

April 17, 2024

Pre-Conference: Colorado Resource Sharing Conference

OCLC workshop: Best practices for ILL

Jenny Rosenfeld

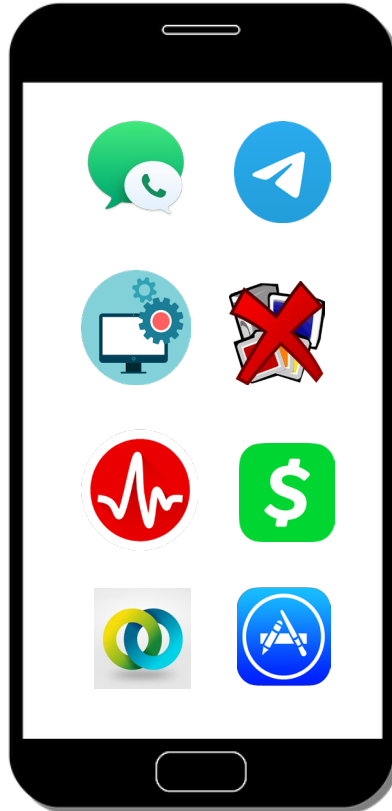
Product Manager

Alena Miller

Product Manager

Apps in your “toolbox”

- Holdings
- Policies
- Deflections
- Availability



- Automation
- Fee management
- Reporting
- Resource Sharing community

Optimizing the use of ILL Fee Management (IFM)

ILL Fee Management (IFM)

What is it?

- IFM lets you reconcile ILL charges and payments through your monthly OCLC invoice—and eliminate invoices and check writing for individual ILL transactions.

Why would you use it?

- Time and energy savings
- Improved decision-making around budgets and ILL partners
- Collection development
- Potential to offset ILL costs

IFM: Some basics

- Use IFM to pay for ILL requests that cannot be filled by LVIS or reciprocal lenders.
- Strive to maintain a net zero balance with IFM.
 - Debits = \$100.00
 - Credits = \$120.00
- Know which lenders charge you so that you will know to charge them
 - Check your IFM reports monthly. Note which lenders charged you.
 - In your Custom Holdings path, put these lenders in your last group so they are used only as last resort.

IFM fun facts: 2023

Most Common Lending Charge

Rank	Amount
1	\$ 15.00
2	\$ 10.00
3	\$ 20.00
4	\$ 25.00
5	\$ 13.00
6	\$ 14.00
7	\$ 11.00
8	\$ 7.00
9	\$ 12.00
10	\$ 17.00

Smallest and Largest Fee

\$0.50 | **\$616.50**

Minimum/Maximum Allowed

\$0.01 | **\$999.99**

Currencies Supported

United States	USD
Canada	CAD
British Pound	GBP
Euro	EUR
South African Rand	ZAR
Austalian Dollar	AUD
New Zealand Dollar	NZD

Use IFM to pay for lost or damaged items

- Avoid the headache of getting a check cut. Use IFM instead:
 - Borrower contacts the lender via email to alert them about paying for a lost or damaged book
 - Get the lender's approval to use IFM and the lender's replacement cost
 - Send the lender an ILL request:
 - In the title, clearly state this request is to pay for a replacement
 - Be sure the request type is set to COPY
 - Maxcost = Replacement Cost
 - Check IFM box

Using IFM for lost or damaged items

Patron Summary

Title / Journal

Uniform Title

Author

Publisher

ISBN

ISSN

OCLC [View Holdings](#)

DOI

PMID

Dissertation

Series

Request Tags

Type

Country

Postal Code

Billing Notes

Use ILL Fee Management (IFM) for payment


Maximum Cost

i If you only want items that are free, enter 0.00
If you do not enter an amount, you will be responsible for whatever the lender charges.

You now can request OCLC to turn off IFM for your library

- If your library is not allowed to use IFM
- To prevent accidental use of IFM
- Contact OCLC accounts receivable: acctsrec@oclc.org

Use ILL Fee Management (IFM) for payment

 IFM is disabled for your institution.

Maximum Cost USD ▼

Ensure your holdings
are accurately
represented in WorldCat

Accurate WorldCat holdings let the world know what your library owns

Holdings are like inventory

- They let everyone know what your library can lend/copy
- They have a significant impact on what requests come into your library's ILL queue

Quality data is important

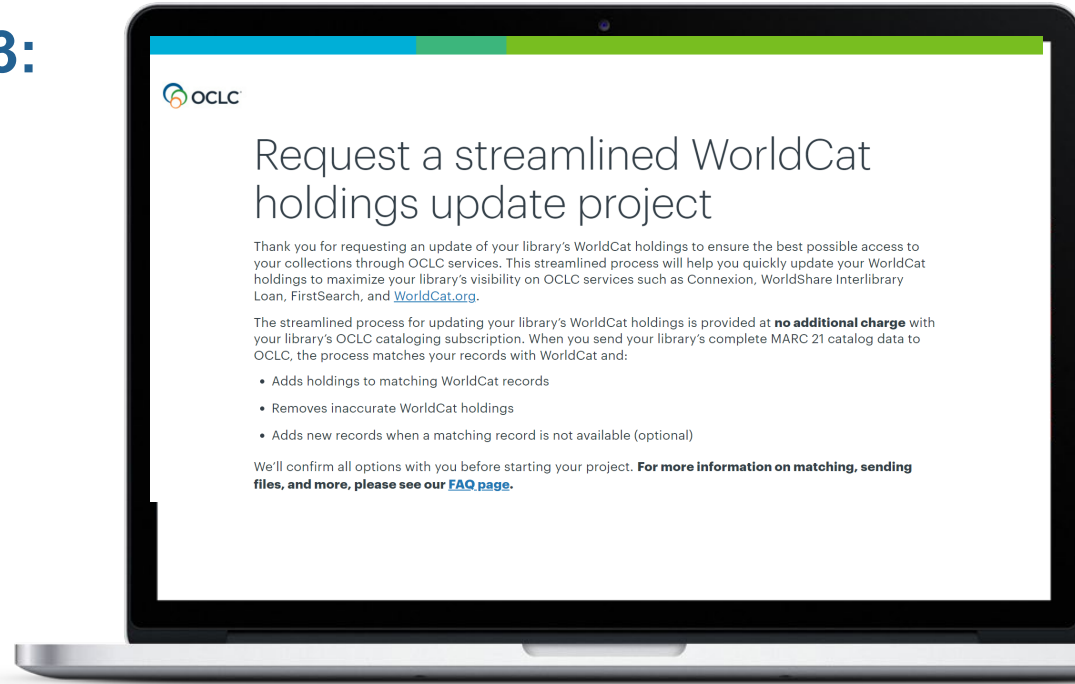
Streamlined holdings update improves fill rates

