Workflow integration: ILL and Circulation
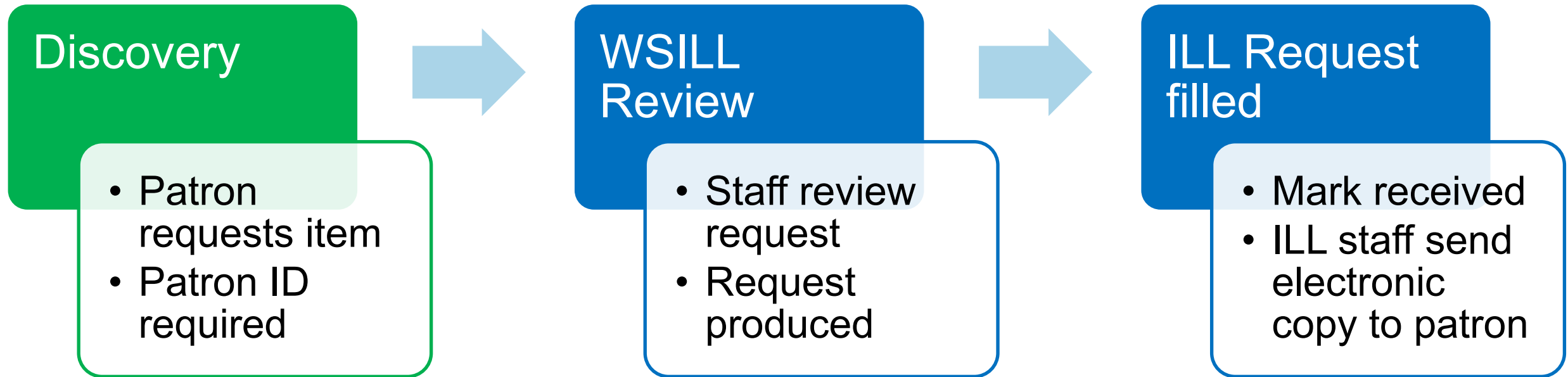
- How the integration works
- How to configure the integration
- Policies considerations
- Exceptions
- Final tips and reminders
- Documentation

WSILL/Circ Integration Flowchart (Loans)

Discovery
- Patron requests item
- Patron ID required

WSILL Review
- Staff review request
- Request produced

Integration process
- Temporary item created in WMS Circ; circulation status *Available*
- Patron ID used to create hold for patron

ILL Request filled
- Staff save Lender barcode in request
- Mark received
- Circulation status changed to *In Transit*
- ILL staff send to Circ staff

WMS Circ
- Check In – patron receives notification of ILL (hold) ready; circulation status *On Hold*
- Patron picks up item – Check Out

Requests could also be submitted by staff via Discovery or within WSILL.
Patron ID (barcode) is required to match in circulation.

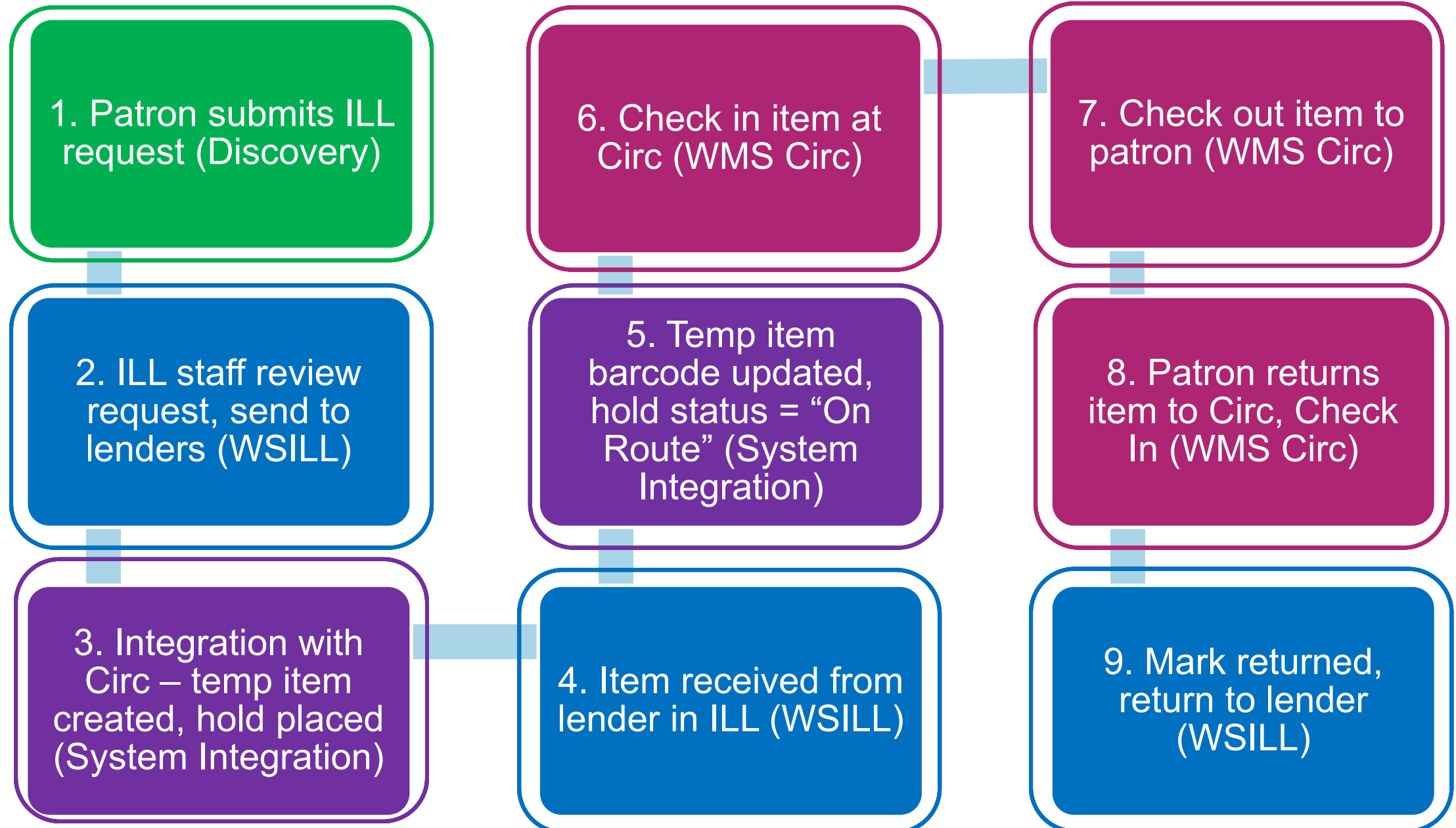# WSILL/Circ Integration Flowchart (Copies)

Discovery

- Patron requests item
- Patron ID required

→

WSILL Review

- Staff review request
- Request produced

→

ILL Request filled

- Mark received
- ILL staff send electronic copy to patron

Requests could also be submitted by staff via Discovery or within WSILL.

STANDARD WORKFLOW

Process Flow – Patron ILL Loan Request
WMS Circ/WSILL Integration

1. Patron submits ILL request (Discovery)

2. ILL staff review request, send to lenders (WSILL)

3. Integration with Circ – temp item created, hold placed (System Integration)

4. Item received from lender in ILL (WSILL)

5. Temp item barcode updated, hold status = "On Route" (System Integration)

6. Check in item at Circ (WMS Circ)

7. Check out item to patron (WMS Circ)

8. Patron returns item to Circ, Check In (WMS Circ)

9. Mark returned, return to lender (WSILL)

1. Patron submits ILL request (Discovery)

About my request

Service Type: *

Loan

Needed before: *

05/17/2024

Amount Willing to Pay:

0/100

Comments:

0/450

My address and contact information

First Name: *

Trainer

7/100

Last Name: *

Training

8/100

Patron ID: *

****

7/100

E-mail Address: *

trainer@biblioteca.org

22/100

Mobile Phone:

0/100

Submit request

Your request for Information graphics has been submitted.

