**WorldShare ILL Lending Training-December 4, 2024**

**Transcript**

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0:00

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

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For all of you, either new to world share ILL or return to the service during this session, you will learn how to better use the functionalities in the service as a lender. We are concentrating on three topics.

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1st, you will discover why and how you should update your policies in OCLC policies directory and update your configurations as a lender. 2nd, I will guide you through the steps in how you can.

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Answer and manage ILL requests and solve issues you might encounter with those requests, including how you can create and manage off system ILL requests those outside of world share ILM.

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Then finally 3rd, as we progress in this session, we will explore how you can generate reports to support your ILL activities. And of course, where you can contact the OCLC support or access more training materials.

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In a way that meets your needs. We offer several short tutorial videos on topics related to world Share ILL. Let me.

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Put the link here in the chat so you can access that. You can use the chat to send your questions related to the topics discussed in each section. You can enter your question as I go through that part and I will pause at the.

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The End of that section to answer your questions, ok? By the end of this session, you will have learned the best practices for a lender in World share ILL.

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Let's start with topic number one, update OCLC policies directory and your libraries configurations for you to enhance your experience with the service. Why is it so important to set or update your libraries policies in the.

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The Policies directory.

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Because borrowing libraries can see your policies when they are creating their ILL requests either briefly from the request form or clicking the icon next to your library's name.

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To access your OCLC policies directories page and see your ILL policies. Also, when libraries are configuring their custom holdings, their pre selected lenders.

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This way a borrowing library can see if they should or can add your library to their custom holdings groups and have the lender string populated either manually applying custom holdings or through automation or.

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Manually add new library to the lender string.

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Plus the policies directory is where you can stop unwanted ILL requests from arriving at your library. Updating your ILL policies saves both your time and the borrowing time with the request. So let's go live to see.

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This is some of the options in the policies directory.

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I will log in to my instance So this is the.

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World share ILL interface and here on the left side panel is where you can manage your requests, you can search for requests active or closed requests using one of the available indexes.

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And quick links is where you can find similar options as you find on the left side panel, and just below on the others is where you can find the other pieces are part of the service. And this is the easiest way to access OCLC policies directory.

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Your policies directory page opens on the profile tab where you can find a brief information about your library. As a lander, it's important to communicate to requesting libraries that you are a supplier.

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So, here, so here where you see OCLC supplier, and this line here where you see this.

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Edit button, you click that, then you need, you need to inform here if you are a supplier or not. So if your library is a landing library.

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You mark this as yes. If you give this as NO, you won't receive any ILL requests, so you have to mark as yes. And then you need to inform the days to respond associated with copies and loans.

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The default is of four day period for both loans and copies, but you can change that. Copies and loans can have different time periods for days to respond. E.g., you may, process copy requests.

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Within two days and long request within four days. Days to respond is the amount of time a request will stay in your world share Illo instance awaiting a response. It doesn't mean that you take that long, long to.

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To respond to our request. After the days to respond the period, the request will age to the next lender if you do not provide a response.

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So then you have to click save to retrieve this information to save your selections. Days to respondent does not count weekends and US national holidays. And if you select one day, it means that the request.

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Expires by midnight on that day, ok? And it's safe and it this place as you can see here in this example and you can edit this at any time. Now, when you want to temporarily pause requests from coming to your library.

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Because your library will be closed for any reason, you can do that using the schedule tab.

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And closures. You can click this add button here on the right and complete the form, give a name to your closure, select the type. These are the options.

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The start date when you click here the calendar opens for you to select the date and the end date or you can type in in the format a month, day, and year. And when you mark OCLC supplier as NO, then the system.

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We'll temporarily pause requests from arriving at your library during this period. You can add any notes you find useful, then you save it. And you can see it shows in your policy directory as you can see here.

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And you can edit or delete this at any time, ok? And for the copy requests, the system will look at not only.

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your days to respond, but your actual processing hours.

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To find the lender that can respond to the fastest for the request to move faster and the lender string. Then as a lender, you should set your ILL policies under.

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Collections tab if you have special collections with different rules, then you can define your collections here. You can use this add button on the right.

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Provided the name, inform if it circulates or not, added the URL, any notes you find useful, save it, and after you add your special collections here, then you needed to define the policies for those collections. And.

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Under the policies tab, you'll find the three options here, deflections, copies, and loans. Deflection.

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Is optional, but saves you a lot of time, so let me show you more details about deflections.

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So deflection allows the system to automatically respond and know to request on your behalf, it automatically moves the request to the next lender for the items you cannot provide for any reason.

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You can, you can create deflection policies based on format, group, cost, age, and or age of items category, materials.

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There are new or old, you can create multiple policies as needed and you can combine the types as well. So now let's see an example of a deflection policy, how you can set up that.

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So imagine a scenario where your library wants to stop ILL requests for items with the format as audio except two libraries part of an OCLC group called libraries very interested in sharing.

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OCLC groups are consortia or the specific groups profiled created by OCLC on behalf of those libraries. So let's see how this deflection policy set is set up in OCLC policies directory under the policies tab.

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You to have an idea how deflections are set up.

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So we are here back to the policies directory and under the policies tab, deflections, let, let me delete this one so you can recreate this policy.

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And now under deflections like you click this add button on the right. So let's give the name for our police, NO audio, oh.

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The request type can be copied, loan or both for this one. Let's select loan Deflection type.

