Okay.

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Hi everyone, I'm Lucia Shelton. I'm part of the member education team at OCLC, and today I'm facilitating your learning on WorldShare ILL lending. Welcome to our session.

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For all of you, either new to WorldShare ILL or returning to the service during this session, you will see the functionalities in the services for a landing library. We are concentrating on three topics.

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First, you will discover why you should update your policies in the OCLC policies directory and update your configurations as a landing library. Second, I will guide you through the paths in how you can answer and manage ILL requests and solve the issues you might encounter with those requests.

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Then finally third, as we progress in the session, we will explore how you can generate reports to support your ILL activities. And of course where you can contact OCLC support or access more training materials in a way that.
meets your needs. We offered several short videos on topics related to WorldShare ILL. I’m adding that URL to the chat so you can copy that.

You can use the chat to send your questions as we go. You don't need to wait for me to stop, you have control of when you send your questions. And by the end of this session, you will have a better understanding of the ILL options for lending libraries.

So, let's start with topic number one, update OCLC policies directory and your library's configurations for you to enhance your experience with the service.

Why is it so important to set and update your libraries policies in the OCLC policies directory? Because borrowing libraries can see your policies when they are creating the ILL request, either briefly.

From the request form or clicking the eye icon next to your library's name, to access your OCLC policies directory page and see your ILL policies.

This way a borrowing library can see if they should or can add your library to the lender string or to their list of preferred lenders. Plus the policy directory is where you can stop unwanted ILL requests from arriving at your library.

Updating your ILL policy saves both your time and the borrowing library time with the request.
So let's go live to see some of the options in the policies directory. You need admin role on your account to be able to set up your policies and configurations. Even if you don't have this type of permission, it's important to learn where all those options are coming from. So give me a 2nd and I can share my browser here for you to see where you can find those options.

So this is the WorldShare ILL home page. If you're seeing this for the 1st time, here on the upper right side where you see your username, this arrow is where you can find the options for language interface.

Where you can change your password and log out from the system at the end of the day. Need help, General help takes you to the documentation page.

Contact support for you to support, for you to contact all CLC support if you need assistance. And community center is where you can communicate with other libraries using LL. You can.

Start discussions or participate in discussions, learn about events, new updates, and, everything else related to. On the left side panel is where you can manage your lending requests.
The middle section, you can search for active and close the requests using one of the index options and below quick links, you'll find the same options you can find on the left side panel.

And under other is where you can find the OCLC policies directory and other pieces of the service for you to easily access, those areas. So let's click the OCLC policies directory page.

Your policies directory opens on the profile tab, so an important area here in the profile tab is the OCLC supplier and days to respond. As a lender, it's important to communicate to requesting libraries that you are a supplier and the days to respond associated with the copy and loan request.

So under OCLC supplier, click in this Edit link.

If you mark as yes, you are supplying items. If you mark as NO, you are not supplying, you do not receive any requests. So if you are a lending library, you mark as yes, and then you need to define the days to respond. Days to respond is.

The amount of time a request will stay in your WorldShare ILL
Awaiting a response. After the days to respond period, the request will age to the next lender if you do not provide a response. The default is four day period for both loans and copies, but you are able to change that. Copies and

loans can have different time periods for days to respond. For example, you may process copies in two days.

And loans in four days. Then you click save, for the system to save your selections.

When you want to temporarily stop requests from coming to your library because your library will be closed for any reason, you can do that using the schedule tab. And the schedule tab under closures.

The add button is where you find the form to name your closure, select the type. These are the options, the start date using the calendar.

The end date, and under the OCLC supplier, you mark as NO. You can add any notes you find useful, then save it. And the system will temporarily pause requests from arriving at your library during this period.

And it displays as you can see here on this example.
And you can edit or delete this at any time. Operating hours is optional, but it helps when the other libraries want to communicate with your library and they can understand when your library is open.

You can use this add button on the upper right side to access the form. You can have multiple operating hours as you can see in my example. You can name it, select the start date, the end date.

The start time, end time, add any notes you find useful save it, and it displays here, it automatically applies the difference in time zones, so a

Library accessing your library in another country would see, the hours according to their time zone, so they can, they can see AM PM is US they would display in military

The time as well, so they would say this according.