394 ILL libraries

Jan-June 2022 versus 2023:

- The total of “Not Owned” dropped by 14,465
 - **56% decrease**
- Some large libraries saw decreases of **90+%**

oc.lc/holdings-request



WorldCat knowledge base integration

What is the knowledge base?

- Manage your e-resources and automatically maintain WorldCat holdings

How is the knowledge base used in ILL?

- Used by automation to assess coverage and license terms when building **smart lender strings**
- Displays an article-level link to requested content in staff interface if holdings are in WorldCat knowledge base
- Also displays terms of use and any specific instructions for ILL use

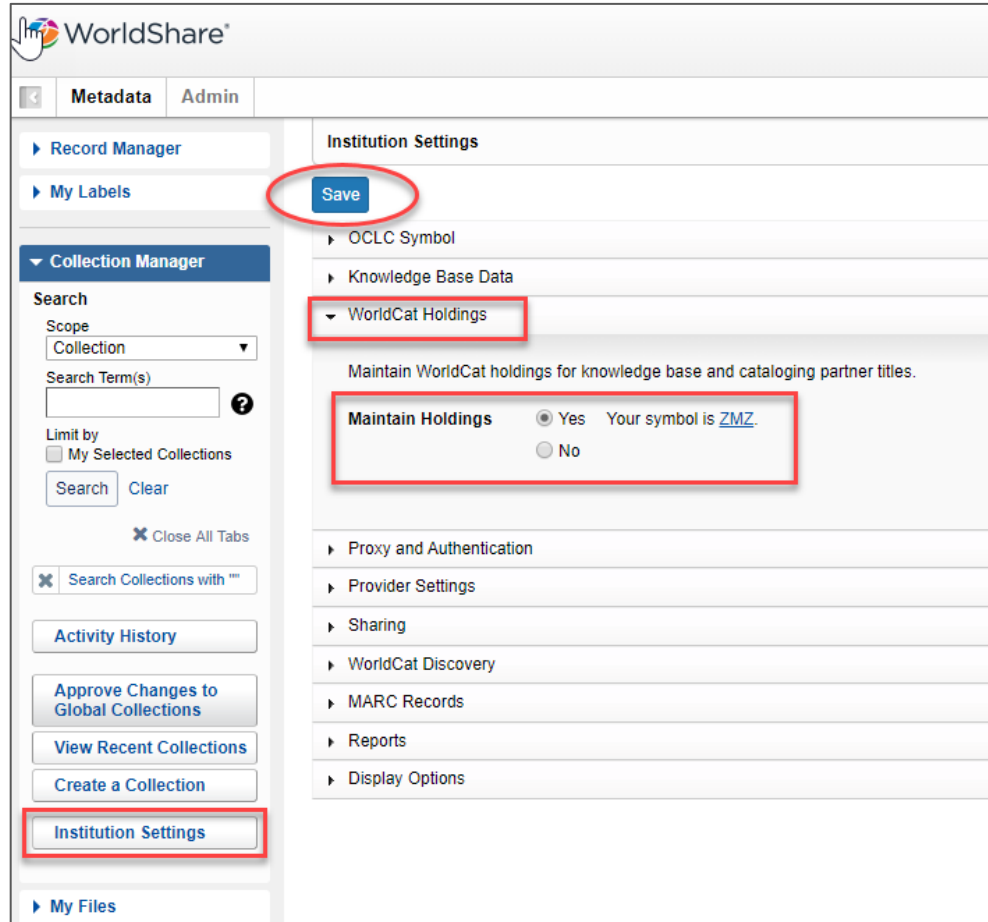
How do you set up the WorldCat knowledge base integration?

- You need to use WorldShare Collection Manager to manage WorldCat knowledge base collections
 - Collection Manager enables you to set WorldCat holdings for those collections to which your library has access
- If you need access to Collection Manager, use the link below to get started

Learn more at oc.lc/getCM

WorldShare® Collection Manager

Configure your **Institution Settings** to maintain holdings in WorldCat for any selected collections.



WorldShare®

Metadata Admin

Record Manager

My Labels

Collection Manager

Search

Scope
Collection

Search Term(s)

Limit by
 My Selected Collections

Search Clear

Close All Tabs

Search Collections with ""

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Institution Settings

Save

OCLC Symbol

Knowledge Base Data

WorldCat Holdings

Maintain WorldCat holdings for knowledge base and cataloging partner titles.

