

WSILL Lending - Manage and respond requests Transcripts

5 March 2026

Transcript

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0:06

So hi everyone, I'm Timestamp. I'm one of the trainers at OCLC and today I'm facilitating your learning on world share ILL lending. Welcome to our manage and respond request session. This session is being recorded.

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And you will receive a follow up email message with the link to the recording and the handouts for the session, the copy of the presentation and the learner guide. I'm putting the link to the learner guide in the chat as well, so you can retrieve that.

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This session is part of a series for world share ILL lending, which comprises two courses. Configurations for lenders, where I cover the configuration options for lenders including deflection policies.

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And manage and respond requests this session, you can register for both or either session or access the recording for each of the sessions. If you registered through the community center events page, you are automatically registered to.

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To receive a training badge after each session. If you did not register through the community center events page or if you are accessing a recording, you can still receive your training badge by completing the form. You can find on this address on the screen.

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Think this goes on a copy of the presentation. When you access this address, the system prompts you to sign into the OCRT community center.

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1:54

Using your OCRC symbol or library's name and your world share account. During this session, you will learn how to better use the functionalities in the service as a lender. We are concentrated.

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On four topics. 1st, I will guide you through the steps in how you respond to ILL requests, including batch processing options. You will learn how you manage ILL requests and solve issues you might encounter.

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With those requests. And how you create and manage off system ILM requests, those outside of world share ILM. And then finally, as we, we progress in this session, we will explore how you.

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Generate statistics reports to support your ILL activities. And of course, where you can contact those support or access more training materials. We offer.

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3:06

Several short tutorial videos on topics related to world share ISOL and please use the chat if you needed to send your questions, ok? And I ask that you send it to all participants.

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Participants so everyone can see your questions.

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Let's start with topic number one. Respond to requests. 1st, let's talk about article exchange. OCLC 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.

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And place request a document, then library patrons can retrieve those documents obtained for them through inter library loan. This is optional, but this is one of the best options for you to respond to copy requests. Article exchange accepts.

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Large files.

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Including high resolution documents, you library staff can upload up to a thousand files per day per authorization and the document expires 30 days or after viewed five times. It does not count when you are previewing.

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That document. You can use article Exchange from the link on your world share ILLO homepage or directly from the ILL request form. Article Exchange creates a unique URL.

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And password to protect the document, viewing included downloading. Yes, when you open that document, not as staff but as the end user.

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When the ending user opens that document, it counts, the 1st time was viewed. So if he he viewed and downloaded is one view. And let me just go back to the previous slide.

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Now after Exchange offers OCR. OCR is optical character recognition. It allows the PDF document to be searched added and highlighted by the end user and this facilitates the the usage of that document and it represented.

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In a hundred and 20 languages, so when you are.

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Applying that document, uploading the document, you can select the OCR language or the system will identify by the title.

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IFM interlibrary loan fee management is one of the options to receive payments for those requests with charge. Both libraries must accept IFM for the system to process it. So when the lender responds yes to a request.

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Then the system automatically.

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Credits your OCLC account and debits the borrowing libraries OCLC account for that amount. Both libraries must accept and the only thing you have to do is to manage your OCLC account, your monthly statement, your monthly.

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Invoice and your reports for that month.

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Now, I will go live, I will share my browser here and go to the service to show you the options you have to respond to yes, to loans including batching processing, how you can respond yes to copies using article exchange. How you can respond to NO to.

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Either loan or copy requests, how you can respond to NO using batch processing and how you can respond to conditional, ok? So let me share my browser here and you can see some examples.

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So this is the world share ILL interface, the homepage as a lending library, you can find your, can you supply queue either from the quick links in the middle section here.

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Or from the left side panel under landing request so you can you supply, you see that I have copies and loans to respond here. So let's start with the loan request for the physical item.

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You see here, on the right column, the time to respond. So the ones expiring sooner will be on the top of the list. You don't need to follow the order, by the way, to respond to the request, but the ones expiring 1st to be on the top.

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Off the list for you to give special attention otherwise that request will expire from your can you supply queue.

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If you don't take action. So let's select one of these loan requests. You can use the ID link or the title link to open the request.

