff to see the pending hold in WorkFlows. You can do this now and update the WorkFlows record later, or you can wait until you have the item in-hand. This is a local procedural decision and should be consistent within your organization. But either method will work.

For today, I'm going to follow the method where I don't create the brief record and place a hold until I have the item in my hand.

# Tracking your loan

The screenshot displays the WorldShare Interlibrary Loan Home interface. At the top, there's a navigation bar with 'Interlibrary Loan' selected. Below it, a sidebar lists options like 'Discover Items', 'Borrowing Requests', 'Lending Requests', 'Purchasing Requests', and 'Print Queue (0)'. The main content area features a search bar for requests, with a dropdown for 'Request ID' and a 'Go' button. Below the search bar, there are radio buttons for 'Active Requests' (selected) and 'Closed Requests'. The 'Quick Links' section is divided into three columns: 'Borrowing', 'Lending', and 'Other'. Under 'Borrowing', there are links for 'Produced (11)', 'In Transit (4)', 'Received', 'Renewal Approved (3)', 'Overdue (3)', 'Recalled (2)', and 'Returned'. A red arrow points to the 'Produced (11)' link. Under 'Lending', there are links for 'Can You Supply? (17)', 'New - Loans (11)', 'Considering - Loans (6)', 'Supplied', 'Overdue (9)', and 'Returned'. Under 'Other', there are links for 'OCLC Policies Directory', 'OCLC Service Configuration', 'OCLC Usage Statistics', 'OCLC Article Exchange', 'Resource Sharing News', 'WS ILL Training Resources', and 'OCLC Community Center'. The footer of the page includes the date 'May 27, 2021', the text 'SWAN Library Services', and the page number '10'.

Once you create your request in WorldShare, 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. I'm often surprised with the speed requests are filled. If you've been doing this for a little while, you have a sense of which libraries are reliable and responsive suppliers and you can put them at the front of your string to expedite fulfilment.

# Receiving your loan

The screenshot shows the WorldShare Interlibrary Loan interface. The main content area displays the request ID 207838976 for the item 'Portraits from nature : 35 studies for dimensional quilts'. A 'Did you receive this item?' section includes a 'Date received' field set to 05/03/2021 and a 'Mark as received' button. Below this, the 'Request Details' section provides a patron summary with the following information:

Source	WSILL
Status	In Transit
Lenders	*LD4, ZCV
Title	Portraits from nature : 35 studies for dimensional quilts
Author	Wells, Jean
Publisher	Lafayette, CA : C & T Pub., 62006.
ISBN	9781571203557 (pbk. alk. paper) 1571203559
OCLC	64592143
Type	Loan
Format	Book
Language	English
Preferred edition	Any edition
Supplier	LD4
Requested on	04/29/2021
Need Before	05/29/2021
Due Date	06/01/2021
Shipped Date	04/29/2021

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Once your item arrives, find the loan in WorldShare and mark it "Received." It will likely be in your "In-Transit" queue, but you can also look up the request 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>

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If you haven't already created the brief record, now's the time to do so. If you have a brief record, you'll want to update it to include the item barcode so it can be circulated within SWAN.

# Circulating the loaned item

Mark as received Not Received

Request Staff Notes

Patron

Name: SWAN Book Discussion  
ID: 21140000240966  
Status:  
Department:

Place Hold

Name: BOOK DISCUSSION\_SWAN Status: OK Library: SWS  
Profile name: BOOK\_DISC... Amount owed: \$0.00 Available holds: 0  
User categories: NONE Overdues: 0  
Group ID: Privilege expires: NEVER

KiTKeeper book club kit. The splendid and the vile : a saga of Churchill, fa... / Larson, Erik, 1954-  
KITKEEPER LARSON Copy:1 ID:31140000240966

Identify User  
User ID: 21140000240966 1

Identify item  
Item ID: 31140000240966 2

Hold Info  
Pickup at: SWS Expires: 5/3/2022  
Comments:  
Date suspended: Date unsuspended:

Level/Range  
Level:  Copy  Title  
Range:  Library  Group  System 3

Recall status  
 Allow Recall  No Recall  Recall now (RUS)

Make hold first in queue

Get User Information Get Item Information (b) Place Hold Place Hold for Another User (a) Close 4

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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. Notify the user, 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.

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We'll talk the other half of a normal circulation in just a moment but are there any questions so far?

## Returning a WorldShare Loan

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

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For the moment, 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. We'll talk about what can go wrong next.

# Mark Item Returned

The screenshot shows the WorldShare Interlibrary Loan interface. The main heading is "207057966: The high frontier : human colonies in space". Below this, there is a section titled "Ready to return this item?" with a "Date returned:" field containing "05/03/2021", an "Options:" section with a "Print Return Labels" checkbox, and a "Desired due date:" field. A red arrow points to the "Return item" button, which is also highlighted with a blue box. Other buttons include "Renew item" and "Lost". The interface also shows a "Request" tab, "Staff Notes" (0), and a "Request Details" section for Request ID 207057966, including a "Patron Summary" and "Source" (WSILL).