Maintain Holdings Yes Your symbol is [ZMZ](#).
 No

Proxy and Authentication

Provider Settings

Sharing

WorldCat Discovery

MARC Records

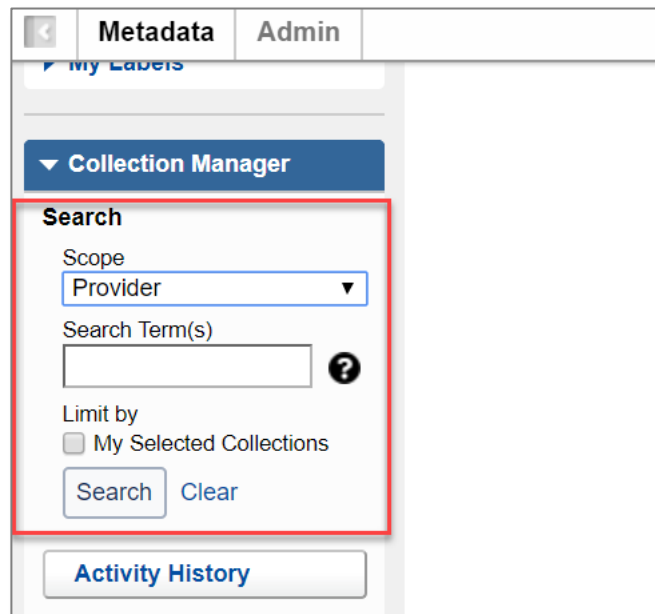
Reports

Display Options

My Files

WorldShare® Collection Manager

Search for collections.



The screenshot shows the 'Collection Manager' section of the WorldShare interface. It features a search form with the following elements:

- Scope:** A dropdown menu currently set to 'Provider'.
- Search Term(s):** An empty text input field with a help icon (?) to its right.
- Limit by:** A checkbox labeled 'My Selected Collections' which is currently unchecked.
- Buttons:** 'Search' and 'Clear' buttons.

Below the search form is an 'Activity History' button. The entire search form area is highlighted with a red border.

WorldShare® Collection Manager

Select collections.

The screenshot displays the WorldShare Collection Manager interface. The top navigation bar includes the WorldShare logo, a user profile for 'Jody S', and a 'Need Help?' dropdown. Below the navigation bar are tabs for 'Metadata' and 'Admin'. The left sidebar contains a 'Collection Manager' section with a search box and various filters. The main content area shows a table of collections with columns for 'Collection', 'Type / Attributes', 'Provider', 'Updated', 'Selections', and 'Sharing'. A red box highlights the 'Selections' column, which contains status messages and 'Select' buttons for each collection.

Collection	Type / Attributes	Provider	Updated	Selections	Sharing
African American Newspapers Collection ID: accessible.africanamericannews	Knowledge base collection • Customizable • Google Scholar Disabled	Accessible Archives	10/23/2019 12:22 PM	Not Selected by my library Titles: 0/10 Select	
African American Poetry Collection ID: chadwyck.daap	Knowledge base collection • Google Scholar Disabled • Non-Customizable	Chadwyck-Healey	08/06/2019 05:28 PM	Not Selected by my library Titles: 0/98 Select	
African American Study Centre Collection ID: OUP.aasc	Knowledge base collection • Google Scholar Disabled • Non-Customizable	Oxford University Press	03/19/2020 09:24 AM	Not Selected by my library Titles: 0/0 Select	
African Diaspora, 1860-Present: Text - All Titles Collection ID: alexanderpress.africandiaspora	Knowledge base collection • Google Scholar Disabled • Non-Customizable	Alexander Street	01/02/2020 03:02 PM	Not Selected by my library Titles: 0/6004 Select	
African Diaspora, 1860-Present: Video - All Titles Collection ID: alexanderpress.africandiasporaviddall	Knowledge base collection • Google Scholar Disabled • Non-Customizable	Alexander Street	07/16/2019 02:58 PM	Not Selected by my library Titles: 0/22 Select	

WorldShare® Collection Manager

- Set collections you want to lend as **ILL allowed = Yes**.
- Select any additional instructions from drop-down menu.
- These terms and instructions can appear in ILLiad for you as you process lending requests.

The screenshot displays the WorldShare Collection Manager interface for a collection named "2012 Cambridge Journals Full Package Standard UK". The interface includes a navigation menu on the left with options like "Record Manager", "My Labels", and "Collection Manager". The main content area shows various settings for the collection, including "Maintain WorldCat Holdings", "Data Sources", "Export to Google Scholar", and "Enable MARC Record Delivery". A red box highlights the "ILL allowed" section, which has the "Yes" radio button selected and a dropdown menu for "Instructions" set to "Non-Profit only".

Next: Turn on kb integration for ILL

Interlibrary Loan Options	ND- Clone of Hennepin County Library - Test Library (148755) Change
Borrower Data	
Lender Data	Help on this screen
Custom Holdings Groups	
Custom Holdings Paths	
Automated Request Manager	
Direct Request Profiles	
Purchase Options	
Patron Request Workforms	

Interlibrary Loan Options
Persistence Setting
Select whether you wish constant data records be automatically applied to each resource sharing request. If persistence is turned on, a default constant data record will automatically be applied, and if a modified constant data record is selected, that record will be applied to future requests. If persistence is turned off, users must manually select a constant data record for each resource sharing request.
<input type="checkbox"/> On
Knowledge Base Active Link
Select whether you wish to activate a link to the Library's WorldCat knowledge base for enhanced Interlibrary Loan of articles
<input checked="" type="checkbox"/> On

Lender view in WorldShare ILL or Tipasa

Library's Holdings Information

Collection

[Elsevier ClinicalKey](#)

ILL OK?