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Enable real time deflection. Enable real time deflection except when I'm less in the string then the system will allow the request to go through or you can temporarily disable this deflection. For this example, let's select the.

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Enable real time deflection.

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This is when you want to create a deflection based on costs. So e.g., if you don't want to receive requests under certain amount, you can enter the amount here and the system will prevent any.

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Requests under that amount to arrive at your library. For this, this example is not based on costs so we leave this in blank. So now under borrowers OCLC group, we need to exclude which means when you are including.

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In a deflection, the system will deflect.

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You will not receive that request when you are excluding, you are providing to those group of libraries. So because in this example, we are providing to this group, then you have to exclude the group.

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So these are the libraries. Very interested in sharing, so I marked these, but we are providing to those libraries. You can also use custom holdings groups instead of also group. If you have created custom holdings for your.

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Preferred or priority group of libraries to provide to. So you would exclude here or you can include a group of libraries that you don't or you plan not to provide for any reason.

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So exclude, provide, include, do not provide you I mark nothing because I'm not doing anything with customer holdings. Items now we need to select the formats.

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16:24

Include anything that we are not providing, so we're not providing anything that's related to audio, I can mark anything here that sound recording.

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16:48

Okay, so include, we are not providing those formats, and license terms, this is for libraries using world share license manager and have added the licenses there, then now.

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17:06

Is setting deflection policy based on those licenses. We are not doing this for this example. So if you are providing, you exclude the license and if if you are not provided you include.

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Material H, as I mentioned before, if you have new materials that cannot circulate, then you can select and then other materials.

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17:42

You're not doing this for this example and ask notes, I see your question there just give me a 2nd. Note anything you find useful? No out just.

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Except to LVIS OCLC group and then.

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18:14

You save it and now you can see the deflection policy here, anything that you see with the green check mark is included and will deflect anything that you see with the.

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18:31

Red X mark is excluded you are providing. So there is a question here. Can you deflect the titles less than six months old? I see the shortest period is one year.

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Anything that's under one year would be in this option. So if you have a material that's one month, two months or six months old, this material would be in this category of one year, ok?

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So you select one year for any material that's like one year or less. Did I answer your question? If.

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You you long any anything young younger than 07:12 months this is something that I will I'll take note of your questions to see if something that can implemented for your library.

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For for that case, ok? And you will receive a more complete answer to your question.

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So any questions regarding to deflections, how you build deflections, any other questions?

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The important thing when you are setting up deflection policies is to remember that deflection is for the system to respond NO to request.

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On your behalf according to your rules. When you choose.

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21:14

When you choose include, it means that the system will deflect your library will not receive those requests when you choose exclude, it means that the system will not deflect your library.

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21:34

We'll receive those requests.

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21:38

When you choose the correct option, you avoid receiving unwanted requests and you avoid not receiving any requests at all. And the copy of the presentation there's the link to the documentation page where you can find a short.

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21:58

Videos in how you can set up deflections. You can set up deflections for an entire collection, you can.

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22:08

Your electronic collections, you can define deflections as I showed here in the example and you can define deflections but for individual items in serious.

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22:24

Collections, ok? So you find those shorter videos to use as reference have any other questions you can use the chat.

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22:49

So this is for deflection, as I said is optional, but saves you a lot of time. You don't need to manually answer NO to request for items you don't provide or libraries you don't supply items to.

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23:06

But you should have at least the copies and policies defined here. For copies, e.g., you click this add button on the right, give a name to your policy, choose the name that is easily.

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23:24

Identifiable for your staff and your library and other libraries as well. You can select the copy type. Then if you charge anything, you can add those fields here, click on this plus sign.

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How you charge and the amount. You can have multiple options here, then you can select the currency. And if you have any type of.

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24:02

Reciprocal type of a group of libraries. Borrowers, the OCLC groups, if you, you are part of one of those groups or any profiled consortia groups here, you can either include if you supply to those.

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24:21

Libraries or exclude if you do not supply, so you can select the groups here. Any means that you supply to any library, libraries categories include those type of libraries that you supply.

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24:37

To or exclude those you do not supply to. Locations, any supply to any type of libraries. Locations.

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24:53

You can include the areas where you supply to or exclude those areas you do not supply. And this is the area where you can inform the system if you are an international lender. So when you select your country.

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25:13

When you mark your country, you are telling the system that you supply only within your country. You are not an international lender and you can define the states of provinces.

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As well, those you do not supply or those you were supplying only any for any locations. Collections.

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25:46

When you define your collections under the collections tab, then now you can define the policies for those collections. Include, means that you provide, then you can select the collections that you provide and exclude.

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26:03

Those co collections that do not circulate outside of your library formats include those formats that you supply or exclude those that you do not supply. So e.g., if you.

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26:23

Supplier everything but two types of formats you can simply exclude is easier to just exclude those two then mark anything else that you supply.

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26:38

Any for anything, if you have any restrictions, and then the details how you accept requests, so you can click the plus sign.

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26:55

And define the type and if there is any fee, how you handle the request, you click the plus sign, you can have multiple for any of the options. You can have multiple.

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27:14

Fields, the type, and if there is any fee related to that, delivery method, how you deliver, any fee, the.

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27:32

And you can specify your carrier. Billing methods, how you accept the payments. OCLC IFM is when you accept the payments to go through your OCLC account.

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27:52

And you can manage that through your monthly invoice and your reports.

