

January 24, 2024

WorldShare® ILL Lending

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OCLC Member Education

In this course you will learn to...

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

Documentation & Support

1. UPDATE YOUR ILL POLICIES AND CONFIGURATIONS

Borrowers can see policies on workflow

i 100 days of happiness (908538067)

Author Brizzi, Fausto; Shugaar, Antony

Type

Publisher New York, New York : Viking, an imprint of Penguin Random House LLC, [2015]

OCLC Number 908538067

[Search my library's online catalog](#)

Lender String

[clear](#)

Quantity

1

Create Request

All Holdings

State Holdings

Regional Holdings

Filter by:

Year:

Volume:

Results 1 - 100 of 414

Rows

Library	Supplier	Days To Respond	Location	Symbol	Group	Cost	IFM	Holdings
i AKRON-SUMMIT CNTY PUB LIBR	-	-	US, OH	APL		-		
i ASHTABULA CNTY DIST LIBR	-	-	US, OH	ASHDL		-		
i AVON LAKE PUB LIBR	Yes	Copies: 4 days Loans: 4 days	US, OH	OH9WF		Copies: 0.00 USD Loans: 0.00 USD	Yes	
i CINCINNATI & HAMILTON CNTY PUB LIBR	-	-	US, OH	OCP		-		
i CLEVELAND PUB LIBR	Yes	Copies: 8 days Loans: 8 days	US, OH	CLE		Copies: 15.00 USD Loans: 0.00 - 20.00 USD	Yes	
i COLUMBUS METROP LIBR	Yes	Copies: 12 days Loans: 12 days	US, OH	OCO		Copies: 0.00 - 1.00 USD Loans: 0.00 USD		
i	Copies: 8 days		Copies: 0.00 USD	...	

OCLC Policies Directory

Online Demo

Profile	Collections	Policies (24)	Schedule	Contacts
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Last updated Monday, June 8,

Set Policies

- Deflections
- Copy
- Loan

▼ Deflections

Microform			
SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection		Groups: ALPU	Formats: Microform
Note: Will books newer than 2014 get through?			

No DVDs or CDs			
SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: Sound Recording - CD Visual Material Visual Material - DVD Visual Material - VHS

OCLC Policies Directory

Set Supplier Status and Days to Respond; indicate non-circulating items

Profile Collections Policies (5) Schedule Contacts

Institution Profile Last updated Thursday, June 12, 2014 7:01:41 PM EDT

Summary

Name (Symbol): OCLC Training-TPU (TPU)

Also Called: TPU

Location: Washington, DC 20036 US

Shipping Address: Training Coordinator
11 Dupont Circle NW
Suite 550
Washington, DC 20036 US

Institution Type: Library Networks or Processing Center

OCLC Supplier: Yes [Edit](#)

Days To Respond: Copies: 4 days [Edit](#)
Loans: 4 days [Edit](#)

Non-Circulating: Audio-visual material (DVDs, VHS, CD), special collection items, archival items, whole issues of magazines or journals, newspapers, microform/microfiche. [Edit](#)

Periods: **Loan Period:** 3 Week(s)
Renew Period: 2 Week(s)

Fees: **Copies:** 0.10 - 5.00 USD [More...](#)
Loans: 5.00 USD [More...](#)

Edit Profile

OCLC Supplier: Yes No

Non-circulating:
5/20/14 testing, 1,2,3 newsprint, unbound journals, computer files, audio-visual (except within state)console gamesreference - Ebooks are not loaned.

Note: Days to Respond uses calendar days, not 24-hour periods. Selecting "1 day" means you will have until midnight Eastern time (US) to respond, *on the same day the request is routed to you*, whether it arrives in your Can You Supply queue at 8 am or 10 pm. If you do not respond by midnight, the request will advance to the next lender.

