WorldShare® ILL Lending

Lucia Shelton
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
1. UPDATE YOUR ILL POLICIES AND CONFIGURATIONS
Why do I need to update my ILL policies?
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 definition

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

[Deflections- Documentation](#)
Automation for Lending libraries

OCLC Service Configuration

Resources
- 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

Select a file to drop:

Choose File  No file chosen

Drop file

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

<table>
<thead>
<tr>
<th>Lending:</th>
<th>Other:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can You Supply? (1)</td>
<td>OCLC Policies Directory</td>
</tr>
<tr>
<td>New - Loans (1)</td>
<td>OCLC Service</td>
</tr>
<tr>
<td>Supplied</td>
<td>Configuration</td>
</tr>
<tr>
<td>Overdue (2)</td>
<td>OCLC Usage Statistics</td>
</tr>
<tr>
<td>Returned</td>
<td>OCLC Article Exchange</td>
</tr>
<tr>
<td>Returned/In Transit (5)</td>
<td>Resource Sharing News</td>
</tr>
<tr>
<td>Returned/Complete? (3)</td>
<td>WS ILL Training Resources</td>
</tr>
<tr>
<td></td>
<td>OCLC Community Center</td>
</tr>
</tbody>
</table>

### From the ILL request

```
Request Details (Request ID 179925341)

Source: WSILL
Status: Received
Lenders: *LSTB*

URL Type: Article Exchange

URL: http://oclc.mQ1JR1

Password: YTHQPha

Journal: Journal of Comparative Politics
Publisher: [S.l.]: University of Ljubljana, 2010-1338-1385
ISSN: 695989035
OCLC: 695989035
```
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.

Documentation
3. STATISTICS REPORTS
Reports for Lenders documentation
Statistics reports – monthly email

1- Enter email address(es), separated by semi colon
2- Check Send Monthly box
3- Select Format and Style
4- Save it
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
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: June 20, 2024

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