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And both libraries must accept IFM for the system to use this option of payment. And you can add any notes to find it useful, save it, and you can see here an example of your policies, anything with the green checkmark.

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28:18

Back.

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28:19

Yeah, you provide anything with the red X mark you do not provide and you can edit or delete these at any time. You can have multiple as you see here in my example and the libraries can access your page to see your rules when they are.

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28:39

Are adding libraries to the lenderstring or.

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28:44

Their custom holdings groups, the pre selected libraries. The same thing with the loans, you click this add button on the right, give a name to their polished.

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29:00

The maximum number of items you allow in the long period in days, weeks and months, renewal maximum, in days and weeks and months.

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29:17

If you charge, you can add the fees here and how you charge, and very similar to copies, OCLC groups include or exclude.

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29:33

Any for any type of OCLC groups, library categories included to provide or exclude to not provide and locations.

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29:49

Then you have to specify if your internet, if you are not an international lender, you can specify for loans as as well by selecting your country, ok? When you mark your country, you're not supplying.

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**Timestamp**

30:08

To, to other countries outside of your place. Collections, if you have added the collections there, then you can include if you provide or exclude if you do not provide.

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30:24

The format the same thing, very similar to the copies. Exclude if you do not supply, if you have any restrictions.

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30:42

And how you accept the request is the same thing as the copies, handling, how you handle those requests, the fees, how you deliver.

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31:02

And how you accept payments, add the notes and save it and you can see here the example of policies and you can edit or delete this at any time.

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Green check Mark.

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31:23

You provide X red mark, you do not provide. Okay, any questions related to the policies directory page?

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So now let's talk about automation as a.

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32:03

Lending library.

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32:04

How can you set up rules for the system to automatically check your configuration and send your library only those requests that you are ready to answer? This is done in OCLC service configuration under automated request manager.

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32:24

Let's look at that and you can see that the copy of the presentation you have the links to the self self paced the training and the documentation pages.

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32:36

For you to use as reference. So let's go back live so here the world share interface in the homepage.

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32:55

On the other is where you can find the OCLC services configuration, and on the left side panel under world share ILL.

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33:12

So let's start with inter library loan options. Persistent setting is for your constant data, the information about your library that does not change from request to request and you have configured here I talk about how to create constant data.

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33:34

Introduction to world share ILL session. You can access a recording or you can find the short videos on constant data as well. So if you are creating automation setting up automation, I would suggest for you to uncheck the.

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Persistent setting to allow the system to apply the constant data according to your automation rules. So this is the 1st step. Then for knowledge based integration, if you have set set up your electronic collections in.

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34:14

The Worldcat knowledge base, then you can refer here for the system for the ILL system to look into your knowledge base. So the 1st option is to, activate that link.

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To communicate, with the world share ILL, so you mark this as own. And if you want the system to automatically answer NO rest to request based on your knowledge based coverage and.

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License terms, then.

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34:56

You check this option as well. The 2nd option is optional, but for you to use the 2nd option, you need to check the 1st option as well. It does not work independently, so you have to mark.

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35:13

Both options. And that's, and as lender when this setting is turned on, when you receive it when you receive a landing request and the requested item is.

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Followed by your library as indicated by your holidays in worldcat knowledge base.

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You will see a link to the item in the request details accordion. So you're gonna see that when you are checking that request. Then you have the option for.

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36:00

New lending request email.

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36:04

Notification. If you think that you will receive only a small number of requests, so you can receive notifications and the email addresses you add here, you can add up to five email address and you check this as on.

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36:24

Home.

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**Timestamp**

36:24

You can preview and send a test email and you have to save anything that you are changing in this area for the system to retain that information. And anytime a new landing request arrives at your library, you receive a notification and the email.

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36:44

Email addresses.

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**Timestamp**

36:46

Configured here, ok? So this is the 1st option. Then let's talk about automation on the automated request manager. So as a landing library, you click the lending.

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37:06

Tab here. So when you set up for automation, the system 1st looks into your deflection policies, your supplier status, your knowledge base holdings that I showed you where you can.

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37:26

Define those and the deflection supply status you define in the policies directory as I showed you. If you are part of any group.

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37:38

The time to respond, your days to respond, your real time availability requires additional configuration for the system to look into your real time availability and to define the automation for the system to look all.

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37:58

All of these options and only send it to your library those requests that you are ready to answer, then you need to click this add new, you need to enable the automation.

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38:14

Give a name to your automation. If you are creating multiple, then you need to give a priority. The priority would be the lowest number and your list of priorities, like e.g. you have this 1st one, you give the number ten, and the 2nd one.

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38:34

When you given number 20, then the the this will be the number ten will be the your 1st top priority.

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38:42

Then you select the, the match, you can have your group of libraries, your custom holdings groups. You can select those you wanted to be part of your.

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**Timestamp**

38:58

Automation those like e.g. your preferred libraries or the group of libraries that you do not supply, e.g., you want to supply, you have a specific.

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39:14

Rules. The formats you can use the control key to select multiple. Multiple options here, the formats you want to automate.

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39:31

And the request type if you are automating for copy of or loan and you can have like I said I can, you can have multiple matches here to  define.

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So you can have one for the type, one for the, the borrow group, one for the formats, and then you can have the actions for your customer data, and you can define which one you want to be part of for this automation.

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And you have to save it for the system to retain. And if you have different type of automation, then you can create a different type of option here for automation. You create a new one with your rules for that automation, ok?