Your requestID is 163181810.

2. ILL staff review request, send to lenders (WSILL)

The request will either appear in the New for Review queue or be processed based on automation configuration. If in New for Review, ILL staff will:
A. Select lenders and Send Request
B. Confirm ILL request is sent
C. Review status in Circulation section

▼ Borrowing Requests

New For Review (10)
Not Reviewed (4)
Reviewed (6)
Produced (2)
In Transit (1)
Received? (1)
Expired (1)
Received (1)
Received/In Use (1)
Overdue (1)
Returned
Create Request

163181810: Information graphics /

Send Request   Purchase Request   Open Access
Cancel Request

Apply constant data:
DEFAULT
Actions:
Mark as Reviewed   Save   Reset   Email   Print Now

▶ Request Details (Request ID 163181810)
▼ Lender Libraries

Lender String
TPU, TPV

Lender	Days To Respond	Cost	Shelf Status

LEGEND

✓ Item is available   ⊘ Item is not available   ⚠ Shelf status unknown

▶ Borrowing Library (TS259)
▶ Patron (Test request please do not fil)
▶ Request History
▼ Circulation

Circulation History Refresh

No events.

TS259 Reg ID: 127968
◀ Previous Request   Next Request ▶

✓ Request 163181810 was sent

163181810: Information graphics /

Cancel Request

▶ Request Details (Request ID 163181810)
▶ Borrowing Library (TS259)
▶ Patron (Test request please do not fil)
▶ Request History
▼ Circulation

Circulation History Refresh

Date	Status
	Temporary item record [object Object] successfully created

3. Integration with Circ – temp item created, hold placed (System Integration)

A. System creates temporary item and places hold. Success indicated in WSILL

WSILL

163181810: Information graphics /

Cancel Request

▶ Request Details (Request ID 163181810)

▶ Borrowing Library (TS259)

▶ Patron (Test request please do not fil)

▶ Request History

▼ Circulation

Circulation History Refresh

Date	Status
	Temporary item record [object Object] successfully created

A

WMS Circ

Metadata | Acquisitions | **Circulation** | Interlibrary Loan | Analytics | Admin

▶ Assist Patrons

Check In

▼ **Discover Items**

Enter barcode

[ ] Go

Temporary Items ▼

Title ▼

information graphics

Search Clear

✕ Discover Items
Search:Title with inform...

✕ Temporary Item: Information graphics /

▶ Reports

▶ My Apps

Temporary Item: Information graphics /
Item Details

Details Statistics Holds (1) Schedules (0) History

B

Place Hold Create Schedule Report Missing Delete

Status — Available

Owning Institution — WS ILL

Holding Location — WS ILL

Shelving Location — Permanent

Temporary

Title — Information graphics /

Description of Item

Author — Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes

Material Format — Book

Language

Local Call Number

Electronic Link

Barcode — g-$7fd40e57$

B. In WMS Circulation, temporary item created

C. In WMS Circulation, hold placed for patron

C

Temporary Item: Information graphics /
Item Details

Details Statistics **Holds (1)** Schedules (0) History

WMS Circ

Delete Hold Request Create: Hold Request

Results 1 - 1 of 1

☐	Patron Name	Patron Barcode	Position ▲	Hold Date	Status	Type
☐	**Patron name**	4426335	1		In Queue	Item Level Hold Request

Results 1 - 1 of 1 |◁ ◁ 1 ▷ ▷|

3. Integration with Circ – temp item created, hold placed (System Integration)

Discovery

My Library Account

Contact Information   View   E

Change password

1 Checkouts	0 Overdue - $0.00	**2 Holds**	5 Charges	$37.00

Sort by:	Queue Position ▼	Status	Begin hold	End hold
1	**Information graphics /**	Queue Positions:		
	by Sandra Rendgen; Julius Wiedemann;...	1 of 1		

Remove   ~~Not needed.~~   ~~Not needed.~~
                From: To:
Edit

D. In WMS Circulation, patron's hold requests lists ILL request

Metadata	Acquisitions	**Circulation**	Interlibrary Loan	Analytics	Admin

▼ **Assist Patrons**

Enter barcode

[   ] Go

Search

Everything ▼

[   ]

Search

Patron name

✗ Close All Tabs

Check In

Patron name

Checkout | **Holds** | Bills | Profile | History

▼ Holds (0 a~~v~~ D 2 not ready)

Create Hold

WMS Circ

Refresh   Results 1-2 of 2 Show 10 ▼ rows per page   << First < Previous 1 Next > Last >>

	Title	Volume	Barcode	Call Number	Pickup Location	Pickup Institution	Queue	Notes	Status
☐	Information graphics /Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes Edit...		q-$7fd40e57$		Main Branch	Training Library	1		Not Ready

E. In Discovery, patron can track status of ILL request under Holds

4. Item received from lender in ILL (WSILL)

When received from lender:
A. Update item barcode, Mark as received.
B. Verify status update
C. Check Circulation History – update pending
D. Check Circulation History – update successful

▼ Circulation

Circulation History Refresh

Date	Status
	Temporary item record [object Object] successfully created
	Temporary item record update pending (running) C

▼ Borrowing Requests

New For Review (10)

Not Reviewed (4)

Reviewed (6)

Produced (2)

In Transit (1) 📑

Received? (1)

Expired (1)

Received (1) 📑

Received/In Use (1)

Overdue (1)

Returned

Create Request

163181810: Information graphic

✅ Request 163181810 status updated to: Received

Did you receive this item? B

Date received: _____ Options: ☐ Print Book Straps

[Mark as received] [Not Received]

▸ Request Details (Request ID 163181810)

▸ Lending Information (Supplier: TPU) ⓘ

▸ Borrowing Library (TS259)

▸ Patron (Test request please do not fil) A

▸ Request History

▼ Circulation

Item Barcode [1613181810] [Mark as received]

Circulation History Refresh

Date	Status
	Temporary item record [object Object] successfully created

Route to Circ E

163181810: Information graphics /

Ready to return this item?

Date returned: _____ Options: ☐ Print Return Labels Desired due date: _____

[Return item] [Renew item] [Lost]

▸ Request Details (Request ID 163181810)

▸ Lending Information (Supplier: TPU) ⓘ

▸ Borrowing Library (TS259)

▸ Patron (Test request please do not fil)

▸ Request History

▼ Circulation

Circulation History Refresh

Date	Status
	Temporary item record [object Object] successfully created
	Temporary item record [object Object] updated successfully D

5. Temp item barcode updated, hold status = "On Route" (System Integration)

Patron name

Checkout | **Holds** | Bills | Profile | History

▼ Holds (0 available, 2 not ready)

Create Hold

Ⓑ

Refresh   Results 1-2 of 2   Show [10 ▼] rows per page

<< First < Previous [1] Next > Last >>

☐	Title	Volume	Barcode	Call Number	Pickup Location	Pickup Institution	Queue	Notes	Status
	Information graphics /Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes Edit...		1613181810		Main Branch	Training Library	On Route		Not Ready

---

Temporary Item: Information graphics /

Item Details

Details Statistics Holds (0) Schedules (0) History

Place Hold   Create Schedule   Report Missing   Delete

Status   In Transit ~~............~~ ~~............~~
                     Training Library
                     From WS ILL

Owning Institution   WS ILL

Holding Location   WS ILL

Shelving Location   Permanent
                          Temporary

Title   Information graphics /

Description of Item

Author   Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes

Material Format   📖 Book

Language

Local Call Number

Electronic Link

Ⓐ

Barcode   1613181810

A. Temporary item barcode is updated

B. Hold is updated to show that the item is "On Route" indicating it has been received in ILL and is on its way to Circulation