Yes

Print then send secure electronic
(Same country only) (Non-Profit
only)

Lender view in ILLiad

System 42 - Lending Request

Lending Processing OCLC

Cancel Request Conditionalize Request Finished Searching Yes Yes With Due Date No Route Policies Directory Resend Request Billing View Send E-Mail Print Request Add to Print Queue Print and Empty Queue Pending Updates System

Detail History OCLC Z39.50 PubMed/Docline

General Request Information

Transaction Number: 42 Article Loan
Username: Lending Service Type:
Transaction Date: 9/28/2011 11:23 AM Not Wanted After: 10/28/2011
Delivery Method: Site:
Service Level: Regular Shipping Options: Mail
Billing Account: Doc Type:

OCLC Information

ILL Number: 10004340
OCLC Number: 225470254
Lending String: *OCL,IUL
Borrower: OZY 1
System ID: OCLC 0
OCLC Status: IN_PROCESS

Local Holdings

Collection	ILL Terms	Instructions	URL
SAGE Health Science Package	Yes	Print then se...	http://kbwcap01.qxd.u.dev.oclc.org:22340/
SAGE STM Package	Yes	Scan	http://kbwcap01.qxd.u.dev.oclc.org:22340/

Item Information

Call Number:
Location:
Due Date:
Reason For Cancellation:
Item Num/Ref Num:
ISxN: 1753-4658
Special Instructions:
Max Cost/Pieces:

Citation Information

Cited In: London, UK ; SAGE Publicat
Title:
Date:
Volume/Pages:

Accept Alternate Edition
Accept Non English
Allow Copies?
Copyright Already Paid?
Allow Renewals?
Library Use Only?
Replacement Pages?
Priority Shipping
Ariel
Odyssey (Missing OdysseyIP)

Date Note Type Added By

Awaiting Lending Request Processing Lending

Improve turnaround time with WorldCat knowledge base integration

“My recommendation is to make sure your collections are in the WorldCat knowledge base. That way, you get seamless integration between your holdings and ILL, ensuring you can quickly and efficiently locate items in your collection.”



oclc.org/sf-stories

Leanna Pagano

Manager of Resource Sharing and Course Reserves,
California Lutheran University

Clearly communicate
your lending policies

Check and update your lending policies

- What do/don't you lend?
- What do you charge? Do you reciprocate?
- Include notes for clarification

▼ Copies

Reciprocal Lender

SERVICE	FEES	BORROWERS	ITEMS
Copies: <ul style="list-style-type: none">• Color Copies• Microfiche• Microfilm• Photocopy	Per Request: <ul style="list-style-type: none">• No Charge Currency: United States Dollar Tax Included: No Reciprocal: Free/Fee	Groups: <ul style="list-style-type: none">✓ Any Libraries: <ul style="list-style-type: none">✓ Any Locations: <ul style="list-style-type: none">✓ Any	Collections: <ul style="list-style-type: none">✓ Any Formats: <ul style="list-style-type: none">✓ Any

Note: 50 page limit. We are a reciprocal lender and LVIS member. We charge what you charge. Copies of archival We lend free to libraries on our Orbis Cascade courier. We welcome reciprocal agreements.

▼ Loans

Reciprocal Lender

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None Loan Period: 6 Week(s) Renewal Max: 1 Renewal Period: 3 Week(s)	Per Request: <ul style="list-style-type: none">• No Charge Currency: United States Dollar Tax Included: No Reciprocal: Free/Fee	Groups: <ul style="list-style-type: none">✓ Any Libraries: <ul style="list-style-type: none">✓ Any Locations: <ul style="list-style-type: none">✓ United States	Collections: <ul style="list-style-type: none">✓ Any Formats: <ul style="list-style-type: none">✓ Any	Requests: <ol style="list-style-type: none">1. OCLC ILL2. Email3. Mail Delivery: <ol style="list-style-type: none">1. Courier / Orbis Cascade Alliance2. Mail / USPS with tracking number Billing: <ol style="list-style-type: none">1. OCLC IFM

Note: We are a reciprocal lender and LVIS member. We charge what you charge. We lend free to libraries on our Orbis Cascade courier. We welcome reciprocal agreements.

illpolicies.oclc.org

Keep your contacts up-to-date

- Provide ways to reach your team.
- Include entries for borrowing, lending, billing, and shipping, as needed.
- Delete outdated information (e.g., Ariel).

illpolicies.oclc.org

Contacts	
TYPE	CONTACT
Article Exchange	E-mail: ill@callutheran.edu Note: OCLC Article Exchange
Billing	Attention: ILL Manager Address: California Lutheran University 60 W. Olsen Rd #5100 Thousand Oaks, California US 91360-2700 Phone: 805-493-3120 Fax: 805-493-3842 E-mail: ill@callutheran.edu Note: Allow for 30+ days for invoice processing as all billing goes through the university Business Office.
Electronic	Attention: ILL Department E-mail: ill@callutheran.edu
General	Attention: Interlibrary Loan Department Phone: 805-493-3120 Fax: 805-493-3842 E-mail: ill@callutheran.edu
Location	Attention: California Lutheran University Address: Pearson Library 60 W Olsen Rd, #5100 Thousand Oaks, California US 91360-2700 URL: https://www.callutheran.edu/library/
Shipping	Attention: Pearson Library - Interlibrary Loan Address: California Lutheran University 60 W. Olsen Road, #5100 Thousand Oaks, California US 91360-2700

Communicate **hours** of availability

- List your department's regular operating hours.
- Let other libraries know when to contact you or when your team is processing requests.
- Inform borrowers about closures.

The screenshot shows a web interface for managing library operating hours and closures. It is divided into two main sections: 'Operating Hours' and 'Closures'.

Operating Hours

Regular hours

DAYS	HOURS	NOTES
Monday thru Friday	8:00 AM to 4:00 PM	

Weekend hours

DAYS	HOURS	NOTES
Saturday thru Saturday	8:30 AM to 3:30 PM	Closed on Sundays

Closures

Closed

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Academic Break	05/13/2024 thru 05/22/2024	No	

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Say “no” quickly

Speed your “no” response

- Set up real-time availability (auto-no)
- Automatically deflect specific types of requests
- Shorten your Days To Respond
- Set supplier status to “no” when your service isn’t available



Say “no” automatically with real-time availability

What is it?

Connects to a lender’s local catalog to see if an item is on the shelf

Responds “no” automatically if item is checked out or unavailable

Complete this form: oc.lc/realtimeill

HOW DOES IT HELP?

