Establish ILL policies video transcript.

Welcome to Establish ILL policies in OCLC Policies Directory.

Today, you will 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 purposes 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 set up their 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 name and access the library's OCLC Policies Directory page.

The first step after you log in to your ILL service account is to click on the OCLC Policies Directory link, which you can find in the middle section under Other in your ILL service homepage. 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 Non-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 will want to set up your Supplier Status as "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 4-day period for both copies and loans but you can define your Days to Respond in several options. If you select 1 day, it means that any request arriving that day will expire at midnight the same day. It does not count weekends and US 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 4 Days to Respond for loan requests but it takes another 3 extra days to be shipped, then your Days to Respond for loan should be 7 days or 8 days instead of 4 days.

Copies and Loans can have different time periods for days to respond. For example, you may process copy requests within 2 days and loan requests within 4. If you set loans to 4 days, for example, any requests that have been in your "Can You Supply?" queue for more than 4 days without any action will automatically age to the next lender.

You can also indicate the non-circulating items from your collection are- but note that the 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 purposes only.

On the other hand, if your library is a non-supplier and you don't want to receive unwanted requests, you can edit you 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 requests from arriving in your "Can you supply" queue such as during holidays or academic breaks. One option is to edit 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 a lending library is 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* and *end date* then under 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 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 is 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 this example on this screen, and 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 other 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 adding that information on the Notes field and 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 their 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 look at each of these three options:

Let's start with Deflections. If your library is getting too many requests for items you will 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 non-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 your 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 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 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 policy, for OCLC Group (which are groups created by OCLC on behalf of consortias and libraries part of these ILL groups), you can select library categories, and/or geographic location. You can also include or exclude Items and place restrictions 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 dropdown 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 you copy policy to display as you can see on 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 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 form the dropdown menu if it's in days, weeks, or months. Then inform the renewal maximum and enter the period in numbers and then define in days, weeks, or months. Then scroll down to add any fees for those with charges, you can select the increment then enter the minimum and maximum range, the fee and the respective currency. Then you can leave the Tax included option as No. Reciprocal Type, if you have any agreement or you are part of a group or partner with another library that agrees with same type of fee.

Then the same thing with defining the Borrowers, include (to provide) or exclude (to not provide). Any means that you provide to any libraries. When you click include or exclude you can select OCLC Group, Library categories, and locations (geographic locations). Then you can include, refer to your collections (to include or exclude those you have added under Collections tab), Any means that you provide any collections, and formats (the same thing with formats) include anything that you provide or exclude any format you don't provide. Select any restriction.

Define the details in how you accept request, how you handle, deliver, and accept payments then add 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 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 it's excluded from your loans policy (and you do not provide). You can edit or delete any of this information clicking on the respective link 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 on loans or copies or excluded from 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.oclc.org. Thanks for watching!