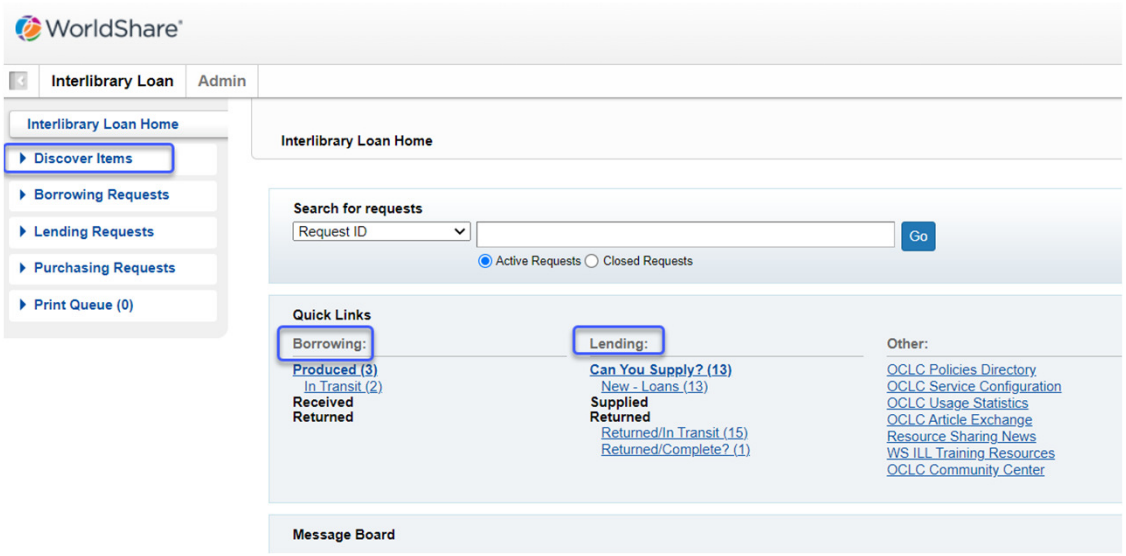
Good morning everyone! Today is Thursday, June 24th. My name is Helen Pinder, I'm the resource sharing consultant here at SWAN, and I'd like to welcome you to the third session of our Interlibrary Loan Boot Camp. Today we'll be going through the lending functions of WorldShare ILL.

The first two ILL Boot Camp session recordings are posted. In case you need a refresher on where to find your WorldShare instance link, orientation on your dashboard, or anything else like that.

Keep the document **Categories and queues** linked on the slide as a quick reference guide. It provides an explanation of the Borrowing and Lending queues with the request statuses – how the status was set, and what the next step is in processing.

WorldShare ILL Home Page



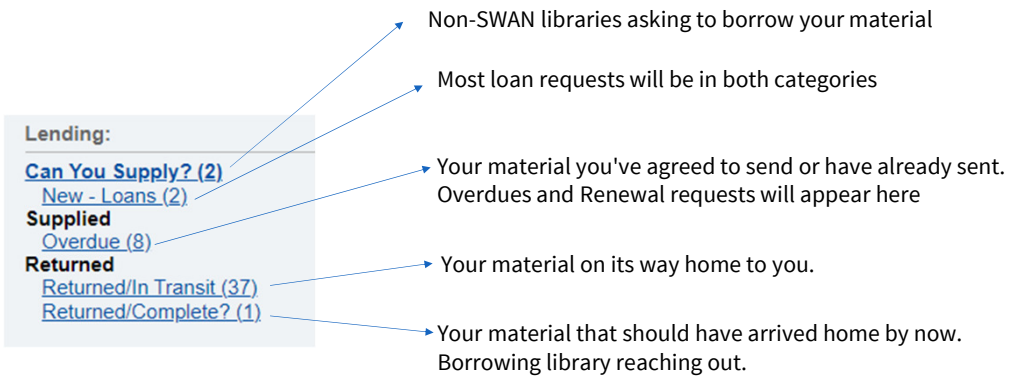
Here's your dashboard. Most of your interactions will fall into these three categories. Today we'll be focusing on the Lending queues.

WorldShare Lending

Requests made for your material. (SWAN outgoing material)

The Lending request queue is something you'll want to check every day. Not only will frequent checking keep your queues small but it will expedite fulfilment or rejection for the waiting non-SWAN patron. Plus your turnaround statistics will be something worth bragging about.

