

ILL BORROWING (Last updated: 11/14/13 by Barbara Costello)

REQUESTS VIA THE OCLC REVIEW FILE

- Click on the WorldShare ILL icon and or go to <https://stetson.share.worldcat.org/wms/cmnd/> and [logon](#)
- On the “Interlibrary Loan Home” page, under “Quick Links” click on “New For Review”
- Click on the first record in the list (if there is only one in the review file, the record will automatically pop up). When you open the request, it automatically changes to “Reviewed.”
- If the request is for an article, verify that Stetson does not own it in electronic format. If the item is owned, email the article to the patron.
- Click on the link to “View Holdings” to the right of the bib record
- Click on “Libraries Worldwide that Own Item.”
- Scroll down and click on “Yes” in the Supplier column to add a supplier to your lending string.
 - You can select up to fifteen of the suppliers from which you intend to request this item.
 - Usually five suppliers is a sufficient number, except in cases where the item may be hard to get, like a very recent book or an item not owned by many libraries.
 - See ILL Supervisor to learn which codes to click – if the request is a journal article, you must check to see if the library owns the particular year or volume that is being requested. Try to pick Florida libraries if possible, then move to southeastern libraries, eastern libraries, and move west as necessary
- As you click you can scroll to the top of the page and see that the codes are being automatically entered into the “Lender String” box.
- Once all five (or more) blocks are filled, click on “Update Request” to the right of the lender string
- Scroll down the page and verify that all the fields are filled in correctly – especially patron information.
- Under billing, check the box for ILL Fee Management (IFM) and enter amount, if needed
- Scroll back to the top of the screen and click “Send Request.”
- A confirmation message will appear. Click on the hyperlinked ILL number in the message to reopen the record
 - Click on “Print Now” in upper right of screen.
 - A print preview will open. Do <control P> to print the page. If more than one page, print just the first page (1 of 1). Close preview window.
- Repeat until all requests in the NEW for REVIEW file are completed.

REQUESTS VIA EMAIL

- Check circdept@stetson.edu email account for ILL requests. Print each one out.
- If the request is for an article, verify that Stetson does not own it in electronic format. If the item is owned, email the article to the patron.
- Click on the World Share ILL icon and or go to <https://stetson.share.worldcat.org/wms/cmnd/> to logon
- Click on the “Discover Items” tab.
- Search for the item by title, ISBN, or whatever relevant information you have. Choose the appropriate OCLC record.
- Click on “All holdings.”
- Scroll down and click on “Yes” in the Supplier column to add a supplier to your lending string.
 - You can select up to fifteen of the suppliers from which you intend to request this item.
 - Usually five suppliers is a sufficient number, except in cases where the item may be hard to get, like a very recent book or an item not owned by many libraries.
 - See ILL Supervisor to learn which codes to click – if the request is a journal article, you must check to see if the library owns the particular year or volume that is being requested. Try to pick Florida libraries if possible, then move to southeastern libraries, eastern libraries, and move west as necessary.
- As you click you can scroll to the top of the page and see that the codes are being automatically entered into the blocks of “Lenders.”
- Once you’ve entered all your lender codes, click on “Create Request.”
- Under “type,” indicate whether we’re asking for the loan of a book or a copy of an article
- Scroll down and fill in with patron information and, if an article, fill in all the article information.
- If information appears correct, return to the top of the page and click “Send Request.”
- A confirmation message will appear. Click on the hyperlinked ILL number to reopen the record.
 - Click on “Print Now” in upper right of screen.
 - A print preview will open. Do <control P> to print the page. If more than one page, print just the first page (1 of 1).
- Return to “Discover Items” in the left column and repeat until all e-mail requests are finished. Note: if the search history gets too long, you can clear them by clicking on the x in the upper corner of each.

PROCESSING AND FILING PAPERWORK

- After processing the requests on OCLC, take the print-outs and stamp them with the “form” stamp that is used to track the request.
- Check the requests for CCC (copyright) journal requests that need to be logged for copyright. These include any journal articles published in the last five years.
- Log copyrights into the copyright spreadsheet (Susan Derryberry’s PC) and write CCC on the request.
- Take all new requests that have been stamped and copyright logged and file them in the new requests file cabinet by last name of the patron.

