

19 November 2025

WorldShare® ILL Lending

Manage and respond requests

Lucia Shelton

Senior Product Trainer

WorldShare ILL Lending

- WSILL Lending – Configurations for Lenders
- WSILL Lending – Manage and respond requests

[Register](#)

Receive Community Center badge for attending training

Complete this form: oclc.org/training-badges

In this course you will learn **how to...**

- **Respond** to ILL requests (including batch processing)
- **Manage and solve** issues with ILL requests
- **Create and manage** off-system requests
- **Generate and analyze** statistics reports

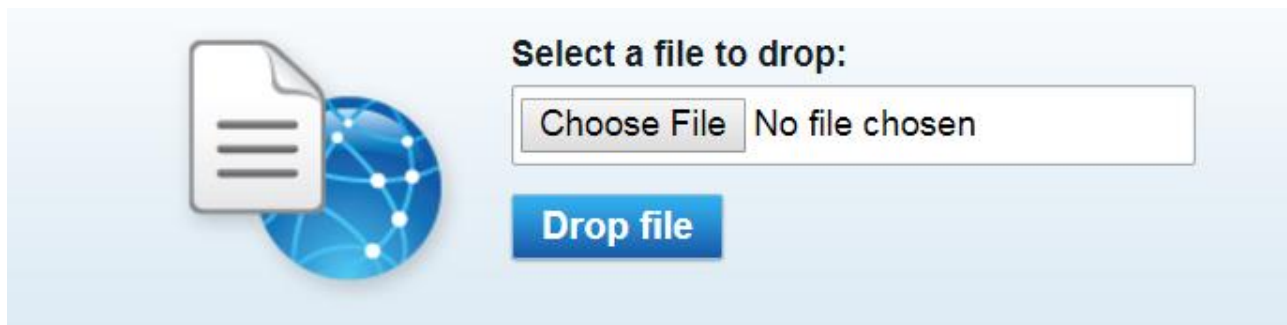
Documentation & Support



WSILL tutorial videos:
<https://oc.lc/WSILLvideos>

RESPOND TO REQUESTS

OCLC Article Exchange



- Files no larger than 120 MB. Up to 1000 files a day per authorization.

Article Exchange- how it works

- Lending Libraries

Note: Document expires in 30 days or after viewed five times. Staff preview does not count.

From the WSILL
homepage

Lending	Off-system	Other
Can you supply? (12)	Lending (8)	OCLC Policies Directory
New - Copies (1)		OCLC Service Configuration
New - Loans (10)		OCLC Usage Statistics
Conditions accepted (1)		OCLC Article Exchange
Supplied		Resource Sharing News
Not received (2)		WS ILL Training Resources
Overdue (5)		OCLC Community Center
Renewal requested (3)		