5. Temp item barcode updated, hold status = "On Route" (System Integration)

C. In Discovery, patron can see that physical item has been sent to the pick-up location

6. Check in item at Circ (WMS Circ)

Check In (A)

Item Barcode:	1613181810	Check In	Check In Mode:	Auto
Check In Date:			Receipt Option:	Network Printer

☐	Title ⇅	Barcode ⇅	Check Out Date ⇅	Due Date ⇅	In Date ▼	Patron Name ⇅	Action ⇅
No data to display							

[Clear] [Receipt]

Once Circulation receives the item:

A. Check In
B. Print Hold Receipt
C. Place on Hold Shelf for patron

Print Preview ✕

Hold Receipt (B)

Patron name

Patron email

Date

Name
Last Name — **Patron name**
Patron Barcode 4426335
Email Address — **Patron email**
Telephone 7084426335

Call Number
Title Information graphics /
Author Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes
Item Barcode 1613181810
Material Format BOOK

[Print] [Cancel]

Check In

⚠ Hold Information graphics **Patron name**

Item Barcode:		Check In	Check In Mode:	Auto
Check In Date:			Receipt Option:	Network Printer

(C)

☐	Title ⇅	Barcode ⇅	Check Out Date ⇅	Due Date ⇅	In Date ▼	Patron Name ⇅	Action ⇅
☐	Information graphics /	1613181810			Date		⚠ HOLD

6. Check in item at Circ (WMS Circ)

Patron's hold request is updated to "On Shelf"

D. Discovery shows item is ready for pick-up

E. Patron record in Circulation shows an item is on the hold shelf

F. System generates an email indicating item is ready for pick-

Pick-up notification queued for email F

OCLC

Advanced Search

Library Links | Patron username

🎓 Course Reserves | 💬 Chat with a librarian 🗗 | ☰ My List 0

My Library Account

Discovery

Contact Information | View | | Change password

D

1 Checkouts	0 Overdue - $0.00	**2 Holds	1 Ready**	5 Charges	$37.00

Sort by:	Queue Position ▼	Status	Begin hold	End hold
1	Information graphics /	Ready to be picked up from Main		
	by Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Ri...			

Patron name

| Checkout | Holds | Bills | Profile | History |

▼ Holds (1 available, 1 not ready)

Create Hold

E

Refresh   Results 1-2 of 2   Show [10 ▼] rows per page   << First < Previous | 1 | Next > Last >>

☐	Title	Volume	Barcode	Call Number	Pickup Location	Pickup Institution	Queue	Notes	Status
☐	Information graphics /Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul W urman; Simon Rogers; Nigel Holmes Edit...		1613181810		Main Branch	Training Library	On Shelf		Available Held until: Date

7. Check out item to patron (WMS Circ)

Circulation staff

A. Manually set due date based on lender's due date and library's guidelines (e.g. Due Date – 5)
B. Confirm Due Date before handing to patron
C. Item Statistics indicates Circulation Rule applied

7. Check out item to patron (WMS Circ)

C. In Discovery, the patron can track the item check out and its Due Date

8. Patron returns item to Circ, Check In (WMS Circ)

Check In (A)

Item Barcode:	1613181810	Check In	Check In Mode:	Auto ▼
Check In Date:	📅		Receipt Option:	Network Printer ▼

☐	Title ⇕	Barcode ⇕	Check Out Date ⇕	Due Date ⇕	In Date ▼	Patron Name ⇕	Action ⇕
No data to display							

Clear   Receipt

Print Preview ✕

Routing Receipt (B)

Route To	WS ILL (Training Library)
Call Number	
Title	Information graphics /
Item Barcode	1613181810
Sent From	Main Branch
Date	
Note	

OCLC Training Library

- -

Print   Cancel

Check In

⚠ Send Information graphics / to WS ILL

Item Barcode:		Check In	Check In Mode:	Auto ▼
Check In Date:	📅		Receipt Option:	Network Printer ▼

(C)

☐	Title ⇕	Barcode ⇕	Check Out Date ⇕	Due Date ⇕	In Date ▼	Patron Name ⇕	Action ⇕
☐	Information graphics /	1613181810	Check out date	Due date	Date here	Patron name	⚠ SEND TO: WS ILL (Training Library)

When the item is returned:

A. Circulation Check In
B. Print Routing Receipt
C. Follow action
D. Route to ILL Department

Route to ILL (D)

8. Patron returns item to Circ, Check In (WMS Circ)

In Circulation, temporary item information shows:

E. Details – Status = In Transit to WS ILL
F. Statistics – Last Issued to the patron associated with the ILL

E

Temporary Item: Information graphics /	
Item Details	Details Statistics Holds (0) Schedules (0) History

Place Hold Create Schedule Report Missing Delete

Status	In Transit
Owning Institution	WS ILL
Holding Location	WS ILL
Shelving Location	**Permanent**
	Temporary
Title	Information graphics /
Description of Item	
Author	Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes
Material Format	Book
Language	
Local Call Number	
Electronic Link	
Barcode	1613181810

F

Temporary Item: Information graphics /	
Item Details	Details **Statistics** Holds (0) Schedules (0) History

Status:	In Transit
Last Seen:	
Issued Count:	1
Issued Count YTD:	1
Soft Issued Count:	0
Soft Issued Count YTD:	0
Inventoried Count:	0
Last Inventoried:	
Last Issued:	
Last Issued To:	Patron name
Date Hold Expires:	
Reminders Sent:	0
Date Schedule Starts:	
Date Schedule Ends:	

Refresh Statistics

9. Mark returned, return to lender (WSILL)

ILL Department will:
A. Check Print Labels, Return Item
B. Verify status set to Returned
C. Process the Return Label print queue
D. Print the label and return item to lender

Print Queue: Borrowing Return Labels (1) Ⓒ

Results **1 - 1** of **1** ⟳ Rows 20 ▾

☐	ID	Media Type	Title	Status
☑	163181810	🟫	Information graphics /	Returned

Results **1 - 1** of **1** ⟳ Rows 20 ▾

Format 6 per page ▾

Paper Size: US Letter
Avery 5164/5264/8164 and Avery 6464/6482

Include on labels
☑ Request ID barcode
☑ LIBRARY MAIL DMM: 173.5.0
☑ RETURN SERVICE REQUESTED

Start at label position 1 ⚠

[Print] [Remove]

1	2
3	4
5	6

Borrowing Requests

New For Review (10)
Not Reviewed (4)
Reviewed (6)
Produced (2)
In Transit (1)
Received? (1)
Expired (1)
Received (1)
Received/In Use (1)
Overdue (1)

▸ Off-System Requests

▾ Print Queue (18)
Borrowing
Remove All (18)
Return Labels (9)

163181810: Information graphics / Ⓐ

Ready to return this item?
Date returned: Options: Desired due date:
☑ Print Return Labels

✅ Request 163181810 status updated to: Returned Ⓑ

[Return item]   [Renew item] [Lost]

Actions: [Save] [Reset] [Email] [Print Now] ▾

▾ Request Details (Request ID 163181810)

Source	WCDISC
Status	Received/In Use
Title	Information graphics /
Author	Sandra Rendgen; Julius Wiedemann; Paolo Ciuccarelli; Richard Saul Wurman; Simon Rogers; Nigel Holmes
Publisher	2012
ISBN	9783836528795 3836528797
OCLC	727703562
Type	Loan
Format	🟫 Book
Language	English
Preferred edition	Any edition
Lenders	
Requested on	
Need Before	
Due Date	
Verification	WorldCat(no:727703562): Desc: 480 pages (some folded) : illustrations (chiefly color), maps ; 38 cm + 1 poster (48 x 68 cm) Type: Book PrintBook

