

## **Establish ILL Policies transcripts**

Welcome to Establish ILL Policies in OCLC Policies Directory. Today you'll learn why you should establish or update your policies in OCLC Policies Directory page, why and how you can set up your supplier status either as a supplier or non-supplier, how you can temporarily pause your supplier status, why you should add contact information for ILL purpose and how you can do that, and why and how to set up your lending policies as a lending library a supplier in the system.

Whether your library is borrowing or lending, setting up or updating your policies is an important step to ensure a good experience with the service. The OCLC Policies Directory is where other libraries will go to see your library's information and your policies for the service. The more complete your policies are the better the experience for your library and other libraries with OCLC interlibrary loan services.

When libraries setup the policies in OCLC Policies Directory, the summary of those policies are available on the list of lending libraries for a borrowing library to choose to add to the lender string when creating a borrowing request. From there, the borrowing library can click the blue *i* icon next to the library's name and access the library's OCLC Policies Directory page.

The first step after you log into your ILL service account is to click the OCLC Policies Directory link which you can find in the middle section under Other in your ILL service home page. The OCLC Policies Directory is where you set up your ILL policies and find ILL policies and other important information from other libraries part of the service

Defining your supplier status is important because it tells the system if your library will be considered to supply items in the service or not. This way you avoid receiving requests when you are not a supplier for example. The profile tab is where you manage your OCLC supplier status, days to respond, and no circulating items and you can edit the information for these categories by clicking on the edit link next to each of them.

You define your supplier status clicking the edit link next to the respective field. If your library plans to lend, supply items you want to set set up your supplier status to yes and then indicate the days to respond and inform non-circulating items. Days to respond will be used by the system to automatically keep a request at your location for the period of time you designate.

The default is a four day period for both copies and loans but you can define your days to respond in several options.

If you select one day it means that any request arriving in that day will expire at midnight the same day. It does not count weekends in U.S national holidays. As a note for loans, physical items take into consideration the time it takes for the courier to pick up shipping items at your library so your library turnaround time is no longer than your days to respond. For example, if you mark four days to respond for loan requests but it takes another three extra days to be shipped then your days to respond for loan should be 7 days

or eight days instead of four days

Copies and loans can have different time period for days to respond. For example, you may process copy requests within two days and loan requests within four. If you set loans to four days for example, any requests that have been in your Can you Supply queue for more than four days without any action will automatically age to the next lender. You can also indicate the non-circulating items from your collection but note that items you list in the non-circulating field will not be automatically deflected in any way.

Specific deflection policies will have to be set up for that purpose. List of non-circulating items on the profile tab is for information purpose only. On the other hand if your library is a non-supplier and you don't want to receive unwanted requests you can edit your OCLC Supplier status to No, this will prevent borrowing libraries from sending requests to your library.

If your library is a lending library, a supplier, but your library or your ILL department will be temporarily closed you can temporarily pause the requests from arriving on your Can You Supply queue such as during holidays or academics breaks. One option is to edit the OCLC supplier to no then when your library is ready you can change it back to yes. A more automated way to temporarily pause requests as lending library is a from the schedule tab

under closures: click the add button located on the right side then complete the form with the name of the closure, select the type

enter the start date, the end date, then on the OCLC supplier mark as no. The system will temporarily pause requests from arriving to your Can You Supply queue during that period, this will avoid the issue of receiving requests when your library is closed. Remember that any form that you fill out using the add button you need to save for the system to display on

your policies directory and maintain that information until it's edited or deleted by your library. The schedule tab is also where you can set your operating hours in case other libraries need to contact you to solve any ILL issue. You can use the add button to complete the form and save it to display in your OCLC Policies Directory page. Now even if your library plans to borrow materials only, you should provide your contact information in the OCLC policies directory because there will be situations in the service when the only option to solve an issue would be by a lending library contacting a borrowing library or vice versa.

The contacts tab is where other libraries can find information on how to contact your library. You can click the add button on the upper right side and fill out the form to create your type of contact. You can create multiple types of contact such as the ones you see on the example in this screen. You can edit or delete any of these types of contacts as needed. You can also create temporary contact information when the main contact person for ILL is on vacation and or being temporarily substituted by another staff in your library or you can add this information on the Note field of the contact already created by clicking the edit link and add that information in the notes field then save it.