Days To Respond - **Copies:**
4 days

Days To Respond - **Loans:**
4 days
1 day
2 days
4 days
8 days
12 days
16 days
20 days

Cancel [Save](#)

Deflection defined

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

Spend less staff time saying No
to undesired requests



Types of deflection

OCLC Policies Directory

- **Format:** electronic, audio-visual, serials, etc.
- **Group:** OCLC Group(s) or Custom Holdings Group(s)
- **Cost:** maximum cost
- **Age:** material age (new or old)

Deflection policy example

No audio loans except for libraries in OCLC group
Libraries Very Interested in Sharing (LVIS)

Policy name	Enter a name (i.e., no audio loans)
Request type	Loan
Deflection type	Enable Real Time Deflection
Borrowers	<u>Exclude</u> OCLC Group = LVIS
Items>Formats	<u>Include</u> all audio formats

Deflection policies

System will answer **no**, **stop** ILL requests on your behalf according to your deflection policies.

Include = Will deflect/Do **Not** receive ILL requests

Exclude = Will not deflect/ **Will** receive ILL requests

Note: Certify that you select the correct options to avoid receiving unwanted requests or not receiving requests at all.

[Deflections- Documentation](#)

Automation for Lending libraries

OCCL Service Configuration

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Patron Request Workflows

Print Settings

Advanced Workflows

Patron Settings

Address Book

Notifications

Change

Automated Request Manager

[Help on this screen](#)

Borrowing **Lending**

Lending New Request

These standard actions are done for all Lending New Requests:

- Deflections**
Deflects requests based on [Policies Directory](#) settings
- Supplier status check**
Checks if current supplier status is set to yes
- Knowledge base holdings check**
Checks for WorldCat knowledge base holdings and adds a link to requested content
- Group affiliations check**
Identifies groups of which both borrower and lender are members
- Time to Respond**
Visible in Can You Supply? queues; displays how long a lending request will stay with your library before aging or expiration
- Real time availability check**
Allows system to respond no to requests for unavailable items; [request configuration](#)

Main Automations
Configure automations that will be applied to new lending requests. Only the best matching automation will be applied to a request.

Enabled	Name	Matches	Actions	Priority
There are no automations for this institution. Automations are useful for performing predictable actions on requests that meet specified criteria.				

[self-paced training](#)

[Documentation - Automated Request Lending](#)

[Documentation- Custom Holdings](#)

Turn on real-time availability

When your **library** is the current **lender** in the string, the **system checks**

Item Status	System Action
Unavailable	Request moves to next lender in the string
Available or not found	Request goes to your <i>Can you Supply</i> queue
Other status other than Unavailable	Request goes to your <i>Can you Supply</i> queue

Note: You need to complete an online questionnaire:

[Real-time availability questionnaire](#)

Monitoring Real-time availability

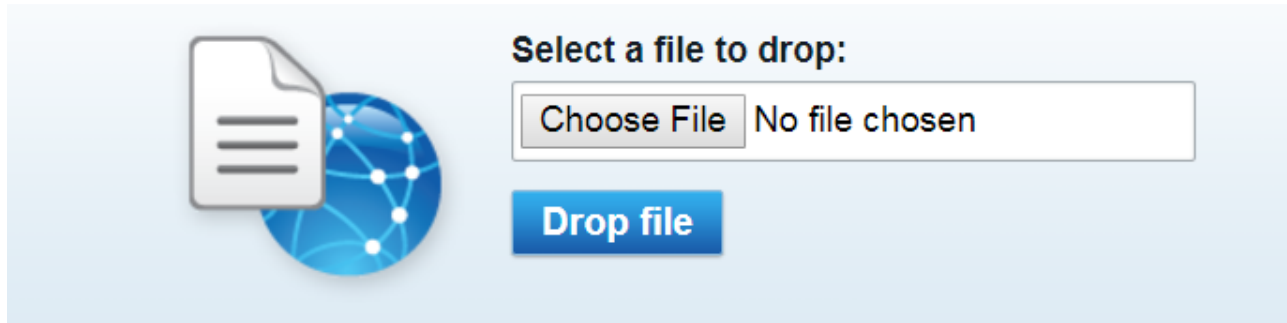
- Users should check their **Resource Sharing Lending Reasons For No** reports in CUSP
- Look for **System Checked Availability** as a reason for no