Gets requests to lenders that can supply the fastest

Speeds borrower turnaround time systemwide

Reduces time as a lender spent looking up item availability

Real-time availability in action



Since January 2021, RTA has saved libraries
935,000+ manual lookups,
plus moved items faster on network

Date	Supplier	Response
2022-04-13 15:26:20	YBM	No - Auto-Deflection
2022-04-13 15:26:20	COO	No - System Checked Availability
2022-04-13 15:26:22	VYL	Supplied

Minimize staff intervention with real-time availability



oclc.org/sf-stories

“At Ohio State, we saw a reduction in ILL requests for checked out items reduced from 30% to 5%. That’s a huge savings in staff time.”

Brian Miller

Head, Interlibrary Loan, The Ohio State University

Deflect specific types of request

Deflections + Add

audio [Edit](#) [Delete](#)

SERVICE	FEEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			Formats: <input checked="" type="checkbox"/> Sound Recording

Note: **New Items Auto Deflection**

SERVICE	FEEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Material Age: < 1

Note: **E-license term = NO** [Edit](#) [Delete](#)

SERVICE	FEEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			E-License Terms: <input checked="" type="checkbox"/> No

Note:

Shorten your Days To Respond

- How long do you want a request to “sit” in your queue?
- Find the balance that gives you enough time to fulfill the request but also keeps requests moving to the next lender.

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Summary	
Name (Symbol):	California Lutheran University (CCT)
Also Called:	Pearson Library
Location:	Thousand Oaks, CA 91360-2700 US
Shipping Address:	Pearson Library - Interlibrary Loan California Lutheran University 60 W. Olsen Road, #5100 Thousand Oaks, CA 91360-2700 US
Institution Type:	Academic Library
OCLC Supplier:	Yes
Days To Respond:	Copies: 2 days Loans: 2 days
Days To Respond:	Copies: 4 days Loans: 4 days
Days To Respond:	Copies: 4 days Loans: 8 days

Set supplier status to “no”

- Go non-supplier for extended closures or staff shortages
 - Change supplier status from Yes to No (but remember to change back when you reopen/are fully staffed)
 - Set up scheduled closures in advance on the **Schedule** tab... and go non-supplier automatically

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Woodbury University Library (OMB)
Los Angeles Times Library

Profile Collections Policies (6) Schedule Contacts

Summary

Name (Symbol):	Woodbury University Library (OMB)
Also Called:	Los Angeles Times Library
Location:	Burbank, CA 91510 US
Shipping Address:	OMB-default Woodbury University Library - ILL 7500 N. Glenoaks Blvd. Burbank, CA 91510 US
Institution Type:	Academic Library
OCLC Supplier:	Yes Edit

Say “yes” quickly

Speed your “yes” response

- Check your lending queues at least twice a day.
- Set up WorldCat knowledge base integration to speed processing of article requests.
- For WorldShare ILL and Tipasa libraries:
 - Use Lending automation to predictably apply constant data.
- For Tipasa libraries:
 - Use Lending priorities groups to highlight requests from particular borrowers.
- For ILLiad libraries:
 - Use routing rules to speed processing.

Lending: what can you automate?

- Define a match based on elements in the request.
 - Who is the borrower?
 - What type of request is it (copy v. loan)?
 - What is the requested format?
 - Where does your library hold the requested item (branch or shelving location)? (Tipasa only)
- Take these actions on matching requests.
 - Apply constant data (add a charge, lending notes, due date, different return address)
 - Add a request tag (Tipasa only)

Lending Automation: Configuration

- Set it up in OCLC's Service Configuration
 - WorldShare ILL > Automated Request Manager > Lending

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Article Exchange Settings

Purchase Options

Request Forms

Print Settings

Circulation Integration

Advanced Workflows

Patron Settings

Address Book

Automated Request Manager

[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.

Basic lending automations

Examples

- Charge a certain group of lenders \$10.
- Assign a shorter loan period for AV materials than for books.

Enabled	Name	Matches	Actions	Priority 	
Yes	Charge \$10	Borrower Groups: (Custom Holdings Groups) TRISTATE	Apply Constant Data: CHARGE10.	5	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Enabled	Name	Matches	Actions	Priority 	
Yes	AV Loans	Format(s): Sound Recording Cassette, Sound Recording CD, Sound Recording LP, Sound Recording, Visual Material DVD, Visual Material VHS, Visual Material	Apply Constant Data: AVLOANPERIOD.	5	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

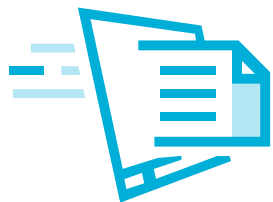
Advanced lending automations

Example: Charge some libraries \$0, charge others \$20, and charge everyone else a default \$15 charge, regardless of request type.

Enabled	Name	Matches	Actions	Priority ⓘ	
Yes	No Charges	Borrower Groups: (Custom Holdings Groups) FIRST or (Profiled Groups) LVIS	Apply Constant Data: FREE.	5	Edit Delete
Yes	Charge these libraries \$20	Borrower Groups: (Custom Holdings Groups) CHARGE20	Apply Constant Data: CHARGE20.	10	Edit Delete
Yes	Charge \$15 for everything else	All Requests	Apply Constant Data: CHARGE15.	25	Edit Delete

And if you speed your lending enough...

- **Earn an invitation to the Express Digital Delivery Program!**



Copies get delivered fast
through the Express program

10-hour

average turnaround times for copy requests among Express libraries.



Express library collections



1,000+ libraries

make up the Express group



580,000,000+

WorldCat Holdings



25,000,000+

unique Holdings

Achieve impressive borrowing turnaround times

During the first six months of 2022, 30% of their Express requests were filled in one hour or less, 40% were filled in two hours or less, and 10 requests were filled in two minutes or less!



Ashley Cole

Associate Director of Collection Strategies,
Eastern Kentucky University Libraries

Let the system process
standard borrowing
requests with borrowing
automation



Automated request manager (ARM)

What is it?