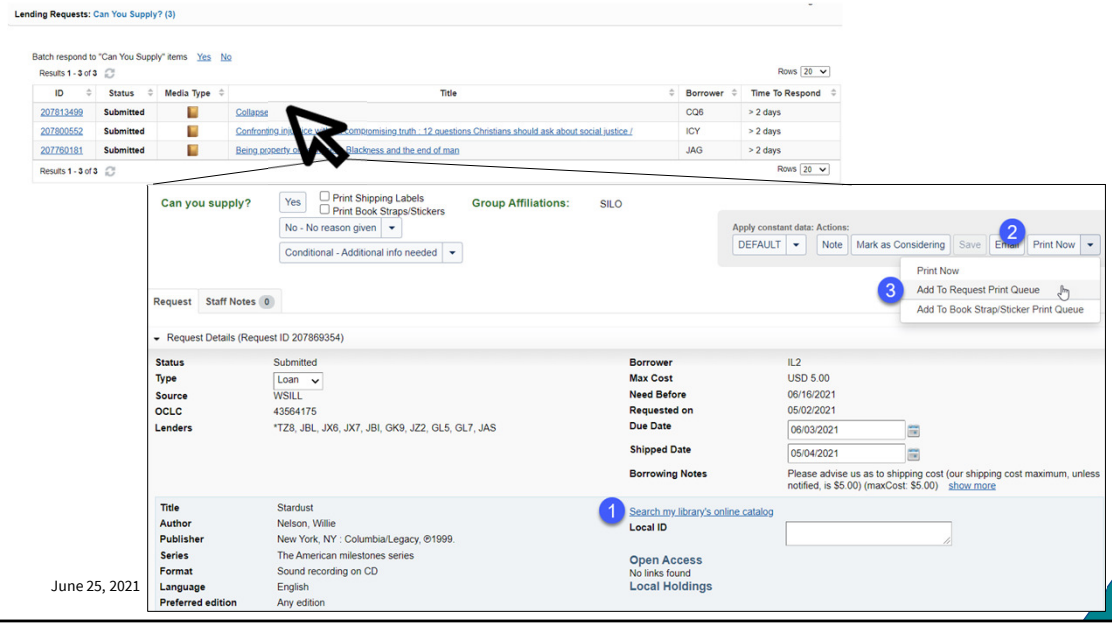
Lending Queues & Statuses



This will look slightly different day to day. Check regularly and respond to loan requests, renewal requests, and Returned/Complete inquiries.

Can you supply?

Click to expand, review, and respond to requests



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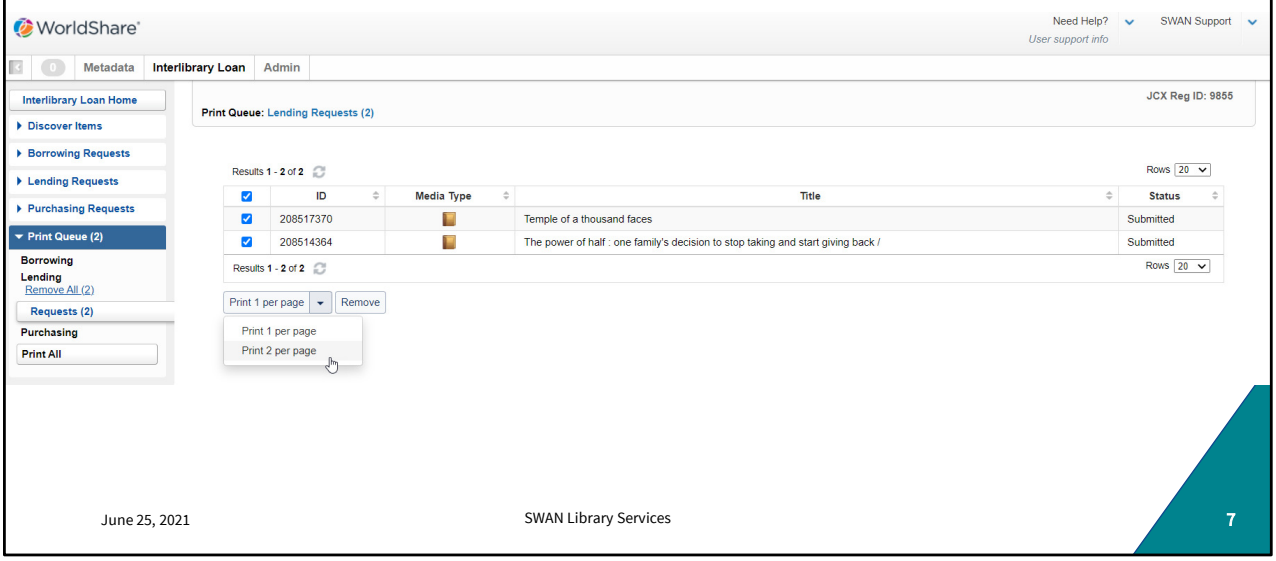
Expand the request to view the details. Click "search my library's online catalog" to search availability. You can also search in WorkFlows if you prefer. If the item appears on-shelf and is an item your library would lend (e.g. not a restricted or high-demand item like a Hot Spot or a Lucky Day.) Click "Print Now" and "add to request print queue." Pull the items from the shelves.

Can you supply?