To their time zone when they can contact your library. You can edit and delete this at any time as well. Then, as a lending library, you should set your ILL policies under the

Policies tab and under collections, collections is.
For the collections with the special rules, they either don't circulate or circulate with some special rules. You can add the collections here and then refer to the policies tab to create those policies.

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Under the policies tab, there are three options here, deflections, copies, and loans. I will talk briefly about deflections 1st.

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So deflection is optional, but it saves you a lot of time. Deflections allows the system to automatically say NO to requests on your behalf. It automatically moves the request to the next lender for the items you cannot provide.

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You can create deflection policies based on format, group, cost, and or age of items category. You can create multiple policies as needed, and you can combine the types of deflection options in one policy as well.

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12:39
So now let's set up a deflection policy as an example. Imagine a scenario where your library wants to stop ILL requests from items with the format as audio.

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Except to libraries part of an OCLC group called libraries very interested in sharing LVIS. OCLC groups are consortia or other specific groups profiled created by OCLC.
On behalf of those libraries. So let's see how this deflection policy is set up in OCLC policies directory under the policies tab for you to understand better how deflection works. So let me go back to.

my browser and to the policies tab. So let's create that deflection policy.

Click the add button. Let's give a name to our policy, No auto loans. The request type can be copy, loan or both. Let's select loans for our example. Deflection type, it can be enabled real time deflection real deflection deflect everything. Enable real time deflection except when I am the last in the lender string, so if your library is the last in the lender string, you will supply, you won't deflect and you can temporarily disable your deflection policy. So let's mark enable real time deflection.

This is for when you are deflecting based on costs. For example, you charge $5 for loan for physical materials and you don't want to receive requests under that amount, so you can enter Five.
15:12
Dollars here five, and then the system will prevent those requests under this amount to arrive at your library. The system automatically answers NO to those requests. Type of borrowers, you can also create a deflection.

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Based on, on libraries you can serve or you cannot supply to. So OCLC group because in our example, we are excluding libraries.

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Very interested in sharing the group. So we mark exclude, which means that we are providing to those libraries. So let's select that group.

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16:06
So we are excluding the group from the deflection. You can also use custom holdings groups. This is a group of your preferred libraries, the libraries that you.

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16:21
Have some priority for supplying items or group of libraries you don't want supply items or you cannot supply items at all, and you can either include to not provide or exclude to provide.

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16:38
Items, formats, you can either include or exclude, we're gonna include for our example anything that is audio, so we are not providing anything that's audio.

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So anything sound recording here, that's ok. And license terms, this is for those libraries subscribing to world share license manager, and they have.

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added their electronic license to the system, then they can refer here in deflection for those items that they do not supply in those licenses. So, they can either include or exclude. And material age you can also.

**Timestamp**
17:38
create a deflection based on new materials. You don't want any materials under one year circulating outside of your library or older items you can create

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17:52
Deflection based on that as well, and then you can add any notes you find useful. Let's add a note here, No

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audio loans except to LVIS OCLC Group then we save it and.

**Timestamp**
18:29
Our deflection policy is displaying here. You can see everything in green is deflecting and everything with the X mark in red we are excluding from the deflection policy.

**Timestamp**
18:45
So, for you to understand what happens when, a borrowing library tries to send a request based on those materials, I will log in as a borrowing library and I will create a request for.

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an item with one of those formats and you can see what happens to that request. Just give me a second. I need to login.

**Timestamp**
19:23
Okay, uh.
So I'm here as a borrowing library and I will search for an item.

Title, and combined with the author, and I will get the format to be audio book CD.

I will send this to our library So the request was sent.

And that request, is now here under awaiting response and let me see.

I can reload this and because I sent that request to one library only and the library had a deflection policy we just created that deflection policy and the request goes as unfilled here.

And if I scroll down and I go to the history, the request history, you'll see you can see in the request history here. No, the system automatically answered NO.

auto deflection, NO audio loans. So that's what happens when you create a deflection policy, the system automatically answers NO on your behalf. You do not receive that request in your library. And that's why it saves you a lot of time.
Creating deflection policies. So let's go back to, let's go back to.

our library and continue seeing the policies so deflection is optional.