Automates ILL workflows based on library's configuration

Enables libraries to determine how patron-generated requests are processed

The only way to get "smart lender strings"

HOW DOES IT HELP?

Ensures patrons get resources quickly

Processes more requests faster

Helps staff focus time on more complex needs

Automation: smart lender strings

Strings built with automation utilize and consider:

- Deflections
- Electronic licenses
- WorldCat knowledge base holdings and coverage ranges
- Print serial holdings
- Custom holdings groups and profiled groups in custom holdings paths
- Turnaround time
- Load leveling

oclc.org/sf-get-started

GOAL: Faster turnaround times

Recommended: two basic automations

- One for loans
- One for copies

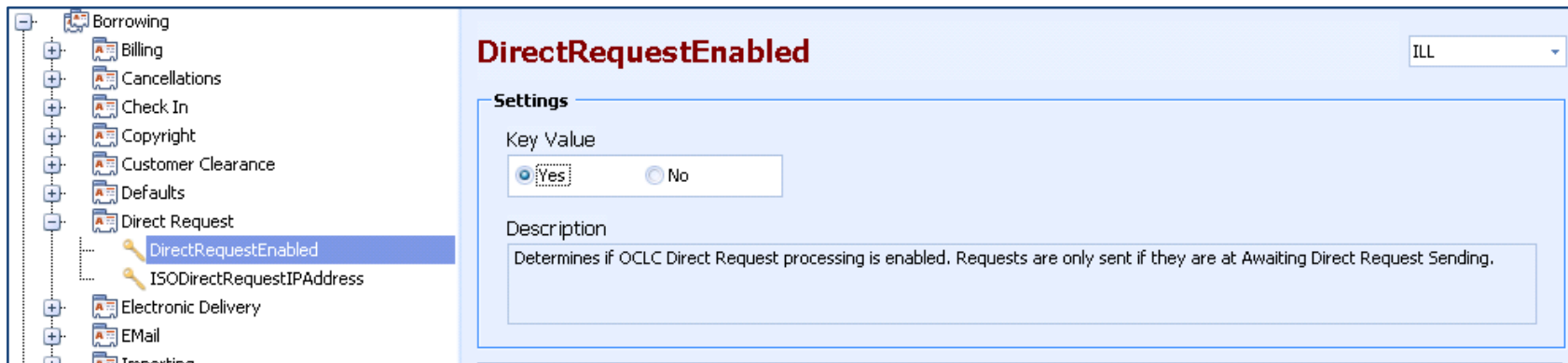
Name	Matches	Actions	Priority		
SENDLOANS	Request Type: Loan	Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path FAVORITELENDERS hold(s) the item. Apply Constant Data: LOAN.	10	Edit	Delete
SENDCOPIES	Request Type: Copy	Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path EXPRESS hold(s) the item. Apply Constant Data: COPY.	20	Edit	Delete

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ILLiad setup for automated request manager

Customization Manager

- Borrowing | Direct Request | DirectRequestEnabled
- Set to Yes

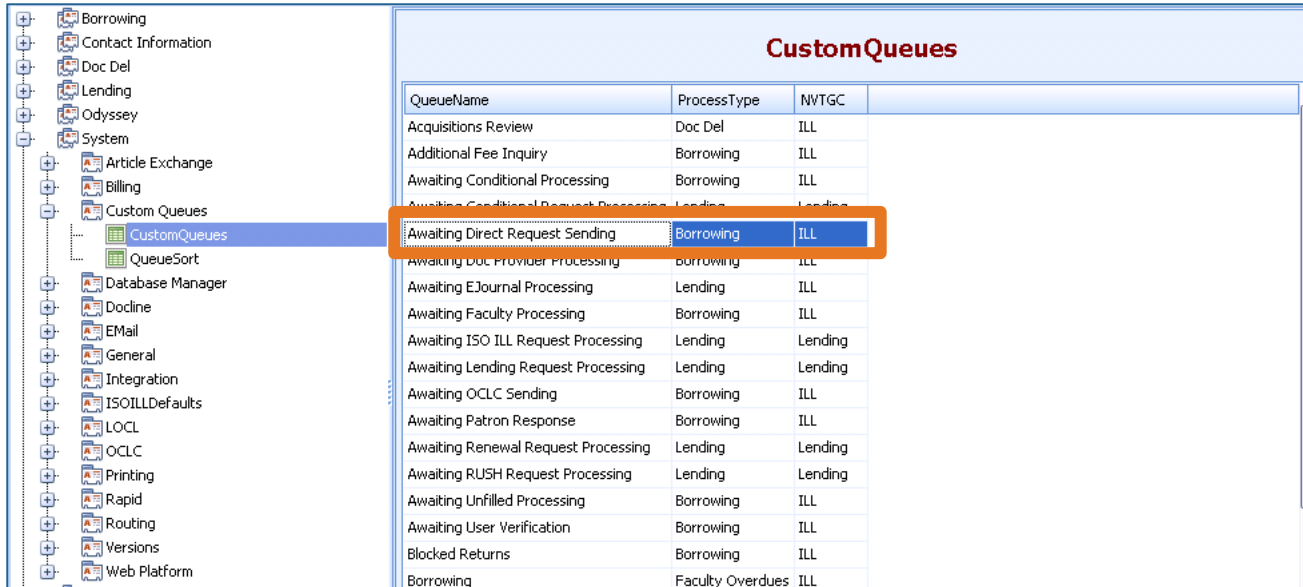


The screenshot displays the Customization Manager interface. On the left, a tree view shows the hierarchy: Borrowing > Direct Request > DirectRequestEnabled. The main panel is titled "DirectRequestEnabled" and includes a dropdown menu set to "ILL". Under the "Settings" section, the "Key Value" is set to "Yes" (selected) and "No". The "Description" field contains the text: "Determines if OCLC Direct Request processing is enabled. Requests are only sent if they are at Awaiting Direct Request Sending."