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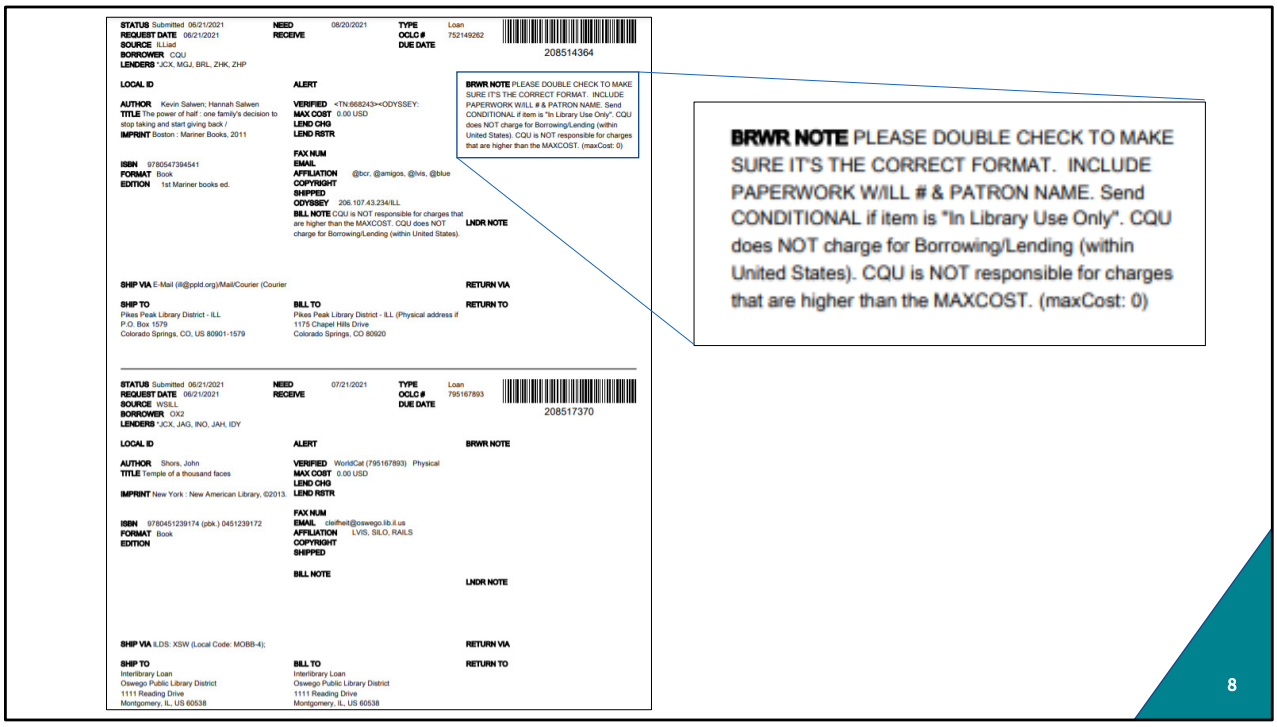
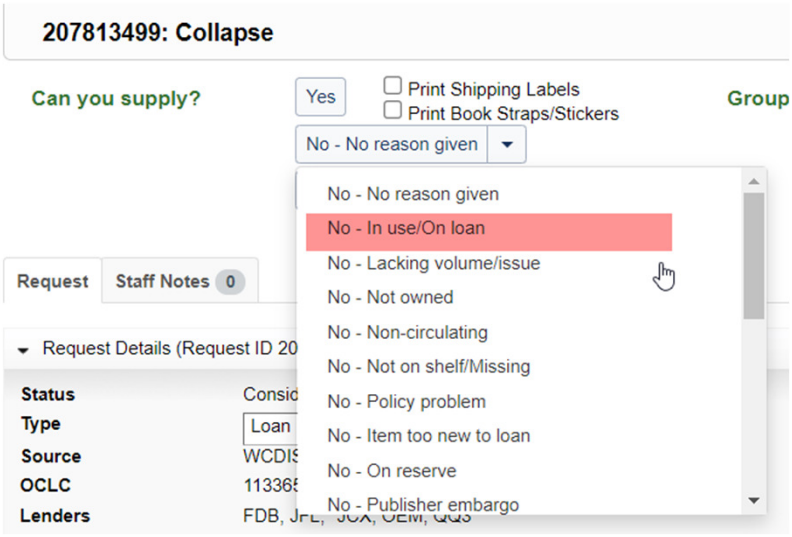
You can print your requests from the Print Queue. I like to print them two per page and jot down the call number and last 4 digits of the item barcode. I use the printouts to make sure I'm pulling the exact item requested. (Serials, classics, and other titles can be tricky with multiple editions.) It's worth pointing out that this is the only piece of lending, or borrowing for that matter, that involves paper. ILL can be paperless- but if there's any possibility that I might grab the wrong item, I like to bring that specific information to the stacks with me. If you have a tablet or similar device that you can bring along- then there's no need to print this list. For this list of two items, I'd print them out, tear the sheet in half, and include each with the item when I send it in delivery. I do this the half in the spirit of "here, you throw this away." Because the borrowing item doesn't need that piece of paper, though it may be useful for them to look up the Request ID. But that's about the extent of its usefulness.



I had to laugh when I grabbed this screenshot. The borrower note for this top request actually asks for the paperwork. So, if you do print these out, including paperwork with the items doesn't do any harm and it's a convenient way to get rid of them when you're done. It doesn't include any patron information (unless you write it on there as Pike's Peak is asking- which I don't recommend doing, frankly. This slip should provide them all the information they would need to find the loan and the borrower information.)

Can you supply?

