WorldShare ILL Lending Transcripts

January 24, 2024

WEBVTT

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Timestamp 00:02:47.140 --> 00:03:04.420

So, hi everyone I'm Lucia Shelton, I'm part of the member education team at OCLC and today I'm facilitating your learning on WorldShare ILL Lending welcome to our session.

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For all of you either new to ILL or returning to the service during this session, you will see the functionalities in the service for Lending Library. We are concentrating on three topics, so.

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First, you will discover why you should update your policies in OCLC policies directory and update your configurations as a lending library. Second, I will guide you through the path in how you can answer and manage ILL requests

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and solve issues you might encounter with those requests then finally third as we progress in the session, we'll explore how you can generate reports to support your ILL activities and of course where you can contact.

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Support or access more training materials in a way meets your needs. you can use the chat to send your question as you go and by the end of this session you will have a better understand of ILL options for lending libraries. So let's start with

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Number one, update OCLC policies directory and your library's configurations for you to enhance your experience with the service. So why is it so important to choose set or update your library's policies in the policies

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Directory because borrowing libraries can see your policies when they are creating their ILL requests, either briefly from the request form or clicking the icon to access your OCLC policies.

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Directory page and see your ILL policies this way, a borrowing library can see if they should or can add your library to their lender string or to the list of preferred lenders. This saves both your time.

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And the borrowing library time with the request, if your library is getting requests for item that you no longer own the cataloging team at your library need to update your holdings in WorldCat, they can easily do it in the OCLC cataloging service.

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By removing those items from your holdings in the WorldCat database. This would stop those unwanted ILL requests from coming to your library. So now let's go live to see some of the options in the OCLC Policies Directory. So even if you are not

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The person responsible for the configurations at your library, you will benefit from learning how these options work in the system. So let me share my browser.

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Timestamp 00:06:27.300 --> 00:06:31.060

And log into the service.

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To see how you can access the OCLC policies directory. So we are here in the WorldShare ILL homepage and if you haven't seen this page before.

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This area here is where you start using your custom web address and where you see your username on the right side of the screen this arrow is where you can change the language interface and change the.

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Password and log out from the system need help general help takes you to the documentation pages and contact support for you to contact OCLC support in case you need it on the left side panel is where you can manage your ILL requests.

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Here in the middle section under order is where you find the other pieces for the service and it's where you can easily access the OCLC policies directory page for your library. So your policies directory opens on the profile tab

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with brief information about your library. As a lending library, it's important to communicate to requesting libraries that you are a supplier. So here on the OCLC supplier you can click this edit link and you mark OCLC

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Supplier as Yes because you are a lending library and it's important also to communicate your days to respond for copies and loan requests. Days to respond is

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The amount of time a request will stay in your WorldShare ILL instance awaiting a response after the days to respond the period your library has stipulated the request will age to the next lender, if you do not provide a

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response. The default is four-day period for both loans and copies, but you are able to change that. Copies and loans can have different days to respond, for example, you may process copies in two days.

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Timestamp 00:09:16.260 --> 00:09:28.340

And process loans for physical items in four days, and then you click save for the system to retain this information.

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

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under closures, so you click this add button on the right.

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Give a name to your closure select the option.

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enter the starting date and the end date.

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You Mark OCLC supplier as no, you can add any note you find useful save it then the system will automatically stop pause requests from coming to a library during this period.

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So this is the easiest way to temporarily stop those requests and the other libraries, they can see this information in your OCLC policies directory page, you can edit this or delete this information at any time. Clicking the

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Timestamp 00:10:51.800 --> 00:10:55.040

Respective links here on the right.

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You can also have your operating hours. This is optional. It helps when the other library needs to contact your library, so they know when your library is open, you can click this add button complete the form with all the information save it, you can have.

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Timestamp 00:11:16.520 --> 00:11:31.960

Multiple, as you can see in the example and the other libraries can see this information and you can edit or delete this at any time.

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Timestamp 00:11:33.760 --> 00:11:53.600

As a lending library, you should set your ILL policies under the policies tab. The options are deflections copies and loans deflection is optional, but it saves you a lot of time.

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Timestamp 00:11:54.240 --> 00:12:13.640

Because deflection allows the system to automatically answer no to requests on your behalf. it automatically moves the request to the next lender for the items you cannot provide, you can create deflection policies based on format group.

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Age of items you can create multiple policies as needed. So now let's set up a deflection policy as an example.

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Timestamp 00:12:26.880 --> 00:12:30.680

So you have an idea how this works.

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Timestamp 00:12:38.400 --> 00:12:57.600

So let's imagine a scenario where your library wants to stop ILL requests for items with a format as audio except to libraries part of an OCLC group called Libraries Very Interested in Sharing

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Timestamp 00:12:59.520 --> 00:13:18.080

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

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Timestamp 00:13:18.200 --> 00:13:19.880

Live there.

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Timestamp 00:13:26.400 --> 00:13:32.760

So under deflections you click this add button on the right.

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For this example, let's call this: No audio loans.

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The request type, let's say select as loan. The deflection type enable real time, enable time except when I'm last in the lender string, it means that.

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Timestamp 00:14:04.280 --> 00:14:19.680

When your library is last in the lender string, you supply the item and you can temporarily disable this deflection. So let's Mark enable real time it will defect for all libraries, following this rule.