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40:35

And then the system will follow your rules and only send it to your library those that you are ready to answer. Let me show you this slide, on real time availability how

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That works, so when you define that you want real time availability turned on, as I said requires additional configuration by OCLC. Then OCLC uses.

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41:15

Z39 50 to look into your online catalog and check the item status to take the action. If item is checked out, e.g., then the request moves to the next lender in the lender string.

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41:32

If the system cannot find the status that determines that the item is unavailable, then the request moves to your, can you supply queue. Of course, after the system, checks your deflection policies.

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42:02

Then you, for real time availability, you will be able to check which requests were moved to the next lender in the landing string through your resource sharing lending reasons for NO report. I will talk about reports in a moment. Your report.

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42:22

Port will show the reason to respond the note to the request as system.

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**Timestamp**

42:29

Check the availability and here the slide with the information to configure for the system to automatically respond know on your behalf based on your knowledge based coverage and license terms as I showed you.

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42:49

View in service configuration and remember that the 1st option has to be selected for the 2nd option to work.

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43:04

And the borrowing library can see on the request history why the lender answered NO. Your library as a lender won't have this reason option when manually responding note to request when I go to the demo, I will show you that you have.

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43:24

The Options to select why you are answering NO, and this is not one of the options. This is a system option only based on the configuration.

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43:39

Now let's talk about article exchange. OCL article Exchange is part of world share ILL and it's one of the options for you as a lender to respond to copy requests and place requested documents, then library.

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43:58

Patrons can retrieve those documents obtained for them through intern library loan. This is optional. Article exchange accepts large files including high resolution documents. You library staff can upload up to a thousand files.

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44:19

A day per authorization. You can use article exchange from the link on your interface or from the request form. Article Exchange creates a unique URL and the password.

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44:39

To protect the file. And the file automatically expires after 30 days or after viewed five times. This is the default setting. Any questions so far?

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**Timestamp**

44:57

Yeah. You can use the chat to send your questions. While you while you are thinking about your question, I have a question for you. Let me send this.

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45:16

Let me open the app here and send you the 1st one. So when I want to stop receiving unwanted the ILL request for audio visual materials that don't circulate outside my library, my library needs to have configured

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45:37

Constant data deflection policies include format audio visual, custom holdings, deflection policies exclude the format audio visual.

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45:57

Which one do you think is the.

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**Timestamp**

46:09

Correct option. Thanks for participating, by the way. Let's see the correct answer.

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**Timestamp**

46:30

So the correct answer is deflection policies include format audio visual. When you are including, you are deflecting, ok? So if you wanted to stop, you needed to select the deflection and include that format.

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46:48

For the system to deflect that. Thanks for participating. So now let's move to topic number two Respond to a manage request.

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47:08

As a lender and see how everything works in the system.

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**Timestamp**

47:16

I will show you the options you have to respond yes, NO or conditional to loan and requests including batch processing. And you will learn how you can manage those requests.

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47:36

As the borrowing libraries update them

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47:42

Of course, there are situations when requests don't work as expected. You will see how you can easily resolve those issues. Then how you can create and manage off system ILL requests, have those done outside of world share ILL.

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**Timestamp**

48:02

So let me share my browser here again and go live so you can see how everything works live. So we are back to the, interface, the home page.

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48:21

So we start answering to start responding to requests, you have the option on the left side panel under landing request you can see your supply queue.

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**Timestamp**

48:36

And you can also find that under the quick links in the middle section. And you still have copies and loans this little here, so let's start to respond yes too loans. So you have all your.

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**Timestamp**

48:54

Loan request listed here and you have your time to respond according to your days to respond and the ones that are expiring 1st, you'll be on the top of the list. You don't need to follow the order, but the ones that are expiring.

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**Timestamp**

49:14

1st, they are on the top to call your attention that if you don't take an action, they will automatically move to the next lender in the lender string. So let's open this request, the 1st one, you can.

- 

**Timestamp**

49:31

Pick the ID or the title, and here the 1st thing that you need to look into is there are some options here for the request. So here is the borrow.

- 

**Timestamp**

49:49

Information the maximum cost if they accept IFM when they need that item and you can.

- 

**Timestamp**

50:06

Check your online catalog. If you have configured your online catalog in the system, you can click this link here and check the availability and add your call number here. And after that you can print your request, you can mark the.

- 

**Timestamp**

50:26

Print now button on the upper right side. If you click here, you can send this request to your print queue or you can print it directly now. If you have multiple, you can add to your printer queue.

- 

**Timestamp**

50:43

Your printer query is here on the left side panel and you can find your, requests listed here and you can print your request, you can print multiple, you can see here you can mark multiple to print and you can print the request here.

- 

**Timestamp**

51:01

To go to the shelfs and pick those, those items so after you have prepared that material or after you.

- 

**Timestamp**

51:21

You found out that the item is available

- 

**Timestamp**

51:25

For you to respond yes, then you can mark to print the shipping labels and the bookstraps if your library uses this option to go with the material. This option of Mark as considering is while you are.

- 

**Timestamp**

51:45

Going to the shelves to pick up the item if you want to just mark as considering. This does not change your days to respond, by the way. So if you don't take an action, the request will expire. So this is just for you to understand that you are considering, you're just waiting for somebody.

- 

**Timestamp**

52:05

In your library to pick up those items for you to answer yes here. So I can mark to print shipping labels, print the book straps, you can apply your constant data if you, you are using different constant data.