From the WSILL
homepage

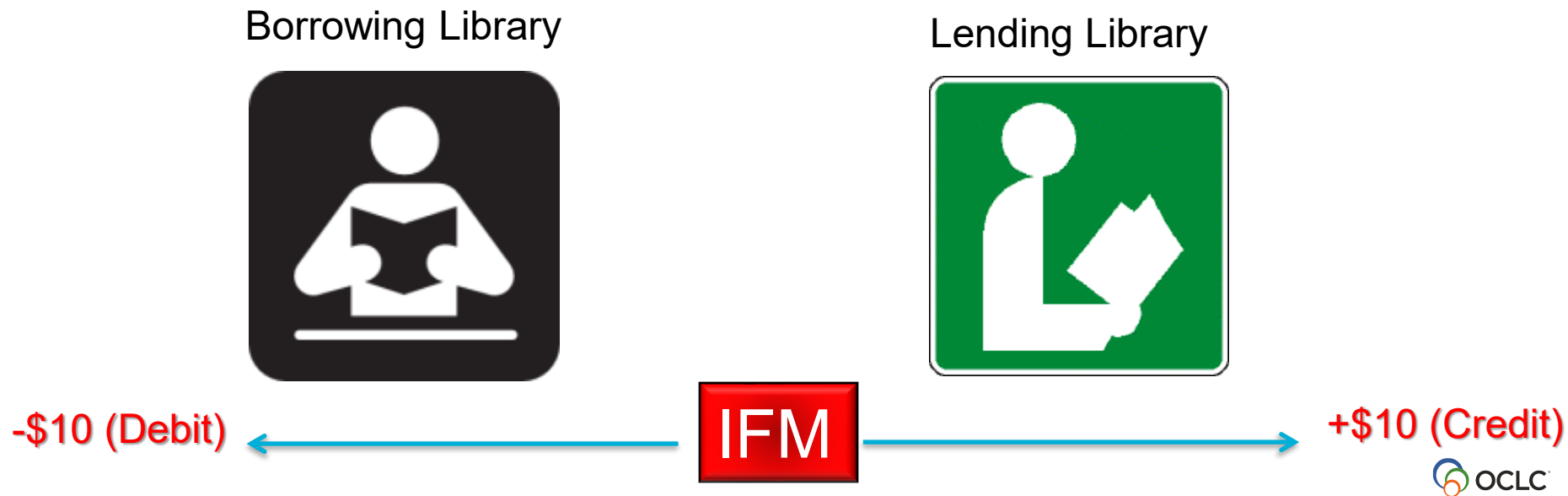
URL type
☒ Article exchange

File/URL <https://worldcat.org/ILL/AE/CemLgJuo8>   

Password 8X7nVhZY 

IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions using the libraries OCLC account. Both libraries must accept IFM.



oc.lc/community



Welcome ▾ Product ▾ Knowledge ▴ Events Recordings Ideas

Cataloging and Metadata

Resource Sharing

Discussions

News

Events

Recordings

RSC

OCLC Community Center > Knowledge > Resource Sharing > Recordings > Office Hours: November's release

Office Hours: November's release



Carmen_Byg-OCLC

OCLC staff - Community manager

yesterday

14 November 2025

Resource Sharing Office Hours



55:57

Date recorded: 14 November 2025

Session description:

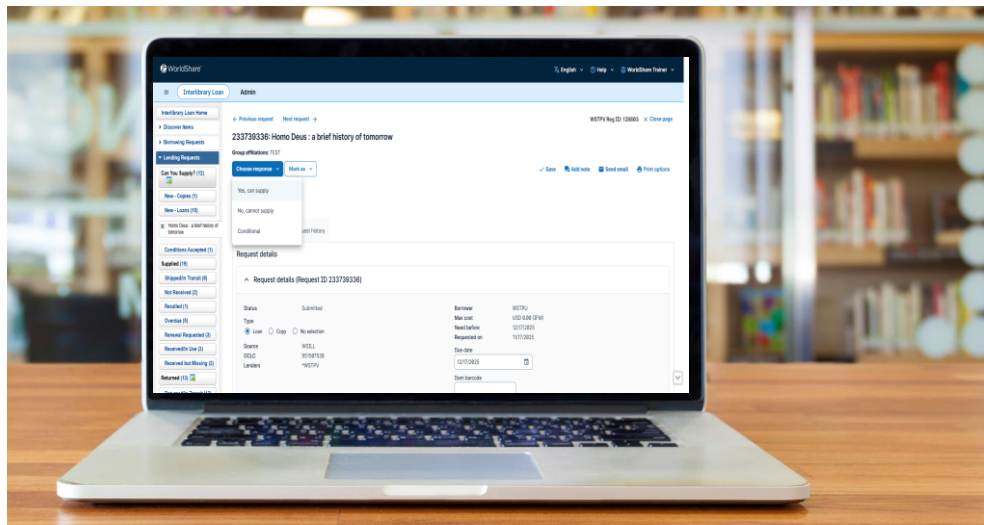
This session featured important information and key updates from the Product and User Experience teams regarding the November 8 new staff interface release:

- Agenda and introductions
- Option to use legacy interface
- Known issues and work-arounds
- Member resources
- Accessibility
- Q & A
- Open discussion