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Timestamp 00:14:21.760 --> 00:14:35.760

Fee Is based in costs, if you charge for ILL request and you don't want to receive requests under certain amount, you would enter the amount here, not for this example.

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Timestamp 00:14:36.800 --> 00:14:57.280

Borrowers OCLC group we are providing to that group called The Library Very Interested in Sharing. So we would exclude those libraries from the deflection policies exclude means that you are providing

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Timestamp 00:14:57.920 --> 00:15:04.640

To those libraries, so I can find those libraries here.

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Timestamp 00:15:10.720 --> 00:15:29.760

This is the library. This is the group of libraries very interested in sharing. I'm excluding. If you include, you are not providing the system will deflect if you are excluding you are providing the system will not defect for this group of libraries.

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Timestamp 00:15:31.840 --> 00:15:51.680

Custom holdings, custom holding groups could be used instead of OCLC group, if you have created custom holdings for your preferred or priority group of libraries, you could exclude to provide.

Timestamp 00:15:52.960 --> 00:15:54.960

Included to not provide.

Timestamp 00:15:57.480 --> 00:16:13.440

So now let's choose include to deflect the format that you not, you are not providing. So it would be everything that is audio.

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So when I include, I'm not providing for these formats.

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E-license term is for libraries using WorldShare License Manager and have added licenses there then now are setting deflection policy based on those licenses. So you could include to not provide or exclude to provide.

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You can create based on material age as well. You can deflect the new materials or the old materials, not for this example, then notes anything you find useful. I will add no audio to

Timestamp 00:17:11.680 --> 00:17:14.120

Loans except.

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Timestamp 00:17:20.640 --> 00:17:22.520

LVIS

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Timestamp 00:17:24.520 --> 00:17:26.400

Group libraries.

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Timestamp 00:17:28.960 --> 00:17:48.800

And save it, and now your deflection policy is displaying here and it's visible for the other libraries as well. So everything that you see in green with this check mark is deflecting you do not provide and.

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Timestamp 00:17:48.880 --> 00:18:02.760

Anything you see with the X in red is excluded, you are providing. So that's how you can set up the deflection policies.

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Timestamp 00:18:06.080 --> 00:18:07.920

Do you have any questions?

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Timestamp 00:18:14.400 --> 00:18:34.880

And one important thing when you are setting up deflection policies is to remember that deflection is for the system to answer no to requests on your behalf according to your rules. When you choose include, it means that the system will deflect.

Timestamp 00:18:35.520 --> 00:18:55.360

Your library will not receive those requests when you choose exclude, it means that the system will not deflect your library will receive those requests. So this way you avoid receiving unwanted request and you avoid not

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Timestamp 00:18:55.360 --> 00:18:58.040

receiving any requests at all.

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Timestamp 00:19:07.520 --> 00:19:24.800

So this is for deflection, deflection is optional, but you should at least have policies for copies and loans. For copies, for example, let's click this add button on.

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Timestamp 00:19:25.080 --> 00:19:26.200

right.

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Timestamp 00:19:27.400 --> 00:19:33.920

You give a name to your policy, you select the type of copy.

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Then if you charge anything for the copy request, you can add here, you can click this add a copy fee and select the increment and complete the other fields and select.

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Timestamp 00:19:55.760 --> 00:19:56.880

Currency.

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Timestamp 00:19:58.720 --> 00:20:19.200

Then you select the libraries to whom you provide those materials or do not provide. Any means that you are providing to everybody. Include means that you provide to those groups exclude means that you do not.

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Timestamp 00:20:20.660 --> 00:20:39.620

It's the opposite of deflection. So include you provide exclude you do not provide so for OCLC groups, you can include the groups you provide or exclude those you do not provide the same thing with library category.

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Timestamp 00:20:43.580 --> 00:21:01.500

Under locations here it's where you can inform the system that you are not an international lender. So here under locations you include your country and when you include your country, you are informing the

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Timestamp 00:21:01.620 --> 00:21:07.860

System that you only supply items within your country.

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Timestamp 00:21:11.180 --> 00:21:29.660

Collections collections are the special collections that have different rules. So you can include the collections under the collections tab and refer to those here under the policies tab. You can include if

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Timestamp 00:21:30.940 --> 00:21:50.140

You provide and you can exclude those that don't circulate outside of your library. The same thing with formats. So if you leave as any, you're providing everything you can include the formats you provide or exclude those you do not.

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Timestamp 00:21:51.620 --> 00:22:10.620

With copy and loan policies, you are only informing other libraries about your policies. You are not preventing them from sending those requests. You need to have deflection policies to stop those requests. So this is just for information.

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Timestamp 00:22:12.540 --> 00:22:24.300

You add any restrictions, then the details, how you accept the request. You click the plus sign.

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Timestamp 00:22:25.980 --> 00:22:29.340

How you handle the request?

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Timestamp 00:22:31.100 --> 00:22:33.220

How you deliver.

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Timestamp 00:22:34.940 --> 00:22:55.420

And how you accept payments for those with charge. You can add multiple fields on any of these options. Add any note you find useful save it, and then it displays as you can see here.

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Timestamp 00:22:55.540 --> 00:23:15.900

Everything with the green check Mark is included you provide anything with the Red X Mark means that you do not provide is excluded, so you see all the details you can edit or deleted this at any time

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Timestamp 00:23:16.540 --> 00:23:36.220

The same thing with deflections clicking on the respective link on the right, and you can have multiple policies for copies the same thing with loans. You also have that form from the add button.