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Discharge/checkin the item again in WorkFlows to make sure it's off the patron's record. Look up the loan in WorldShare using the Item Title if the Loan number isn't available. Click the Return Item button.



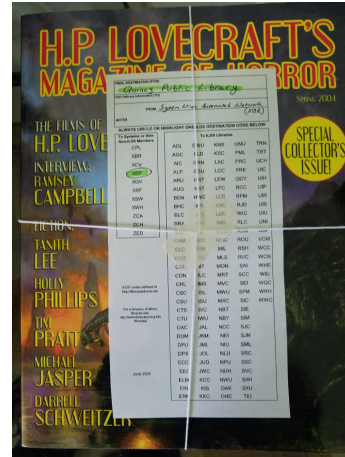
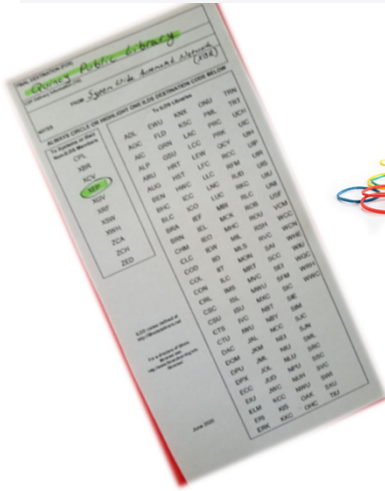
<https://librarylearning.org/directory>



Quincy Public Library  
217-223-1309

526 Jersey St  
Quincy, IL 62301  
County: Adams

ILDS: XEP  
Route: XEP-05  
OCLC: IDQ



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For in-state requests, 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 the label to the packaging never the item itself.

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>



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Follow the return instructions included in the loan. Prepare the item for delivery with appropriate ILDS or RAILS labels (in-state) or mailing labels.

## 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 delete the brief item record for the borrowed non-SWAN item:



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

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Detailed directions for deleting a brief record is on our support site. It's best to wait until the item is safely returned to the lending library and the loan is marked Complete before deleting the brief record in case anything goes wrong and you need to track what happened on the SWAN system.

## Questions about WorldShare Borrowing?

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

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Any questions about uneventful borrowing?

# WorldShare Borrowing issues

The 20% of loans that can spoil your day

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These are the most common loans-gone-wrong scenarios. If you have any doozies you've encountered and would like to share, please do so at the end of this section, or share it in the forums for discussion and comiseration.

## When it all goes wrong



- The requested item fails to arrive
- The item is lost or damaged
- The item does not make its way home

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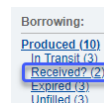
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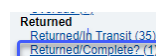
Anyone who's worked in Circulation has horror stories. But it's so much more complicated when it's not your item.

## Transited item does not arrive

- Lender sends item, asks if the item was Received
  - Check to see if you received the item, update WSILL
  - Contact lender, request shelf check
- Lender hasn't marked the loan Complete
  - Check your shelves
  - Mark the loan "Returned/Complete?"
  - Contact lender, request shelf check



Borrowing:  
Produced (10)  
In Transit (3)  
Received? (2)  
Expired (3)  
Unfilled (3)



Returned:  
Returned/In Transit (35)  
Returned/Complete? (1)

Transited items get mislabeled, misrouted, and mislaid. Your first clues that an item has gone walkabout between libraries are going to be your WorldShare queues. An item that's taking its time on its way to fill your request will likely be marked "Received?" By the supplying library. Your first action should be to check your patron's record to see if it did come in but didn't get marked "received." Next, check your shelves to see if somehow it got shelved. (hey, it happens!) If it clearly didn't arrive, contact the lender and ask them to check their shelves.

On the return side of the loan, where you've completed the transaction with your patron and sent the item home, keep an eye on your Returned/ In Transit queue. If a few weeks go by without the loan being marked Complete, check your shelves. If it's not there, mark the item "Returned/Complete?" That should be enough to get the supplier to check their shelves, but you can also contact the lender to request a shelf check.

## Requested item is not marked Received or Complete

- [ILL Code Section IV.7](#) states
  - The requesting library shall be responsible for borrowed materials from the time the materials leave the supplying library until they have been returned to the supplying library. If damage or loss occurs, the requesting library shall be responsible for compensation, in accordance with the policy of the supplying library.



For items that either fail to arrive or fail to return home, the requesting library is financially responsible. That said, you should always communicate with the lending library to confirm a loss, verify replacement costs, agree on a timeline for reimbursement, and the like.



## The item is lost or damaged

- Contact the Lender to confirm item price and remittance preference
  - Use the Email button for maximum efficiency
  - Invoices are paid by your library (Not SWAN Quarterly)
  - Interlibrary-loan Fee Management (IFM) documentation is on the support site

<https://support.swanlibraries.net/documentation/85588>

When an item becomes lost or damaged you'll want to contact the lender to let them know what's happened and how they prefer to receive payment. The easiest way to initiate that contact is with the "Email Now" button in the top right portion of the loan record.