Respond "No" to requests



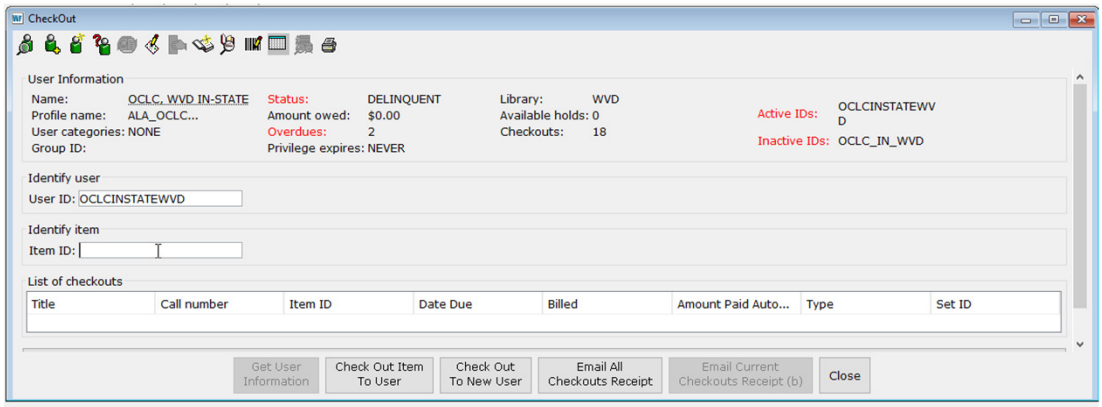
If the item requested is not something you'd be willing to lend, is checked out, is not found on the shelf, or was found in poor condition, etc.; use the dropdown to reject the request. You are not required to provide a reason for the rejection, However it may help the requesting library understand what sorts of items your library will supply. If you routinely see requests for a material type you don't lend, you should review and revise your lender policies. Same-type libraries *tend* to restrict the same types of items (brand new titles, certain types of media, archival material, realia.) Knowing that, a requesting library will usually look at your policies before adding you to the string if the requested item falls into one of those categories.

Can you supply?

Check out in WorkFlows

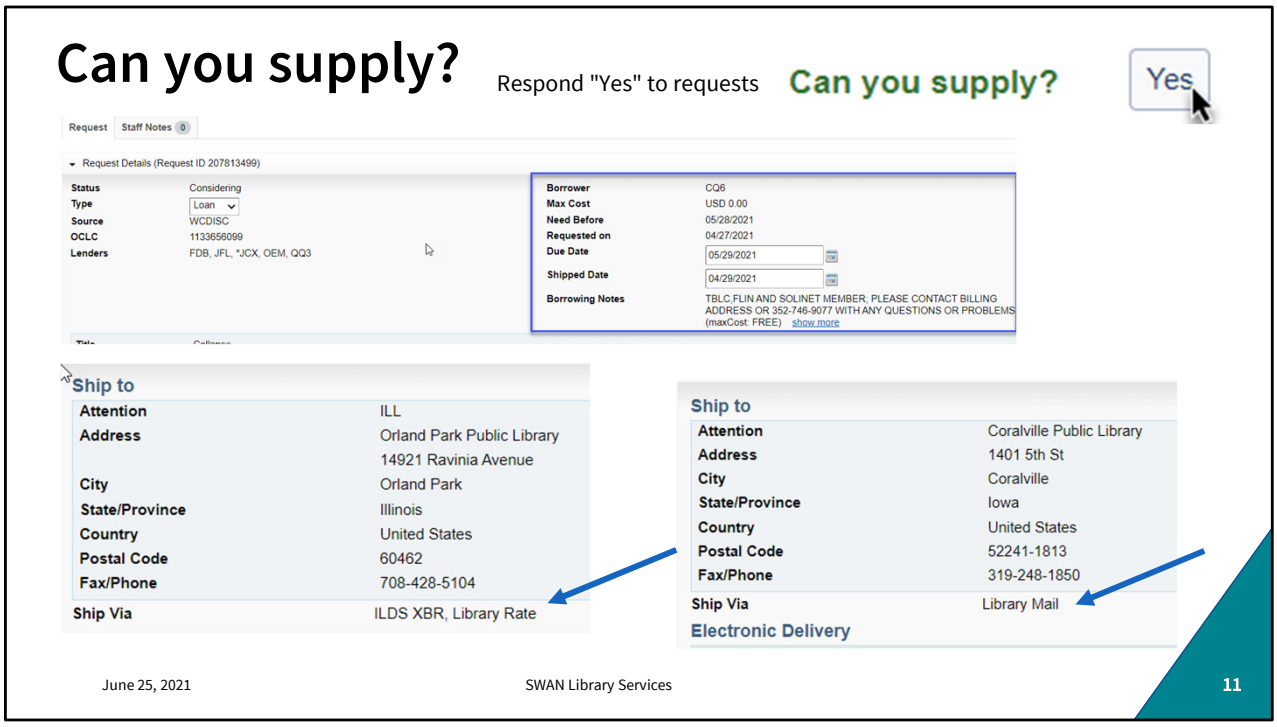
Can you supply?

Yes



Use your XXX In-State and XXX Out-of-State OCLC Users to checkout.

If you find the item on-shelf, check it out to your local In-State or Out-of-State (as appropriate) user. Every library should have one already but if you don't, just open a support ticket and we'll help you set that up. Checking items out to this user gives it an accurate location while it's on-loan. You can set a special due date with the calendar widget to correspond with the due date in WSILL. As a rule of thumb, the WorkFlows date should be 7 days after the WSILL date to allow for delivery time. This way you won't start seeing WF generated overdues before the borrowing library sees an overdue status in WS. Some borrowers will request a specific due date for discussion groups or research projects. My experience has been the borrower will keep the item to that date whether you set it in WS or not, so it's simplest for your workflow (small w) to just set the requested date and avoid the overdue headaches. Or don't fill it, if you don't want it out for as long as they're asking.