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Timestamp 00:23:36.420 --> 00:23:42.780

You complete the form with a name for your police.

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Timestamp 00:23:44.220 --> 00:24:04.540

Maximum number of items and the loan period in days weeks and months, the maximum number of renewals and the period in days weeks, and months the same thing with fees, if you charge.

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Timestamp 00:24:04.820 --> 00:24:25.020

Those, you can add the increment and complete the other fields, select the currency and you can include or exclude OCLC groups, library categories and here.

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Timestamp 00:24:25.180 --> 00:24:38.340

Locations is where you can also inform that you are not international lender for loan for the physical items, including your country.

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Timestamp 00:24:40.380 --> 00:24:49.340

Any, you are providing to everybody. Same thing with collections. You can include or exclude.

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Timestamp 00:24:51.260 --> 00:25:12.380

And the formats you can include the ones you provide or exclude those you do not provide any restrictions and the same thing with the details. How you accept requests how you handle those requests.

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Timestamp 00:25:13.020 --> 00:25:32.860

How you deliver and how you accept payments for those with charge, and again, you can add multiple fields for any of these options. Add any notes you find useful save it and it will display

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Timestamp 00:25:33.020 --> 00:25:53.340

As you see here, all the details. Anything in green check Mark is included you provide anything with the X Mark is excluded, do not provide you can edit or deleted this at any time and libraries, they have access

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Timestamp 00:25:53.380 --> 00:26:03.100

To this information as well, and you can have multiple policies. So this is for the policies directory.

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Timestamp 00:26:05.060 --> 00:26:20.060

The collection tab is I mentioned you can refer your collections here and then create policies, add them to your copies and loans policies.

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Timestamp 00:26:24.060 --> 00:26:26.100

Do you have any questions?

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Timestamp 00:26:32.380 --> 00:26:48.380

So now let's talk about automation as a lending library, How you can set up rules for the system to automatically check your configuration and send it to your library only those requests that you

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Timestamp 00:26:49.020 --> 00:27:08.860

are ready to answer. This is done in OCLC Service Configuration under Automated request manager and the easiest way to access the OCLC Service Configuration is from your WorldShare ILL homepage under other.

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Timestamp 00:27:08.860 --> 00:27:29.340

So here's service configuration, the service configuration is where your library can customize your experience with the service and both the service configuration and the policies directory to change anything for your library set anything.

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Timestamp 00:27:29.460 --> 00:27:49.700

Here for your library, you must have admin account because you are changing for the entire library, not only to your account. so here on the left side panel under WorldShare ILL

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Timestamp 00:27:51.100 --> 00:28:10.300

You can find the automated request manager. This is where you can configure automation and you select the lending tab as a lending library, you create your deflections and set

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Timestamp 00:28:10.940 --> 00:28:30.780

Your supplier status in the policies directory, and then here you can create automation for the system to look into all these options and send only those requests that your library is ready to answer. So.

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Timestamp 00:28:30.940 --> 00:28:51.260

It saves you a lot of time. You don't have to manually answer No to requests that you are not ready to supply. So in automation is included deflections, the supplier status, checking your knowledge base holdings, if you have your electronic resources there

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Timestamp 00:28:54.180 --> 00:28:55.780

in the WorldCat Knowledge base.

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Timestamp 00:28:57.020 --> 00:29:17.500

Time to respond your days to respond and the real time availability this, if you configure that. Real time availability requires further configuration, if you have that configured, the system will look

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Timestamp 00:29:18.140 --> 00:29:37.980

Into your holdings and see if the item is available in the shelf, for example, for you to supply that item, if the system finds that the item is not available, then the system will automatically skip your library from

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Timestamp 00:29:38.140 --> 00:29:44.220

The lender string and your library does not receive that request.

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Timestamp 00:29:46.300 --> 00:30:06.140

To set up the automation, you would click this add new button, give a name to the automation select the matches if you have a group of library, your preferred libraries of priority libraries, you can select your groups here.

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Timestamp 00:30:08.700 --> 00:30:26.620

The same thing with the formats and the request type and you can select the actions for the system to follow those rules, and this, save it and the system will you look into all these options here to define if the request

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Timestamp 00:30:27.700 --> 00:30:30.260

can be sent to your library.

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Timestamp 00:30:33.460 --> 00:30:35.620

So this is automation.

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Timestamp 00:30:42.420 --> 00:31:02.900

On the copy of the presentation. I give you the link to the documentation pages where you can find the self- pace training and how to set up automation documentation pages and how you can define your custom holdings, your priority libraries or.

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Timestamp 00:31:03.140 --> 00:31:23.380

The libraries to supply to, and real time availability as I mentioned requires for the configuration, you can click this link if your library is interested in this and here what happens when the system looks into.

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Timestamp 00:31:23.580 --> 00:31:43.860

Holdings in your catalog if the item is not available, the system automatically moves that request to another lender, if it's available or the system cannot find that the item is unavailable, then the request moves to your... Can you supply queue.

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Timestamp 00:31:45.820 --> 00:31:59.700

And this goes to your reports and you can see that the reasons for no report. The reason for your library to answer no is that the system checked availability.

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Timestamp 00:32:03.060 --> 00:32:11.060

So something to speed up your processing and save you a lot of time.