Period: Institution:

Resource Sharing Lender Reasons For No Report

REPORTING PERIOD:	INSTITUTION:	SYMBOL:								
March 2021	OHIO STATE UNIV, THE	OSU								
			COASTS				& DEV LTR	FILE		
206889009		PROBABILISTIC REASONING IN INTELLIGENT SYSTEMS : NETWORKS OF PLAUSIBLE INFERENCE	18183633	1988		FOO	PERRY CNTY DIST LIBR NEW LEXINGTON	SYSTEM CHECKED AVAILABILITY	3/1/2021	
206871871	TN:1439572	SEEING THE HIDDEN MINORITY : INCREASING THE TALENT POOL THROUGH IDENTITY, SOCIAL	1178326189	2020	THE ROLE OF IDENTITY ON PERSISTENCE FOR BLACK WOMEN DOCTORAL STUDENTS IN SCIENCE.	2020	UMC	UNIV OF MARYLAND, COL PARK	VOLUME ISSUE NOT YET AVAILABLE	3/1/2021
206872434	TN:1228305	HERITAGE LANGUAGE JOURNAL.	52810814	2003	ABDIZADEH, H., SOUTHCOOT, J., & GIINIDIS, M.: ATTITUDES OF IRANIAN COMMUNITY PARENTS IN AUSTRALIA TOWARDS THEIR CHILDREN'S LANGUAGE MAINTENANCE.	2020	INU	NORTHWESTERN UNIV LIBR	VOLUME ISSUE NOT YET AVAILABLE	3/2/2021

OCLC Article Exchange



Files no larger than 120 MB. Up to 1000 files a day per authorization.

Article Exchange- how it works

- Lending Libraries

Note: Document expires in 30 days or after viewed five times. Staff preview does not count.

Lending:

[Can You Supply? \(1\)](#)

[New - Loans \(1\)](#)

Supplied

[Overdue \(2\)](#)

Returned

[Returned/In Transit \(5\)](#)

[Returned/Complete? \(3\)](#)

Other:

[OCLC Policies Directory](#)

[OCLC Service](#)

[Configuration](#)

[OCLC Usage Statistics](#)

[OCLC Article Exchange](#)

[Resource Sharing News](#)

[WS ILL Training Resources](#)

[OCLC Community Center](#)

From the WSILL
homepage

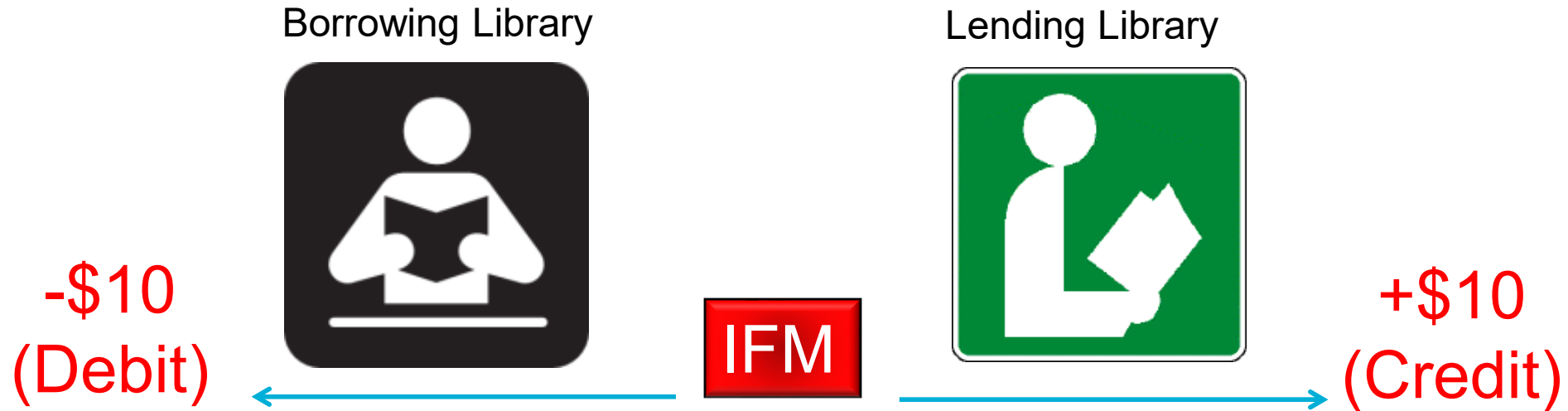
From the ILL request

Request Details (Request ID 179925341)