Office Hours: November's release

Respond to requests as a Lender

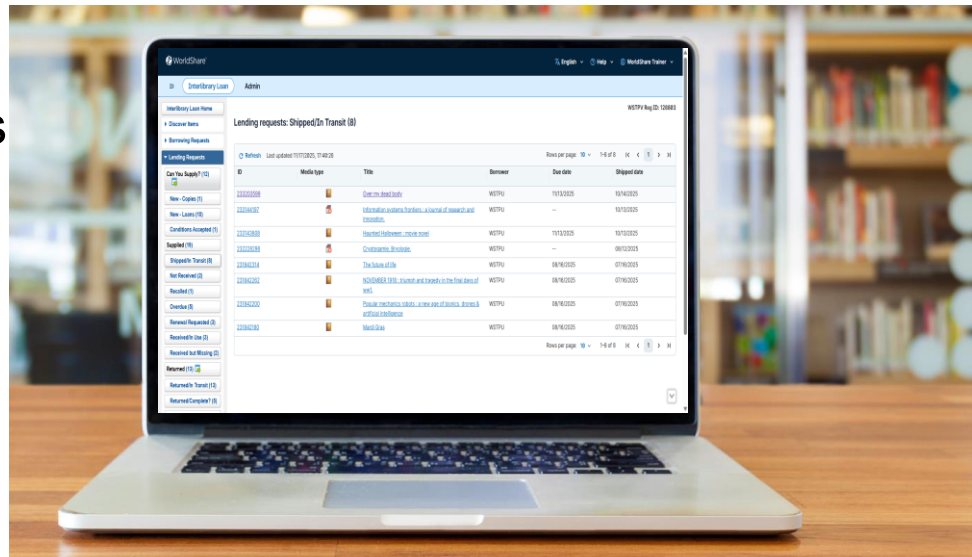
- Respond **Yes** to loans
- Respond **Yes** to copies, using Article Exchange
- Respond **No** to either loan or copy
- Respond **Yes** or **No** in batch
- Respond **conditional**
- Print queue



MANAGE ILL AND SOLVE ISSUES AS A LENDER

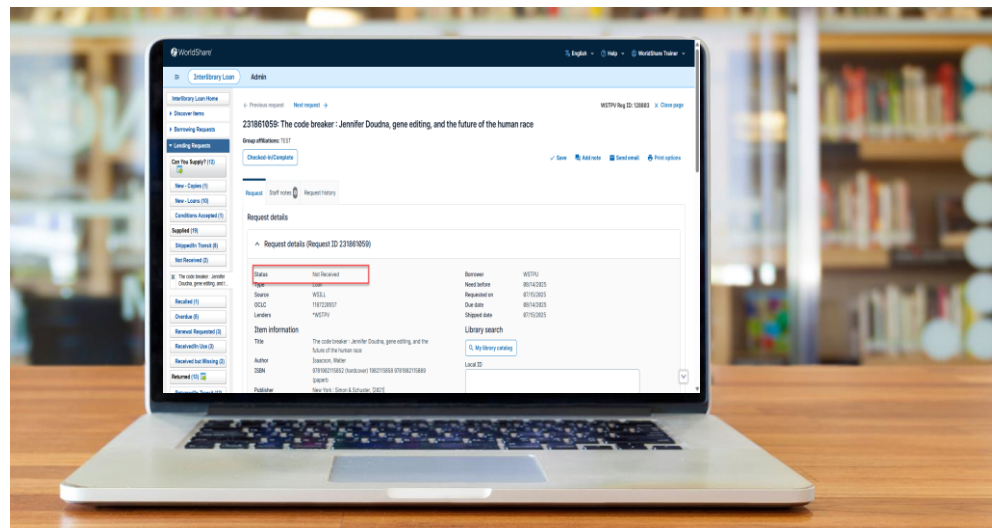
Manage requests as a Lender

- Respond to Renewal requests
- Respond to accepted conditionals
- Returned Items (complete/close request)- including in batch
- Requests pending of action



Issues with requests

- Overdue Items
- Shipped wrong material or material needed in library immediately
- Damaged or Lost items (Received but missing status)
- Not received items (loan and copy)
- Not returned (missing)



CREATE AND MANAGE OFF-SYSTEM ILL

Manage off-system requests

Set up a borrower partner in OCLC Service Configuration

Need Help? ▾

WorldCat Discovery and WorldCat Local

Third-Party Integrations

Metasearch Content

WorldCat Registry

IP Addresses

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Patron Request Workflows

Print Settings

Advanced Workflows

Patron Settings

Address Book

Notifications

Change

Address Book

[Help on this screen](#)

BranchesPartners

Partner Management

Search by name: [+ Add Partner](#)

No Results

Name	Symbol	Email	Status	Role
No Results				

Manage off-system requests

Create off-system lending requests

Use the **Create Lending Request** button in the Off-System Requests queue under the Borrowing and Lending sub-queues to create off-system lending requests.

