

FAQs for WMS integration with WorldShare ILL

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Overview

OCLC has recently redeveloped and enhanced WorldShare Circulation’s integration service with WorldShare Interlibrary Loan. And on 22 October 2023, the existing Circulation’s integration with WorldShare ILL will be automatically migrated to the newly enhanced integration service. Fully utilizing the new integration will enable WorldShare ILL to do more of the routine, repetitive tasks needed to seamlessly borrow and lend materials using interlibrary loan.

If your library is already using the integration between WorldShare ILL and WMS, you do not need to make any changes to your system configuration. However, you will experience changes to your borrowing workflows and will have the option to enable new integration features.

Note: Your library will not see any changes if your library uses Relais D2D, Project ReShare, or Tipasa integrations with WMS; or if your library has not enabled the integration between WMS and WorldShare ILL.

1. How did the legacy integration work between WMS and WorldShare ILL?

Prior to 22 October, a library with WMS and WorldShare ILL could enable a simple integration to support your borrowing workflows.

This legacy integration created temporary items and patron hold requests when an ILL loan (returnable) request was submitted to lenders for fulfillment. The patron hold was subsequently updated to trigger local fulfillment workflows when the borrowing ILL request was moved to *Received* status in WorldShare ILL.

2. What will change for new ILL borrowing requests if my library makes no changes to our configuration?

Temporary items and patron holds will be created in Circulation when the ILL request is updated to *Received* status in WorldShare ILL. Patrons will be able to see their ILL requests in My Account only after the requested item has been received by your library.

Previously, patrons and library staff could see pending ILL hold requests in Circulation, My Account, etc. as soon as the ILL request was submitted to lenders.

After the migration on 22 October, the enhanced integration will wait to create temporary items and holds until the requested item has been received. As a result, your library will no longer need to delete holds in Circulation for ILL requests that are ultimately unfilled, fulfilled as copy requests, etc.

Please note that any temporary items and holds that have already been created by the legacy integration will not be deleted or modified after the migration to the new service. Any existing holds will be updated as usual when the ILL request is updated to *Received* status after the migration.

3. What will change for [existing ILL borrowing requests](#) if my library makes no changes to our configuration?

Your patrons and library staff will see *no changes* to the way borrowing integration works for requests that have already been submitted to lenders for fulfillment.

Temporary items and patron holds that were created prior to 22 October will remain in WorldShare Circulation. Patrons will continue to see these existing ILL holds in My Account. When the ILL request is updated to *Received* status, the holds and items will be updated as usual to trigger local fulfillment workflows.

Your library may need to continue manually deleting holds in Circulation for ILL loan requests that are not filled by a lender, expire unfilled, are fulfilled as a copy request, etc. if the ILL request was submitted to lenders before the 22 October service migration.

4. What new features can my library use to integrate WMS and WorldShare ILL?

The new integration service between WMS and WorldShare ILL introduces five new features to streamline your borrowing and lending workflows. All of these features are optional, disabled by default, and can be configured separately:

- a) Borrowing: Choose the holding and shelving location assigned to temporary items
- b) Borrowing: Charge your patrons fees for interlibrary loan
- c) Borrowing: Check-in items that your library has returned to the lending library
- d) Lending: Check out items that your library has agreed to lend to another library
- e) Lending: Check-in items that your library has received back from the borrowing library

4a. Borrowing: Choose the holding and shelving location assigned to temporary items

Integration between WMS and WorldShare ILL no longer requires your library to maintain a **WS ILL** branch for shelving temporary items created for circulation of borrowed materials.

Your library may choose to [continue to use the WS ILL branch](#) or to [choose a different location for temporary items](#).

By default, WMS integration with WorldShare ILL will continue to use the **WS ILL** branch as the default holding location for temporary items and as the event location to begin the fulfillment process, i.e., temporary items are automatically 'in transit' from **WS ILL** to the pickup location after the ILL request is updated to *Received* in WorldShare ILL.

4b. Borrowing: Charge your patrons fees for interlibrary loan borrowing

Automatically charge your patron a bill in Circulation when a lending library agrees to fulfill the patron's interlibrary loan request and updates the ILL request to *Shipped* status. The ILL request ID is stored in a bill note for easy reference. Your patron will be able to see the fee in My Account and to pay the bill like any other created in Circulation.

Your library can control patron ILL billing by patron type and by request type (i.e., copy vs. loan). Your library can also choose if the patron should be charged the lending library's fee or a flat service fee determined by your library. You also get to choose an appropriate bill reason.