- 

**Timestamp**

52:22

And then you can mark yes. Now the request moved to in transit and it will be in this status until the other library receives that item and updates that request.

- 

**Timestamp**

52:42

And the, your shipping labels are here under the printer queue.

- 

**Timestamp**

52:49

And you can print your shipping labels from, from here. Mark anything you find useful to add to that. You can print multiple as well. You can mark the position and the label.

- 

**Timestamp**

53:09

If you're starting in a different position and have those printed. And the same thing with the bookstraps, they are here in your pretty queue for you to mark those you want to print.

- 

**Timestamp**

53:26

And have them printed according to your configurations. So this is how you will answer yes.

- 

**Timestamp**

53:41

To loans. You can also respond yes to copies. So let's see an example of copy request and to answer yes for copy, you can use article exchange.

- 

**Timestamp**

54:01

Or you can supply this using different methods and using article exchange, I can click on OCLC article Exchange link. Then I can search for my file. I can have that file prepared.

- 

**Timestamp**

54:26

I dropped the file. I can preview to see if this is the correct one. If it's not, you can cancel and attach the correct one. And you see that outlook exchange creates this unique URL.

- 

**Timestamp**

54:46

L and password and after you have that, then you can.

- 

**Timestamp**

54:52

Yes or yes, and the other library, the borrowing library, will receive this request with this information to forward to the patron. So yes yes. So the request is NO longer in your Can you supply. The request is here in transit.

- 

**Timestamp**

55:12

So this is the loan and here's the copy waiting for the other library to update that request in the system. You can also answer NO.

- 

**Timestamp**

55:28

Either for loan or copy request, let's start with the loan 1st. Let's open the request. If your library for any reason cannot provide this item, you can select the reason.

- 

**Timestamp**

55:45

Oh NO, you don't need it to give a reason, but I would suggest to do so because this information goes to your report and then your library can understand why you are answering NO to a request. This helps your collection development team to.

- 

**Timestamp**

56:05

Decide if they.

- 

**Timestamp**

56:08

Should add more items to your library or or not or or check your subscriptions if you are receiving a lot of requests that you cannot supply your answer NO, and then you can also define if you should create deflection policies.

- 

**Timestamp**

56:28

Based on those requests. So for this example, let's answer NO NO circulating. So the request is NO longer in your.

- 

**Timestamp**

56:47

Lending under your lending request, that request moved automatically to the next lender in the landing string. For copies, let's open, and you also have the same type of options.

- 

**Timestamp**

57:04

these are the options and you can define a reason.

- 

**Timestamp**

57:23

And that reason goes to your report and the request is NO longer here in your library. It moved automatically to the next lender in the lender string. These are answering yes or NO to individual.

**Timestamp**

57:40

Requests, you can do that in batch as well. So anytime you see this green arrow, this icon, it means that you have a batch processing option. So you have the batch processing option for answering.

- 

**Timestamp**

57:59

Yes or NO. So let's open that. So, let's start answering yes and batch. So you have prepared all the materials, you have printed your request, you went to the shelves to get the materials.

- 

**Timestamp**

58:19

Instead of opening request to request to answer yes, you can simply.

- 

**Timestamp**

58:26

Do that in batch, so you can click yes, you can mark to print the shipping labels and the bookstraps for to all of them. The constant data has to be the same to all of them.

- 

**Timestamp**

58:45

And then you'll start selecting those titles that you are adding to your batch processing. So let's select here this one, you click this plus sign and add those.

- 

**Timestamp**

59:05

If you accidentally add one.

- 

**Timestamp**

59:12

That you're not responding yes, you can easily remove that, click in this X icon and then you can click the YES button here on the bottom.

- 

**Timestamp**

59:30

And you see that all the five requests had the status updated to shipped. You have all the shipping labels for all the five and the bookstraps in your print queue. You can check that in your print queue, they are here.

- 

**Timestamp**

59:49

Your shipping labels are here. You can print all of them at once, and the same thing with the book straps. So it can save you a lot of time instead of going individually. You can also answer a NO.

- 

**Timestamp**

1:00:07

In batch, you go to the Can you Supply queue, you have to click here where you find the, the arrow and then I can select those to mark NO.

- 

**Timestamp**

1:00:24

Then the reason the catch here is that the reason for NO has to be the same for all of them. So I can mark here NO circulating. No circulating is a reason for you to create a deflection policy. Instead of manually answering NO to those requests, you can create a deflection policy.

- 

**Timestamp**

1:00:44

And have the system doing that on your behalf. So now I needed to add the words using the plus sign. Again, if you add anything that's not supposed to be there, you can easily remove them.

- 

**Timestamp**

1:01:04

You are clicking the X icon, the X button, and now you can click the No button, you'll find it here on the bottom, and all of them.

- 

**Timestamp**

1:01:20

We're removed from your Can yousupply queue. They automatically move to the next lender in the lender string and your report will have those four.

- 

**Timestamp**

1:01:36

Requests listed as non circulating, ok? And this will be an option for you to define that you needed to create deflection policies for certain type of collections. In this situation, they

were maps, so your maps don't circulate outside of your library, you can create a deflection policies.

- 

**Timestamp**

1:01:56

For those formats. So this is responding yes or NO for the request. You can also respond conditional. So let's see here you have loans.

