Off-system borrowing

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Learn how to create and manage off-system borrowing requests in WorldShare Interlibrary Loan. Borrowing libraries will typically only resort to off-system email lenders when they have exhausted their in-system lender strings and have still not filled the request, or because the nature of the material demands that they have to start the request off-system.

Create off-system borrowing requests

Create off-system requests by taking an existing new or exhausted ILL request and changing the fulfillment type to Off-System Request.

To change the fulfillment type of a request:

1. Locate the request you want to change to an off-system request.
2. In the request, click Change Fulfillment Type > Off-System Request.
3. Complete the Off-System Request Details.
   - Enter your Off-System partner information into the Lender Name or Lender Symbol fields. The Partner List will update as you type with the corresponding entries entered in the Address Book of the OCLC Service Configuration.
     - Once you have selected the Lender from the partner list, the Email Address and Need Before date will automatically populate with the information from the Address Book record for that partner institution. The Return to address will also populate.
     - Refer to Address Book to find information about adding to the Partner List.
4. The request moves to the Off-System Request > Borrowing queue.

Update off-system request details

Off-system requests will need to be edited for two main reasons:

1. You need to process and respond to an incoming email message from the request's off-system partner.
2. You need to instigate the next phase of the ILL transaction and send an email indicating the change to the request's off-system partner.
All fields in off-system requests are always editable. Certain fields are considered essential, and the system will warn you if these fields are accidentally removed or were never entered:

- Partner name
- Need-before date of the request
- Title of the item being requested

**Process updates in an existing off-system request**

When you receive updates from an off-system partner for an existing request, use the Note option on the request and enter any updates or important information as a Staff Note. Either copy and paste or manually enter the information into the Note, including emails, dates, addresses, and other pertinent information.

The Staff Notes tab allows you to keep notes that are viewable and searchable only by your library staff and can be used as a repository for information about your off-system request. Staff Notes can be added to active and closed requests. The number on the tab indicates how many Staff Notes currently exist for a particular request. Refer to Staff Notes for additional information.

**Edit and add Staff Notes**

All staff users within an institution can add, edit and delete notes. Any staff member may edit any existing notes. The original author displays in the left column with the most recently-edited-by user name appearing just below the note.

Note: Only staff with the WorldShare ILL Admin role will be able to see the name of the author of the staff notes. Staff with the WorldShare ILL User role will see a date and time stamp for when the note was created/updated along with the name of the library.

The most recently added note will display at the top of the Staff Notes tab. Edited notes display based on the updated date and time.

**Add a Staff Note**

Note: There can be up to 500 notes per request.

1. From the request, select Note from the Actions panel.
2. Add the text of your note to the Add Staff Note text box.
   - There is a 500-character limit for each note.
3. Click Add.
   - To remove any text added to the Add Staff Note box, click Cancel.

**Edit a Staff Note**

1. From the request, click on the Staff Notes tab.
2. Next to the desired Staff Note, click on the button.
3. Select Edit.
4. Make the desired edits in the text box.
5. Click Update to save your changes.

A message appears confirming the note was successfully saved.

**Change the status of an off-system request**

When it is time to Cancel, Ship, Receive, Return, or check in an off-system request, it is recommended that staff make the necessary updates to the request details before changing the request status.

- Off-system lending and borrowing requests that are 14 days overdue will automatically have the overdue status applied.

Use the Change Status dropdown to change the request status. Select the appropriate status after request details are updated.

Note: Changing the status of a request automatically saves any changes that have been made.

If the status change is important to the patron, use the Email button to send them an email with information regarding the status of their request.

**Email an off-system partner**

Use the Email button to send an appropriate email to the off-system partner. Emailing the off-system partner after updating the request details and status ensures that the email contains all the correct details.

From the email template, enter the recipient's email address manually or select the email from the address book.

- To review emails sent regarding an off-system request, navigate to the Notifications section of the Request History accordion on the request.
- To review emails received regarding an off-system request, navigate to the Staff Notes tab to review the history of messages received and manually entered as a Note.
Unfilled off-system requests

If a borrowing request goes unfilled by the off-system partner(s), you may change the fulfillment type of the request to continue fulfillment for the patron.

When the request status is updated to Unfilled, the Change Fulfillment Type button reappears. The request may be changed to Document Delivery, ILL Request, Open Access, Purchase Request, or WMS Acquisitions.

Statistics and Reporting for off-system requests

Review off-system requests using OCLC Usage Statistics to track your off-system requests along with all your other forms of ILL requests.


Note: All off-system requests displayed in statistics will show the off-system partner as having the OFSYS OCLC symbol.