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Timestamp 00:32:13.300 --> 00:32:32.500

Now let's talk about article Exchange OCLC article exchange is part of WorldShare ILL and it provides a single secure location for you as a lending library to answer to copy requests and place requested documents, then library patrons

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Timestamp 00:32:32.820 --> 00:32:42.300

Can retrieve those documents obtained for them through interlibrary loan. This is optional. Article exchange

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Timestamp 00:32:44.020 --> 00:32:57.020

Accepts large files, including high resolution documents, you library staff can upload up to a thousand files per day per authorization.

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Timestamp 00:32:58.820 --> 00:33:18.900

You can use article exchange from the link on your WorldShare ILL homepage or directly from the ILL request form when you are answering to a copy request, then article exchange creates a unique UL and passwords to protect the file.

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Timestamp 00:33:19.860 --> 00:33:30.220

This file expires automatically after thirty days or after viewed five times, it does not count staff preview.

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Timestamp 00:33:33.300 --> 00:33:52.500

When your library charges for ILL requests, you can receive payments using IFM- the interlibrary loan fee management, which uses your OCLC account. So when you answer, yes, to a request the system debits and credits the libraries

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Timestamp 00:33:52.940 --> 00:33:54.420

for the transactions.

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Timestamp 00:33:56.740 --> 00:34:12.659

Both libraries must accept IFM for this to work. This is for ILL transactions with costs, if your library does not charge for ILL, you would skip this part of IFM

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Timestamp 00:34:15.580 --> 00:34:21.940

Do you have any questions you can type your questions in the chat as you go.

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Timestamp 00:34:33.460 --> 00:34:53.940

So now let's move to topic Number two, answer and manage requests as a lender and see how everything works in the system. So you will learn about the options you have to answer. Yes, no, or conditional to loan

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Timestamp 00:34:55.379 --> 00:35:14.420

And copy requests and you will learn how you can manage those requests and of course there are situations when requests don't work as expected, you will see how you can easily resolve those issues.

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Timestamp 00:35:14.420 --> 00:35:16.540

So let me.

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Timestamp 00:35:21.460 --> 00:35:26.060

Let me share my browser again.

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Timestamp 00:35:37.460 --> 00:35:57.860

So let's start with answering requests as a lending library. So in the left side panel, you find that the lending request accordion, you find similar options under the quick links in the middle section, you can use Can you supply queue.

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Timestamp 00:35:57.940 --> 00:36:05.260

You see that I have new copies and new loans requests here, let's start with.

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Timestamp 00:36:06.940 --> 00:36:12.620

answering Yes to loan requests. So let's open the new loans.

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Timestamp 00:36:13.940 --> 00:36:17.180

And you can see.

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Timestamp 00:36:20.340 --> 00:36:38.900

You can see here, time to respond that the ones that are expiring sooner are on the top and then you have the other requests, You don't need to follow the order, this is for you

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Timestamp 00:36:40.980 --> 00:36:59.260

To note that you have requests expiring soon if you don't take action, those requests will disappear from your Can you supply queue. So now let's answer yes, to this first one here, let's open the request.

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Timestamp 00:37:00.020 --> 00:37:19.860

And the first thing you need to pay attention before you answer, yes, to the request is the information that comes from the borrower, mainly if you charge for requests. So here the information about the borrower, if you

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Timestamp 00:37:19.860 --> 00:37:25.140

Haven't created deflection policies, you would have received that

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Timestamp 00:37:26.260 --> 00:37:46.740

If the library does not accept any charges. And then you can check your online catalog if you have configured this in the service configuration, adding your online catalog to your service and.

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Timestamp 00:37:46.900 --> 00:37:54.060

After you locate you the item in your online catalog, you can add the shelf location.

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Timestamp 00:37:57.300 --> 00:38:16.180

Put an example here, and then you can save this information if you want to print this request to go to the shelf to pick the material, pick up the material. You can either click the print now.

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Timestamp 00:38:16.220 --> 00:38:20.500

On the upper right side here and print that request.

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Timestamp 00:38:22.580 --> 00:38:32.900

It goes with that information about the shelf location, or you can add this to your print queue.

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Timestamp 00:38:35.380 --> 00:38:55.220

When you add this to the print queue, then you can print that. Multiple requests here on the left side panel the print queue, you can print multiple requests at a time. It'll be your pick list, so you can have several requests here to print at a time.

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Timestamp 00:38:57.180 --> 00:39:04.260

instead of printing individual requests. So it will print everything the two requests at once.

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Timestamp 00:39:09.300 --> 00:39:25.860

So if your library is ready to answer, yes, to this request, then you can mark to print shipping labels. This information goes to your print queue for you to print the labels and then.

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Timestamp 00:39:27.220 --> 00:39:28.340

Yes.

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Timestamp 00:39:33.620 --> 00:39:50.260

And now the request moved from the new loans to shipped in transit if you forgot to print that labels, you still can do that on the upper right side. You can still.

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Timestamp 00:39:50.900 --> 00:40:11.380

Send the shipping labels to a print queue and the shipping labels will be here in the print queue under shipping labels. It's here you can print multiple as well. Select anything you want to add then click print.

142

Timestamp 00:40:12.020 --> 00:40:15.860

And print your labels to ship those items.

Timestamp 00:40:19.700 --> 00:40:37.620

So this is answering yes to loans. Let's see how you can answer Yes to copy requests. So let's open copies and let's open the first one here. The one that's expiring sooner.