PROCESSING BORROWED ITEMS WHEN THEY ARRIVE

- Keep any paperwork that arrives with the item (arrives either by DLLI courier or by mail) with the item.
- Pull the original request paperwork from the new requests file cabinet and staple our paperwork and the lending library’s paperwork together – including any return labels. Put the original request on top.
- Click on the WorldShare ILL icon or go to <https://stetson.share.worldcat.org/wms/cmnd/> to logon
- From the Interlibrary Loan Home Page, enter or scan the ILL number from the top of the original request paperwork into the box.
- When the record comes up on OCLC, the default should be “Did you receive this item?” and the current day’s date. Click on the “Mark as Received” button.
- You’ll get a confirmation message that the status has been updated to “Received” and the screen automatically goes back to the Interlibrary Loan Home page.
- On the original paperwork, in the “form stamped area,” write the lending library’s three-letter code and the date received.
- **For LOANS that must be returned:** If the item already has a band or label from the lending library, leave that in place. It should have the patron’s name and due date – highlight those if necessary. If there is no band or label, please put one of our loan labels on the front and fill in the patron’s name, the due date, and any other special information (such as no renewals).
- Put a scrap card in the book with the patron’s name and today’s date and place on the hold cart in alphabetical order by the patron’s last name.
- Give the paperwork to a supervisor so that the patron can be notified. Supervisors notify patrons, usually by email, and write the date notified on the original paperwork.
- Paperwork is then filed in the file cabinet by month due, then by patron’s last name.

- **For COPIES that do not get returned:** For articles going to an on-campus address, put in recycled manila envelope and mail to patron. For articles going to an off-campus address, type a label and mail in new manila envelope.
- Paperwork is then filed in the “completed” file cabinet by patron’s last name.
- **FOR COPIES delivered through Article Exchange:**
 - An Alert will show up in the Borrowing section on either the Quick Links or the column on the left. Click on the Alert to open the list, then the record.
 - In the record, on the right, there will be a AEURL (link to the article in Article Exchange) and a AEPassword (password needed to view the article).
 - Copy the password and click on the link. Paste the password into the box and click on “Get My File.” Make sure the article opens correctly and that the lending library sent the correct article.
 - From the file menu, select “Send to,” select the default e-mail (Outlook), and click on continue.
 - An e-mail window will pop up with the file already attached. Enter the patron’s e-mail address and send.
 - Go back to the OCLC WorldShare window and click on “Mark as Received” to complete the transaction. You’ll get a message confirming that the status has been updated to “Received.”

PROCESSING RETURNED BORROWED ITEMS

- Pull the paperwork for the item (which is filed by month due, then by patron’s last name).
- Click on the WorldShare ILL icon or go to <https://stetson.share.worldcat.org/wms/cmd/> to logon
- From the Interlibrary Loan Home Page, enter or scan the ILL number from the top of the original request paperwork into the box.
- You’ll be prompted “Ready to return this item?” and the default is the current day. Click on the “Return Item” button. If the message is something other than “Ready to return this item?”, ask a supervisor before doing anything else to the record.
- You’ll get a confirmation message that the status has been updated to “Returned” and the screen automatically goes back to the Interlibrary Loan Home page.
- Write the returned date on the original paperwork. Pull any return mailing labels with the paperwork and use to return book. Return any paperwork sent by the lending library with the item. **NOTE:** If lending library has a band or label on the book, leave it as is. **If we have put a label on the book, remove it before returning the book.**
- Use DLLI bags if appropriate or pack the books back in boxes or padded envelopes for return. Type return labels if one was not provided. Put in outgoing DLLI or in outgoing mail.
- Paperwork is then filed in the “completed” file cabinet by patron’s last name.

PROCESSING SCANNED COPIES OF ARTICLES E-MAILED BY LENDER – done by ILL supervisor

Check circdept@stetson.edu email account for scanned articles sent by lenders.

DRAFT