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And then, the 1st thing you have to do is to check, you can check your online catalog if your library has configured for your online catalog to be displayed here in the service. This is done in the service configuration. Then you can see this my library catalog.

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For you to search your online catalog and see if that item is available for.

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Being loaned through ILL. So after you search your online catalog and you locate that item, let me copy the, the shelf location for this one. You can copy that shelf locations.

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And paste it here on the local ID, this field here, local ID, then you save it. And after you do that, the item is available, then you can either print the request on the print the options here on the right. You can either print this.

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Request or you can send to bookstraps instead.

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So let's send this to bookstraps. Then after that, you print that bookstraps here under the your print queue on the left side panel.

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You'd selected that print, that bookstraps, and you can see that the local ID because I added that to the local ID field and save it, then this is printed on the book straps or the request if you choose to print the request.

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So with this information, I can retrieve that material and after I have that material, I can return here to the can you supply.

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And choose the response. So now I can supply yes, I can supply this item, I check the shipping labels and submit the response. This request changed the status. Your request is here under.

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11:41

Shipped in transit and the return the shipping label is under your printed queue for you to print that shipping label. It's here. You select the.

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Options to add to that shipping label, the paper size comes from your configuration. There's a question how you add the library logo to the bookstraps page. You can do that in the service configuration. I will show you in a bit. Just give me a second.

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12:16

Second. So it starts the label position, you, it starts at one, but you can change this. E.g., if you are reusing paper, you can change this label position here, and then you can print the shipping label to ship that item to the library.

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12:36

So that question, how you can customize your bookstraps or your shipping labels. This is done here if you go to your home page and you go to service the configuration.

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Instead of the configuration in the left side panel will share ILL, then you have the option called print settings. Here is where you define the size of the paper.

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For printing both the bookstraps and the shipping label, and this is where you can add the logo. So you can add the URL for the logo here. You can test that to see if it is correct. And after you have this information here.

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You have the option to customize the bookstraps as a lender adding notes, e.g., and you need to save this configuration for the system to retain this, ok? So it's again service configuration.

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Print settings and here where you can add your logo. So you saw me responding yes to loans for an individual item. I can do this for multiple items. E.g., if, if you want to create.

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To your pick list. So the option for you to create a pick list for several items at once. So let's go back to.

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Loans, and let's open at least three requests here and add that local ID to those requests. So let's open this one here 1st.

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And you will, e.g., you search your library catalog and I can copy and paste that location to the local ID, save it.

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14:51

And then I added this to the bookstraps. Now I go to another one, go back to loans, and let's do this.

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15:07

Escape to Australia, and the same thing, you sort your online catalog and then you add that copy and paste that shelf location here. Save it.

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15:25

Yeah, let's add this to the bookstraps, and let's do another one history of South Africa. I'm putting the shelf location here because it's easier for you to retrieve that item.

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So if you have this shelf location, this information will print on the bookstraps, you can use the bookstraps as your pick list. So you can go to the shelf location, you know where this item is located already.

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16:02

And you can easily retrieve that, that item, ok? That's why you are adding this information here, the local ID. This is to facilitate, ok? So I search my online catalog and I added that.

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16:19

Shelf location here. So I'm giving you some tips to facilitate your process. Then I save it and I add to the book straps. Now I go to the print queue.

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16:37

To print those bookstraps, so I can select all the three to print at once, and then I select print. And you can see that the local ID is printing.

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On each one and I can use this as my pick list when I go to the shelf location to retrieve the items. So I'm doing this for several items at once. So it saves you a lot of time back and forth retrieving items mainly when you have several requests in your can you supply queue.

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17:18

So now we've printed this, we've retrieved the items, and after you have the items retrieved, you go back to landing requests, and now you see this, can you supply, you see this icon with the arrow. This means that you can batch process. So I click here, can you supply.

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Right?

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And this bulk respond bottom, you see here on the on the top, I selected that and then I can use those bookstraps and because the bookstraps has the request ID as well, I can scan the.

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Request ID from the bookstraps or I can select the items from the list. So there this one here.

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This one and the history of South Africa. And now I have all the three selected. I choose the response yes, can supply. You can apply your constant data?

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You can use the default one or if you have a separate one, you can select, it has to be the same constant data for all the requests. So I can select the constant data and check to.