- 

**Timestamp**

1:02:21

So e.g. this item here, I can't provide but I have some conditions. So these are the options for conditional, so I I can select here that I accept IFM.

- 

**Timestamp**

1:02:36

As payment and I charge this amount and I send that response, and now that request goes to the borrowing library, they have four days to take an action. If they accept, then the request comes back.

- 

**Timestamp**

1:02:56

That returns to your library and the days to respond are reset.

- 

**Timestamp**

1:03:01

So if you take seven days to respond, that request comes back to your library with seven days to respond, ok? So this is how you can respond to request yes, NO conditional and in batch, and do your.

- 

**Timestamp**

1:03:19

Print queue Manage your printer queue. You can manage the request as the borrowing library start starts updating those requests. So e.g., if a library requests a renewal.

- 

**Timestamp**

1:03:37

So here renewal requested, you can open that request and you can see here all the information the original due date.

- 

**Timestamp**

1:03:52

And when they want the renewal to end, you have the option to accept that renewal, then, the new date will be set up for that request and the request moves to renewal accept.

- 

**Timestamp**

1:04:12

You can deny the request.

- 

**Timestamp**

1:04:16

And the due date remains as original date and the library must return this item, NO original date or you can recall the item, which means that you need that item immediately.

- 

**Timestamp**

1:04:33

So to accept a condition for renewal, you have to mark the date for the condition for the renewal is the, this date, so I have to mark this date in the.

- 

**Timestamp**

1:04:51

Calendar and then accept the renewal. And you see that the request now is not in under your renewal requested is there for the library to.

- 

**Timestamp**

1:05:08

Accessed under the renewal accepted. You can also deny renewal and the original date due date remains for that request.

- 

**Timestamp**

1:05:27

When you set conditionals for the request and the library then accepts the conditions, then you see here the conditions accepted the status. You see that these were the conditions you sent to the library.

- 

**Timestamp**

1:05:44

The library accepted that and your days to respond reset, and you can open that request and you'll see that now you NO longer have the option to set up a conditional. You can only set conditional.

- 

**Timestamp**

1:06:03

Once you can only respond to conditional once and this is to speed up the processing. You can answer NO and give a reason or you can supply the item. So you can mark to print this the labels because this is a book, and you can answer yes to the.

- 

**Timestamp**

1:06:23

That request.

- 

**Timestamp**

1:06:28

And for those requests that were returned to your library, you will find them under the returned in transit. You can see the date the request will returned to your library. So from this page here you can see the date.

- 

**Timestamp**

1:06:50

To manage if the item has arrived in your library, and if you have received those items, then you can close, complete that. So, e.g., I can open this request here, I have received this, so I can complete.

- 

**Timestamp**

1:07:09

And when I complete that, the request is NO longer under the landing request. This request is closed, ok? So the request is closed when you complete the the request. And you see that you have here.

- 

**Timestamp**

1:07:25

Some, requests with the question mark. These are pending of action and you can use the batching processing, you see the the icon here, the arrow, on the returned, you can use the batch processing to solve those. You see those that are pending.

- 

**Timestamp**

1:07:45

Of action. You can add those to your.

- 

**Timestamp**

1:07:50

Batch processing, you can click here and select those. If you have received those items, and complete.

- 

**Timestamp**

1:08:10

Those requests. Okay, so saves you some time as well instead of marking complete to individual items. So you received all those items back. You can check here under the returned.

- 

**Timestamp**

1:08:27

And, batch receive all those items that you have that you have received back in your library. Overdue, overdue.

- 

**Timestamp**

1:08:43

Those are items that the borrowing library did not return the due date and the 14 days or more have passed after the due date. The system does not count weekend or US national holidays, then.

- 

**Timestamp**

1:09:02

After those 14 days have passed the system automatically moves the request to overdue status. So it takes around three weeks at least to be in this status. And when the request is here, you have the option.

- 

**Timestamp**

1:09:18

To open that request oh let me open one, the one that's oh that has the option and you have the option to record that item. So the library has to return that item immediately to your library.

- 

**Timestamp**

1:09:38

Sorry.

- 

**Timestamp**

1:09:39

And one thing that you have to do, you can do when a library is constantly overdue returning items to your library, you can create a list of custom or libraries in your custom holdings groups and add those libraries

- 

**Timestamp**

1:09:59

To your deflection policies. So you do not supply to those libraries. When you have the custom holdings area, you can create a deflection policies based on those libraries you do not supply. So this would be an option for deflection as well.

- 

**Timestamp**

1:10:17

And now the issues with requests, so e.g., if you ship the material, the material is here in transit, but your library needs that material for any reason.

- 

**Timestamp**

1:10:36

And you need that material immediately. You can select that item here and you can recall that item. So the order library must return that item immediately to your library. You can use this email option here to communicate with the other.

- 

**Timestamp**

1:10:56

The library and explain why you needed that item immediately.

- 

**Timestamp**

1:11:01

Back to your library, ok? And you can recall that. Another issue you might find with your request is the request arrived at your library, the item arrived, but the item.

- 

**Timestamp**

1:11:21

Is damaged?

- 

**Timestamp**

1:11:23

Or the item never arrived back to your library, those physical items. So here on the returned in transit.

- 

**Timestamp**

1:11:43

So you have an item here?

- 

**Timestamp**

1:11:47

This item arrived either damaged or never arrived at your library, then you can mark this as not returned. Your request moves to returned but missing.