Once the item is checked out to your OCLC user in WorkFlows, review the Borrower information in WorldShare. This is where you'll set that special due date if it's something other than your default loan period. Also look for delivery needs. Some libraries will request return mailing labels to ensure your item is correctly routed back to you. Typically in-state loans are sent with a RAILS or ILDS label. Out-of-state loans are sent US Mail.

Click "Yes" when you're ready to send the item.

https://librarylearning.org/directory

▼ Quincy Public Library
217-223-1309

526 Jersey St
Quincy , IL 62301
County: Adams

ILDS: XEP
Route: XEP-05
OCLC: IDQ

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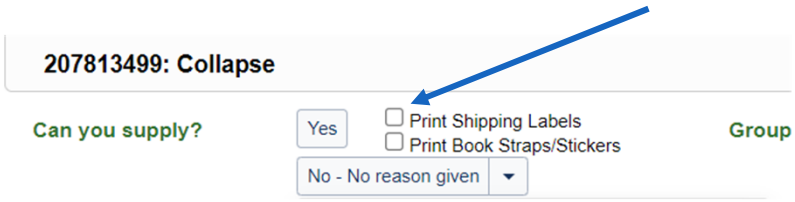
ILDS label instructions should be in the loan request. But you can always confirm in L2. Neatly and clearly address your route tag and include return route information (this may be helpful for delivery personnel!) As you can see here, my label is not self adhesive. So, to ensure the tag stays in place, I've crisscrossed the rubber bands and taped the label where they intersect. Tape should never touch the item! Tape the label to the packaging never the item. You know who you are. Don't do that.

Out of State – Use WorldShare ILL Shipping Labels

See Printing for Lenders - https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Print/Printing_for_Lenders



A huge timesaver for your out-of-state loans is printing the shipping labels from WS before clicking "Yes" to supply the loan. Another exception to my "ILL can be paperless" claim, but well worth it, in my opinion.

Label the item for delivery or mailing and send it on its way!

- In-State Only

Delivery label templates and instructions

https://www.railslibraries.info/services/deliverylabels

- Out-of-state

US Mail or specified carrier

WorldShare and WorkFlows steps are now complete and it’s labeled for ILDS or mailing. It's time to send the item out into the world.

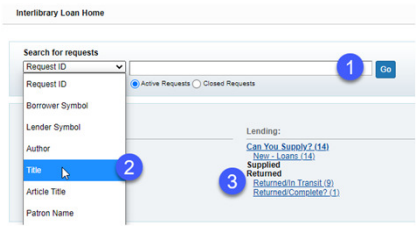
Time passes

Remember this scenario is best case. At no point does the item go missing in transit or become overdue. The item goes out and comes back without need of further intervention or communication. The “ifs” “whens” “unlesses” will be covered in later slides. the majority of your loans will be uneventful.

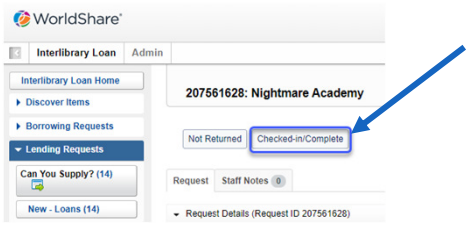
Closing a loan

Checked-in/Complete

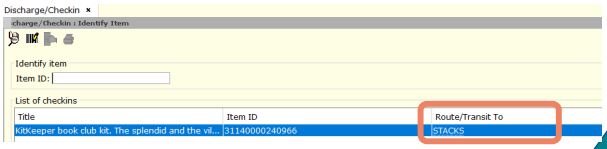
Find the loan in WSILL with one of several methods
1. Search by Request ID (preferred)
2. Search by title
3. Find in "Returned/In-Transit"



Mark the request checked-in/Complete in WSILL



Lastly, discharge/checkin the item in WorkFlows and follow the routing instructions.



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You will most likely be alerted when the item is on its way home. It will appear in your "Returned/In-Transit" Returned queue when the borrowing library marks it returned. Sometimes, however, your item will just turn back up. It's important to look at route tags when sorting your incoming deliveries to intercept and correctly process these returning items.

You can look the item up by Request ID, title, or one of several other options in that search term dropdown. When you find it, mark it Checked in/ Complete with the button.

Once the loan is closed you can discharge/check-in in WorkFlows and route accordingly.

Questions on Lending?

So that's how most of your loans will go. Are there any questions?

Loans gone wrong

- The loaned item fails to arrive
- The item is lost or damaged
- The item does not make its way home to you

Sometimes the loaned item doesn't arrive at the borrowing library or it becomes lost or damaged. Other times it's marked returned but doesn't make it home.

Transited item doesn’t arrive

- Item is sent, but it isn’t marked received
  - Check your shelves
  - Mark the item “Received?” in WSILL
  - Contact requesting library (borrower) if no reply
- Borrower marked the item “Returned” but it hasn’t arrived
  - Check your shelves
  - Mark the loan “Returned/Complete?”
  - Contact requesting library (borrower), request shelf check

Transited items get lost, albeit not often. Your first clues that something has gone wrong be
your WorldShare queues.
An item that's taking its time on its way to the requesting library most likely did arrive but wasn’t updated in WS. To eliminate the simplest explanation first, however, it’s best to do a shelf check. If it’s not on your shelves, then go into WS and click the "Received?" button to let the borrowing library know it should have arrived by now.
On the return side of the loan, where the borrower has marked the item “returned,” if several days go by, check your shelves. If it's not there, mark the item “Not

Received" That should be enough to get the supplier to check their shelves, but you can also contact the lender to request a shelf check.