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Print the shipping labels for all three requests. So now I click the submit response and you'll see that all three three requests moved to the status as shipped in transit and the shipping labels were sent to the print queue so.

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I can go to the print queue.

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Shipping labels and printed the shipping labels for all three requests at once. And then ship the item back to the libraries, ok?

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So there's another question here, I understand but we usually make sure we have the item before we say yes in case the system shows the item is in, but for some reason it's not on the shelf. That's correct. You print the the bookstraps 1st.

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Go and check if the item is available.

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Before you respond yes. I'm responding yes here because I'm assuming I have all those three items in hand, they are ready and available to be loaned. Otherwise, if one of the items cannot be supplied.

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20:07

Then you don't batch process that item. You'll respond to note to that item separately, ok? Thanks for your comments and your questions as well.

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20:25

So the shipping, the bookstraps helps you retrieve that item, check if the item is available, and then you can respond yes to that request and you have the option to respond in batch. Now let's.

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See how you can respond yes to copies of using article exchange.

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So let's go to copies and let's select one of the copies. You see, I have one here that's expiring in 12 h, so if you don't take any action, this request will.

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Disappear from my Canyon supply queue. You will move to the next lender and the lender string. So let's open this request. So if you have this item available and.

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You can prepare the file for this item, you'll be able to respond yes. So you have three options here for answering the request. I'm going with the yes options 1st, then I will show you how you can respond to NO and how you can respond to conditional.

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So for this example, we are responding yes to copies using article exchange.

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If your library have your electronic collections in the Worldcat knowledge base, any library using OCLC cataloging services has access to add the electronic collections in the WorldCat knowledge base. And if you.

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Have enabled that in the service configuration

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Then you would see here that information, that link to that collection related to to the title being requested. Otherwise, you can search your online catalog, locate that item.

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And prepare the file. After you have that file ready, then here on the electronic delivery you have the option for article exchange. You select the language for the OCR, there are 120

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Languages represented here and then you choose the file, I have the file

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Ready. And you see that creates this unique URL and the password to protect the document, you can preview this.

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To see if this is the correct file. If it's not, you can delete this and repeat the process. And after you have this information, then you can choose the response.

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23:38

To respond yes, when you respond to yes, then the borrowing library will receive this request with this information to be able to email this to the patron. So I respond yes.

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And you don't need to print anything unless your library prints any bookstraps for copies and then you submit a response. So now the request is NO longer in your canyon supply.

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It's with the borrowing library, it's here under the shipped in transit that you can see here the loan for the physical items and the here the copy request.

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Another option you have is to respond NO to request. So this is to respond yes for physical items, electronic for copies. Now, when you cannot supply an item, you can respond a note to that request. So e.g., I open this.

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Item here this book, and my library cannot supply this item because it's a non circulating item it's a reference document. So, for this option.

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You choose the response and you select NO, cannot supply. And here you have the option to select the reason for responding NO. You don't need to choose a reason, but it's very important to.

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To select a reason because it benefits your library as the lender and the borrowing library because this information goes to your reports and then you can make some decision based on the reports for NO, because you have the option.

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25:48

When I said lender to create a deflection policies e.g. for materials they don't circulate outside of your library.

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And the deflection will allow the system to respond to know on your behalf. So e.g., this item is a non circulating item. I can create deflection policies for collections, for material that don't circulate outside of the library. And as a lender.

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You also have the option to set define real time availability, it's an extra configuration that you request to OCLC. I I talked about this in the

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Configurations for lenders and the real time availability allows the system to check if an item is available for ILL or not in your collection. So if you have reference materials, e.g., you can have that represented there.

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So I submit the response, you can only choose one reason. You cannot choose multiple reasons for NO, just one reason. Then you submit that response.

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You have the option to respond to NO in batch as well. So from the Can you supply where you see the icon?

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You can use the bulk respond option, then select the items that you cannot supply. Like, e.g., I have four requests for maps and maps don't circulate outside of my library, so I can select.

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All of them at once, so I have all of them and then I can choose NO and choose the reason. It has to be the same reason for all the requests you are.

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28:02

Processing. So these are the options.

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28:07

For you to choose, I select non circulating and this is an option for you to create deflection policies by format, e.g., because my maps don't circulate outside of your library.

