WORLDCAT RESOURCE SHARING
REQUEST MANAGER

Messages You Will See and How to Respond to Them

The **Request Manager** is a feature in OCLC WorldCat Resource Sharing that you use to see the "status" of ILL transactions. ILL work through OCLC is an interactive process and the Request Manager helps you identify which transactions currently require a response from you. They are organized by borrowing and lending status and then by urgency. For example, some statuses require more immediate work than others and are thus grouped under Attention. **Note:** The Request Manager does not necessarily include all of your active requests. For example, records in Received status do not display in the Request Manager.

To access the Request Manager, click the **Resource Sharing** tab. The **Request Manager** link on the horizontal blue menu bar immediately beneath the tabs will bring you back to the main Request Manager status screen.

Retrieving records

To retrieve an individual record from the Request Manager when there is only one for a status message, click the underlined number for the status whose records you want to view.

To retrieve an individual record from the Request Manager when there is more than one for a status message, click the underlined number for the status whose records you want to view. A status list displays with all the records for that status; click the Request number for the record you want to view.

To retrieve an individual record with the ILL Request Identifier number, type the number of the record in the **Search all requests for:** box; choose Request Identifier from the pull-down menu and then click the **Search** button.

To retrieve a list of all items you have borrowed from other libraries, in the **Search all requests for:** box type your library's OCLC symbol, then use the drop-down list to specify **Borrowing Library**.

To retrieve a list of all items you have loaned to other libraries, in the **Search all requests for:** box type your library's OCLC symbol, then use the drop-down list to specify **Lending Library**.

Common messages for you as *lender*:	**How to respond to them:**
PENDING	These are requests made to you by other libraries. If you do not respond, each request will appear in your Request Manager for four days before moving on to the next library in the Lender string. Before responding, check the following fields in a record to see if you can comply: Need Before, Edition, Ship Via, Maximum Cost,

Copyright Compliance, and Borrowing Notes. Then check to see if the item is available to be checked out for interlibrary loan.

Answering **YES**
If you can supply the item requested on the terms of the borrower, follow this procedure to respond yes. With the record on the screen, click in the radio button to select **Yes**. From the drop-down list, select a Constant Data record if needed. Click the **Update** button. This will bring in the Constant Data, so check to see that the Due Date, Shipped, Lending Charges and Lending Notes fields are filled out as desired. If not, make corrections as needed. Check again to see that all fields are filled out as you wish. If you have not already done so, use the dark grey **Print** button at the top of the request to bring up the request reformatted for printing. Print a copy of the request to send with the item. Then click the **Update** button to replace the record with the status of Shipped.

Answering **NO**
If you cannot supply the item requested, click in the radio button to select **No** and click the **Update** button. The record will be immediately eliminated from your Request Manager.

Answering **NO** with Reason
If you cannot supply the item requested and can respond with a reason, click in the radio button to select **No**. From the drop-down box, choose the reason you cannot supply the item. Then click the **Update** button. See *OCLC ILL System Reasons for Saying No* for list of codes and input text and whether OCLC would prefer another command be used. The record will be immediately eliminated from your Request Manager.

Answering **CONDITIONAL**
If you have a question about a request or some restrictions on a loan, send a Conditional response. Click in the radio button to select **Conditional**. Select one of your saved notes from the pull-down menu or type the questions or conditions in the Lending Notes box to the right of Conditional. (for example, **The article listed is not in this issue; please check citation.**) Then click the **Update** button.

Now that there are codes for Reasons for No, OCLC prefers you do not use Conditional for stating why an item is not loaned except in the cases outlined in *OCLC ILL System Reasons for Saying No*.

Answering with a **FUTURE DATE**
If the item is checked out to a patron, on reserve or for any reason unavailable within the four days that the request is in your Request Manager, but will be available before the Need Before date, you may respond with a Future Date Command. Click in the radio button to select **Future Date**. Then enter the date the item will be available in the box. The record will be immediately removed from your Request Manager.

IN PROCESS

These are requests you have already reviewed. You may have put them into this category manually, by choosing In Process on a PENDING request. In addition, once a PENDING request has been printed, the status updates to In process. Respond to IN PROCESS the same way you respond to PENDING.