But you should at least have your copy and loan policies. So for the copy and loan policies, they are only information. We are not preventing libraries from requesting those materials it's just for the library to have as reference. Anything that you want to prevent libraries to send to your library, you have to use deflection policies. For the copies, you can use the add button to fill out the form with the policy name.

The type of copy, then you have the options for the fees. If you charge anything, you can add that information and the currency.

You can also define the OCLC groups that you provide or do not provide so you would include those you provide and exclude those you do not provide to. The same thing with the libraries category.
If you do not supply to certain type of libraries, so you can exclude them, they would see that in your policies directory page. And the locations, this is where you can define in the system if you are.

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24:15
An international lender. So if you are not an international lender, you'd simply include your country here and when you add your country only, it means that you do not supply outside of your country.

**Timestamp**
24:32
And you can also, include or exclude the States or provinces you don't supply to. Items collections, here is where you can define your policies for the collections you you have added under the collection

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24:52
Tab, you can either include those you supply.

**Timestamp**
24:57
And or exclude those collections that do not circulate outside of your library. And the formats you can include or exclude the formats, including your supplying excluding, you are not supplying.

**Timestamp**
25:17
That's the difference between deflection and the copy and loan.

**Timestamp**
25:23
Any restrictions you have regarding to those items and any details how you handle those requests, how you accept the request, how you handle.
Those requests.

**Timestamp**
25:46
How you deliver those items and how you accept payments. OCLC IFM is when you're accepting payments through your OCLC account instead of receiving directly from the bank. So.

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26:06
The library would be receiving a debt in their account. You receive the respective credit on your account for those transactions. And this happens when you accept.

**Timestamp**
26:29
The request to mark the request as yes, both libraries must accept the IFM for this to work and the system takes care of placing those charges on both accounts. And you can add any notes.

**Timestamp**
26:46
And save it and it displays as you can see here, anything in green you are supplying and everything with the X marking red, you do not supply.

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27:01
You can have multiple, as you can see in this example, and you can edit or delete those policies at any time. For loans, is very similar. You have this add button.

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27:21
To name your police and complete the form with all the information, very similar to the copy, add a note you find useful save it to display as you can see here, everything in green is including you supply.
And everything in red you're not supplying.

So this is the difference between loan and copy and deflection. Let me show you, on the PowerPoint. In the case of deflection.

It's important, the important thing is that deflection is for the system to answer NO to request on your behalf according to your rules. So in deflection, when you choose, include.

It means that the system will deflect your library will not receive those requests and when you mark exclude it means that the system will not deflect your library will receive those requests. When you.

Choose the correct option for deflections. You avoid receiving unwanted request and or not receiving any requests at all. So you have this on a copy of the presentation for you to understand the difference between deflection policies and the copies

And Loans requests.

Do you have any questions? And by the way, you offer short videos for the policies directory and how to set up deflection policies there are different options for you
To create your deflection policies.

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29:44
You can use the chat if you have any questions. Now let's talk about automation as a lending library, how you can set up rules for the system to automatically.

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Check your configuration and send to your library, only those requests that you are ready to answer. This is done in OCLC service configuration that you can access from your home page here just below policies directory.

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Service configuration is where you can customize your experience with the service. I put links to the documentation pages on the copy of the presentation that you'll be, and you'll be able to access the copy of the presentation along with the recording after the session.

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And I also cover this area of the service configuration on the intro to WorldShare ILL training session. So the automation as a lending library is done here under WorldShare ILL on the left side panel.

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31:07
Then automated request manager, you click the lending tab and when you create automations, the system will look into your deflection policies that you have created.

**Timestamp**
31:27
In the policies directory

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Your supplier status that you have defined in your profile tab in the policy directory as well. The system will look into your collections in the WorldCat knowledge base, your electronic holdings there. If you are part of any group.

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Your group affiliations or those OCLC groups, your time to respond and real time availability which requires additional configuration.

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32:05
So you can add, you can use this add new button here to add, enable, automations, give a name to automation. You can have multiple and if you have multiple, you have to add the priority, which, which the lowest number is.

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The top priority

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And then you can select the, the matches if you have your priority groups, you can add those, you can select from your groups that you have created, your custom holdings groups, the types of formats, and the type of requests, and then save it.

**Timestamp**
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And the system takes care of that for you. So something to help you, facilitate your processes as a landing library.