- 

**Timestamp**

1:12:04

That's the request returned but missing. You can use this email button here to communicate with the other library and this request will really stay here in this status until both libraries have figured out how.

- 

**Timestamp**

1:12:22

This item will be replaced, ok? And after this is solved, then you can complete this request. But you will stay here until it's solved. You have this other issue here.

- 

**Timestamp**

1:12:42

Year of not received this is when the.

- 

**Timestamp**

1:12:46

Borrowing library claims that they did not receive the item, so you have here the physical item. For the physical item, you need to communicate with each other and check how you will proceed with that. You can.

- 

**Timestamp**

1:13:04

Check with your carrier to see what's happening to that item and you can communicate with each other. You can either use this email option here because all the information about the request goes from the body of the message, and you can define.

- 

**Timestamp**

1:13:21

If you're gonna close this request and let the library select another group of libraries to request the item from or if you're gonna tell the library that the item is on its way and they need to wait a little bit more.

- 

**Timestamp**

1:13:37

So the request will will stay here until this issue is solved by the two libraries. For the copy request is a little bit easier because you can't.

- 

**Timestamp**

1:13:54

Supply e.g., you forgot to attach the copy in this option here. You can simply use the article exchange link, attach the file, drop file.

- 

**Timestamp**

1:14:11

The system creates this unique URL and password, then you save this. When you save this request, the other library receive, can look at the request with this option and then mark this as received.

- 

**Timestamp**

1:14:30

Okay, so it's pretty simple. You attach the item and save it or you can supply that item through other means and the other library must mark as received for the request to move from.

- 

**Timestamp**

1:14:49

Not received to received and received but missing is when the borrowing library lost that item and they all damaged that item and they marked that as.

- 

**Timestamp**

1:15:09

Lost and the same thing you needed to communicate with each other. The request will be here until the two libraries have decided how the item will be replaced and once that is solved, then you as a lender.

- 

**Timestamp**

1:15:27

Can complete this request. Though the request will be here until this is solved. So remember received but missing, the borrowing library marked as lost. Returned but missing is when you mark that as not received, ok?

- 

**Timestamp**

1:15:47

Okay.

- 

**Timestamp**

1:15:50

Do you have any questions so far, about how to respond, manage, and solve the issues as a lender?

- 

**Timestamp**

1:16:10

How can we, there's a question here, how can we update our holdings if you were selecting not owned a lot? What do you mean by not owned the reasons.

- 

**Timestamp**

1:16:30

Before NO, not owned a lot. When you have this option, if you don't own that item and you are receiving a lot of requests, then you need to check with your.

- 

**Timestamp**

1:16:47

Cataloging team, your cataloging team must update your holdings in WorldCat because it's showing that you own that item in Worldcat because it's not updated. So your team.

- 

**Timestamp**

1:17:03

Cataloging team can go to the, the catalog service and update your holdings in Worldcat that you don't own those items, ok? That's how you can solve that that issue. You need to talk to your catalog.

- 

**Timestamp**

1:17:20

cataloging team. They can do that in batch as well. They can update that in batch, ok? Good question by the way. Then another option you have here is to manage off system requests. Those are.

- 

**Timestamp**

1:17:40

Outside of world share ILL, so you you see it on the left side panel off system requests.

- 

**Timestamp**

1:17:48

You need to manually create that request here, create landing request. 1st, the 1st step is to configure your partner. So you do that in the service configuration under.

- 

**Timestamp**

1:18:04

Address book, you needed to configure your partner here using the plus sign here to add a partner. You enter all the information.

- 

**Timestamp**

1:18:20

Save it and after you have your partner defined here, then you can start creating that manual request. So this will be for a long request, e.g..

- 

**Timestamp**

1:18:39

So, let's mark this as loan and let's give some number. This requester reference ID is the number you have with the partner, the ILL. The need before that is a required field.

- 

**Timestamp**

1:18:58

So let's mark this to be January the 3rd. Then I can select my partner here that I have configured and all the information comes automatically.

- 

**Timestamp**

1:19:14

And then instead of typing all the information about your item, I can just enter the title here, then when I click.

- 

**Timestamp**

1:19:34

The next field, now I have this magnifying glass icon. When I click that.

- 

**Timestamp**

1:19:40

It, it takes me to the Worldcat is searching for that item. You see this is my item, so I click the title and apply data to request new.

- 

**Timestamp**

1:20:00

So now you see all the information moves to my form, I don't need to type in all that information. I can apply my constant data if I have a constant data for off system.

- 

**Timestamp**

1:20:16

I can apply that for the information about my library, and then I click this create button on the right, and now the system has added that to the system and I can start managing that request here.

- 

**Timestamp**

1:20:36

And I can manually change the status until the request is closed and all the information moves to my reports with the other requests I have in old share ILL.

- 

**Timestamp**

1:20:56

So you can manage everything in your reports, even though those.

- 

**Timestamp**

1:21:01

Outside of world Share ILL. And for those that a copy requests, let's see if I have one here, you can even supply through article exchange. So you can add.

- 

**Timestamp**

1:21:18

Your item here, drop, and then you can preview that and you can use this email button on the top.

- 

**Timestamp**

1:21:36

And then you can, you see all the information about the request goes on the body of the message and you can add that information about the, the request, the unique URL and password and send that to your partner.

- 

**Timestamp**

1:21:53

So you can use this option within. Any questions, any more, any other questions?