CONDITIONAL/ PENDING

This message is the response of the other library to your conditional. Look at the record to see how they responded to your lending notes. Depending on their response, follow the instructions listed under **PENDING** (Yes, No, Conditional, Future Date) to answer their request.

RETRY/PENDING

This request is one for which you entered a Future Date. It has gone through the rest of the lender string unfilled and the library making the request was willing to wait and see if you could fill it on the date you entered. Check to see if the item is now available and follow the instructions listed under **PENDING** for Yes, No or Conditional to answer their request; you may not send a second Future Date response.

RENEWAL REQUEST

The library borrowing this item is requesting a renewal. Pull up the record and check the Renewal Request field. If you decide to honor the request, click in the radio button to select **Renewal OK.** Type your new due date as ***yyyymmdd*** (for example, **19980315**) or use the pop-up calendar to select your new due date. Then click the **Update** button.

If you do not want to renew, click in the radio button to select **No Renewal** and click the **Update** button.

RETURNED

This is an item that a borrowing library has returned to you. When the item arrives, retrieve the record. **Complete** will be the only option and the system will default to selecting it. Click the **Updat**e button to Complete the transaction. The record will be immediately deleted from your Request Manager.

Special Messages for you as *lender*:

NOT RECEIVED	This is an item that you marked as shipped to another library but they have told the system after 7-14 days that they did not receive it. Check the Borrowing Notes field, then contact the borrower to resolve the problem.
COMPLETE?	This is an item that the borrowing library updated to RETURNED 30 days ago, but you have not marked it as complete. Check on the item and **Complete** if it has been returned; if necessary, contact the borrower to resolve the problem.

Other *lending* command:

RECALL	If you want an item back before the due date, or if the item is past due but the record has not been updated to OVERDUE by the system, you may use the Recall command. Click in the radio button to select **Recall** and click the **Update** button.

Common messages for you as *borrower*:	**How to respond to them:**
REVIEW	These are records for requests made from the FirstSearch system.
SAVE	These are records that you have saved. You may retrieve them, make changes, save them again, produce them or delete them.
CONDITIONAL	This means a library in the lender string has a question or comment regarding your request. Retrieve the record, read Lending Notes. The message might say an article citation is incorrect, that the library will accept IFM payments only, that they will only lend the item for two weeks, or a variety of other comments. You must decide if you can meet whatever restrictions or requests that the other library is making. If you can comply, click in the radio button to select **I accept the Lender's condition** and click the **Update** button. If you need to correct a citation or any other field, do so now; then click the **Update** button again. If you do not want to accept the restrictions, click in the radio button to select **I do <u>not</u> accept the Lender's condition** and click the **Update** button. The request will then go on to the next lender in the string.
SHIPPED	When the Lender can supply an item, they change the record from Pending to either Will Supply or Shipped. When the item is received in your library, retrieve the record. **Receive With Today's Date** will be the only option and the system will default to selecting it. Click the **Update** button to indicate that you have received the item.
WILL SUPPLY	Respond to this the same way you respond to SHIPPED.
RETRY	This message appears when the request has gone through the entire lender string and none of the libraries has responded yes but at least one library put in a FUTURE DATE. This means that the library is willing to lend to you, but the item is not available until some possible date in the future. Retrieve the record and look at the date (it appears in the Status field in parentheses after Retry). Would your patron be willing to wait that long? Remember that a retry is not a promise to fill but a possibility of filling.

If you do nothing, when the specified retry date arrives the OCLC system will place the request back in the lender's Request Manager as RETRY/PENDING. They then have four days to fill the request or respond no.

If you decide send the request to some other libraries instead of taking a chance on the future date, retrieve the RETRY record. Click the **New** button to copy the data from the record into a new workform. Enter your new lender string and make needed changes, for example, NeedBefore date. Click the **Produce** button to forward the request to the first Lender in the string. Retrieve the RETRY record again; select **Delete Record** and click the **Update** button to delete the request.

If you decide to cancel the request entirely, retrieve the RETRY record. Select **Delete Record** and click the **Update** button to delete the request.

RECALLED

This means that the lending library wants you to return the borrowed item as soon as possible. Call the item back from your patron immediately and ship back to the lender. Once the item is in the mail, retrieve the record; **Return With Today's Date** will be the only option and the system will default to selecting it. Click the **Update** button to indicate that you have returned the item.