**Timestamp**
33:06
And for real time availability, as I mentioned, it requires additional configuration you need to to contact OCLC to finish completing.

**Timestamp**
33:21
The real time availability and the system will look into your catalog to check, we're using Z39 50, we look into your catalog to check if the item is unavailable, is, e.g., checked out.

**Timestamp**
33:41
And then the system will automatically answer NO on your behalf. If the item is available or not found, then the request goes to your canal supply queue, and if the system does not find anything that tells that the item.

**Timestamp**
34:01
Is unavailable, then the request goes to your supply queue as well.

**Timestamp**
34:07
And if the, system answers NO on your behalf, this goes to your report, your resource sharing lender reasons for NO report, with the.

**Timestamp**
34:22
Reason being the system checked availability. So you can see this on your reports as well. Now let's talk about article exchange. OCLC article Exchange is part of what.

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34:42
And it's one of the options for you as a lending library.

**Timestamp**
34:50
To answer to copy requests and place request documents, then library patrons can retrieve those documents obtained for, for them through interlibrary loan. This is optional.

**Timestamp**
35:06
Article Exchange accepts large files including high resolution documents, new library staff can upload up to a thousand files per day per authorization. You can use article Exchange from the link on your.
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35:26
WorldShare LL homepage under other or directly from the request, article Exchange creates a unique URL, and, passwords to protect the file.

Timestamp
35:45
And the file expires automatically after 30 days or after viewed five times it does not count staff preview. Any questions?

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36:08
You can use the chat if you have any questions, I can see your questions as you send them. So now let's move to topic number two, answer, and manage requests as a lender and see how everything works in the system.

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36:28
I will show you the options you have to answer yes No or conditional to either loan or copy requests. You will learn how you can manage those requests.

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36:47
And of course there are situations when requests don't work as expected. You will see how you can easily resolve those issues. So let me share my browser again, and you can see some examples.

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37:09
Let's start with answering request, requested as a lender. So you can either open your can you supply queue from the quick links or from the left side panel under landing request and you can find your.

Timestamp
37:29
Can you supply queue here and you have your new copies and new loans?
In the under the quick links as well. So let's start with responding yes to loans. So let's open the loans. So under loans you can one thing that I would like to.

One thing I would like to point out here when you open your supply queue either from the quick links or from, the left side panel is here that.

This column called time to respond. You can see that they are in order of the requests that are expiring.

Earlier, can you see what I'm sharing? Yes? Okay, so you can see the the order.

As they are expiring, you don't need to follow the order, but this is to warn you, e.g., this 1st request is expiring in few hours, so you if you don't take an action, this request will disappear from your Can you supply queue and move to the next.

Lender and the lender string. So for you to, to.

Have an idea of the priority of the request. So let's answer yes to a loan request. Let's work with this one here. So before you answer yes to a request because

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after you answered yes, there's NO undo button. So take a look at few things here like e.g. here on the right, the borrower information, the maximum cost if they accept IFM.

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The need before a date, so if you can supply that. If you have added, configured for your online catalog to display in the service, you find this search my library's online catalog and you can search your catalog to see if the item is available.

**Timestamp**
40:20
And if the item is available, you can add your local ID here, then save it and then go, you can either print this request, you can.

**Timestamp**
40:36
Print this request, you can use the print now and print that request or you can send it to your print queue, to print it later because you are working several at a time.

**Timestamp**
40:55
Then you can go to the shelf location and see if the item is ready to be supplied or if there any special rules or the item is not in conditions to be shipped. And after you define that the

**Timestamp**
41:15
Item is ok to be supplied, then you can select this.

**Timestamp**
41:21
Print shipping labels, print the book straps and stickers if you use this option, and then as optional, you can apply constant data if you have different type different from the default.

**Timestamp**
41:41
The default was already created for your library, but if you want to apply a different one, you can select one and then you can mark yes, that request moved to.
Shipped is here shipped in transit is NO longer in your can you supply and you can find the shipping label here under the print queue on the left side panel. Under the shipping label, that's where you can find your requests too if you.

You need to print your requests, you can select.

Multiple at times, then print those requests and the shipping label, you can print multiple at a time as well.

The paper size comes from the configuration and you can I can see your question here. Just give me a second I will answer and you can include anything that you want in the label.