Search my library's online catalog

Open Access
No links found

Received Date

▸ Lending Information (Supplier: TPU) ⓘ

Ⓓ

163181810

LIBRARY MAIL DMM: 173.5.0

FROM: TS259 - TRAINING LIBRARY: THIS IS A TEST REQUEST
123 MAIN ST.
DUBLIN IL 12345

RETURN SERVICE REQUESTED

TO: TRAINING LIBRARY
123 MAIN ST
WASHINGTON DC IL 60546

CONFIGURATION

1. Setup and Configuration

Checklist:

1. Create a new branch (WS ILL)

2. Update Holding Codes Translation Table to include WS ILL location

3. Add Location Policy for WS ILL (and update other circulation policies)

4. Edit ILL Patron Request Form (Patron ID/barcode required)

5. Activate integration (WSILL configuration setting)

OCLC

Need Help? ▾   Training TSF ▾

WorldCat Registry

WSILL (273282)   Change

WorldCat Account Migration

Search

Create a New Institution

Profile Summary

Name and Location

Map

Open Hours

Relationships

Contacts

Identifiers

Online Catalog

Virtual Reference

Currency and Locale

Authorized Users

Name and Location

Help on this screen

Last Updated: 4/24/24

Directory-style information, such as physical and postal street addresses, Web sites and main telephone numbers.

Required fields are marked with an asterisk (*).

Institution Name

* Institution Name: [WSILL]
e.g. Seattle Public Library; Beacon Hill Branch; Penn State University

Also Called: [OCLC Training TSF]
e.g. Schreyer Business Library; CLAN; Royal Library

* Institution Type: [Other ▾]

Secondary Type: [▾]

Test Institution: ☐ Yes

Training Institution: ☐ Yes

Addresses

| Main Address | Business Address | Shipping Address |

<< first < prev   next > last >>

Address Name	Address		Primary	Attention Of
No records found.				

2. Update Holding Codes Translation Table

OCLC®

Need Help? ▾   Training TSF ▾

OCLC Training TSF (87132)   [Change]

WorldCat Discovery and WorldCat Local

- Search Settings
- Item Detail Settings
- User Interface Options
- Display Settings
- Relevancy and Scoping
- Full Text OpenURL Resolvers (outgoing requests)
- Place Hold/Request Buttons
- OPAC Statuses, Locations and Circulation Policies
- **Holding Codes & Shelving Location Messages**
- Local and Enhanced Content
- Full Text and Open Access Links
- ILS Support and Maintenance
- Google Analytics (WorldCat Discovery only)

Holding Codes & Shelving Location Messages

Required fields are marked with an asterisk (*).

Holding Codes Translation Table

When OCLC retrieves Local Holding Records (LHRs) for an item, we will display the "Location" of the item in the availability area in your worldcat.org.
If you would like to display a user friendly location name instead of a Holding Code from the LHR, you can customize the display here.

Shelving Location Messages (WMS Only)

Provide messages specific to shelving locations for your library users.

Non-WMS subscribers: To access enhanced settings, please speak with your OCLC representative about purchasing our WorldShare Management Services or contact sales@oclc.org

▾   Holding Codes Translation Table

To add or delete a holding location, click on a cell in the Shelving Location column. Multiple entries can be made using a semi-colon to separate them. Make sure semi-colons are not at the beginning or end of the field.

It is recommended that existing data is copied and pasted to another application prior to editing to ensure you have the original data, once saved you can not undo changes.

Please list Holding Codes with the Location that you want displayed for the code.

<< First < Previous   **1**   Next > Last >>   [25 ▾]   [Add 1 Row] [Add 10 Rows]   [Delete Selected Row(s)]

☐	Default Symbols (clear settings)	Holding Symbol	Holding Code	Branch Registry ID	Display Name	Shelving Scheme	Shelving Location ⓘ
☐	●	TSF	TSFA		Main Library	Library of Congress	General Collection
☐	○	TSF	WSIL		WSILL	Library of Congress	WS-ILL

<< First < Previous   **1**   Next > Last >>   [25 ▾]   [Add 1 Row] [Add 10 Rows]   [Delete Selected Row(s)]

▸   Shelving Location Messages (WMS Only)

[Save Changes] [Cancel]

3. Add Location Policy

4. Edit ILL Patron Request Form

5. Activate integration

OCLC Training Library (127968)   [Change]

Circulation Integration   Help on this screen

Required fields are marked with an asterisk *

Circulation

Enable Circulation integration   ☑ On

* Select your ILS   [WMS ▼]

You must select at least one functionality either in Borrowing or Lending section to successfully activate your circulation integration.

Borrowing

Ensure that your circulation systems policies have been updated before enabling the borrowing integration.

Update/Create circulation item record on received   ☑ On
    Use supplier's shipped item barcode   ☐ On
    Use request ID as item barcode   ☑ On
Check in item on returned   ☑ On
Charge patron on shipped   ☑ On

Lending

Ensure that your circulation systems policies have been updated before enabling the lending integration.

Check out item on shipped   ☑ On
Check in item on check in   ☑ On

[Save] [Cancel]

Sidebar:
- WorldCat Registry
- IP Addresses
- EIDM Institution
- **WorldShare ILL**
  - Interlibrary Loan Options
  - Borrower Data
  - Lender Data
  - Custom Holdings Groups
  - Custom Holdings Paths
  - Automated Request Manager
  - Article Exchange Settings
  - Purchase Options
  - Request Forms
  - Print Settings
  - **Circulation Integration**
  - Advanced Workflows
  - Patron Settings
  - Address Book

1. Setup and Configuration

POLICY CONSIDERATIONS

1. Loan limits

   • Restrict patrons from renewing without staff assistance

2. Loan policies

   • Loan & renewal periods

   • fees/fines associated with ILL

   • recalls

3. Notifications

4. Hold policies

OCLC

Policy Considerations: 1. Loan Limits

ILL renewal requests need to be processed through WorldShare ILL. You may want to consider limiting patrons from renewing items they have on loan via ILL.

Loan Limit Matrix

Patron Policy	Material Format	Holding Location	Shelving Location		Loan Limit Policy	
All	All	Main Branch	MAIN-Reference	=	No Renewals	
All	DVD video	All	All	=	DVD Loan Limit Policy	
All	All	Main Branch	MAIN-Reserves 2 hr	=	No Renewals	
All	Blu-ray video	All	All	=	DVD Loan Limit Policy	
All	All	WS ILL	All	=	No Renewals	
All	All	All	All	=	No Limit Loan Limit Policy	
Child	All	All	All	=	Child Loan Limit Policy	
	All	All	All	=	Community Patron Ln imt Plcy	
	All	All	All	=	No Limit Loan Limit Policy	
	Main Branch	MAIN-DVD	=	Faculty AV Loan Limit Policy	
	Main Branch	MAIN-Reserves 2 hr	=	Reserve Room Loan Limit Policy	
	Main Branch	MAIN-Reserves 24 hr	=	Reserve Room Loan Limit Policy	
	All	All	=	Student Loan Limit Policy	

Loan Limit Policy > Edit Policy: No Renewals

Required fields are marked with an asterisk (*).