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28:26

Submit a response and you see all four requests are NO longer in your kind of supply queue, they were automatically moved to the next lender in the lender string. And this information.

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Goes to your reports. I talk about the reports in a bit. You will be able to see the requests you answered NO and the reason you gave to those requests.

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28:58

Yeah, you saw you have the option to respond yes, respond NO, and in some situations you'll be able to respond to conditional. Conditional means that.

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29:15

You cannot supply the item as requested, but you can supply you you will be able to supply that item if the borrower accepts your conditions. So.

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Let's open an example here This is a request for an ebook.

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And e.g., my library cannot supply the entire ebook, but if the borrowing library accepts some pages or some chapters, I will be able to supply that. So from the top menu here choose response. I select the conditional.

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And I needed to select the option. So these are the options So for my example here.

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I cannot land the entire ebook, but I can supply some pages or some chapters, and this field here you can edit or add any information I can.

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Select another option here, you can completely change this and type something here else.

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Then I submit the When I submit a conditional response, I don't see that request here until the.

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31:18

Borrowing library

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31:20

Accepts my conditions and the borrowing library has four days to take action, otherwise the request moves to the next lender in the lender string. If the library accepts my conditions, then I see the request under conditions accepted.

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So this is how you respond to a conditional. And if the borrowing library like accepts your conditions, then your days to respond resets. E.g., if your days to respond is set as seven days, then the request will

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reset to seven days.

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And another example of responding NO to copies, e.g., you can do that for copies as well and go to can you supply.

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And you can select, e.g., I can select this bulk option. I can select this 1st one that's expiring soon and the information and I can choose.

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32:48

No, and give a reason. So for copy requests e.g. for this one, I don't have a license to I cannot fill this through ILL, so I can I can choose the option here.

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33:08

And submit that, that.

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What copies? Any questions so far? Any other questions?

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There's a question using the legacy interface or the new interface. I'm using the.

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Interface. There's, there are few differences between the classic interface and the new interface. You can still use the classic interface if you prefer.

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34:28

Or you can choose the new interface, ok? Now let's move to topic number two, manage requests and solve the issues as a lender.

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34:48

And you will learn how you manage those requests as the borrowing libraries, update them, how you manage the renewal requests, the conditionals accepted, how the items that were returned.

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35:08

And any items that are pending of action. 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 go live and go back to the.

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Interface and show you some examples there. Just a second so I'm using the new interface. If your library wants to keep using the classic interface for.

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35:49

File. You can do that from the homepage.

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35:53

Serves the configuration world share ILL, user interface settings, and you see your library is automatically enabled to the modernized interface, the new interface. If you don't want to.

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36:13

Use that for a while you can uncheck this and save it?

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36:17

You return to the classic interface. So let's start with the manage requests as lender and the 1st option is to respond to renewal requests.

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36:37

So here on the landing requests or here on the quick links, you can see that you, some libraries re requested renewals and it's up to your library to accept that or not.

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So the 1st one, let's open this one here and you can see here that the this library has requested the renewal to the end of the the month and.

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37:17

You have the option to accept or deny. If you deny, the original due date will stay here. This is the original due date. And if you accept, then for you to accept you need to enter the.

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37:36

A new date requested here in this field, so you can use the calendar icon and select that date and then you can accept the the renewal. So now that the.

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37:53

Request is under renewal accepted and the borrowing library has a new date to return that item to your library.

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Another option is to for you not to accept like e.g. this one here, the library did not specify a date for, the renewal. So it's up to your library as lender to decide for how long.

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38:30

How long you want to keep that item with the borrower or for how long your library can leave that item with the borrower?

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38:38

So e.g., the due date has expired a long time ago. You can either deny that or can recall this item. Recall means that the library has to return that item immediately or you can enter a new date here.

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38:57

For for that, you can give him few days more and accept that or you can deny that the library must return and recall means the library must return immediately.

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39:20

So let's deny this one here. So now the library must return that item. So that's how you accept or.

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39:37

Deny renewals, you just needed to, look at the request, requested the renewal date and enter that information here, then accept, ok? Or you just deny that request.

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39:56

Another situation you have is the conditions accepted. I showed you how you can respond to conditional, and then you have here the library has accepted.