You can define the start position. I can change this. E.g., I'm reusing paper, and then you can print the shipping label and ship those items to your library.

So there are a couple of questions here. They used to respond to question, my profile is set for four days. The request is I received typically say three days if I receive the request on Monday, Wednesday, and 5.5 days if I receive the request Thursday Friday.

What's going on with this? I have just to
clarify that days to respond does not include weekends and it does not include US national holidays.

**Timestamp**
43:57
Your profile is set up for four days. If you take longer to ship the item, you should change that day to respond.

**Timestamp**
44:12
For a longer period, so days to respond if you mark eight days it doesn't mean that it takes eight days for you to supply the item. It's just that the item will stay at your library for eight days, so you have to select those days based on how long it takes for you to process.

**Timestamp**
44:32
That request and ship that item. So, the, so the request doesn't disappear from your.

**Timestamp**
44:41
From your can you supply queue before you process your request before you answer that yes. So if you are receiving Monday, Tuesday, Wednesday.

**Timestamp**
45:07
You what's what's happening to your request? Because as I mentioned, it doesn't count weekends or or US or holidays, so if it's it's set for four days.

**Timestamp**
45:30
Is showing three days depends on when you're looking at your can you supply queue. You need to give me some examples though of what happened to your request so I can understand it and I can try to help you, but just the days to respond to work this way. So it starts counting.

**Timestamp**
45:50
E.g., if you mark four days.

**Timestamp**
45:53

It doesn't count, it counts 24 h for that day. So if the request arrives at ten A 10:00 A.M. expires at midnight for that day. So if you look in your can you supply the next day, you'll be counting three days instead of four.

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46:13

Does that make it clear? Does it clarify? It counts, it's it's counting the hours of the day until midnight and it doesn't count.

**Timestamp**
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Weekends and the US holidays if there's any holiday in the middle. The other question, if I didn't respond to your question, you can rephrase your question, please. The local ID, location and call number.

**Timestamp**
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Cannot be fulfilled automatically by WorldShare ILL have to copy it. It depends on your your libraries configuration. It depends for libraries, e.g., that are working with resource sharing for groups. They.

**Timestamp**
47:09

Have a special configuration, so it might be automatically fulfilled.

**Timestamp**
47:17

InWorldShare ILL it doesn't. It does in other resource sharing service but not in WorldShare ILL t ok if you have

**Timestamp**
47:37
Any other questions regarding to days to respond you can place in the chat or if I didn't respond to your question?

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47:48
Now let's take a look at how to respond yes to copies. So let's go back to the can you supply queue and you have copies, you have a few.

Timestamp
48:04
Requests here. So let's open this request. You can either click the ID number or the title, and for this example, I want to supply using article exchange. So I have checked my online catalog, I have.

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48:24
That item available. I have prepared the PDF copy of, of the article.

Timestamp
48:31
in that journal, and now I will supply using article exchange. So I can click in OCLC article exchange, and I can.

Timestamp
48:47
Let me go here, go to my file. This is the file. I can open, drop the file, and you see that article Exchange automatically creates this unique URL and password to

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49:07
protect the document, I can preview that.

Timestamp
49:10
So this is the item. If it's not the item, if I attach the incorrect one, I can cancel this and try again. Drop the file.
Preview, this is the correct one and because this is copy, I'm not shipping anything, I don't need to print anything, then I can answer yes. And when I answer yes, then the library receives that.

Request in transit with that information from article exchange to supply that information to their patron. That's how you answer yes to copies.

You can also answer NO to either loan or copy requests, so let's use a loan request and this map here, e.g., your library did not create.

Deflection policies based on format, and I received this request and I have to manually answer NO to this request. I need to give a reason to this answer.

For answering NO, you don't need to give a reason, but it's useful because it displays on the report, the usage report for both libraries and the other library can understand why you are answering NO, and you also can manage

Those requests that you're answering NO for what reason

And this one I'm gonna mark as non circulating, and that's why creating deflection policies can save you, can save you time because you don't need to be manually answering NO to materials that you do not supply.
You can also respond conditional. Conditional means that eh you cannot supply everything or because of any reason, but you can give a chance to the other library to.

Accept or not your conditions and the other library has four days to.

Take any action. So, so the request will pause for four days until the other library takes action and then it starts to reset your days to respond for that request.