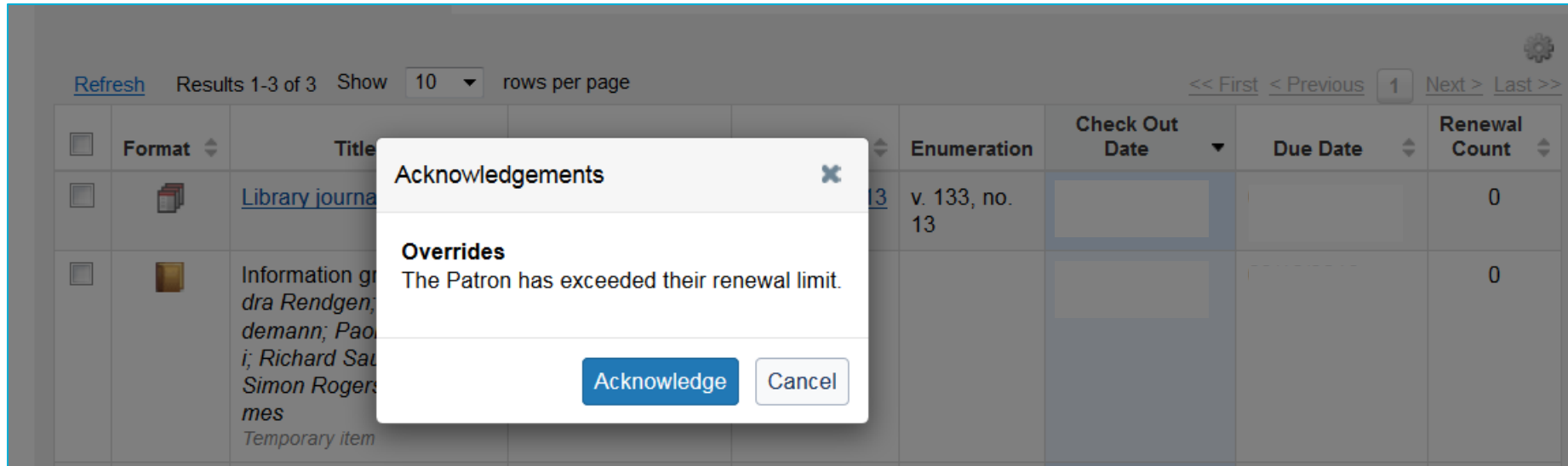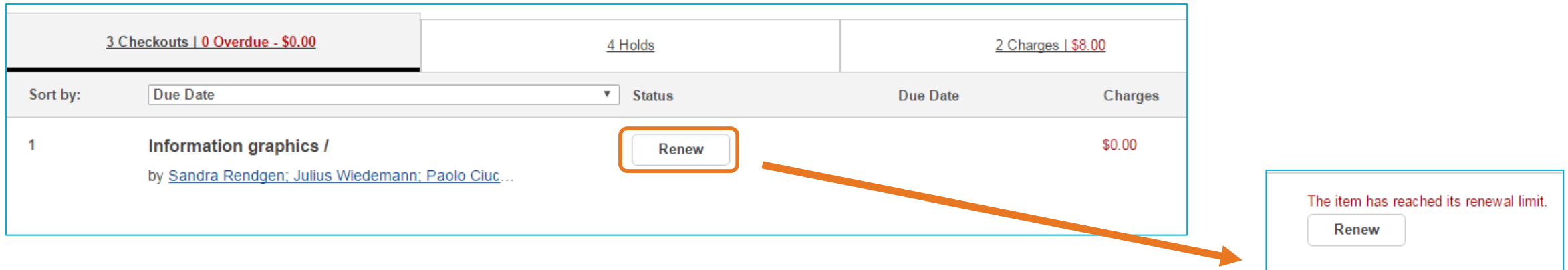|	
* Policy Name	No Renewals
Last Modified	Jun 22, 2015 2:36:43 PM
Verified Loan Count Limit	☑ No Limit
Verified Loan Value Limit	☑ No Limit
Verified Renew Time Limit	0 ☐ No Limit

Policy Considerations: 1. Loan Limits

Staff attempting to renew receive override – exceeded their renewal limit.

Patron attempting to renew in Discovery receive message of renewal limit.

Policy Considerations: 2. Loan Policies

Do you have different loan and renewal periods, billing, notifications, and recalls for ILL loans?

Loan Policy > Edit Policy: ILL Loan Policy
Required fields are marked with an asterisk (*).

* Policy Name   ILL Loan Policy
Last Modified

Loan

Circulates?   This loan policy always allows circulation
Loan Period   3   Weeks
Overdue Grace Period   0   Minutes
Renew Period   2   Weeks   After The original due date

Automatic Renewal   ○ Yes ● No

Fixed Due Dates   Name   Date a
                                                     Not Specified

Loan Fixed Bill
Renew Fixed Bill
Overdue Fixed Bill
Overdue Periodic Bill   ILL Overdue Bill
Overdue Notification Policy   ILL Overdue Notice
Pre-closing due date adjustment policy   System default

The due date of the item is determined by the lending institution. Circulation staff will need to pay attention to the ILL due date and follow library procedure when setting the due date upon check out.

Recall

Recall Period   0   Minutes
Recall Grace Period   0   Minutes
Minimum Loan Period ?   0   Days
Recall Fixed Bill
Recall Periodic Bill
Recall Notification Policy   ILL Recall Notice

Policy Considerations: 3. Notifications

Do you want different messaging to go to patrons when ILL items are coming due? This shows our sample courtesy notice for interlibrary loans. It is sent 3 days before the items are due.

Notification Policies > Edit Policy: ILL Overdue Notice

Required fields are marked with an asterisk (*).

* Policy Name	ILL Overdue Notice
Last Modified	Jun 13, 2014 7:20:35 AM
Description	
Notification Type	Loan Overdue Notification

Notification 1

Subject	Library Interlibrary Loan Due Soon
Start Text	Hello. You have Interlibrary loans coming due soon. ILL items are owed by other libraries and it is critical that we return their items on time. We do not allow renewals on interlibrary loan materials that are overdue.
End Text	Please return them right away. If you need to talk to the ILL Department, you can reach us at training@oclc.org or 800-848-5878. Thanks
Default Delivery Method	Email
* Send Notification	3 Days Before the event occurred

Policy Considerations: 4. Hold policies

Hold Request Policy/Map

Hold Request Policies > Edit Policy: Standard Hold Policy

Required fields are marked with an asterisk (*).

* Policy Name	Standard Hold Policy
Last Modified	
Default Hold Request Period	12 Months ▼ ☐ Unlimited
Hold Fixed Due Date(s)	Name
	No
Bill for placing hold	None ▼
Bill for expired hold	None ▼
Hold Request Expiration Notification Policy	Hold Expiration Notice ▼
Forwarding Policy	Prefers Pickup Location if any items are ava ▼
Hold can be placed if patron has item on loan	Hold can only be placed with an override ▼

Hold Request Policy Map

Patron Policy	Material Format		Hold Request Policy
All ▼	DVD video ▼	=	Video Hold Policy ▼
All ▼	All ▼	=	Standard Hold Policy ▼

Hold Fulfillment Policies > Edit Policy: ILL Hold Policy

Required fields are marked with an asterisk (*).

* Policy Name	ILL Hold Policy
Last Modified	
Hold Expiration Period	3 Days ▼ ☐ Unlimited
Bill for picking up hold	None ▼
Hold Pickup Notification Policy	ILL Hold Ready Notice ▼
Hold Shelf Expiration Notification Policy	ILL Hold Shelf Expiration ▼

Hold Fulfillment Policy/Map

Hold Fulfillment Policy Map

Patron Policy	Material Format	Holding Location	Shelving Location		Hold Fulfillment Policy
All ▼	All ▼	WS ILL ▼	All ▼	=	ILL Hold Policy ▼
All ▼	DVD video ▼	All ▼	All ▼	=	Video Hold Policy ▼
All ▼	All ▼	All ▼	All ▼	=	Standard Hold Policy ▼

How is hold notification applied?

Situation	Notification policy applied	Considerations
Hold request expires before the ILL item is received from the lender	Hold Request Policy • *Hold Request Notification Expiration Policy*	• Hold Request Policy Map does not consult location. • Use standard hold policy. • Add special wording to notice regarding ILL requests.
Hold request is fulfilled (ILL item received from lender and checked in at Circ) but the patron fails to pick up the item	Hold Fulfillment Policy • *Hold Pick Up Notification* • *Hold Shelf Notification Expiration Policy*	• Indicate in the Hold Pick Up Notification that the item has been received through ILL • Consider fewer days allowed to sit on pick-up shelf. • May want to send a daily reminder until the item is picked up. • Only one expiration notice is allowed.