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40:15

The conditions. So you can see here the conditions you have sent to the library that you charge \$3 and then the payment has to go through IFM. So the library has updated the request if I open the request here.

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The library has updated that request. If you scroll down to the borrowing information, you can see that the library has accepted the costs using IFM. And now you can choose the response and then.

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40:54

Not, not that you NO longer has the conditional option. So you can only respond to conditional once. And this is to speed up the processing because when you respond to conditional, then the library has four days. If they accept, then it resets.

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41:14

So it can take a long time until.

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41:17

The request is supplied. So you can choose no yes or you can choose NO. These are the options. You can say yes and accept this and you need to take action before the request expires because you can.

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41:37

You see here.

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41:38

On the conditions accepted, my time to respond reset resets, but the time is counting. So if my days to respond expires and I don't take action, this request will automatically move to the next lender in the lender string.

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42:01

There's a question. Can I set up an automatic response? We are not able to send the materials out of state. So in this situation, you needed to create deflection policies. Deflection policies can be set by geographical location as well.

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So what you do in your deflection policies, you select your state, e.g., you exclude your estate and it means that you are supplying only two libraries in your estate. I would recommend that you watch the recording.

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42:40

Of my configurations for lenders because I teach you how to set up deflection policies and excuse me, in that session. And the recording is divided by chapters so you can go directly to the chapter where I talk about the deflection policies, ok?

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43:00

So for your situation, select the option for deflection policies where you see the geographical locations for the libraries, you exclude your state.

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43:18

And that means that everything else will be automatically responded now, ok? So now for the conditional.

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43:36

If everything is ok and you still can supply the item, then you can choose the response to be yes. If not, you answer NO, and the requester moves to the next lender and the lender string. So I can respond to yes, and when I respond to yes.

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43:56

Then I can select to print the shipping labels, submit the response, and print those shipping labels to ship the item to the library, ok?

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44:11

And as a lender it's very important for you to update the system when you receive those items back. So here under returned in transit.

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44:26

You needed to complete those requests, so you needed to select the request, you can do this individually and complete or you can do this in batch as well. So you see this arrow?

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44:42

You see on the returned, so now I have that bulk respond bottom here on the top, and then I can either scan the request ID if I have that.

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44:58

Or I can select the items that I wanted to respond as completed. Okay Mark as complete.

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45:13

And then all requests are closed now. And anything you see here with the question mark, it means that these are requests pending of action and you can use the bulk option to complete those as well.

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45:31

So I can select those with the question mark and complete those, ok? It's very important not leaving anything pending here.

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45:46

Let me see your question here so the situation here, you cannot receive a returned item because it's still in transit from, from when we sent it out.

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46:06

The borrowing library never received it, not checked it out, not checked in on their end. They just sent it back to us without changing status at all. We have emailed them and they are unwilling to take the action to make this request and move through the system.

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46:26

Now we can't cancel the loan or receive it or mark it as complete. Yeah, that's that's a problem. So when you ship the item and the item see, I I shipped this item here.

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46:47

The only thing you can do at this point is recall the item. You don't have that complete option. So this is you have to communicate with the library and I recommend you contact OCLC support. I'm going to put it here.

Timestamp (OCLC)

47:07

ocl.lc/support to state your situation and inform the symbol for that library, so all CLC can help you in that situation, ok? This is.

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47:25

A very odd situation for a library not taking action and be unwilling to take action. So I would recommend you contact OCLC for OCLC to help you in this situation. And you'll be able to supply.

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47:45

All the information about the request and the symbol of that library so OCLC we can contact that library and try to solve that situation, ok?

Timestamp (OCLC)

48:00

And talking about issues, let's see some very common issues that might happen with your request. Like e.g., if an item

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48:18

is damaged or lost, and the borrowing library has set that item has lost as damaged. The request will be on the received but missing.

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48:33

And in this situation, both libraries have to communicate with each other to check how the borrowing library will compensate your library for that item and.

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48:50

Under this send email option, you have the option to add the email contact for that library here. You see all the information about the request goes on the body of the message and then you can communicate with that library to check how they're going to

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49:10

Compensate your library for that loss, then you can send that message.