In four days. And if the other library does not accept or does not take action, in four days, the request then moves automatically to the next lender in the lender string, so you do not do have to.

take care of that request. So let's see here one example, this music the classic period.

The library's asking for the entire material. You can only supply part of the material, so instead of answering NO, I can use one of the conditional options. You have several here, and I can use this conditional cannot lend copy

This request moves to conditional status. You don't see the request here. The request is with the library. If the library accepts the conditions, they have four days to take action.
And, if they, do not accept the conditions, then it moves automatically to the next lender in the lender string. You don't it see here, it's with the other library.

So you have to wait if the library accepts, it will be here under conditions accepted. You can also answer yes or NO in batch.

So here, under can you supply you see this green arrow, which means that you can process in batch, you can answer yes or NO to multiple items.

So let's see an example of, answering yes to several. You click that yes link, and then you can use the plus sign to select those that you are.

Answering yes, so let's see this, this other one, this other one, this another one. If you add anything here.

Here that you are accidentally.

Add anything that you don't want to, batch answer yes, you can easily remove using the X radio button, so it's eliminated. Then you can apply constant data. It has to be the same for all of them.
Oh, we can use leave the default and you can mark to print the shipping labels when click the yes button. Now you see that all four.

**Timestamp**
55:27
Changed the status at the same time and all four were added to your print queue so you can find your shipping labels under your print queue to print those.

**Timestamp**
55:42
Shipping labels. So you don't need to do that, one by one. You can work on those requests in multiple batch. You can also answer NO.

**Timestamp**
55:58
So go to can you supply here. You can use the NO link and answer NO to multiple as well. So, let's mark here this one, this other one.

**Timestamp**
56:22
And, I can mark this one e.g. and let's add this as well. So e.g. this was a mistake I can eliminate this one.

**Timestamp**
56:41
And, the trick here that has to be the same for all of them. So if you have, e.g., I had this other one here added, but it's a different type of

**Timestamp**
57:01
Reason. So I have to eliminate this one and then answer NO individually. So I will answer these NO circulating is the same reason for all of three

**Timestamp**
57:19
And then when I click the NO button so all the three, they moved out from my Can you supply queue and they moved automatically to the next lender in the lender string. I don't see the
Requests here any longer. So the options for you to work with multiple requests at a time you can manage the requests you have available here, even though you cannot take actions in some of them, but you can.

See the status moving according to the actions that the borrowing library is taking on those requests. So e.g., if a library requests renewal, you can see that renewal requested that you can take action.

On those requests. So e.g., let's open one of those requests. The library is requesting to keep the item a little longer and you have three options here. You can accept the renewal.

And the renewal moves to the new date, you can deny the renewal and the request, it stays with the original due date, the item must be returned in the original due date or you can recall the item, which means that.

The library has to return that item immediately.
So let's accept this. To accept this renewal you have to complete the field with the desired due date this is the date, and then you accept the renew.

**Timestamp**
59:30
So.

**Timestamp**
59:33
And, that changed it to renewal accepted and the other library can see that they have, another due date for that item. If you answer NO, they have to return the item.

**Timestamp**
59:59
You had the option to send the conditionals to the library, and if the library accepts your conditions, you see here conditions accepted and the condition was additional information needed.

**Timestamp**
1:00:18
The library sent the request under the journal name without the information about the article or the pages they needed from that journal. You asked for additional information, the library accepted the conditions and sent that information.

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And now you can supply that item. I can click the article exchange link.

**Timestamp**
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And supply that drop file, can preview, this is the item, this is the article, and then I save when I save this request here on the upper right.

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Side, then the other library now can see that request with the article exchange information and that they can supply this information, they can forward this information to the patron.
So this is accepted conditions. Another thing you can do here to take action is the items that were returned to your library returned in transit. You need to complete.

To those requests for those items that you have received. So.

E.g., you can open those requests, you can do it individually, and you can complete those requests, or you can do it in batch. So under returned you also.

See this green arrow icon and you can batch complete returned item as well. You can click on the link, batch complete.

Yeah, then you can complete items and those items are NO longer, are NO longer pending of action. So anything that you see here, with the question mark are pending.

Of actions, so you needed to take action on those requests. You can batch complete those requests that are pending of actions if you have received those items. Another status that you can take action.

