WorldShare® ILL Lending

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OCLC Member Education
In this course you will learn to...

- Update your ILL policies and configurations
- Answer and manage ILL requests as a Lender
- Generate statistics reports

Documentation & Support
Borrowers can see policies on workform
OCLC Policies Directory

Set Policies
- Deflections
- Copy
- Loan

Online Demo
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.
Automation for Lending libraries

OCLC Service Configuration

self-paced training

Documentation - Automated Request Lending

Documentation - Custom Holdings
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 <em>Can you Supply</em> queue</td>
</tr>
<tr>
<td>Other status other than Unavailable</td>
<td>Request goes to your <em>Can you Supply</em> 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
OCLC Article Exchange

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.

From the WSILL homepage

From the ILL request
IFM – Interlibrary Loan Fee Management

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

Borrowing Library

Borrowing Library

-$10 (Debit)

IFM

Lending Library

Lending Library

+$10 (Credit)
2. 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
- 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.

203764314: The dynamics of bureaucracy: a study of interpersonal relations in two Government agencies
3. STATISTICS REPORTS
Statistics reports – automatically sent

After you configure the email address(es) to receive the reports automatically every month.
The three topics...

1. Update your ILL policies and configurations

2. Answer and manage ILL requests as a Lender

3. Generate statistics reports
Support, Documentation & Tutorials

https://help.oclc.org

Welcome to OCLC Support
How can we help you?

Select a category
- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing

OCLC support regions

<table>
<thead>
<tr>
<th>Region</th>
<th>Location</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asia Pacific</td>
<td>OCLC Asia Pacific 6600 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614-764-8009</td>
</tr>
<tr>
<td>Australia and New Zealand</td>
<td>OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU</td>
<td>+61-3-9929-0800</td>
</tr>
<tr>
<td>United States</td>
<td>OCLC Support—United States 6550 Kilgour Place Dublin, Ohio 43017 US</td>
<td>+1-614-755-6682</td>
</tr>
</tbody>
</table>
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: January 24, 2024

Training questions? Contact OCLC Training training@oclc.org