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49:16

If you want to be compensated by using IFM for that replacement costs, then you can ask the borrowing library to create a dummy request. They're gonna create, they can use the.

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49:32

Here under borrower, they can create use this create request using a blank form or they can recreate that request and under notes they can use the notes option.

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49:51

To inform that this is just for replacement costs, not to supply the item. And then when you respond yes to this dummy request then the system applies the the IFM cost for that replacement cost. So that's how you can solve this situation.

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50:15

But you must communicate with the other library. Another situation might have here is, e.g., the borrower said that they haven't received the items, so you.

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50:35

Shipped the items but they haven't received for not received status.

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50:43

If the situation is for a physical item, both libraries can communicate with each other using the send email option. And then you can check with the courier company to see what is happening to that request, that item. If the item.

Timestamp (OCLC)

51:03

Disappeared, e.g., it would you would take longer. You can communicate that with the borrower so the borrower can request that item to another lender, to another library.

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51:16

If the situation happens to a copy request, this is a much easier to solve because you can use the article exchange for this situation. So you can choose that file.

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51:33

To generate that let me see which one is script, this one here then you can copy this information, you can copy this article exchange URL copy this password.

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51:53

And email this information to the library. You can either use this email option here on the upper right side or you can send it directly from your email account. So the it's easier to solve it when it's for copy.

Timestamp (OCLC)

52:09

Not received and then you have the situation where the library said that they returned the item but you haven't received it. So under returned in transit, e.g..

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52:30

This item here, this 1st item, you've never received that item back. Now it was returned weeks ago you haven't received that item, then you can mark this item as not returned.

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52:50

When you mark this item as not returned, your request will be under.

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52:56

Returned but missing, you have the option to send an email to that library communicating that. When you mark this as not returned, the borrower will see this request under the returned but missing.

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53:14

The request will be here until both libraries have solved this situation. And after the situation is solved, then you can complete this request from this status, ok? But marking has not returned will help you manage the request become.

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53:34

Because the the request is separated.

Timestamp (OCLC)

53:37

In another status for you to easily find that and manage that request. And you can add notes, you can add an internal note, to inform all the staff in your library what happened to this request.

Timestamp (OCLC)

53:55

I've not received it yet. I communicated with the borrower anything can put, you can put the date when you communicated.

Timestamp (OCLC)

54:14

With the library and add that note and any staff in your library will be able to see that you are still working on this item. This avoids anybody coming here and complete this request before it's solved, ok?

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54:34

Another situation you have here, it's overdue. Overdue means that the due date has passed over 14 days. It does not count weekends so for the request to.

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54:54

Gets to this status will take at least three weeks that the item is overdue. And in this situation, the option you have here is to.

Timestamp (OCLC)

55:06

Let me open another one. The option you have here is to either recall that item, communicate with the library, you can open that request and you can recall this item.

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55:23

And you can communicate with the other library to see what's happening to this item. They must return this immediately. And everything you recall will be under the recall the status for you to manage from here.

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55:42

Okay? And after the item is received, then you can complete the request. But it will stay here until it's solved. And as I mentioned before, you can add staff notes at any time.

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56:00

And you can recall items at any stage. E.g., you, you've just shipped an item, this one here, but your library needs that item.

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56:15

So you can recall that item and the library must return that item immediately recall, when you recall.

Timestamp (OCLC)

56:31

The item will be here on the record and when you open that record request, you still have the send email message here on the upper right side for you to communicate with that library, ok?

Timestamp (OCLC)

56:50

You can still send a message to the library You yeah, this, email option here is optional, but saves you a lot of time because you have all the information about.

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57:10

What's the request from the body of the message already?

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57:13

The only thing you have to do is add an additional note and the email address, ok? So you still have that option. This option is available at every stage of the request. Thanks for your questions by the way, they are very good questions.

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57:35

I have a question for you. Let me open the slide here to see if you haven't this, have understood.

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57:55

For the concept so far, you need to accept the question?

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57:59

And thanks, by the way, for participating.

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58:45

Let's check the correct answer. The correct answer is number one, the landing library can answer a conditional once only. The other options are incorrect. You can record the item at any time.

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59:04

You can decline renewal requests and you are able to select one reason only for responding NO. Even if you are responding to multiple requests, the reason must be.