Source	WSILL
Status	Received?
Lenders	*WSTPV
URL Type	Article Exchange
URL	http://oc.lc/nQIJR1
Password	YHHQCPha
Journal	Journal of Comparative Politics.
Publisher	[S.I.] : University of Ljubljana, 2010-
ISSN	1338-1385
OCLC	695989035

IFM – Interlibrary Loan Fee Management

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



2. ANSWER & MANAGE REQUESTS AS A LENDER

Answer requests as a Lender

- Respond **Yes** to loans
- Respond **Yes** to copies, using Article Exchange
- Respond **No** to either loan or copy
- Respond **Yes** or **No** in batch
- Respond **conditional**
- Print queue

Manage requests as a Lender

- Respond to Renewal requests
- Respond to accepted conditionals
- Returned Items (complete/close request)
- Overdue Items

Issues with requests

- Shipped wrong material or material needed in library ASAP
- Damaged
- Not received items (loan and copy)
- Lost items (Received but missing status)

Manage off-system requests

Set up a borrower partner in OCLC Service Configuration



Need Help? ▾

- WorldCat Discovery and WorldCat Local
- Third-Party Integrations
- Metasearch Content
- WorldCat Registry
- IP Addresses
- WorldShare ILL
- Interlibrary Loan Options
- Borrower Data
- Lender Data
- Custom Holdings Groups
- Custom Holdings Paths
- Automated Request Manager
- Article Exchange Settings
- Purchase Options
- Patron Request Workflows
- Print Settings
- Advanced Workflows
- Patron Settings
- Address Book**
- Notifications

Change

Address Book

[Help on this screen](#)

Branches

Partners

Partner Management

Search by name:

[+ Add Partner](#)

No Results

Name	Symbol	Email	Status	Role
------	--------	-------	--------	------

No Results

Manage off-system requests

Create off-system lending requests

Use the **Create Lending Request** button in the *Off-System Requests* queue under the *Borrowing and Lending* sub-queues to create off-system lending requests.

Interlibrary Loan Home

Discover Items

Borrowing Requests

Lending Requests

Purchasing Requests

Off System Requests

Borrowing (1)

Lending (1)

Create Lending Request

Print Queue (4)

Create Lending Request

NDCLV Reg ID: 114960

Apply constant data: Actions: Create Reset

Request Details (Request ID NEW-SUPPLIER)

* indicates required fields

Source WS-ILL

Status

Type Loan

Requester Reference ID

Fulfillment Type Off-System

Borrower Name *

Borrower Symbol

Email Address

Search my library's online catalog

Need Before *

Change the status of an off-system request

When it is time to Cancel, Ship, Receive, Return, or check-in an off-system request, it is recommended that staff make the necessary updates to the request details before changing the request status using the **Change Status** dropdown. Select the appropriate status after request details are updated.

203764314: The dynamics of bureaucracy : a study of interpersonal relations in two Government agencies

NDCLV Reg ID: 114960

Previous Request Next Request

Apply constant data: Actions: DEFAULT Note Save Reset Email Print Now

Requested on 04/18/2022

Need Before 05/30/2022

Shipped Date 04/21/2022

Due Date 05/21/2022

Received Date

Return Date

Change Status

Unfilled

No reason given

In use/On loan

Lacking volume/issue

Not owned

Non-circulating

Not on shelf/Missing

Policy problem

Item too new to loan

On reserve

Borrower Name OCLC Test Library

Borrower Symbol OCLC

Email Address silvaa@oclc.org

Search my library's online catalog

[Documentation](#)

