WorldShare® ILL Lending

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Member Education
Topics

1. Update the OCLC Policies Directory
2. Answer and manage ILL requests as a Lender
3. Statistics reports

Documentation & Support
How we will be using WorldShare ILL

We will be responding to requests as a Lender:

• Staff-Mediated requests processed directly from the WorldShare ILL interface
1. UPDATE OCLC POLICIES DIRECTORY
Borrowers can see policies on workform
Set Supplier Status and Days to Respond; indicate non-circulating items.
OCLC Policies Directory

- Set Policies
- Deflections
- Copy
- Loan
Deflection defined

- Deflection is the ability of a lending library to automatically be skipped, even though they are in the lender string

Spend less staff time saying No to undesired requests
Types of deflection

Deflection in OCLC Policies Directory

- **Format:** electronic, audio-visual, serials, etc.
- **Group:** OCLC Group(s) or Custom Holdings Group(s)
- **Cost:** maximum cost
- **Age:** material age (new or old)

[Deflections- Documentation](#)
OCLC Policies Directory

Set Policies
- Deflections
- Copy
- Loan

### Deflections

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<thead>
<tr>
<th>Microform</th>
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<tr>
<td>SERVICE</td>
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<td>Requests: Loan</td>
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**Note:** Will books newer than 2014 get through?

### No DVDs or CDs

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**Formats:**
- Sound Recording - CD
- Visual Material
- Visual Material - DVD
- Visual Material - VHS
2. ANSWER & MANAGE REQUESTS
Request type determines workflow

Type also determines completion (Borrower or Lender)

Loan Request
- B Creates Loan Request
- L Yes
- L Shipped/In Transit
- B Receives Item
- B Received/In Use
- B Returns Item
- B Returned
- L Checked In/Complete
- L Closed

Copy Request
- B Creates Copy Request
- L Yes
- L Shipped/In Transit
- B Receives Item
- B Closed

No Due Date on Copy requests
OCLC Article Exchange

Note: Document expires in 30 days or after viewed 5 times. Staff preview does not count.

Files no larger than 120 MB. Up to 1000 files a day per authorization.
Article Exchange- how it works

- Lending Libraries

From the WSILL homepage

From the ILL request
IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions

Borrowing Library

Lending Library

IFM

-$10 (Debit)

+$10 (Credit)
Where to specify IFM preference

- OCLC Policies Directory
- OCLC Service Configuration (Constant data)
- Within the ILL request workform
Specifying IFM preference
OCLC Policies Directory
Turn on real-time availability

When your library is the current lender in the string, the system checks the item’s status in the local system.

- If the item is unavailable, the request moves to the next lender in the string.
- If the item is available, not found, or any status that does not readily map to unavailable, the request is put in the Lending Can You Supply queue.

However, you first need to supply some information about your library by completing an online questionnaire.

Real-time availability questionnaire
Monitoring Real-time availability

- Users should check their **Resource Sharing Lending Reasons For No** reports in CUSP
- Look for **System Checked Availability** as a reason for no
LIVE DEMO
ANSWERING & MANAGING REQUESTS AS A LENDER
Answering Requests as a Lender

Lender request management:

1. Responding Yes to loans (including using batch)
2. Responding Yes to copies, using Article Exchange
3. Responding No (including using batch)
4. Responding conditional
5. Print queue
Managing requests as a Lender

- Respond to Renewal requests
- Respond to accepted conditionals
- Returned Items (complete/close request)
- Overdue Items
Issues with requests

- Shipped wrong material or material needed in library ASAP
- Damaged items
- Borrowing library did not fill maximum cost field and there is charge for the request (skipped deflection)
- Not Received
- Received but missing items
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.

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.

Documentation
3. STATISTICS REPORTS
Thank You!

Please remember to fill out the evaluation for this class

- Category: Resource Sharing and Delivery
- Class name: WorldShare ILL Lending
- Instructor: Lucia Shelton
- Date: October 27, 2022

Training questions? Contact OCLC Training training@oclc.org