The screenshot shows the 'Interlibrary Loan Home' interface. On the left, a sidebar contains a list of links: 'Discover Items', 'Borrowing Requests', 'Lending Requests', 'Purchasing Requests', and 'Off-System Requests'. Under 'Off-System Requests', there are buttons for 'Borrowing (1)', 'Lending (1)', and 'Create Lending Request', which is highlighted with a red box. The main content area is titled 'Create Lending Request' and includes a 'Request Details' section with fields for 'Source' (WS-ILL), 'Status', 'Type' (Loan), 'Requester Reference ID', 'Fulfillment Type' (Off-System), 'Borrower Name', 'Borrower Symbol', and 'Email Address'. A 'Change Status' dropdown menu is also visible, showing options like 'Unfilled', 'No reason given', 'In use/On loan', 'Lacking volume/issue', 'Not owned', 'Non-circulating', 'Not on shelf/Missing', 'Policy problem', 'Item too new to loan', and 'On reserve'. The 'Borrower Name' field is highlighted with a red box.

Change the status of an off-system request

When it is time to Cancel, Ship, Receive, Return, or check-in an off-system request, it is recommended that staff make the necessary updates to the request details before changing the request status using the **Change Status** dropdown. Select the appropriate status after request details are updated.

The screenshot shows the 'Change Status' dropdown menu for an off-system request. The dropdown is open, showing a list of status options: 'Unfilled', 'No reason given', 'In use/On loan', 'Lacking volume/issue', 'Not owned', 'Non-circulating', 'Not on shelf/Missing', 'Policy problem', 'Item too new to loan', and 'On reserve'. The 'Borrower Name' field is highlighted with a red box. The main content area shows the request details for '203764314: The dynamics of bureaucracy : a study of interpersonal relations in two Government agencies'. The 'Borrower Name' field is highlighted with a red box. The 'Change Status' dropdown is also highlighted with a red box. The 'Borrower Name' field is highlighted with a red box. The 'Borrower Name' field is highlighted with a red box.

[Documentation](#)

GENERATE STATISTICS REPORTS

support@oclc.org

Reports for Lenders

Interlibrary Loan Home

Search for requests

Request ID

☒ Active Requests ☐ Closed Requests

Quick Links

Borrowing:	Lending:	Other:
AE Alert (2) Produced (23) Conditional (1) In Transit (16) Received? (16) Expired (3) Unfilled (3) Received Renewal Approved (1) Returned	Supplied Returned	OCLC Policies Directory OCLC Service Configuration OCLC Usage Statistics OCLC Article Exchange Resource Sharing News WS ILL Training Resources OCLC Community Center

OCLC® Usage Statistics

[WorldCat Discovery](#)

[WorldCat.org](#)

[OCLC WorldShare Interlibrary Loan](#)

[COUNTER](#)

[Link Resolver](#)

[Assessment Tools](#)

Period: Months: [Update](#)

▼ Institution: WSTPU

- [WorldShare ILL Purchase Request](#)
- [WorldShare ILL Open Access Request](#)
- [Resource Sharing Borrower Reasons For No Report](#)
- [Resource Sharing Lender Reasons For No Report](#)
- [Borrower Resource Sharing Stats Report](#)
- [Lender Resource Sharing Stats Report](#)
- [Strategic Union List Report](#)
- [Borrower Activity Overview Report](#)
- [Borrower Transaction-Level Detail Report](#)
- [eSerials Requests by Journal Title Report](#)
- [Serials Request Overview Report](#)
- [Copyright Compliance Payment Report](#)

[Reports for Lenders documentation](#)

Statistics reports – monthly email



WorldCat Discovery

WorldCat.org

OCLC WorldShare Interlibrary
Loan

COUNTER

Link Resolver

Assessment Tools

E-mail Address:

biblioteca@library.org; biblioteca2@library.org

Send Monthly:



Format:

☒ HTML

☐ Excel

Style:

☒ Attachment

☐ Hyperlink to report

Save

Send Now

List All

Delete

Done

- 1- Enter email address(es), separated by semi colon
- 2- Check Send Monthly box
- 3- Select Format and Style
- 4- Save it

Statistics reports – automatically sent

WSTPV -- The report (Resource Sharing Lender Reasons For No Report) you requested for July_2024



Usage_Statistics@oclc.org

To: Shelton, Lucia

Retention Policy: 2 Year Delete - Default (2 years)