Action here is under overdue. Overdue means that the other library.
Has not returned the item on the due date. The due date has passed. That item is still with the other library, and what you can do is open that request and you can recall.

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Not another one. You can recall that item and the library has to return that immediately. And another thing you can do is to use this email button located on the.

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upper right side and email the other library to check with them what's going on with that request, with that item. All the information about the request goes on the body of the message, so they have this information as reference and they can check on that

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Better to respond to your library to see what's going on with that request, why they haven't returned that yet.

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And another thing that might happen, this is for answering and managing requests, you have the situations where you have some issues to s resolve with the request and.

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One of the issues is, e.g., you ship a material to the library, you either ship to the wrong material or you shipped an item that your library needs for an exhibit or any other purpose, and you needed that item.

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As soon as possible. You can recall items at any time, at any stage from doing transit to being received by the other library. So let's go to.

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1:05:22
Shipped in transit and find one item that you have at.

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Sent to the other library and it's the wrong item, so you can use the recall item. When you recall that item, your request goes under the recalled.

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Status, and you can reopen that request from here. You can use that email button to communicate with the other library and it will stay here until.

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This item is returned to your library and then you can complete this request, you can close this request. So that's how you can solve this type of issue. Another issue is, e.g., the library turns an item and the item.

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Is either damaged or never made it to your library, so you go under returned in transit, you can see here under the returns date column on the right when that item was shipped to your library.

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So if a lot of days have passed and you haven't received that item yet or you have received the item missing pages or all damaged.

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You can open that request and you can mark this as not returned. Your request goes on the returned button.

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You can also use that email button to communicate with the other library. The other library sees that request on the missing, status and then the two libraries have to work together to see how.
To define how that item can be replaced. So until that is solved the request you you stay under the returned but missing when you solve that situation, then you can complete the request. It's very important to complete.

To the request, so, you don't have those requests pending and the other library also can see that the request was closed or was completed. Another.

Issue you might find, you might encounter with your request, is when the borrowing library marks the request as not received. You, you shipped the item or you.

Respond to a copy request but you forgot to send the file. So the request will be here under not received. This is an example, e.g., here, let me open. This is an example of a physical item.

For the physical item, you can communicate with each other.

And you can check with your courier, to see, what happened to that shipment. And then you, the two of you, the two libraries can decide how you should proceed.

If you just complete this request and the library can restart the request with other group of libraries or if, they can wait a little bit because the item is underway.
1:09:27
So this is for the physical item. In the case of for the copy request, if you forgot to attach that file either using article exchange or you forgot to email that file.

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And any other options besides of article exchange. So you then you can provide that item in article exchange, you can just click the article exchange, attach that file here.

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Yeah Drop the file, you can preview and save it, and the other library receives that material and, then.

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The other library will mark as received and the request will NO longer be on the not received the status. So it's up to the other library to update that request. And another issue is.

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When the other library.

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Marks the request as lost. They, the patron lost the item or they lost the item somewhat and they marked as lost. So that request to be here on the received but missing.

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And it's very it's very similar to the other situation when you receive the item damaged or you didn't receive the item. So the both libraries have to work together, use, you can start using the email button.

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To see, how you're gonna solve the the replacement for that item. And after that issue is solved, then you can complete the request. That's how you can solve those issues with your request. Do you have any questions

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so far? You can type your questions. And another option you have here on the left side panel.

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It's called, Off System Requests. Off system are requests that you are doing with other libraries outside of WorldShare ILL and you can bring those requests to the system to be part of.

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your reports and also you have the options to supply copy requests using article Exchange directly from WorldShare ILL. So you need to create that request first, so you go under create a lending request here under off system.

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and, let's enter the title for our request, so I click the next.

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Field here and this magnifying glass icon that you see here next to the field, if I click that, it takes me to the search results and then I can select the record.

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And I can click the title, apply data to request, I click this button, and now I have all the information filled out on the form, so I don't need to manually.

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fill those, all that information. So this type of request is loan request. I can enter the request reference. It can be a number I have with the other library, then the partner name.
This is something you have to configure in OCLC service configuration under.

Address book, add partner, then you can complete your partner information here, save it, and once you save this in the service configuration under address book, then you.

Can select your partner from the list, all the information is coming from the configuration. The need before date is a required field. So let's select the due date.