Policy Considerations: 4. Hold policies

Hold Request Expiration Notice

Notification Policies > Edit Policy: Hold Expiration Notice

Copy Delete

Required fields are marked with an asterisk (*).

* Policy Name	Hold Expiration Notice
Last Modified	
Description	Hold expiration notice.
Notification Type	Hold Request Expiry Notification

Notification 1

Subject: Your hold has expired

Start Text:
Hello. We were not able to fulfill you hold request in the allotted time. If desired, you may place another hold for the item.

If you requested an interlibrary loan item, your request is still active in the system and you will be notified when it arrives from the lender. Your ILL request has not been cancelled. Do NOT submit another ILL request for this item as it will be a duplicate.

End Text:
If you still need this material and require assistance, please contact the OCLC Training Library at training@oclc.org or 800-848-5878. Thanks

Default Delivery Method: Email

* Send Notification
0 Days After the event occurred

Print Preview Save Cancel

Hold Shelf Expiration Notice

Notification Policies > Edit Policy: ILL Hold Shelf Expiration

Copy Delete

Required fields are marked with an asterisk (*).

* Policy Name	ILL Hold Shelf Expiration
Last Modified	
Description	Notification that patrons receive when the ILL request they placed was filled and available for pick-up. They did not pick up the item before the expiration date.
Notification Type	Hold Shelf Expiry Notification

Notification 1

Subject: Failed to pick-up ILL item

Start Text:
An interlibrary loan item has been waiting for pick-up at our Circulation Desk. The time period for pick-up has been exceeded. Therefore this item will be returned to the lending library.

End Text:
If you would like to check out this item or place another hold, you may do so. Questions? Call 555-1212

Default Delivery Method: Email

* Send Notification
1 Minutes After the event occurred

Print Preview Save Cancel

EXCEPTION PROCESSING

1. Setup and configuration not completed

2. Patron barcode missing

3. Patron barcode does not match

4. Patron account is blocked or expired

5. Temporary item cannot be created based on bibliographic details (e.g. Author field too long)

6. Hold cannot be placed, resulting in an error on creation of the temporary item and hold request (e.g. policies/limits)

7. Hold expiration time period exceeded

Exception Processing: 1. Setup and Configuration

Checklist:

❑ Create a New Branch (WS ILL)

❑ Update Holding Codes Translation Table to include WS ILL location

❑ Add Location Policy for WS ILL (and update other circulation policies)

❑ Edit ILL Patron Request Form (Patron ID/barcode required)

❑ Activate Integration (WSILL configuration setting)

   ❑ Missing Circulation section in ILL workform indicates activation error
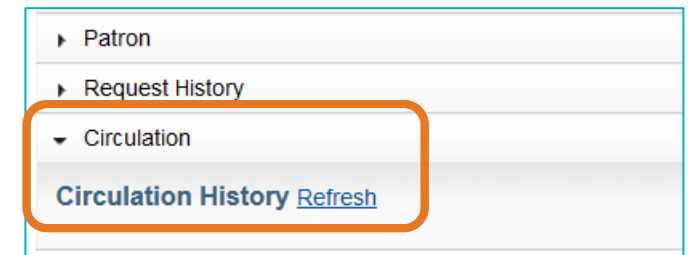
Exception Processing: 2. Barcode missing

Barcode is the matching data point between Circ and ILL. This field must be populated to send the ILL request to lenders.

164014196: The solitaire mystery

🚫 Some information is incorrect, please review and try again.
'patronId' must be supplied for the request: 164014196

| Send Request | Purchase Request | Open Access | Cancel Request |

▸ Request Details (Request ID 164014196)

▸ Lending Libraries (TPV, TPU, TSE, TSF)

▸ Borrowing Library (TS259)

▾ Patron (Test request please do not fil)

Name   Mary Smith

ID

ID = barcode
Must be supplied before request is sent to lenders

Workaround:
1. Search for patron in Circulation
2. Update barcode (ID) in ILL workform (Patron section)
3. Save the ILL workform change
4. Resend the request

Exception Processing: 3. Barcode does not match

Incorrect patron barcode is entered in the request
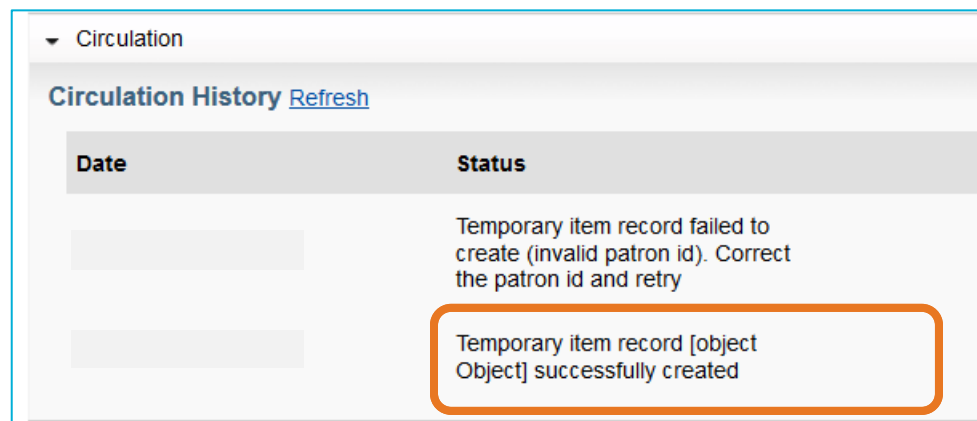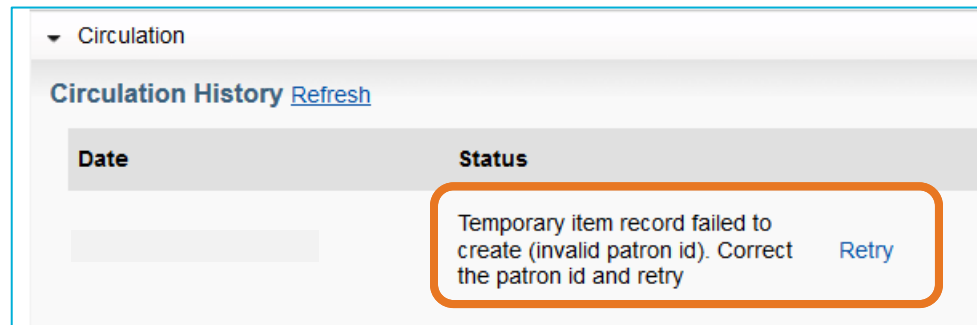
Workaround:
1. Search for patron in Circulation
2. Update barcode in ILL workform (Patron section)
3. Save the ILL workform change
4. Return to Circulation section, Retry
5. Be patient for Circulation History to refresh