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Timestamp 00:40:39.640 --> 00:41:00.120

And you can prepare the file and if you're using another option for sending that file, you can use this email option as well, or you can send in different ways. If you are using article exchange

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Timestamp 00:41:00.200 --> 00:41:08.680

to supply this item then you can click the OCLC article exchange.

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Timestamp 00:41:12.280 --> 00:41:14.920

Then you'll find your file.

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Timestamp 00:41:19.320 --> 00:41:36.600

Drop the file and now you see that OCLC article exchange creates this unique url and passwords to protect the document. You can preview to see if it is, it's the correct one, if it's not, you can cancel.

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Timestamp 00:41:36.600 --> 00:41:42.040

And restart again and attach the correct file.

149

Timestamp 00:41:44.280 --> 00:41:55.400

And after you have added this article exchange, the file to article Exchange, then you can mark this as Yes.

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Timestamp 00:41:57.720 --> 00:42:16.920

And the other library receives the request updated with the article exchange URL and passwords to forward that to their patron. So this is answering yes to both loans and copies individually.

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Timestamp 00:42:17.560 --> 00:42:23.600

Now let's see how you can respond no to either loan or copy.

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Timestamp 00:42:25.320 --> 00:42:45.720

Let's start with the loan first. Let's open the Firefly Atlas. You can either click the ID or the title, open the request and now I cannot supply this item. This item does not circulate

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Timestamp 00:42:46.080 --> 00:43:06.200

Outside of my library and my library has not created the deflection policies and that's why deflection policies save you a lot of time. You don't have to manually answer no, to request. you can create deflection policies for the system to do that on your behalf.

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Timestamp 00:43:06.880 --> 00:43:26.680

So now if, if I want to answer, no, I can give one of the reasons I don't need to give a reason, but it's important to add a reason for the other library to understand why you are answering no to the request and.

155

Timestamp 00:43:27.560 --> 00:43:46.800

Also to see that on your reports. So let's mark this as no circulating and now the request moved automatically to the next lender in the lender string it's no longer in the system for your library.

156

Timestamp 00:43:49.080 --> 00:44:00.000

The same thing with a copy request. Let's open a copy request and you want to answer no to this.

157

Timestamp 00:44:02.520 --> 00:44:04.920

So let's give a reason.

158

Timestamp 00:44:07.680 --> 00:44:26.840

Not licensed to fill, this is another option that you could have created a deflection policy based on your license and now the request moved automatically to the next lender and the lender string, it's no longer in your.

159

Timestamp 00:44:27.000 --> 00:44:28.120

System.

160

Timestamp 00:44:29.400 --> 00:44:49.880

So you saw answering, yes and no for individual requests, you can do that in batch as well. So where you see this green arrow, it means that you have batch processing available for supplying item.

161

Timestamp 00:44:51.200 --> 00:45:03.600

And to complete items as well, when you receive that item back under the returned. So let's see an example in. Can you supply queue

162

Timestamp 00:45:05.240 --> 00:45:19.400

So batch respond you can supply items you can batch answer, yes or batch answer. No, let's start with batch answering. Yes, you click the link.

163

Timestamp 00:45:21.240 --> 00:45:38.680

And now to add the request to the list for batch processing, you'll select the items by clicking the plus sign next to the title. So let's mark this one.

164

Timestamp 00:45:40.440 --> 00:45:44.360

This other one, and this other one.

165

Timestamp 00:45:45.560 --> 00:46:06.040

So you have all your requests there, if you want to eliminate a request that you accidentally added to the list, I can click the X mark, so it's no longer there, and now I can mark to print the shipping labels for all of them at, on.

166

Timestamp 00:46:06.760 --> 00:46:26.520

I can apply the constant data, it'll be this, it's optional as a lending library. You already have your default automatically applied, but if you want to select one, you can add that, it will be the same for all of them, and then when you click

167

Timestamp 00:46:27.160 --> 00:46:28.960

This Yes button.

168

Timestamp 00:46:30.520 --> 00:46:50.840

System you see the system automatically updated all the requests in the list to the next stage, which is shipped in transit and added all the three shipping labels to the print queue. So they're all here.

169

Timestamp 00:46:54.040 --> 00:47:06.920

The shipping labels they're all here for you to print them at once, and here in the print queue you can keep the requests here while you are printing them.

170

Timestamp 00:47:08.160 --> 00:47:28.600

After you've print your request for your labels, if you no longer need them, you can mark the ones you don't need and then you can remove those from your print queue, so they're

171

Timestamp 00:47:29.080 --> 00:47:32.000

here until you remove them.

172

Timestamp 00:47:35.000 --> 00:47:38.280

Now let's see the option to.

173

Timestamp 00:47:39.600 --> 00:47:43.360

Answer no in the batch processing.

174

Timestamp 00:47:47.160 --> 00:47:55.560

The same way you select the ones that you cannot supply. Let's select this, this one here.

175

Timestamp 00:47:57.400 --> 00:48:12.760

And these are materials that don't circulate outside of your library and you haven't created deflection policies, so you can batch process them and the reason has to be the same for all of them.

176

Timestamp 00:48:14.040 --> 00:48:27.560

If you have anything different from the reason for No, you have to answer no to that request separately, and now when I click no.