3. STATISTICS REPORTS

Reports for Lenders

Interlibrary Loan Home

Search for requests

Request ID

Go

Active Requests Closed Requests

Quick Links

Borrowing:

[AE Alert \(2\)](#)
[Produced \(23\)](#)

- [Conditional \(1\)](#)
- [In Transit \(16\)](#)
- [Received? \(16\)](#)
- [Expired \(3\)](#)
- [Unfilled \(3\)](#)

Received

[Renewal Approved \(1\)](#)

Returned

Lending:

[Supplied](#)
[Returned](#)

Other:

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)
- [WS ILL Training Resources](#)
- [OCLC Community Center](#)

WorldCat Discovery

WorldCat.org

OCLC WorldShare Interlibrary Loan

COUNTER

Link Resolver

Assessment Tools

Period: February 2020 Months: 6 Update

Institution: WSTPU

- [WorldShare ILL Purchase Request](#)
- [WorldShare ILL Open Access Request](#)
- [Resource Sharing Borrower Reasons For No Report](#)
- [Resource Sharing Lender Reasons For No Report](#)
- [Borrower Resource Sharing Stats Report](#)
- [Lender Resource Sharing Stats Report](#)
- [Strategic Union List Report](#)
- [Borrower Activity Overview Report](#)
- [Borrower Transaction-Level Detail Report](#)
- [eSerials Requests by Journal Title Report](#)
- [Serials Request Overview Report](#)
- [Copyright Compliance Payment Report](#)

[Reports for Lenders documentation](#)

Statistics reports – automatically sent

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

WSTPU -- The report (Borrower Activity Overview Report -- Instituti...



Usage_Statistics@oclc.org

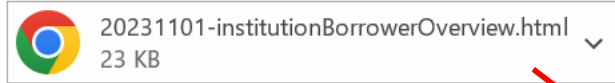
To Shelton, Lucia



Tue 4:54 PM

Retention Policy 2 Year Delete - Default (2 years)

Expires 12/4/2025



Start your reply all with:

Thank you!

Received, thank you.

Thank you very much!

Feedback

WSTPU -- The report (Borrower Activity Overview Report -- Institution
20231101

[Assessment Tools](#)
[About WorldShare](#) [Interlibrary Loan](#) [Comments](#) [Help](#)
Period:
Months:

[Export Email](#)

Borrower Activity Overview Report -- Institution

Reporting Period:
November 2023 - June 2023

Institution:
OCLC EASTERN TRAINING - TPU (BETA)

Symbol:
WSTPU

	History					
	Nov 2023	Oct 2023	Sep 2023	Aug 2023	Jul 2023	Jun 2023
Requests Initiated	32	8	33	7	33	6
Requests From WorldCat	32	7	32	7	33	6
Requests Cancelled	1	0	0	1	0	0
Requests Filled	13	6	8	3	11	3
Loan	11	2	7	1	8	1

The **three** topics...

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

Support, Documentation & Tutorials



<https://help.oclc.org>

System Status Dashboard

Contact OCLC Support

Welcome to OCLC Support

How can we help you?

Search

Select a category



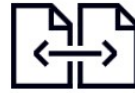
Discovery and Reference



Library Management



Metadata Services



Resource Sharing

OCLC support regions

Region	Location	Contact information
Asia Pacific	OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US	Or: +1-614-764-6009 Send an email Submit/View requests
Australia and New Zealand	OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU	T: 1300 260 795 (local call w Or: +61 (0) 3 9929 0800 Send an email Submit/View requests
United States	OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US	T: 1-800-848-5800 (toll free in USA and Canada) Or: +1-614-793-8682 Send an email Submit/View requests



**Congratulations!
You completed
WorldShare
ILL Lending
training!**

Thank You!

Please remember to fill out the evaluation for this class

- Category: Resource Sharing and Delivery
- Class name: WorldShare ILL Lending
- Instructor: Lucia Shelton
- Date: January 24, 2024

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)