July. So I have all the information, as optional I can apply constant data or I can leave it as a default, this is default or I can apply if I have created one specific for off system.

I can apply that as well, and then I can click the create button under actions and my off system request is created and it's here under off system.

Lending, this is the request, and then I can manually change the status of this request. If I've added this request for copy, let me see if I have one for copy here.

This is for copy request. You see you can supply copy requests using article exchange. And when you article Exchange creates the unique URL and password, then you can email that information to your partner.
And then all the information about the request goes on the body of the message, and you can add that information for the article exchange. So that's how you can add the.

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Off system.

**Timestamp**  
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Okay let's talk about our 3rd and last topic.

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Statistics reports, I will go live to show you how you can generate reports to support your LL activities as a lending library. You have some options there, so from the WorldShare ILL

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Home page under OCLC usage statistic link here in the middle section, you need your nine digit authorization and password. If you don't have that, you can contact support OCLC support.

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To retrieve that information.

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1:17:29  
There are several options in reports that you can find here, the resource sharing lender reasons for NO report. So you see you have all the information about those requests and the.

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Reason why you answered NO to those requests. That's why it's important to define the reason so you can manage those and understand why you are answering NO. If you have a lot of non circulating materials, so you should create deflection
Policies for those formats.

So you don't have to manually answer NO to those requests. Another option you have here is the lender resource sharing status. Let me select.

This is monthly basis. So here, all the information about the request, these are more complete type of requests it includes the costs, so you can manage if you are e.g. accepting a transaction using

IFM, you can manage those requests here and another one is lender activity overview report. This is annual it can be six months to a year. You can update here the number of months and you have all this information. All these reports can, you can export

To an Excel format, e.g., or you can email to yourself or you can add, email addresses here, separating by semi colon
You can have several email addresses. If you check the Send monthly box, then the system will automatically send you those reports on a monthly basis. You have to do this to

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Each individual report that you want to receive automatically, then you define the format you want to receive that in an Excel file or HTML, the style as a link or attachment. When you click this save, then the system will automatically

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Send you to the email addresses. You don't need to come here to the usage statistics page to manually pull those reports.

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So it's something that can save you some time. Any questions on that?

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Okay, here an example of an email message with

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That you would receive after you configure that in the system.

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So.

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Today, you have learned about updating your policies such as deflection, loans and copies, and how to set automation as a lender. You saw how you can answer and manage ILL requests and solve some issues.
Okay.

Then, we covered how you can set to automatically receive your reports. So, next step in the days and weeks ahead as you start using the service.

Is to access our support portal as reference for ILL activities. You can find more training materials and contact support at help.oclc.org. Let me briefly show you that.

So this is our support portal, you would click on resource sharing, then WorldShare Interlibrary Loan, and everything is divided into categories.

For you to easily find, and this is also where you can find more training materials, the videos and more training materials. Or you can type in the topic here

You want, e.g., and get to those pages directly from, from your search, and you can find.

The shorter videos I mentioned before, there is a question here, so the lending reports are for

What my library lends and the borrowing reports are for what I borrow, that's correct. So.
If you are looking for the reports as a lending library, you pull as lender. If you're looking as a borrowing library, you pull as borrower. So you see the title of the the reports. And as I mentioned, you can receive all those reports automatically on the email addresses, you just do it once.

Open each one, email link on the top and add the information, send monthly, select the options, you have this on the copy of the presentation as well, and then you receive all those reports automatically on a monthly basis.

Those months that you don't have any activity, you won't receive any reports, ok?

Only for those months that you have activities. Do you have any additional questions? We are reaching the end of our session.

Okay.

If you don't have any additional questions, I would like to thank you for participating. I hope I have helped you today. When you leave the session, a page will display on your screen, and if you click continue it will take you to the evaluation form. The information related to this.

Session is on this slide here. Let me show. It's on this slide. We value your feedback, helping us improve our training materials and training sessions. As I mentioned before.
You will receive a follow up email message with the link to the recording, where you can find also the copy of the presentation and, with all the links for the.

Documentation pages and also the learner’s guide with the link to the documentation page for the topics we have discussed here today for you to use as reference and find further information, ok?

So, for any training questions, please contact us at training@oclc.org. Thanks again and enjoy the rest of your day.