To enable this feature, you must make configuration changes for both WorldShare Circulation and WorldShare ILL:

1. Create any new **Bill Reason** policies that will be applied to interlibrary loan fees.
2. Enable integration for Circulation in OCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL.
 - a. Enable **Tipasa and WorldShare ILL**.
 - i. Note: Other required fields include temporary item location and borrowing institution account barcode. These fields must be populated even if you do not intend to enable the related features in your WorldShare ILL settings.
 - b. Enable **Patron Fees** and populate your billing map.
 - c. Save your changes.
3. Enable integration for ILL in OCLC Service Configuration > WorldShare ILL > Circulation Integration
 - a. Enable Circulation integration.
 - b. Select **WMS** as your ILS.
 - c. Under **Borrowing**, enable the setting for **Charge patron on shipped**.
 - d. Save your changes.

4c. Borrowing: Check-in items that your library has returned to the lending library

Automatically check in the temporary item in Circulation when your patron has returned a borrowed item and the associated ILL request is updated to *Returned* status in WorldShare ILL.

This optional workflow step ensures that Circulation knows that the temporary item is no longer on loan to the patron after your library returns the item to the lending library. If the item is overdue, any overdue penalties will be created on the patron's account.

Note: The check-in integration will work only if the temporary item was initially created by the integration.

To enable this feature, you must make configuration changes for both WorldShare Circulation and WorldShare ILL:

1. Enable integration for Circulation in OCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL.
 - a. Enable **Tipasa and WorldShare ILL**.

- i. Note: Other required fields include temporary item location and borrowing institution account barcode. These fields must be populated even if you do not intend to enable the related features in your WorldShare ILL settings.
 - b. Save your changes.
2. Enable integration for ILL in OCLC Service Configuration > WorldShare ILL > Circulation Integration
 - a. Enable Circulation integration.
 - b. Select **WMS** as your ILS.
 - c. Under **Borrowing**, enable the setting for **Check in item on returned**.
 - d. Save your changes.

4d. Lending: Check out items that your library has agreed to lend to another library

Automatically check out items that your library has agreed to lend when the associated ILL request is updated to *Shipped* status. The due date that you specified in the ILL request will be reflected in WorldShare Circulation.

All loaned items will be checked out to a single user account in your Circulation system. The ILL request ID and the name of the borrowing library will display on each loan in the checkouts list and on each item record for easy reference.

Note: Renewals approved and recalls processed in WorldShare ILL will not be reflected automatically in Circulation. Your library may wish to manually update the Circulation loan to reflect new due dates set in ILL.

To enable this feature, you must make configuration changes for both WorldShare Circulation and WorldShare ILL:

1. In WorldShare Circulation or Admin, create or select a user account where loaned materials should be checked out.
2. Review and adjust the following circulation policies before you enable this feature:
 - a. **Patron Type Policy** of the user account where items will be loaned
 - b. **Loan Policies** that may be applied when checking out materials and associated overdue penalties
 - c. **Notification Policies** that may be used to support library staff workflows for lending
3. Enable integration for Circulation in OCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL
 - a. Enable **Tipasa and WorldShare ILL**.
 - i. Note: Other required fields include temporary item location borrowed temporary items. These fields must be populated even if you do not intend to enable the related features in your WorldShare ILL settings.
 - b. Specify the barcode of the user account to be used to loan materials in the **Borrowing Institution Patron Barcode** field.
 - c. Save your changes.
4. Enable integration for ILL in OCLC Service Configuration > WorldShare ILL > Circulation Integration
 - a. Enable Circulation integration.
 - b. Select **WMS** as your ILS.
 - c. Under **Lending**, enable the setting for **Check out item on shipped**.
 - d. Save your changes.

4e. Lending: Check-in items that your library has received back from the borrowing library

Automatically check an item into Circulation when the material is returned by the borrowing library and the associated ILL request is updated to *Returned/Complete* status in WorldShare ILL. This optional workflow step ensures that Circulation knows that your item has been returned to your collection.

When the ILL request is returned and completed, Circulation will terminate the loan against the ILL user account and adjust the item's status to be on the shelf at its holding location. Circulation will not fulfill pending hold and item schedule requests automatically in case additional time is needed to route the item, the item is damaged, etc.; instead, the item will appear on the pull list to prompt library staff to retrieve and check in the item in Circulation to fulfill the local request.

Note: The check-in integration will work only if your item was also checked out by the integration.

To enable this feature, you must make configuration changes for both WorldShare Circulation and WorldShare ILL:

1. Enable integration for Circulation in OCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL
 - a. Enable **Tipasa and WorldShare ILL**.
 - i. Note: Other required fields include temporary item location and borrowing institution account barcode. These fields must be populated even if you do not intend to enable the related features in your WorldShare ILL settings.
 - b. Save your changes.
2. Enable integration for ILL in OCLC Service Configuration > WorldShare ILL > Circulation Integration
 - a. Enable Circulation integration.
 - b. Select **WMS** as your ILS.
 - c. Under **Lending**, enable the setting for **Check in item on check in**.
 - d. Save your changes.