Customization Manager Keys

System | Custom Queues | CustomQueues

- Add record for **Awaiting Direct Request Sending**



The screenshot shows the Customization Manager interface. On the left is a tree view with 'Custom Queues' selected. The main area displays a table titled 'CustomQueues' with the following data:

QueueName	ProcessType	NVTGC
Acquisitions Review	Doc Del	ILL
Additional Fee Inquiry	Borrowing	ILL
Awaiting Conditional Processing	Borrowing	ILL
Awaiting Conditional Request Processing	Lending	Lending
Awaiting Direct Request Sending	Borrowing	ILL
Awaiting DOC Provider Processing	Borrowing	ILL
Awaiting EJournal Processing	Lending	ILL
Awaiting Faculty Processing	Borrowing	ILL
Awaiting ISO ILL Request Processing	Lending	Lending
Awaiting Lending Request Processing	Lending	Lending
Awaiting OCLC Sending	Borrowing	ILL
Awaiting Patron Response	Borrowing	ILL
Awaiting Renewal Request Processing	Lending	Lending
Awaiting RUSH Request Processing	Lending	Lending
Awaiting Unfilled Processing	Borrowing	ILL
Awaiting User Verification	Borrowing	ILL
Blocked Returns	Borrowing	ILL
Borrowing	Faculty Overdues	ILL

Routing Rules

Not required

- Recommended for **most** automated workflow
-

Send only those items with ISSN, ISBN, or OCLC Number in request

Rule number should be low

- Prioritize the rule to run before all others

Make smart use of groups
to fulfill your requests
quickly and accurately

Types of groups



Profiled groups

- Available for use by all libraries
- OCLC-managed membership
- Up-to-date membership every 24 hours



Custom holdings groups

- Only used by your library
- Library-managed membership
- Requires on-going maintenance by your staff



Profiled groups

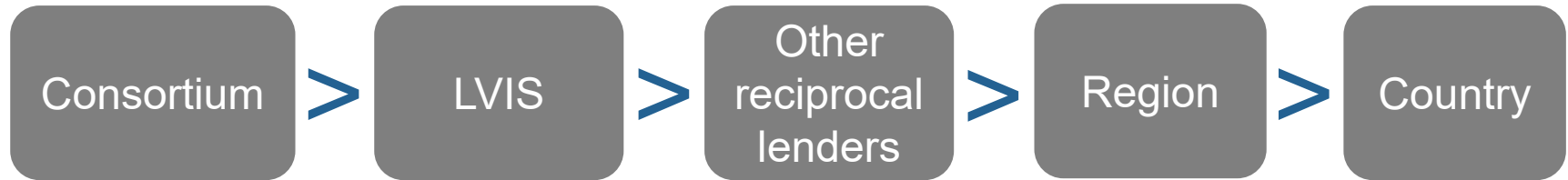
Lists of OCLC symbols for libraries associated by geography, membership in an organization, subject matter, or other attribute. Examples:

- **LVIS** – Libraries Very Interested in Sharing ([oc.lc/lvis](https://oclc.org/lvis))
- **LONG/LLLL** – Libraries with loan periods of 12+ weeks
- **FILM** – Libraries supplying AV materials free of charge
- **EBOOK** – Libraries that lend whole e-books
- Regional groups

For more information: [oc.lc/support](https://oclc.org/support)

Custom holdings path examples

When **free** is the priority and distance matters for shipping time (loans):



When **fast** is the priority and electronic delivery makes geographic location irrelevant (copies):



Fill copy requests faster with automation



oclc.org/oclc-stories

“All the new smart fulfillment features work together for a superior experience for our library users and more effective use of our ILL staff’s time.”

Laura D'Amato

Head of Access Services and ILL,
Baldwin Wallace University

Monitor for improvement
opportunities

Review your ILL stats

Standard and customizable reports

- **Analyze borrowing, lending, and document delivery to:**
 - Refine staffing, as needed
 - Review workflows
 - Update policies and preferences
- **Show your stakeholders** how much your users and other libraries rely on your ability to support ILL

OCLC Usage Statistics

OCLC® Usage Statistics

FirstSearch

WorldCat Discovery

WorldCat.org

OCLC WorldShare Interlibrary Loan

Cataloging

COUNTER

Digital Collections

Period: August 2023 Months: 6 Institution: OCL Update

▼ Institution: OCL

- ↓ ✉ [Resource Sharing Borrower Reasons For No Report](#)
- ↓ ✉ [Resource Sharing Lender Reasons For No Report](#)
- ↓ ✉ [Borrower Resource Sharing Stats Report](#)
- ↓ ✉ [Lender Resource Sharing Stats Report](#)

www.stats.oclc.org

Fee management: Itemizes the library-to-library debits and credits listed on your OCLC invoice.

Reasons for no: Helps you evaluate your library's fill rate and refine your list of favorite lenders.

Reciprocity: Lets you create reports of your library's borrowing and lending activity with libraries of your choice, which can be used to manage interlibrary loan partnerships such as reciprocal borrowing agreements.

Lender report: Track lender fill rates and average turnaround time over a period of time.

Activity: Review your borrowing-to-lending ratio, filled versus unfilled requests, average turnaround time for receiving items and more.

Resource sharing management statistics: Customize monthly raw data about WorldShare ILL activity using your own spreadsheet or database program.