177

Timestamp 00:48:29.400 --> 00:48:43.680

All the three requests will be automatically sent to the next lender in the lender string, they are no longer part of your ILL Can you supply queue

178

Timestamp 00:48:45.400 --> 00:48:52.480

These are the batching options, the batch processing option.

179

Timestamp 00:48:55.000 --> 00:48:59.520

Let's see the conditional when conditions are accepted.

180

Timestamp 00:49:05.240 --> 00:49:15.920

This is when you answer conditional to a request. Let me show an example of a conditional how you can answer conditional.

181

Timestamp 00:49:19.960 --> 00:49:38.520

Let me see here. loans this one. Here is musical score and the library want the loan for the entire material, your library cannot supply the entire material, but you could send.

182

Timestamp 00:49:38.520 --> 00:49:59.000

Part of the material, a copy instead of loan request, so you can answer conditional to this request and say, cannot lend copy which pays pages and send it to the other library and it's

183

Timestamp 00:49:59.200 --> 00:50:19.200

Up to the other library to accept your conditions or not if they accept the conditions, then the request will be here under conditions accepted and when you open that request, you see that you no longer can answer conditional, and this is to speed up the processing.

184

Timestamp 00:50:19.840 --> 00:50:39.960

You can either answer. No, and give a reason or you can supply that material according to what the library accepted. So the library has accepted the copy, the part of material they, you can check here. They want the chapter.

185

Timestamp 00:50:41.000 --> 00:51:01.480

So, instead of a loan for the entire book, you are supplying just the copy of a chapter. So the first step is to change this from loan to copy and you can use the article exchange to supply the item or you can supply using other option.

186

Timestamp 00:51:03.400 --> 00:51:11.600

OCLC article exchange then you can prepare that file.

187

Timestamp 00:51:14.440 --> 00:51:22.320

Drop the file then now you have the unique urol and password you can preview that.

188

Timestamp 00:51:24.200 --> 00:51:44.360

This is chapter one, and now you can answer Yes, when answer yes, the request is no longer under conditional accepted the request is here shipped in transit, waiting for the other library to

189

Timestamp 00:51:47.000 --> 00:52:00.720

Complete the request and update that request. So this is how you can respond to your requests and work with your print queue.

190

Timestamp 00:52:02.280 --> 00:52:05.640

You can manage requests as well.

191

Timestamp 00:52:08.160 --> 00:52:27.240

It's up to the borrowing library to update the request as they receive the item, back there in the library, but you as a lending library, you can also manage the request, for example, if the library has

192

Timestamp 00:52:27.320 --> 00:52:41.160

requested a renewal. You would see this renewal requested status you can open that, and you can open the request.

193

Timestamp 00:52:43.920 --> 00:53:03.080

You have three options here. You can accept the renewal according to the suggested date because the library's patron needs the item for a longer period. You can deny the renewal because you need that item back.

194

Timestamp 00:53:03.120 --> 00:53:23.560

Or you can recall the item at any time because you need that item immediately, and the other library must return that item immediately regardless to any stage, status of that request. So for example

195

Timestamp 00:53:24.200 --> 00:53:40.280

If you want to accept, if you deny then the library must return it on the original date If you want to accept the renewal, then you select here the desired due date.

196

Timestamp 00:53:44.040 --> 00:54:01.960

Then you can accept the renewal and now the renewal moved from requested to renewal accepted and the other library.

197

Timestamp 00:54:02.800 --> 00:54:07.080

Can return the item on the new due date.

198

Timestamp 00:54:12.200 --> 00:54:28.840

Another thing you can do here is for the overdue items, these are items that the other library haven't returned. They haven't returned your material on the due date. The material is

199

Timestamp 00:54:28.840 --> 00:54:49.320

here under overdue. You can click the request and you can recall the item. You can also email the other library to learn what's going on with that request you can click this email button, all the information about the request goes on the body of the message

200

Timestamp 00:54:50.040 --> 00:55:07.200

You can add a note here for the other library, send that request, and then you can recall the item, which means that the request moves to the recalled status and the other library must return that item immediately.

201

Timestamp 00:55:09.800 --> 00:55:21.160

And then you can complete the request when you receive that item back, your request should be here under returned in transit.

202

Timestamp 00:55:25.800 --> 00:55:43.080

So let's open this one here when you receive that item back, you can mark it as checked/completed if you do not receive that item, you can mark this as not returned and it goes to

203

Timestamp 00:55:44.360 --> 00:55:50.280

Return but missing status and it stays there until the issue is solved.

204

Timestamp 00:55:52.040 --> 00:56:13.160

And you can also batch complete requests, mainly of those requests with this question mark, which means request pending of action, so you can click this icon, the green arrow icon.

205

Timestamp 00:56:13.160 --> 00:56:33.640

And click the batch complete returned items link, then you can add those requests. Mainly of those with the question mark you can add those requests to your. Let me see another one here. You can.

206

Timestamp 00:56:34.360 --> 00:56:52.760

add those to your batch processing list and after you add those to your list, you click the complete items and all those requests are closed.

207

Timestamp 00:56:54.120 --> 00:56:57.480

So another option for batch processing.

208

Timestamp 00:57:01.800 --> 00:57:19.720

And of course, there are situations where the requests, the ILL requests, they don't work as they're supposed to, you have some issues. So if you, for example, you shipped the wrong material or the material is

209

Timestamp 00:57:19.760 --> 00:57:27.880

Needed in your library immediately and the request is here under in transit.