- 

**Timestamp**

1:22:20

3rd topic is statistic reports. I will go live to show you how you can generate reports to support your ILL activities as a lender. You need your nine digit authorization and password. If you don't have that, you need to contact OCLC support.

- 

**Timestamp**

1:22:40

To retrieve that. So let me share my browser again.

- 

**Timestamp**

1:22:48

Our last, this is our last topic for the reports and the library long homepage and under other order.

- 

**Timestamp**

1:23:05

Usage OCLC usage statistics I entered the authorization.

- 

**Timestamp**

1:23:21

Without spacing and the password, so there are several options here. I will highlight the, three.

- 

**Timestamp**

1:23:41

More important ones, the reasons for NO report, resource sharing lender, reasons for NO report. This is the one, this is a monthly based report that shows you why you have responded a NO to ILL request.

- 

**Timestamp**

1:24:01

If you see a lot of aged to unfilled or aged to expired, it means that you never answer those requests or you see a lot of NO circulating, you might consider creating deflection policies in OCLC policies directory.

- 

**Timestamp**

1:24:21

So you stop receiving those unwanted ILL requests. Deflections, as I mentioned before allows the system to automatically respond know on your behalf. And it shows on this report why the request was.

- 

**Timestamp**

1:24:36

Not deflected and the report for the most recent month is available on the day, on the 5th day off for the following month. So the January report will be available December the 5th tomorrow.

- 

**Timestamp**

1:24:55

E.g.. So the other report I would like to highlight here is the lender resource sharing stats report this is a report. Let me see if I have a mouse with.

- 

**Timestamp**

1:25:13

Activity here, this is a report. I don't have any activities.

- 

**Timestamp**

1:25:32

I can show you the borrowing one just for you to have an idea. No, that's one here. So this is a monthly based detailed report with all the information about the request, including the costs.

- 

**Timestamp**

1:25:50

So you can see here the costs, when the request was filled, so this is when the request was filled, and, when the request was completed.

- 

**Timestamp**

1:26:12

Then automation, it will if any automation was applied and any off system request as well if there's one off system request. You can use this report to check where most of your requests are coming from.

- 

**Timestamp**

1:26:32

How many of the same request arrived before? So you can see here though the same type of request received.

- 

**Timestamp**

1:26:41

Before, and the electronic links display that the request contains the knowledge based link as I showed that you can activate that link. So it will display here as well.

- 

**Timestamp**

1:26:59

And the other one I would like to highlight is the lender activity overview report. This is a report with the number of ILL activities that can be for more than one month.

- 

**Timestamp**

1:27:18

Period you can define here. This is the six months you can change this to twelve months and update. So you can see that you have a lot of details and you can analyze, e.g., which month you have filled more re.

- 

**Timestamp**

1:27:38

Request so we can see here request field. You can see the which month you have filled more requests or not supplied the request at all.

- 

**Timestamp**

1:27:48

The request on field. You can check the peak of ILL activities for your library as a lender. So you can see here like e.g., September was very September and March and July were very busy months.

- 

**Timestamp**

1:28:08

Of my library, e.g.. All reports can be exported or emailed to yourself or a group of library library staff in your library, so you can enter the email address here.

- 

**Timestamp**

1:28:31

Separated by semi-colon, and if you mark this send monthly box here, you define the format you want to receive this HTML or Excel in attachment or how.

- 

**Timestamp**

1:28:51

Link and save it, then you receive those reports automatically. You need to do this to.

- 

**Timestamp**

1:28:58

Every individual report you want to receive automatically under email addresses are provided here. And you don't need to come to this area to manually generate those reports. If you don't have any transactions in a 2nd month, you won't receive.

- 

**Timestamp**

1:29:18

The monthly base the reports. And if you accept payments using IFM.

- 

**Timestamp**

1:29:27

Then you would see the IFM, ILL Fee management report defined here if you have any transaction for a given month. So you would see one of the options here. Any question.

- 

**Timestamp**

1:29:47

Related to reports.

- 

**Timestamp**

1:30:01

So here an example of an email message that you received with a monthly report after you define that in the system so you have.

- 

**Timestamp**

1:30:21

Learnt about updating your policies such as deflection, loans, and copies and how to set automation as a lender.

- 

**Timestamp**

1:30:30

You saw how you can respond and manage IL requests and solve some issues. 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.

- 

**Timestamp**

1:30:51

To access our support portal as reference is an option for your activities. You can find more training materials and contact support at help.OCLC.org. You can contact OCLC support from.

- 

**Timestamp**

1:31:11

The upper right side.

- 

**Timestamp**

1:31:13

As you can see the option here, and you can click resource sharing option, then select world share interlibrary loan to find all the categories to choose from. Any additional questions?

- 

**Timestamp**

1:31:44

If you don't have any additional question, this concludes our session. I would like to thank you for participating. 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.

- 

**Timestamp**

1:32:04

I'm adding the.

- 

**Timestamp**

1:32:07

Evaluation form in the chat as well. We appreciate your contribution, we value your feedback, helping us improve our training materials and training sessions. For any questions asked during the course that were not answered your.

- 

**Timestamp**

1:32:27

Question will be passed through to our support staff who will be reaching out to you shortly. I believe that one one of the attendees had had a one of the questions. For any additional questions contact us at training@OCLC.org. Thanks again.

- 

**Timestamp**

1:32:47

Enjoy the rest of your day and enjoy the holidays.