Sample reports

	History					
	Jul 2022	Jun 2022	May 2022	Apr 2022	Mar 2022	Feb 2022
Requests Initiated	868	985	1012	1380	1575	1305
Requests From WorldCat	849	973	987	1297	1470	1284
Requests Cancelled	160	182	196	196	249	245
Requests Filled	712	844	821	1227	1311	1056
Loan	174	201	219	531	531	311
Copy	538	643	602	696	780	745
Requests Unfilled	0	0	0	0	0	0
Average Turnaround Time For Filled Requests (dd:hh:mm)	2:12:00	2:18:43	2:18:14	3:18:58	3:14:24	3:14:38
Average Turnaround Time For Loan Filled Requests (dd:hh:mm)	6:16:05	7:09:07	6:16:48	6:00:58	6:18:00	8:01:26
Average Turnaround Time For Copy Filled Requests (dd:hh:mm)	1:03:50	1:08:24	1:07:41	2:01:41	1:11:02	1:18:00
Purchase Requests						
Requests Initiated (Ordered)	0	0	0	0	0	0
Requests Canceled	0	0	0	0	0	0
Requests Filled (Received)	0	0	0	0	0	0
Requests Unfilled	0	0	0	0	0	0
Average Turnaround Time For Filled Requests (dd:hh:mm)	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00

Sample: Borrower Activity Overview Report

Borrower Symbol	Institution Name	Request Count	ILL Fee
Show All Requests		Total	326
			\$4685.00
AAM	AUBURN UNIV AT MONTGOMERY	1	\$15.00
AFU	UNIV OF ARKANSAS MULLINS	8	\$120.00
ALM	UNIV OF ALABAMA	1	\$15.00
ANV	AUSTRALIAN NAT UNIV	1	\$15.00
AUM	UNIV OF MASSACHUSETTS AMHERST	1	\$15.00
AZU	UNIV OF ARIZONA	1	\$10.00
BBA	UNIV OF BERGEN, SCI LIBR	1	\$15.00
BNG	SUNY AT BINGHAMTON	1	\$10.00
BOS	BOSTON UNIV	3	\$30.00
BRI	BRITISH LIBR	1	\$30.00
BUJF	SUNY AT BUFFALO	2	\$30.00
BXM	BOSTON COL	1	\$10.00
CDS	SAN DIEGO STATE UNIV LIBR	2	\$30.00
CFI	CALIFORNIA STATE UNIV FULLERTON	1	\$15.00
CHBVR	UNIVERSITATSBIBLIOTHEK BERN BIBLIOTHEK	1	\$30.00
CLART	CLARK ART INST	1	\$10.00
CLU	UNIV OF CALIFORNIA, LOS ANGELES	9	\$90.00

Sample: ILL Fee Management Lender Report

Sample report

ILL Record Number	Illiad TN	Title	OCLC #	Imprint Date	Article(Citation)	Date(Citation)	Borrower Symbol	Borrower Full Name	Reason For No	Lender Unfilled Date
211094926		A NATURE POEM FOR EVERY NIGHT OF THE YEAR	1144823682	2020			XLJ	MONTGOMERY CNTY PUB LIBR	SYSTEM CHECKED AVAILABILITY	6/1/2022
211194112		THE LEGEND OF FIRE	62381221	2006			XLJ	MONTGOMERY CNTY PUB LIBR	SYSTEM CHECKED AVAILABILITY	6/15/2022
211199038		FINAL OUT : A MIKE DALEY/ROSIE FERNANDEZ THRILLER	1237370229	2021			XLJ	MONTGOMERY CNTY PUB LIBR	DEFLECTION - NOT CURRENTLY A SUPPLIER	6/28/2022
211244887		THE PSYCHOLOGY OF MONEY : TIMELESS LESSONS ON WEALTH, GREED, AND HAPPINESS	1191843808	2020			XLJ	MONTGOMERY CNTY PUB LIBR	DEFLECTION - NOT CURRENTLY A SUPPLIER	6/28/2022
213417850		VICTOR HERBERT'S NAUGHTY MARIETTA	741311744				KCL	KLAMATH CNTY LIBR SERV DIST	NOT OWNED	6/6/2022
213469849		I GUESS I HAVEN'T LEARNED THAT YET : DISCOVERING NEW WAYS OF LIVING WHEN THE OLD	1258667364	2022			CWU	CENTRAL WASHINGTON UNIV LIBR	AUTO-DEFLECTION: MULTIPLE REASONS	6/2/2022
213502747		ROMEO AND 2 JULIETS	31753017	1995			QQ3	JEFFERSON CNTY PUB LIBR	NOT OWNED	6/1/2022
213550683		COURAGE TO STAND : OCTOBER 1872 - APRIL 1873	1313591078	2022			YVO	ONONDAGA CNTY PUB LIBR	AUTO-DEFLECTION: MULTIPLE REASONS	6/13/2022
213558350		THE LOST BOOK OF HERBAL REMEDIES : THE HEALING POWER OF PLANT MEDICINE	1164738134	2020	THE LOST BOOK OF HERBAL REMEDIES	05/12/2022	TNH	TAMPA-HILLSBOROUGH CNTY PUB LIBR	SYSTEM CHECKED AVAILABILITY	6/16/2022

Sample: Resource Sharing Lender Reasons for No report

Contribute to the RS community

The resource sharing community: Sharing with colleagues worldwide

- What you do at your library impacts other libraries
- What you do at your library impacts the network's speed
- You can have a positive impact by:
 - Taking advantage of IFM
 - Updating your library's holdings
 - Using real-time availability
 - Setting up automations and deflections
 - Keeping your policies, contacts, and hours up-to-date



OCLC Community Center

Learn from peers in online discussion boards

Stay informed with updates from OCLC on releases and events

Collaborate on new ideas and product enhancements

Get involved with focus groups and feedback sessions

oc.lc/community



Questions?

Summary: Today's tools help you...

- **Save time** managing ILL requests.
- **Extend your library's collection** with the world's largest resource sharing network.
- **Obtain items for your users faster** with smart fulfillment capabilities, like automation.
- **Illustrate the value of your ILL services** with reports and statistics.
- **Learn, collaborate, and share** with the resource sharing community.

April 17, 2024

Pre-Conference: Colorado Resource Sharing Conference

Thank you!

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