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59:22

One for all those requests, ok? Thanks for participating again now let's talk about creating and manage off system requests.

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59:42

Those Requests you are.

Timestamp (OCLC)

59:44

Doing with the libraries outside of world share ILL. The the advantage of our system is to have all your IRL requests managed in world share ILL and part of your reports so you can have everything for you to manage in this system.

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1:00:13

There is a question here, the information that goes on the message of the email, it's it's the same you you cannot add it as a template. So if you have a note to add there, you you need to add that note.

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1:00:33

Manually for that the information about the request goes on the body of the request. So you you don't need to add all that information, ok? I will I will I'll go back there and show you the email again.

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1:00:55

What you can do, you can save that information somewhere that you can copy and paste to the email message to save you some up time instead of typing that information, but there is NO template. The template is that one you see there with just the.

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1:01:14

Information about the request, ok?

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1:01:30

Yeah, we don't have that option in the option for templates is from for another service Tipasa. You can use the community center, e.g.. The community center has.

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1:01:50

An area for you to add your ideas. You can create a discussion there in the community center.

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1:01:56

And add that information that you'd like to have that option to create the templates for, for your email messages. Our product team, they they take a look at that so you can, you can add that information to the community center.

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1:02:16

So now off system requests, the 1st step for the off system is to add your partners in the service configuration.

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1:02:31

On the world share ILL, then you select address book. Libraries using WMS as ILS or part of resource sharing for groups.

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1:02:49

You will be able to share, you would find a column here to share the partner or you can add your partner using this plus sign here in this button. Enter the information about your partner.

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1:03:04

And after you complete the information, click create and you'll be able to select your partner when you're creating off system request. So from from the left side panel under off system, create lending request.

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1:03:22

Then you can, 1st select your partner. Oh, let me let me go back there. Let me repeat the process. Just a second. Thanks.

Timestamp (OCLC)

1:03:39

Can you see the the screen now I'm sharing? Okay, so let me repeat that process from the service configuration, world share ILL.

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1:03:55

Then, address book, as I mentioned, WMS libraries, all libraries part of resource sharing for groups, you would see here a column to be able to share the.

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1:04:11

Partners or otherwise you can click this plus sign here and complete the form with your partner information, then create this to be able to select your partner. Now from.

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1:04:29

The interface here, the homepage, left side panel off system requests, create a landing request, now the type of request and creating one for.

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1:04:44

A physical item following request so I can select that. Then I can enter if I have an ID number with my partner for the request I can enter that number here. I can choose my partner.

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1:05:01

From the list after I add added that to the address book, then I can enter the need before date. This would be April the 1st. This is.

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1:05:21

Required information because you have the risks here.

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1:05:27

And then for the title, I enter the title here and then the the I have the also.

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1:05:44

And instead of completing the entire form, I use this magnifying glass icon you see here next to the title. This takes me to the search option, and this is my item here. So I I click the title.

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1:06:02

And apply data to request and now you see all the information is populated in the request. If I have created constant data, I can apply that. I have one here for system.

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1:06:19

So all the information is coming from my constant data and then after I have everything, I click this create button here on the right.

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1:06:35

And the request was created. And now from off system landing, I have my request here that I can manually update, change the status.

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1:06:50

Until the item is shipped to the borrower. And all this information goes to the reports. For copy requests, e.g..

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1:07:09

You can use article exchange to supply that item. You can click the the that link and select that item, and then you can use the the option to send the the information that article exchange.

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1:07:29

To create.

Timestamp (OCLC)

1:07:31

So the actual exchange creates the URL and password, you can use this email doc to pay from here and send this information to your partner. You see the, all the information goes on the body of the message.

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1:07:49

So there's a question here.

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1:08:09

Because their system borrowers are not going to get any overdue notices or lost notices, we still have to create a sock account for them in order to have them get notices. That's correct.

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1:08:24

That's the best approach for you to manage those off system is to create that that additional account so you can manage that. So off system, the regular requests you are doing with another library that.

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1:08:44

Uses the service off system. Your partner is not using world share IRL or any OCLC.

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1:08:53

Interlibrary long service, so you you have the interlibrary loan service your partner does not but you can use the service to have that request here using their off system because they don't have an account with OCLC interlibrary.