Exception Processing: 4. Patron account is blocked or expired

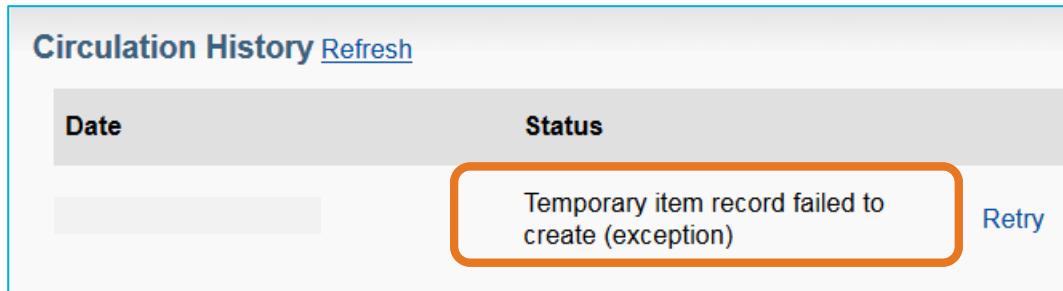The patron record no longer allows circulation activity due to a manual block or account expiration.
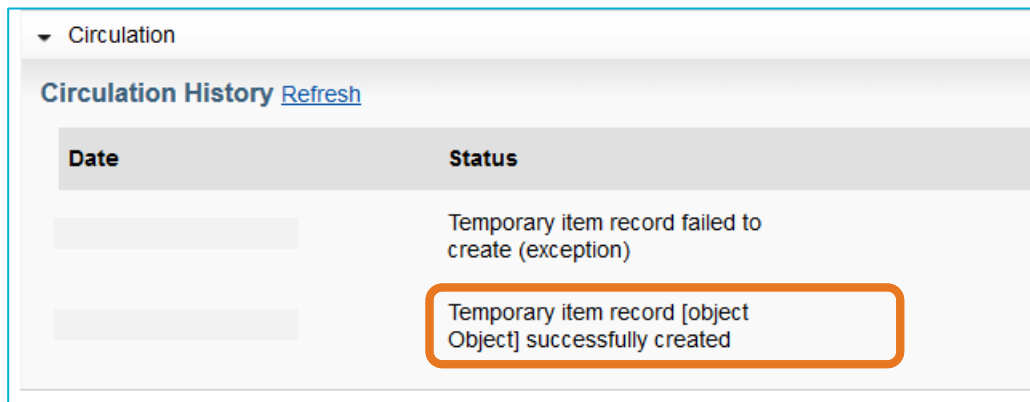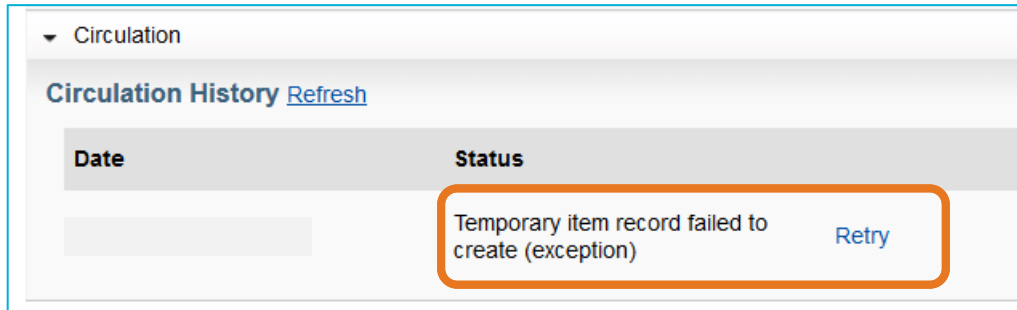
Workaround:
1. Search for patron in Circulation
2. Review the patron record
    a. Check for manual block
    b. Check for expiration date
3. If library procedure allows, remove block and/or update expiration date in Circulation
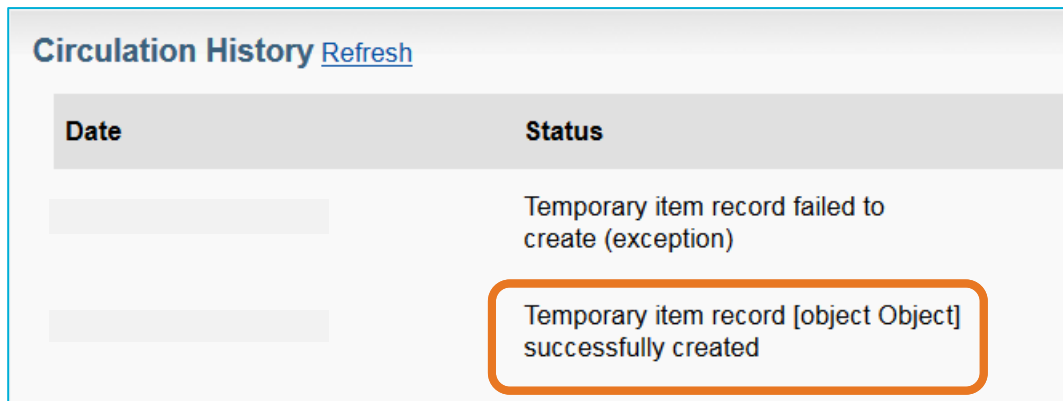4. In WSILL workform, go to Circulation section, Retry

Exception Processing: 5. Temp item cannot be created

While rare, there may be data in the bibliographic record that causes an error when attempting to create the temporary item.

Circulation History Refresh

Date	Status	
	Temporary item record failed to create (exception)	Retry

Circulation History Refresh
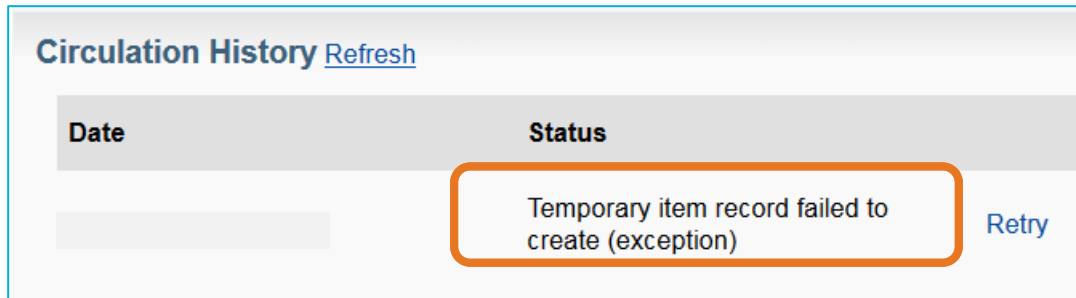
Date	Status
	Temporary item record failed to create (exception)
	Temporary item record [object Object] successfully created

Workaround:
1. Verify that there is no block on the patron record
2. Check item bibliographic for potential exceptions in Title, Author fields (author field > 250 is a known cause)
3. In WSILL workform, modify Request details that may be causing the exception, Save changes
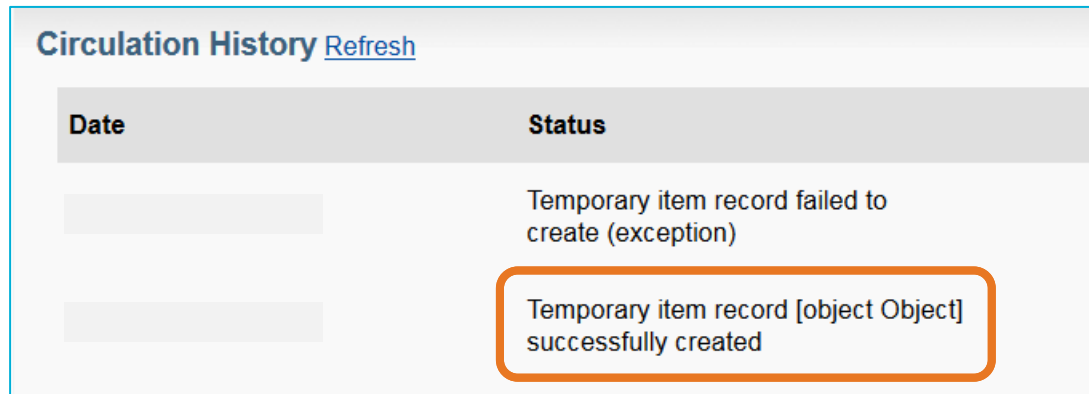4. Go to Circulation section, Retry

Exception Processing: 6. Hold cannot be placed due to policies or limits

If placing a hold is blocked due to policy or limit restrictions, the action to create the temporary item and place a hold will fail.