210

Timestamp 00:57:29.320 --> 00:57:40.120

You can open that request and you can recall that item. You can recall an item at any stage,

211

Timestamp 00:57:42.400 --> 00:57:48.120

even in transit stage and the other library must return that item immediately.

212

Timestamp 00:57:51.080 --> 00:58:10.280

Another situation is when the library returns the item and it's here returned in transit, but the item came back damaged missing pages or missing parts.

213

Timestamp 00:58:10.920 --> 00:58:30.760

So you open that request, you can use the email button to communicate with the other library informing that the material arrived in bad conditions and that the other library, they need to replace

214

Timestamp 00:58:32.040 --> 00:58:51.240

That item, and then you mark this as not returned. Before you mark it as not returned. You can add a staff note here. You can click on this note button under actions, write a note here. So any other

215

Timestamp 00:58:51.880 --> 00:59:11.720

Staff in your library knows why you're working in this request, and then you mark this as not returned and your request is now here under returned but missing until this issue is solved and after the issue is solved, then you can complete

216

Timestamp 00:59:12.520 --> 00:59:15.480

The request you can close this request.

217

Timestamp 00:59:19.400 --> 00:59:37.320

Another issue is when the other library has not received the item, for example, you shipped the material or you completed the copy request, but you forgot to attach the file.

218

Timestamp 00:59:37.960 --> 00:59:57.800

So let's see these examples here in, under not received. Let's start with the copy request. So you see there is no url for the article exchange. The library has not received the file.

219

Timestamp 00:59:57.840 --> 01:00:06.680

You can easily solve this, by clicking the article exchange, attaching that file.

220

Timestamp 01:00:08.160 --> 01:00:11.920

Drop the file and preview it

221

Timestamp 01:00:13.800 --> 01:00:33.640

Then you save it when you save it, then the other library can see the request now with the information about article exchange about the file, if you are providing in a different way, you can send that request to the library and the library

222

Timestamp 01:00:34.280 --> 01:00:41.440

Then can mark that as received and the request moves from your not received list.

223

Timestamp 01:00:45.080 --> 01:01:04.920

Another example of not received is the loan request for this case, then you have to communicate with each other using this email button here, and you can check with your courier, what happened to that item and if you are still able to supply that item, if not then you

224

Timestamp 01:01:05.080 --> 01:01:11.800

Can communicate with the other library and they can send the request to other group of libraries.

225

Timestamp 01:01:16.440 --> 01:01:31.160

And another example you have is when the borrowing library loses that item or they find that the item is damaged and they mark that item as lost.

226

Timestamp 01:01:33.720 --> 01:01:52.920

The request will be here under received but missing and you need to communicate with each other to see how the other library will replace this request, and this request will stay here until the issue is solved.

227

Timestamp 01:01:53.560 --> 01:02:06.480

When the issue is solved, then you can complete the request, you can close the request. So these are some issues you might encounter with your request and how you can solve those issues.

Timestamp 01:02:09.560 --> 01:02:28.760

Another option you have here as a lending library is the off-system request. These are for requests you are doing with other libraries outside of WorldShare ILL. You can bring those requests

229

Timestamp 01:02:28.880 --> 01:02:49.240

Here to be part of your reports, so to do that you need to create the request. You click on the off-system request accordion you click the create lending request, then you have to add your partner if you haven't added your

230

Timestamp 01:02:49.400 --> 01:02:55.360

Partner yet in the service configuration, you can do that by going to WorldShare ILL

231

Timestamp 01:02:57.040 --> 01:03:17.400

In the service configuration address book and partners, you click this add partner button, add the information about your partner, created that save that, and then you can refer to that

232

Timestamp 01:03:17.720 --> 01:03:37.880

When you are creating the off-system request. So let's create one for loan. The reference ID is the number you are using with the other library with your partner, then you choose your partner from the list. The information

233

Timestamp 01:03:37.880 --> 01:03:42.600

Comes from here, then the need before date.

234

Timestamp 01:03:44.960 --> 01:03:47.800

You can add the date here.

235

Timestamp 01:03:48.760 --> 01:04:00.920

Then you need to type in the information, you don't need to add everything. I will teach you a trick here. I can enter the title.

236

Timestamp 01:04:04.120 --> 01:04:18.720

And when I click the next field, you see this magnifying glass icon, when I click that then it takes me to the search result. So this is the item I click the title.

237

Timestamp 01:04:20.800 --> 01:04:40.160

Apply data to request and now I have all the information on my request. so you just enter one of the fields click the next field and click the magnifying glass and you can find the item to apply to your request.

238

Timestamp 01:04:40.600 --> 01:04:46.960

So now I can proceed. You can apply constant data if you want to.

239

Timestamp 01:04:48.280 --> 01:05:07.960

Loan free and when everything is completed, I can click this create button on the up right side, and now the request is part of the off system. It's here under lending.

240

Timestamp 01:05:08.760 --> 01:05:29.240

And you can manually change the status of the request and use the email button to communicate the other library, if you are providing a copy request, for example, you can also supply the article exchange, UR.

241

Timestamp 01:05:30.520 --> 01:05:40.400

You can attach the file here and then email this information to your partner. So that's how you can do

242

Timestamp 01:05:42.040 --> 01:05:44.440

Off-system request.