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1:09:13

Loan, the best way for you to do business with them and have that request here in the system is using the off system request, ok?

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1:09:23

So do you understand the difference between off system and the regular request? This is only when the the other library is not using all center library loan service.

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1:09:39

Okay, this IFM does not work for this option because both libraries must be using IFM and most libraries must have an OCLC account.

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1:09:55

Okay, so why FM wouldn't work for this option here, not yet, so these are the options for off system request.

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1:10:13

Now let's cover our 3rd topic is a statistic reports as a lender, you can generate your reports to support your activities. So from the homepage under.

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1:10:31

Other usage statistics, you need to enter your nine digital authorization and passwords. If you don't have that, you need to contact OCLC support to retrieve that information. So again, this oc.lc/support.

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1:10:48

If you don't have your nine digital authorization for your reports. So I enter my credentials.

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1:11:08

And there are some reports here that are very important like the resource sharing lender, reasons for NO report. This is a monthly based report that shows why you have responded NO.

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1:11:27

To the request. So you see that you have all the information here about the request and the reasons. So if you have created deflections, you'd see here if the library refused the conditions, so you see here.

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1:11:46

The library did not accept and the unfilled means that you never replied to that request. And you can select the month from the list and update that. Another report that's very useful here.

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1:12:05

Let me go back here. It is the borrow, NO lender resource sharing stats report. This is a report that's monthly based as well, but it provides all the information about the request. So we have the.

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1:12:24

Borrower symbol, you have all the information about the request, if there are costs involved, but flag one means that it's a copy request zero means that this is for a loan.

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1:12:44

Physical item. You can see if you receive the request for this title before or how many times you have received it this month and then if it went through automation, so you have all the information about the request and.

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1:13:05

you can use this type of request to to check.

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1:13:12

Your filled and completed and automation off system requests as well and you can see where most of your ILL requests are coming from and how many of the same requests arrived before.

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1:13:29

And the formats as well. And another report is lender activity overview report. This report can be for up to 60 months.

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1:13:45

So let's put this for one year and the February report is already here, the March report will be available on April the 5th. So the February report is just available.

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1:14:04

And the March report will be available April the 5th. It's always the following month on the 5th day of the following month. And this report here, the overview report is for you to see the peak of your activities and your average turnaround.

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1:14:24

The number of field and unfilled requests so you can plan better for your ILL activities. All reports can be exported or emailed.

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1:14:41

And if you enter here on the email address, if you enter here several email addresses separated by semi colon, and if you check this.

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1:15:01

Send monthly select the format and the style, then save it, you will receive the available report.

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1:15:10

Every month on the email account, you don't need to manually generate the reports here, ok? This is the easiest way for you to generate your reports. And the assessment tools, this is for you to see, e.g., your.

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1:15:29

ILL reciprocity report. This is for the ILL request with the libraries you have arrangements with. So you'd see here those requests for you to including your system you see here.

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So you would see those requests here. How many times you have borrowed or lent materials to those libraries.

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1:16:11

So in this session you saw how you can respond to requests including batch processing. You have learned how to manage ILL requests and solve some issues.

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1:16:29

You saw how you can create and manage off system requests, then we covered how you can set to automatically receive your statistics reports and analyze those reports.

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1:16:47

This is an online quiz. If you want to access this, let me give you the link to the quiz if you want to press to check your knowledge.

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1:17:06

This is the link.

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1:17:26

And you can use our support portal on help.oclc.org to find more training materials under the resource sharing, then select world share interlibrary loan to find everything divided into categories, and you can contact OCLC support as well.

Timestamp (OCLC)

1:17:46

From the menu here on the top of the screen. If you don't have any additional questions, I would like to thank you for participating. When you leave this session, a page will display on your screen, and if you click continue, it will take you to the evaluation

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form. If you have anything else that you would like me to show before I close everything here, you can add that to the chat if I

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1:18:16

Didn't show you something if you would like to see it. We value your feedback, helping us improve our training materials. Let me, let me add that. Let me add that information here.

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Okay find the evaluation.

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1:18:56

So here's evaluation. Thanks again. If you have any additional questions contact us at training@oclc.org. Thanks again and enjoy the rest of your day and have a nice weekend.