Circulation History Refresh

Date	Status	
	Temporary item record failed to create (exception)	Retry

Circulation History Refresh

Date	Status
	Temporary item record failed to create (exception)
	Temporary item record [object Object] successfully created

Workaround:
1. Review the patron record for possible blocks
   - Overdues
   - # of items checked out
   - # of hold requests
2. Correct reason for block in Circ
3. In WSILL, Circulation section, Retry

Anything that would cause an Override message in circulation when attempting to place a hold for the patron will result in an exception error.
Correct the condition, retry.

Exception Processing: 6. Hold cannot be placed due to policies or limits

In this specific example, the override is due to the patron's outstanding bills.
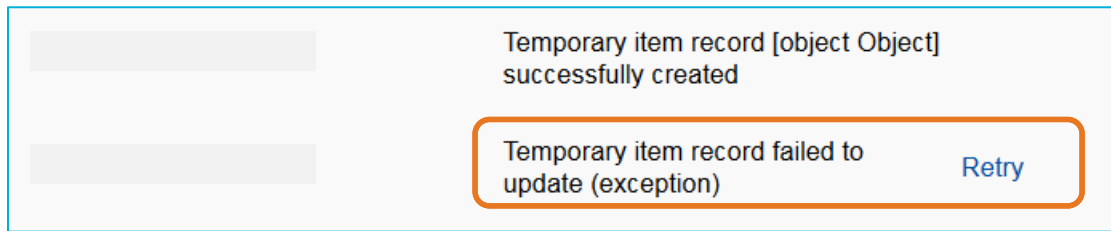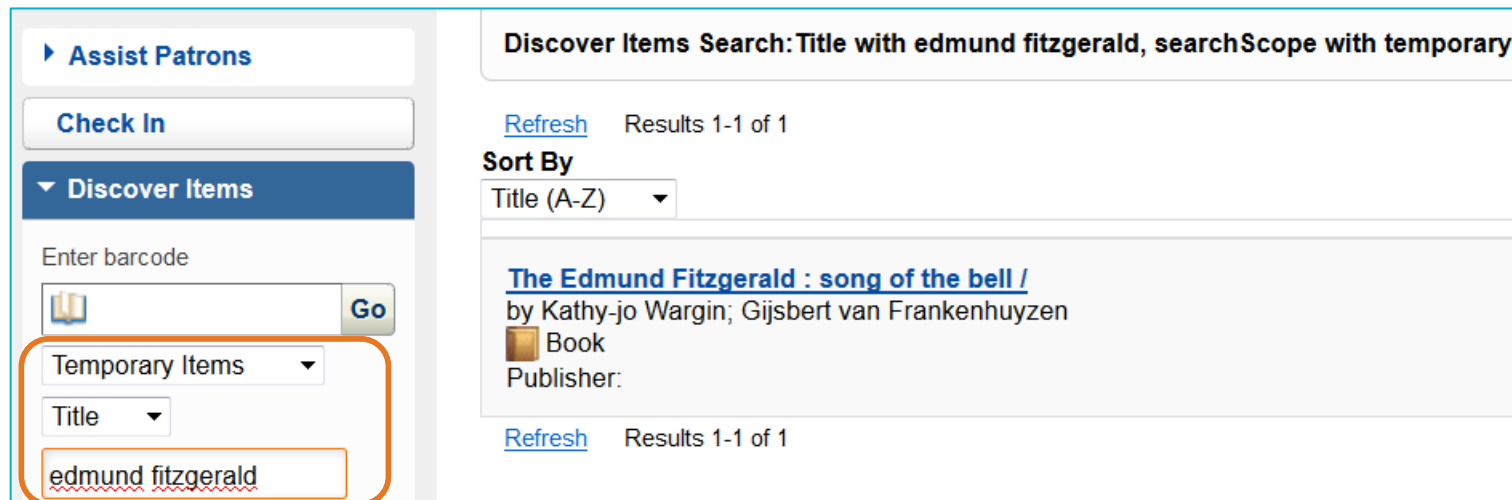

The integration action mirrors actions we undertake as humans, but it cannot determine if an Acknowledge Override should be allowed. Thus, it results in an exception error.

Exception Processing: 7. Hold expiration time period exceeded

By the time the item arrives from the lending institution, the Hold Expiration (how long the system searches to fulfill the hold) has passed. The hold request is automatically removed from the patron record.

Temporary item record [object Object] successfully created

Temporary item record failed to update (exception)   Retry

Exception occurs after the temporary item record was created. This indicates the update when the item was "Marked as Received" in WorldShare ILL failed.

▸ Assist Patrons

Check In

▾ Discover Items

Enter barcode

Go

Temporary Items ▾

Title ▾

edmund fitzgerald

Discover Items Search: Title with edmund fitzgerald, searchScope with temporary

Refresh   Results 1-1 of 1

Sort By
Title (A-Z) ▾

The Edmund Fitzgerald : song of the bell /
by Kathy-jo Wargin; Gijsbert van Frankenhuyzen
Book
Publisher:

Refresh   Results 1-1 of 1

Search for the temporary item created by the ILL request in Circulation

Exception Processing: 7. Hold expiration time period exceeded

The temporary item is still available in Circulation. Place another hold request for the patron.

Temporary Item: The Edmund Fitzgerald : song of the bell /

Item Details (a)   (c)   Details Statistics Holds (0)

Place Hold Create Schedule
(d)

Status	Available
Owning Institution	WS ILL (b)
Holding Location	WS ILL
Shelving Location	**Permanent**
	Temporary
Title	The Edmund Fitzgerald : song of the bell /
Description of Item	
Author	Kathy-jo Wargin; Gijsbert van Frankenhuyzen
Material Format	📙 Book

Temporary item record [object Object] updated successfully

Workaround:
1. Review the patron record for hold request for item
2. If not found, search temporary items for ILL Title
   a. Verify temporary item
   b. Check WS ILL holding location
   c. Check if holds are outstanding
   d. Place a hold for the patron
3. In WSILL, Circulation section, Retry

Exception Processing - Final Notes


```
                              ||||||||||||||||||||||||||||
                                  "163389870"

TITLE
The Edmund Fitzgerald : song of the bell /

AUTHOR
Kathy-jo Wargin; Gijsbert van Frankenhuyzen

VOLUME
ISSUE
ARTICLE AUTHOR

ARTICLE TITLE

DATE
PAGES
ISBN              9781585361267
ISSN

PATRON NAME
PATRON PHONE
PATRON EMAIL
PICKUP
LOCATION

DUE DATE        _____

BORROWER        TS259
SUPPLIER        TPV

PATRON, PLEASE RETURN ITEM TO:

   TS259 - TRAINING LIBRARY: This is a test request please
   123 Main St.
   Dublin, IL, US 12345

BORROWING LIBRARY, RETURN TO:

   OCLC TPV Training
   11 Dupont Circle NW
   Suite 550
   Washington, DC, US 20036
```

US TRAINING LIBR (TS259)

Circulation Desk Procedures:
Item received from ILL Department with Bookstrap

Check In

Hold slip created?
No

(exception in integration occurred)

- Place hold for patron - use bookstrap info
- Check In again
- Hold slip generated, patron notified
- Place on ILL/hold pick-up shelf

Check In

Hold slip created?
Yes

(integration successful)

- Patron notified
- Place on ILL/hold pick-up shelf

FINAL TIPS & REMINDERS

1. Consider WorldShare ILL Request ID as barcode when updating to "Mark as Received"

2. Weigh general hold policies with ILL policies – balance/minimize restrictions for fewer exceptions

3. Customize notifications to indicate ILL requests

4. Encourage patrons to check My Account – ILL requests can be tracked as Holds

OCLC

Support, Documentation & Tutorials

https://help.oclc.org