5. What should I do if I want to continue using the WS ILL branch?

If your library would like to continue to use your **WS ILL** branch, then you do not need to take immediate action. The integration will continue to use the **WS ILL** branch as usual.

Integrations > ILL Settings

Required fields are marked with an asterisk (*)

Relais D2D

Enable Yes No

ReShare

Enable Yes No

Tipasa and WorldShare ILL

Enable Yes No

Note: You must also enable WMS integration in your interlibrary loan configuration to activate these features.

* Borrowing Institution Patron Barcode

* Temporary Item Holding Location

* Temporary Item Shelving Location

Patron Fees Yes No

However, it is highly recommended that you explicitly select the **WS ILL** branch in your WorldShare Circulation configuration: **OCCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL:**

Note: You will be required to provide a valid circulation barcode for the **Borrowing Institution Patron Barcode** value, even if your library will not use lender-side integration.

6. What should I do if I want to remove the WS ILL branch?

Your library may select any branch and shelving location that you prefer for the temporary items created by borrowing integration between WMS and WorldShare ILL. Once you have selected and configured a replacement for the **WS ILL** branch, you may remove the **WS ILL** branch from your institution's configuration.

Do not remove the **WS ILL** branch from your configuration until you have completed all of the steps in the table below.

The location that you configure will control the following workflows when your library borrows materials via interlibrary loan:

- The holding and shelving location of the temporary item created in Circulation
- The policies that are applied as patron borrowing requests are processed through Circulation's hold and loan processes including. See the table below for more details.
- The event branch where holds are fulfilled when an ILL request is updated to *Received* status
 - For example, if Branch AAA is configured for temporary items and the request's pickup location is Branch BBB, then when the ILL request is updated to *Received* status:
 - The temporary item will be created at Branch AAA
 - The pickup location of the hold will be set to Branch BBB
 - The item will be in *In Transit* status from Branch AAA to destination Branch BBB
 - The hold will be in *Getting ready* status.
 - The patron will not receive a hold pickup notification from Circulation until the temporary item is checked in at Branch BBB.
- The branch where the temporary item will be checked in when the ILL request is updated to *Returned* status, if the [new automatic check-in integration](#) is enabled. This ensures that the item is returned to *Unavailable* status and can more easily be withdrawn and purged from your collection, if you choose to do so.

Follow these steps to safely remove the **WS ILL** branch from your library's WMS configuration:

Step	Task	More information
1	<p>Choose your new holding and shelving location for temporary items created by WorldShare ILL integration.</p> <p>Add or review coverage for the new location to your Circulation policies.</p>	<p>If your library creates a new branch or shelving location, it may take several hours for the new option to appear in OCLC Service Configuration.</p> <p>Policies to review:</p> <ul style="list-style-type: none"> • Collection Type Policy • Hold Fulfillment Policy Map • Hold Limits Matrix • Hold Pickup Locations Map • Loan Policy Map • Loan Limits Matrix
2	<p>Configure WorldShare Circulation to use a new holding and shelving location for temporary items created by WorldShare ILL integration.</p> <p>When this step is complete, temporary items will no longer be created in the WS ILL branch.</p>	<p>OCLC Service Configuration > WMS Circulation > Integrations > ILL Settings > Tipasa and WorldShare ILL</p> <ul style="list-style-type: none"> • Enable integration • Select your new location in the Temporary Item Holding Location and Temporary Item Shelving Location fields • Provide a patron barcode in the required Borrowing Institution Patron Barcode field, even if your library does not plan to use the new lending-side integrations • Save your changes
3	<p>Verify that your Circulation policies are working as expected for new borrowing requests</p>	
4	<p>Verify that all temporary items assigned to the WS ILL branch are no longer circulating and/or have been moved to a new holding and shelving location</p>	<p>An item is removed from circulation if it is in any of the following statuses:</p> <ul style="list-style-type: none"> • Available • Unavailable • Available (Withdrawn) • Unavailable (Withdrawn)
5	<p>Remove references to the WS ILL branch from your Circulation policies</p>	<p>See the list of policies to review from step #1</p>
6	<p>Remove references to the WS ILL branch from your WorldCat Discovery configuration: OCLC Service Configuration > WorldCat Discovery and WorldCat Local > Holding Codes & Shelving Location Messages > Holding Codes Translation Table</p>	<p>It is recommended that you make a record of the WorldCat Registry ID associated with your WS ILL branch for future reference.</p> <p>It may take several hours and clearing cache for the WS ILL branch to stop appearing in holding location lists across WorldShare.</p>