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WorldShare® ILL Lending

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Member Education
In this course, you will learn how to…

➢ Update the OCLC Policies Directory and configurations

➢ Answer and manage ILL requests as a Lender

➢ Generate statistics reports

Documentation & Support
1. UPDATE ILL POLICIES AND CONFIGURATIONS
Borrowers can see policies on workform

<table>
<thead>
<tr>
<th>Library</th>
<th>Supplier</th>
<th>Days To Respond</th>
<th>Location</th>
<th>Symbol</th>
<th>Group</th>
<th>Cost</th>
<th>IFM</th>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>AKRON-SUMMIT CNTY PUB LIBR</td>
<td></td>
<td></td>
<td>US, OH</td>
<td>APL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASHTABULA CNTY DIST LIBR</td>
<td></td>
<td></td>
<td></td>
<td>ASHDL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AVON LAKE PUB LIBR</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, OH</td>
<td>OH9WF</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>CINCINNATI &amp; HAMILTON CNTY PUB LIBR</td>
<td></td>
<td></td>
<td>US, OH</td>
<td>OCP</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLEVELAND PUB LIBR</td>
<td>Yes</td>
<td>Copies: 8 days</td>
<td>US, OH</td>
<td>CLE</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>COLUMBUS METROP LIBR</td>
<td>Yes</td>
<td>Copies: 12 days</td>
<td>US, OH</td>
<td>OCO</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CLEVELAND PUB LIBR</td>
<td>Yes</td>
<td>Copies: 8 days</td>
<td>US, OH</td>
<td>OH</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
OCLC Policies Directory

Set Policies
- Deflections
- Copy
- Loan
Set Supplier Status and Days to Respond; indicate non-circulating items.
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

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)
### Deflection policy example

No audio loans except for libraries in OCLC group Libraries Very Interested in Sharing (LVIS)

<table>
<thead>
<tr>
<th>Policy name</th>
<th>Enter a name (i.e., no audio loans)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request type</td>
<td>Loan</td>
</tr>
<tr>
<td>Deflection type</td>
<td>Enable Real Time Deflection</td>
</tr>
<tr>
<td>Borrowers</td>
<td>Exclude OCLC Group = LVIS</td>
</tr>
<tr>
<td>Items&gt;Formats</td>
<td>Include all audio formats</td>
</tr>
</tbody>
</table>
Deflection policies

System will answer **no, stop** ILL requests on your behalf according to your deflection policies.

- **Include** = Will deflect/Do **Not** receive ILL requests

- **Exclude** = Will not deflect/Will **receive** ILL requests

Note: Certify that you select the correct options to avoid receiving unwanted requests or not receiving requests at all.

[Deflections- Documentation](link)
Turn on real-time availability

When your library is the current lender in the string, the system checks

<table>
<thead>
<tr>
<th>Item Status</th>
<th>System Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unavailable</td>
<td>Request moves to next lender in the string</td>
</tr>
<tr>
<td>Available or not found</td>
<td>Request goes to your Can you Supply queue</td>
</tr>
<tr>
<td>Other status other than Unavailable</td>
<td>Request goes to your Can you Supply queue</td>
</tr>
</tbody>
</table>

Note: You need to complete 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
PREPARE TO ANSWER & MANAGE REQUESTS
Files no larger than 120 MB. Up to 1000 files a day per authorization.
Article Exchange- how it works

- Lending Libraries

Note: Document expires in 30 days or after viewed five times. Staff preview does not count.
IFM – Interlibrary Loan Fee Management

- Automates the billing of ILL transactions using the borrowing and lending libraries OCLC accounts.

Borrowing Library

Lending Library

-$10 (Debit)  IFM  $10 (Credit)
LIVE DEMO
ANSWER & MANAGE REQUESTS
AS A LENDER
Answer requests as a Lender

- Respond **Yes** to loans
- Respond **Yes** to copies, using Article Exchange
- Respond **No** to either loan or copy
- Respond **Yes** or **No** in batch
- Respond **conditional**
- Print queue
Manage 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
- Borrowing library did not fill maximum cost field and there is charge for the request (skipped deflection)
- Not received items (loan and copy)
- Lost items (Received but missing status)
Manage off-system requests

Set up a borrower partner in OCLC Service Configuration
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
Congratulations! You completed WorldShare ILL Lending training!
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: September 20, 2023

Training questions? Contact OCLC Training training@oclc.org/