July_2024-lenderReasonsForNo.xls
3 KB



Reply



Reply All



Forward



Mon 8/12/2024 2:03 PM

Expires: 8/12/2026

WSTPV -- The report (Resource Sharing Lender Reasons For No Report) you requested for July_2024

	A	B	C	D	E	F	G	H	I	J	K	L
1	Resource Sharing Lender Reasons For No Report											
2	Reporting Period: Jul-24											
3												
4	Institution	OCLC EASTERN TRAINING-TPV (BETA)										
5	Symbol	WSTPV										
6												
7	ILL Record	ILLiad TN	Title	OCLC #	Imprint Date	Article/Citation Date	Citation	Borrower	Reason For	Lender Unfilled	Date	
8	2.26E+08		BUSINESS	63667581	2006	THE TOP TEN HYBRID	WSTPU	OCLC EAS	AGED TO U	7/1/2024		
9	2.26E+08		IT ENDS W/	9.28E+08	2016		WSTPU	OCLC EAS	AGED TO U	7/2/2024		
10	2.26E+08		JOURNAL	6.09E+08	1906	THE BACTERIOLOGY	WSTPU	OCLC EAS	AGED TO U	7/2/2024		
11	2.26E+08		SILVA SYSTEMS	24008866			WSTPU	OCLC EAS	AGED TO U	7/2/2024		
12	2.26E+08		IT ENDS W/	9.28E+08	2016		WSTPU	OCLC EAS	AGED TO U	7/29/2024		
13	2.26E+08		METROPO	1.93E+08	1971	ARTS FROM THE ROOM	WSTPU	OCLC EAS	AGED TO U	7/17/2024		
14	2.26E+08		OUR POST	49502279	2002		WSTPU	OCLC EAS	AGED TO U	7/25/2024		
15	2.26E+08		OUR POST	49502279	2002		WSTPU	OCLC EAS	AGED TO U	7/25/2024		
16	2.26E+08		OUR POST	49502279	2002		WSTPU	OCLC EAS	AGED TO U	7/25/2024		
17	2.26E+08		JULY	1.23E+09	2021		WSTPU	OCLC EAS	AGED TO U	7/29/2024		
18	2.26E+08		JULY	1.23E+09	2021		WSTPU	OCLC EAS	AGED TO U	7/29/2024		
19	2.26E+08		VERNIANA	2.3E+08		VERNE'S F	WSTPU	OCLC EAS	AGED TO U	7/29/2024		
20												
21												
22												
23												
24												
25												
26												

After you configure the email address(es) to receive the reports automatically every month.

The **four** topics...

1. Respond to requests 
- 2 . Manage ILL and solve issues 
3. Create and manage Off-System ILL 
- 4 . Generate statistics reports 

Test your knowledge

WorldShare ILL Lending online quiz
Answer few questions related to Lending features

[Access WSILL Lending quiz](#)



Questions?

Contact OCLC Support in your region

<https://help.oclc.org>

The screenshot shows the OCLC Support website interface. At the top left, the OCLC logo is followed by the word 'Support'. Below this, there are links for 'Release notes', 'System status dashboard', and 'Contact us'. A red arrow points to the 'Contact us' link, which is enclosed in a red box. The main banner features a blue-tinted image of a library with the text 'Welcome to OCLC Support' and 'How can we help you?'. Below the banner is a search bar with a magnifying glass icon and the word 'Search'. Underneath the search bar, there is a section titled 'Select a category' with five icons and their corresponding labels: 'Discovery and Reference' (magnifying glass over a document), 'Library Management' (document with a circular arrow), 'Metadata Services' (document with a checkmark), 'Resource Sharing' (two documents with arrows between them), and 'Librarians' Toolbox' (toolbox icon). A red arrow points to the 'Resource Sharing' category. At the bottom of the page, the logos for 'WorldShare' and 'WorldCat' are displayed.

OCLC | Support

Release notes System status dashboard Contact us

Welcome to OCLC Support

How can we help you?

Search

Select a category

Discovery and Reference Library Management Metadata Services Resource Sharing Librarians' Toolbox

WorldShare® WorldCat®

Thank you!

Please remember to fill out the evaluation for this class

Your input will help shape our future training sessions.

Evaluation form: <https://www.surveymonkey.com/r/WSILLendingManage>

- Class name: WorldShare ILL Lending – Manage and respond requests
- Instructor: Lucia Shelton
- Date: 19 November 2025

Training questions? Contact OCLC Training training@oclc.org