As a lending library you should set up your lending policies so borrowing libraries can decide if they should or can add your library to the lender string or to the custom holdings groups. The collections tab is optional but it's where your library can display its unique items which can be included or excluded on the copies or loans policies. You can add information about any unique items that your library owns in the collections tab. Once collections are established in the policies directory you can then reference them in the specific policies you establish in the system.

The policies tab in the policies directory is for lending libraries to define rules how and to whom they supply items in ILL. You have three options on this tab: Deflections, copies, and loans. You can add your policies for any of these options clicking the add button located on the upper right side. Let's take a look at each of these three options. Let's start with deflections: if your library is getting too many requests for items you do not lend you can set up for the system to automatically deflect those requests based on your deflection policies, this way you don't need to go to your ILL service and manually answer no to those requests due to local policy problems or no circulating items for example. Here in the policies directory your library can set up category level deflection. You can create deflection policies based on costs, material format and age, library types, geographic location, and more using the add button located on the right to create deflection policies. You can have multiple policies. We offer videos in how to create deflection policies. You can find the link on this video description

This is an example of deflection policies: anything with a green check mark is included and it will be deflected not provide while everything in red mark means is excluded from the deflection policy and it will be provided make sure you select the correct option to avoid receiving requests for items you don't lend or not receiving requests at all

The second option you have under the policies tab is to set up your policies for copies, these are policies are for copies of materials sent by mail or electronically. When you click the add button located on the right

this form appears for you to enter the policy name for your copy policy, select the copy type to be applied

if any fees are charged, then you can select the fees by selecting the type of increment entering the numbers for the minimum and maximum range and the fee amount with the respective currency, scroll down to include or exclude borrowers for this policy, the default is any which means you provide copies to any library when you mark include that means provide or exclude not provide then you have the options to select who you want to include or exclude for copies policies. For OCLC Group which are groups created by OCLC on behalf of consortias and libraries parts of this ILL groups, you can select libraries categories

and or geographic location

you can also include or exclude items

and

place restriction for them as well. If you added collections to the collections tab on the policies directory you now could select to include or exclude any of those collections

you can also select which formats you want to include or exclude

and you can select the restrictions to be applied by selecting the options from the drop down menu

Then you can add the details such as request methods, how you accept requests, how you handle those requests,

how you deliver

and how you accept payments for those requests with charges

then you can add any notes and save your copy policy to display as you can see in this example

You can create multiple policies for copies, you can create policies for copies for libraries within your region and policies for copies for libraries outside your region for example

This is an example of how the copies section under the policies tab on your policies directory will look like after you save your form. This is what your library and other libraries will see on your OCLC Policies Directory page. Note that anything with the green check mark means included in the policy which means that you provide and anything in red means excluded from the policy you do not provide. You can edit or delete any of these policies by clicking on the respective link on the upper right side

The third option under the policies tab is to set up your loans policies. These policies are for the physical materials such as books or DVDs for example. When you click the add button located on the right

this form displays where you can enter your policy name, define the maximum number of items for loan and enter the loan period then select from the drop down menu the days, weeks or month then inform the renewal maximum and enter the period in numbers and then define days, weeks or months. Then scroll down to add any fees for those with charges. You can select the increment, enter the minimum maximum range, the fee, and the respective currency

Then you can leave the tax included as no, reciprocal type if you have an agreement or you're part of a group or partner with another library that agree with the same type of fee

Then the same thing with defining the borrowers: including to provide and exclude to not provide, any means that you provided to any libraries. When you click include exclude you can select the OCLC groups, libraries categories,

and locations

geographic locations

Then you can include refer to your collections to include or exclude those you have added in the collections tab, any means that you provide to any collections and any formats the same thing with the formats include anything that you provide or exclude any format you don't provide

select any restrictions

Define the details how you accept requests, how you handle, deliver, and accept the payments, add any notes you find useful then save it. This is an example of how your loan policies look like after you save your form. This is your what your library and other libraries will see on your OCLC policies directory page. Again anything with the green check mark means it's included in this policy you provide and everything in red mark means is excluded

from your loans policy and you do not provide. You can edit or delete any of this information clicking the respective links on the upper right side of the policy. While creating either deflections loan or copy policies, keep in mind what you want to include to provide or deflect and or excluded do not provide loans or copies or exclude from a deflection from your policy and make sure they are consistent with the information in your constant data forms

You can contact OCLC support and find documentation and more training materials at [help.oc.org](http://help.oc.org). Thanks for watching