RENEWAL GRANTED

The lending library agrees to extend the due date on the item. Retrieve the record and check the New Due Date field. Figure the date the item will need to be shipped back and notify your patron. This status will remain in your Request Manager until the record status has been changed to RETURNED, RECALLED or OVERDUE.

RENEWAL DENIED

This means that the lending library will not agree to an extension of the due date; therefore, if the due date has already passed, you must return the borrowed item as soon as possible. Call the item back from your patron immediately and ship back to the lender. Once the item is in the mail, retrieve the record; **Return With Today's Date** will be the only option and the system will default to selecting it. Click the **Update** button to indicate that you have returned the item.

UNFILLED

This request has gone to all the libraries in the lender string, and they have all said no or done nothing. You should retrieve the record and decide whether or not to ask other libraries for the item. If you do nothing, the record will disappear from the system in

seven days. These records may also be saved if a decision cannot be made within the seven days.

If a request goes into the unfilled status, check the Request History to see if any library gave a reason for no.

If you decide to send the request to other libraries, retrieve the UNFILLED record. Click the **New** button to copy the data from the record into a new workform. Enter your new lender string and make needed changes, for example, NeedBefore date. Click the **Submit** button to forward the request to the first Lender in the string. The UNFILLED record will disappear in four days or you may retrieve and delete it; select **Delete Record** and click the **Update** button.

EXPIRED

No library in the lending string said yes before the Need Before Date was reached, so the system cancelled the request. Retrieve the record and decide if you want to send it out again. If you do nothing, the record will disappear from the system in seven days.

If you decide to send the request to other libraries, retrieve the EXPIRED record. Click the **New** button to copy the data from the record into a new workform. Enter your new lender string and make needed changes, for example, NeedBefore date. Click the **Submit** button to forward the request to the first Lender in the string. The EXPIRED record will disappear in two days or you may retrieve and delete it; select **Delete Record** and click the **Update** button.

Special Messages for you as *borrower*:

OVERDUE	The system initiates this message when the record status is not changed to RETURNED within 14 days after the Due Date or New Due Date. Check to see if the item has been returned but not updated on the computer. If so, update to Returned. If not, retrieve the item from the patron immediately and return it. Once the item is in the mail, retrieve the record; **Return With Today's Date** will be the only option and the system will default to selecting it. Click the **Update** button to indicate that you have returned the item.
RECEIVED?	The system initiates this message when a record status is not changed to RECEIVED within 14 days for loans and 7 days for copies of being updated to SHIPPED or WILL SUPPLY. Check to see if you have received the item but not updated the system. If so, retrieve the record, select **Yes This Item Was Received** and click the **Update** button. If not, retrieve the record and select **Not Received** and click the **Update** button.
ONLINE PRODUCED	All requests produced through WorldCat Resource Sharing will immediately appear under this category. They may be printed, replaced or deleted. The system will drop each request from this category after four business days—but their current status (i.e. Pending, In Process) does not change. To remove a request from this category before the four days are up, retrieve the request, select **Remove** and click the **Update** button. This does not delete the request from the borrowing process.
DIRECT PRODUCED	All requests produced through the ILL Direct Request Service will immediately appear under this category. They may be printed and removed. The system will drop each request from this category after four business days—but their current status (i.e. Pending, In Process, Shipped) does not change. To remove a request from this category before the four days are up, retrieve the request, select **Remove** and click the **Update** button. This does not delete the record from the borrowing process.

Other *borrowing* commands:

SAVE	If you have a workform on the screen and for some reason you cannot complete it before leaving the screen, click the **Save** button. This will change the status to SAVE, and you can retrieve the request from the Request Manager.
RETURNED	When an item is returned, you need to indicate that on the system. Select **Return With Today's Date** and click the **Update** button.
RENEWAL REQUEST	When a patron wants to renew an item, check the lending library's policies to see if they grant renewals. Then retrieve the request using the Request Identifier number. Select **Renewal Request** and in the Renewal Request box, type the proposed date in OCLC format ***yyyymmdd*** (example: **199808707**) or type **any** and click the **Update** button.
DELETE REQUEST	A request may be deleted before the status is changed to Will Supply or Shipped. If you do delete a record that is in a Pending or In Process status for any reason, notify the library where the request currently is, so that they do not mistakenly send out the item. To delete a request, select **Delete Record** and click the **Update** button.