243

Timestamp 01:05:47.800 --> 01:05:53.200

If you have any questions, you can add your questions to the chat.

244

Timestamp 01:06:05.720 --> 01:06:22.440

Our third topic is statistics report, the usage reports. I will go live to show you how you can generate reports to support your ILL activities as a lending library. So let me share my browser.

245

Timestamp 01:06:29.400 --> 01:06:49.880

And from the homepage in the middle section under other, I find the OCLC usage statistics. I need my nine-digit authorization and password to access the reports if you don't have that

246

Timestamp 01:06:50.120 --> 01:06:59.360

You can contact OCLC customer support to retrieve that information, then you can enter your credentials.

247

Timestamp 01:07:04.760 --> 01:07:19.400

To access the reports, there are several reports here as a lending library. I will highlight a couple of reports here. The resource sharing lender reasons for. No report.

248

Timestamp 01:07:21.240 --> 01:07:41.720

This is the one that we will list why your library has answered no to the request. So you have all the information about the request you can select the month. It's a monthly basis report and the reasons for no aged to unfilled, you never answered to the request.

249

Timestamp 01:07:42.600 --> 01:08:02.160

You see the deflection and why was deflected according to your policy, and if the system was checking availability it would be listed here as well. Another report is the Lender Resource

250

Timestamp 01:08:03.120 --> 01:08:08.320

Sharing status report. This is a more complete report.

251

Timestamp 01:08:09.880 --> 01:08:30.359

Let me choose a month here to see if I can populate this. So this is a more complete report. You see all the information; this is an off system request that was added in the system and you see here is part of the report. You can see

252

Timestamp 01:08:31.000 --> 01:08:44.040

the details including costs if you charge for those requests, and another request that another report that you have here is the.

253

Timestamp 01:08:45.160 --> 01:08:55.120

Lender activity overview report, so you see all the detail and this is for

254

Timestamp 01:08:57.240 --> 01:09:17.080

More than a month you can have for a year, for example, and all these reports you can export them, or you can email the reports to yourself. You can add the email address here. You can have

255

Timestamp 01:09:17.120 --> 01:09:37.560

multiple addresses separated by semi colon, and if you mark this send monthly and select the format and the style when you save, you'll receive the report automatically in the email addresses informed here every month you don't

256

Timestamp 01:09:37.720 --> 01:09:51.600

Need to come to the system to pull, to generate those reports and you have to do this to all the reports you want to receive automatically in the email addresses on a monthly basis.

257

Timestamp 01:09:54.200 --> 01:09:56.360

This is for the reports.

258

Timestamp 01:10:10.840 --> 01:10:12.840

Do you have any questions?

259

Timestamp 01:10:19.800 --> 01:10:28.360

Now I have a couple of questions for you. I just open one at a time.

260

Timestamp 01:10:35.160 --> 01:10:55.640

The first one: when I want to stop receiving unwanted ILL requests for audio visual materials that don't circulate outside my library. My library needs to have configured: one constant data, two deflection policies include format audio visual.

261

Timestamp 01:10:56.660 --> 01:11:03.060

custom holdings or deflection policies exclude format audio visual.

262

Timestamp 01:11:05.620 --> 01:11:11.260

You can select yes and select your answer.

263

Timestamp 01:11:17.140 --> 01:11:20.500

Let's check the correct answer.

264

Timestamp 01:11:24.180 --> 01:11:32.740

The correct answer is deflection policies include format audio visual. Remember that in deflection

265

Timestamp 01:11:34.420 --> 01:11:47.860

Policies you need to include for the system to deflect that request. Thanks for participating. So the next one, the last question.

266

Timestamp 01:11:49.140 --> 01:12:09.620

Select the incorrect statement below, if the lending library creates deflection policies, then the system will automatically answer No to requests under the policy's criteria. Two, if a lending library needs an item back immediately then the lending library will

267

Timestamp 01:12:09.860 --> 01:12:30.100

have to wait until the item is due. Three, lending libraries can decline renewal requests, and four lending libraries can answer no to a request for no specific reason. Which one is incorrect? So let's see the answer. Thanks for participating.

268

Timestamp 01:12:30.780 --> 01:12:48.940

If a lending library needs an item back immediately, then the lending library will have to wait until the item is due, this is incorrect, you can recall the item at any time. Thanks for participating again.

269

Timestamp 01:12:49.940 --> 01:13:10.420

So you have learned about updating your policies such as deflection, loans and copies and how to set automation as a lender. You saw how you can answer and manage ILL requests and solve some issues, then we covered how you can set to automatically receive

270

Timestamp 01:13:11.700 --> 01:13:30.900

Your statistics reports. Next step in the days and weeks after you start using the service is to access our support portal as reference for ILL activities. You can find more training materials and contact support at

271

Timestamp 01:13:31.260 --> 01:13:35.260

help.oclc.org.

272

Timestamp 01:13:37.300 --> 01:13:42.020

We are reaching the end of our session. You did very well.

273

Timestamp 01:13:43.060 --> 01:13:46.180

Do you have any additional questions?

274

Timestamp 01:13:52.020 --> 01:14:08.660

If you don't have any additional questions, 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. The information related to

275

Timestamp 01:14:08.940 --> 01:14:29.100

Session is on this slide. We value your feedback helping us improve our training materials and training sessions. For any training questions, please contact us at training@oclc.org. Thanks again and enjoy the rest of your day.