If they prefer a check, they should invoice your library and you should pay that directly- WSILL losses are not included in the SWAN quarterly Billing

Illinois Fee Management is arguably the simplest way to arrange reimbursement. There are detailed instructions for doing that on our support site. Basically how this works is you create a second loan request for the same item. You put the library you want to pay as the only lender in the string. You populate the item replacement cost in the Max cost field and tick the Use IFM box. The lender fills that second, dummy request. You mark it received, then returned. When the lender marks it "complete" the IFM balance is updated.

## Bill the User



- Lost item options
  - Allow the item to progress through the Overdue and Assumed Lost Process
  - Mark Item Lost Wizard (Follow SWAN documentation)
  - Bill a User Wizard
- Damaged item options
  - If the item is still checked out, you can use the Mark Item Lost Wizard
  - Bill a User Wizard

<https://support.swanlibraries.net/documentation/64712>

Reimbursing the lending library is your only obligation. You do not have to bill your user if you don't want to- for whatever reason. But if you do wish to bill your user you can do so one of two ways.

For lost (unreturned) items, it's best to allow the item to progress through the overdue process. As long as the brief record has the correct item price, your patron will be billed for the item in the exact same way they would for one of your own items. (Because as far as WF is concerned- it is your item.)

If the patron wants to pay before the item reaches that Assumed Lost point, or if they're reporting it damaged, make sure they're ready to pay on-the-spot and use the Mark Item Lost Wizard. Follow the support site documentation for billing a user for a lost item.

If the item is already off the patron record, you can bill them with the Bill a User Wizard and NS\_RBILLX or DAMAGEDX as the bill reason. There has been a lot of discussion lately about processing fees- if you charge them, be sure to charge a second and separate PROCESSFEEX. Do not combine item prices with process fees in a single bill reason.

Questions?

Questions about billing your patron or reimbursing the lender?

# WorldShare Borrowing Configuration

Constant Data

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This sounds a lot scarier than it is and we're always happy to log in to your instance and make changes or double check your settings.

## Constant Data

Review your Borrower Data quarterly for accuracy and practice.

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Interlibrary Loan Home

Search for requests

Request ID  Go

Active Requests  Closed Requests

**Quick Links**

**Borrowing:**

- [Produced \(4\)](#)
- [In Transit \(4\)](#)
- [Received](#)
- [Returned](#)

**Lending:**

- [Can You Supply? \(6\)](#)
- [New Loans \(6\)](#)
- [Supplied](#)
- [Overdue \(4\)](#)
- [Returned](#)
- [Returned/In Transit \(18\)](#)
- [Returned/Complete? \(1\)](#)

**Other:**

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)
- [WS ILL Training Resources](#)
- [OCLC Community Center](#)

WorldShare ILL

Interlibrary Loan Options

Borrower Data

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We'll go into more detail on WSILL configuration in general next month, but it's a good habit to check your Borrower Data on a quarterly basis. Click on OCLC Services Configuration, then find WorldShare ILL on the left hand nav bar. Click on Borrower Data

**Configure Borrower Constant Data** [Help on this screen](#)

Required fields are marked with an asterisk \*

Constant Data Record:

**Borrowing Library Information** Create New CD record

\* Constant Data Record Name:

Description:

Need Before:   
Relative to today's date (format +DD)

Request Type:

Editions:

**Shipping and Contact Info**

Attention:

Address Line 1:

Address Line 2:

City:

Country:

State/ Province/ Region:

Postal Code:

Fax / Phone Number:

E-mail:

Bill to:

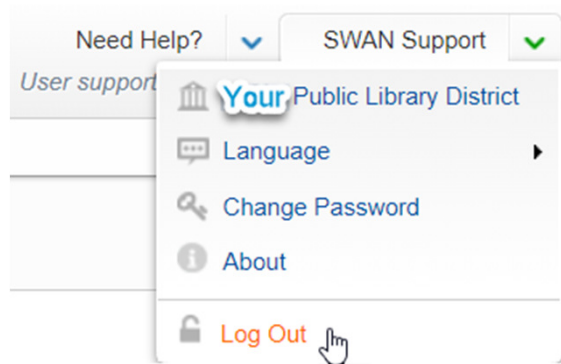
Attention:

Address Line 1:

Address Line 2:

Here we see Acorn's Borrower data. Just scroll through from time to time or as-needed (e.g. staff changes) and update email, phone, and contact information. Save your changes at the bottom of the screen.

## Remember!



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.

## That's Borrowing in a nutshell!



Join us for our next ILL Bootcamp on **6/24** 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/>

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Our next boot camp is June 24th



Keep going!



[ILL Users Group](#)



[WorldShare  
Training Resources](#)

[Process Requests-  
Borrower  
Categories and  
Queues](#)

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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.net](mailto:help@swanlibraries.net)

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## Questions?

If you have any questions about your Worldshare instance, borrowing, configuration, anything at all, please open a support ticket.

We'll see you next month on the 24<sup>th</sup>!