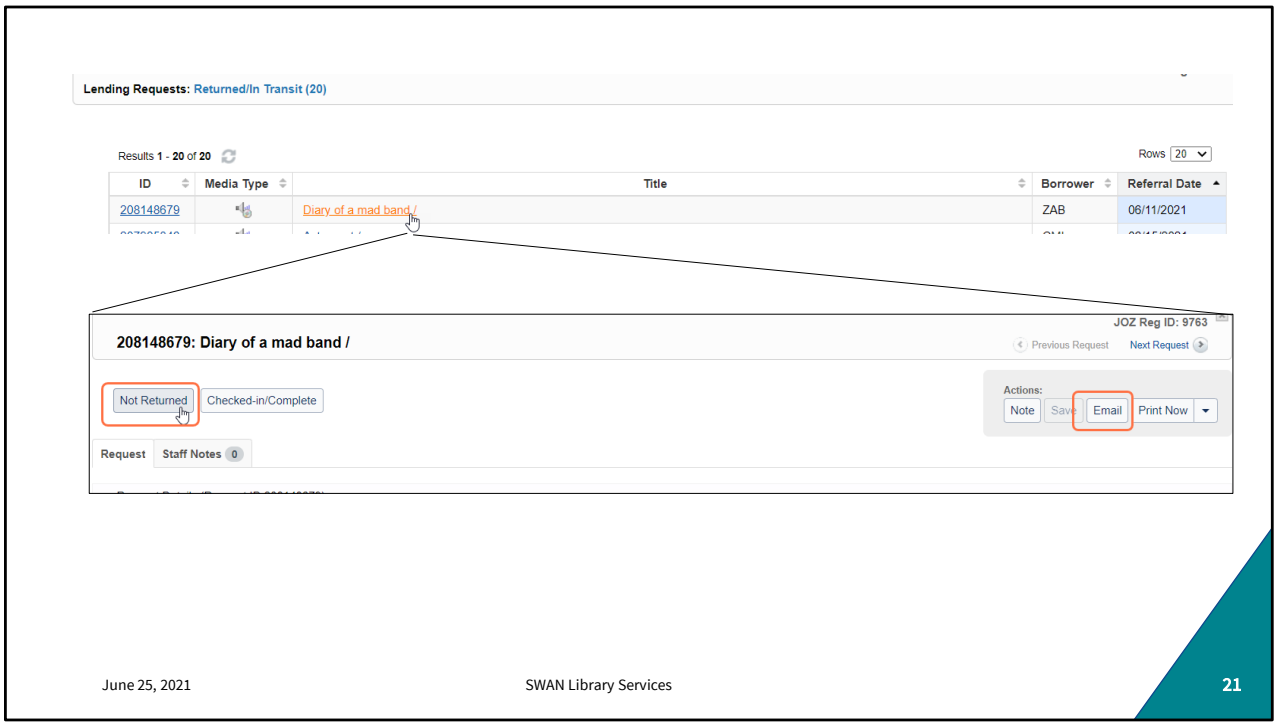
Transited item doesn’t arrive

- You send item, but requesting library (borrower) marks "Not Received"
  - Request is listed in the **Lender > Supplied > Not Received** queue
  - Check your shelves
  - If you have confirmed it should have been received by the requesting library and was sent out, you should initiate procedures for lost material

The requesting library (borrowing library) may be proactive in marking items "Not Received" if they do not get the physical or digital copy within their time threshold. When this happens, you (the lending library) should double check that it didn't somehow end up on shelf or checked out to another user.

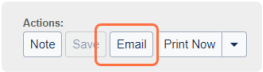
If you confirm it was shipped to the requesting library, you should contact the library and provide shipping information for tracking purposes.

If both parties concur that the item went missing in transit, the requesting library is responsible for covering the cost of the material. At this point you can initiate a request using Interlibrary Loan Fee Management (IFM) for the replacement cost.



If it's marked Returned but is not received click "not returned" or if received in an unacceptable condition, click Email to reach out to the borrowing library.

The supplied item is not marked Received or Complete



ILL Code Section IV.7 states

The requesting library shall be responsible for borrowed materials from the time the materials leave the supplying library until they have been returned to the supplying library. If damage or loss occurs, the requesting library shall be responsible for compensation, in accordance with the policy of the supplying library.

For items that either fail to arrive or fail to return home, the borrowing library is financially responsible. That said, you should always communicate with the lending library to confirm a loss, verify replacement costs, agree on a timeline for reimbursement, and the like. You can do so by clicking the Email Now button within the loan record.

Contact the Borrower to confirm item status and or condition

- Use the Email button for maximum efficiency
- Invoices are paid by your library (Not SWAN Quarterly)
- Interlibrary-loan Fee Management (IFM) documentation is on the support site

https://support.swanlibraries.net/documentation/85588

When an item becomes lost or damaged the borrower will typically contact you with the Email now button to discuss remittance preference. If the item is overdue and you don't hear from them, you can reach out yourself. We have some sample templates on our support site for phrasing those "shoulder taps."

If you prefer a check, you should invoice the requesting library and they should pay you directly- WSILL losses are not included in the SWAN quarterly Billing

Interlibrary Loan Fee Management is arguably the simplest way to arrange reimbursement. There are detailed instructions for doing that on our support site.

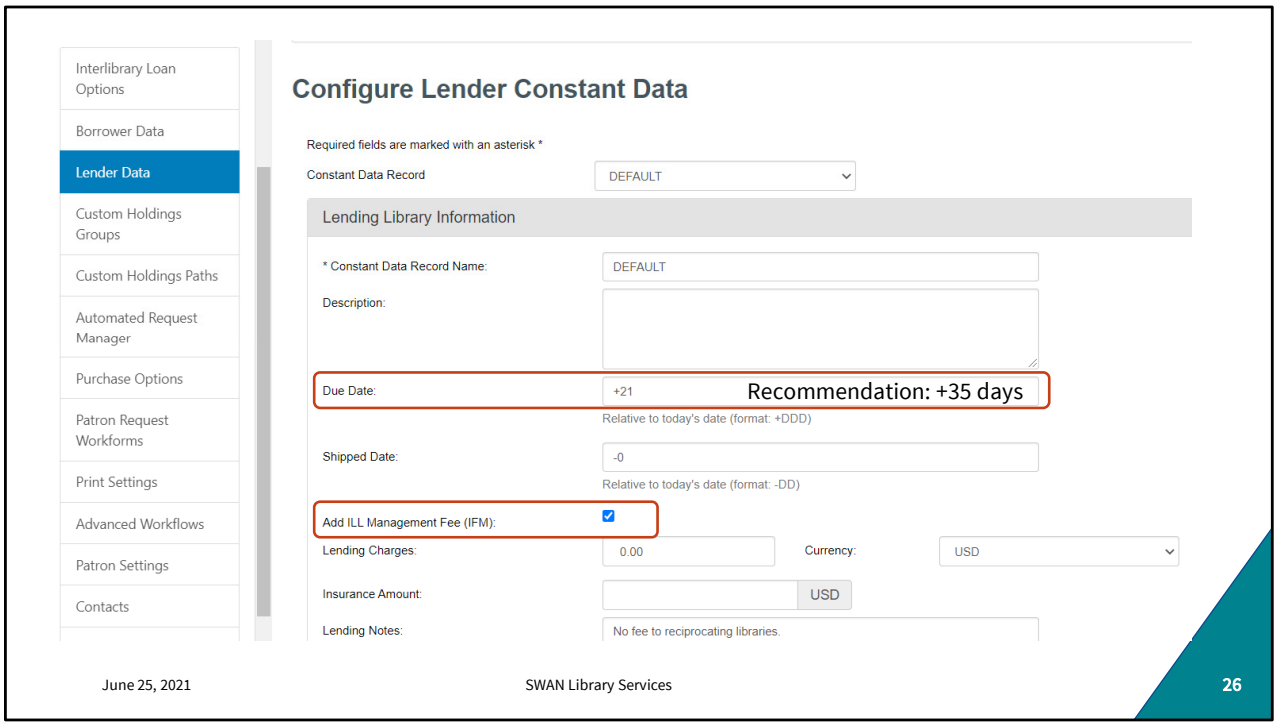
Basically how this works is the requesting library creates a second loan request for the same item. They put your library as the only lender in the string, populate the item replacement cost in the Max cost field, and tick the Use IFM box. Once it’s submitted, you “fill” that second, dummy request. The borrower marks it received, then returned. When you (the lender) marks it "complete" the IFM balance is updated.

Questions?

Questions on lost, damaged, missing loans?

Lender Policy

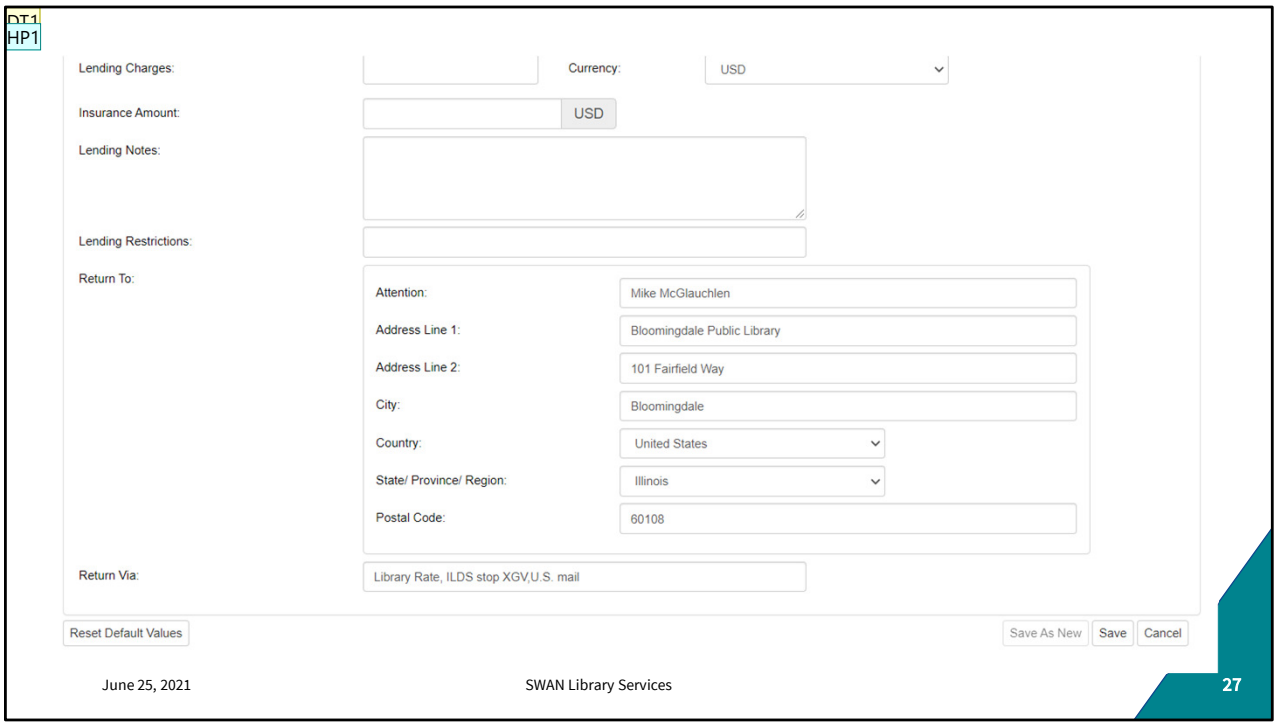
We’re going to dip into policy very briefly here just to give you a running start. Join us next week for a more in-depth discussion.



It's a good idea to review your Lender constant data on a quarterly basis. It will help you stay familiar with where to review and make those changes as well as to actually review them for accuracy. Send us a ticket if you have any questions or if you'd like us to review your configuration with you.

Most of you will only have one CD record; that's the "default." This data record you see is configured to check out loans for 3 weeks with no lender fee assessed where none is charged, and Interlibrary Loan Fee Management is the preferred payment method.

Also note that the Due Date is calculated based on today's date +x days. So, when you mark something supplied, the due date is determined for the item and filled in on the request. The 35 day recommendation corresponds to the default WorkFlows circulation rule of 8W no renewals, minus a week for anticipated transit. You can, if you want, create an out-of-state Lender Constant Data record with other conditions (e.g. may charge for out of state loans, may shorten or lengthen out of state loans to account for transit time).



Farther down on that same data record, you'll see your delivery preferences, return address and attention lines. The physical address isn't likely to change very often, but it doesn't hurt to look. I see a lot of libraries with lending notes indicating types of materials not supplied. Lending notes is not the best place to communicate that information. Where loan rejections can't be done by deflection, you need to define those material types in your lending policy. Because by the time the borrower sees this lending note, the request has been placed. This is where you'd request your material be returned with copies of the paperwork (if that's how you roll and you haven't gone paperless.) We'll talk about lending policies and deflections next week.

Slide 27

DT1 [@Helen Pinder]Actually, this is not where you put notes like this in. At this point, the request has been accepted, so you should not put exceptions in this note. This is where you put processing notes like "always return paperwork" if you are crazy.
Dawne Tortorella, 6/23/2021

HP1 Screenshot updated and notes revised.
Helen Pinder, 6/23/2021

Lender tips

- Response time settings
- Preferred Delivery method
- Check your request queue early and often
- OCLC turnaround time available in your usage stats.

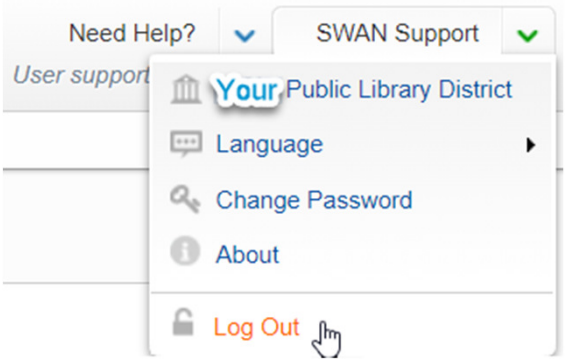
For libraries with adequate staffing, where you can be confident that someone will be looking at requests at least once a day (M-F), setting your response time to 2 days instead of 4 or more will increase your request volume by marking you out as a responsive supplier and drive up your stats!

Going back to that constant data accuracy- make sure your preferred delivery method is clearly identified (ILDS for in-state, USPS for out of state will be what most if not all of you will want to indicate.) This will give prospective borrowers a better idea of delivery/fulfilment time before they add you to a lender string.

Check your request queues as often as you can to drive down your fulfilment time and keep your pull lists short

Your turnaround time is available in your statistics under Usage Statistics! Track your performance and strive for excellence!

Remember!



Always Log Out.
Don't just close your tabs.

Whenever you're in WorldShare (borrowing, lending, reviewing, etc.) It's important to Log Out of each open WorldShare tab before closing the tab or browser.

Our next boot camp is July 1st

WSILL updated on 6/20/2021. The release notes are posted in the forum https://help.oclc.org/Librarian_Toolbox/Release_notes

Also in the forums is a thread on future boot camp topics. So if these have been helpful for you but there's something I haven't covered, please let us know in the forums!

Next ILL Users Group meeting is October 6th . Please mark your calendars and join us for that.
WorldShare has a wealth of training material! Use your WorldShare login to access the community resources, register for webinars, view recordings etc.
July 8th is our next Circ/ILL office hours. Please join us there if you have any questions and we can provide some real-time support.

Questions?
If you have any questions about your Worldshare instance, your login, your configuration, anything at all, please open a support ticket.
We'll see you next week!