



OCLC Policies Directory Quick Reference

Introduction

The OCLC Policies Directory is a Web-based source of lending and copying policies of libraries participating in WorldCat Resource Sharing.

This document provides you with a brief overview of the OCLC Policies Directory as well as a list of information you should bring to your workstation when preparing to enter your policies, contacts, and institution information into the Policies Directory.

You can access the OCLC Policies Directory (<http://illpolicies.oclc.org>). There is also a link to the Policies Directory from WorldCat Resource Sharing and the WorldCat Services Administrative Module. Using your authorization and password, log on to either WorldCat Resource Sharing (<http://www.firstsearch.org>) or the WorldCat Services Administrative Module (<http://www.firstsearch.org/admin/>), and click the **Policies Directory** link at the upper right of any screen.

Overview

The Policies Directory provides two main functions to enhance your workflow. First, it provides a way to search potential resource sharing libraries by OCLC institution symbol, institution name or unit name. The unit name can either be a single library operating under one OCLC symbol or a subordinate library, such as a branch, that operates under or shares the OCLC symbol with one or more other libraries. The search can also be performed on OCLC profiled groups by the OCLC profiled group symbol or OCLC profiled group name.

The second function of the Policies Directory is to enable you to enter and display information about:

- Your library
- Your lending, copying and deflection policies
- Contacts at your library
- Library collections
- Library schedules
- Your resource sharing supplier status

These information categories are separated out for ease of data entry and discovery. Screens within the sections typically provide general data with the ability to drill down for more detail as needed. The screens offer Quick Tips in the right margins to familiarize users with the features provided. Also, many field labels are live links to more information on the purpose and/or definition of the field.

Browser Requirements

Internet Explorer: The Policies Directory supports versions 4 through 7.

Netscape: The Policies Directory supports versions 4 through 9.

Firefox: The Policies Directory supports versions 1 through 3.

If you are operating with an older version than those listed, please upgrade your browser.

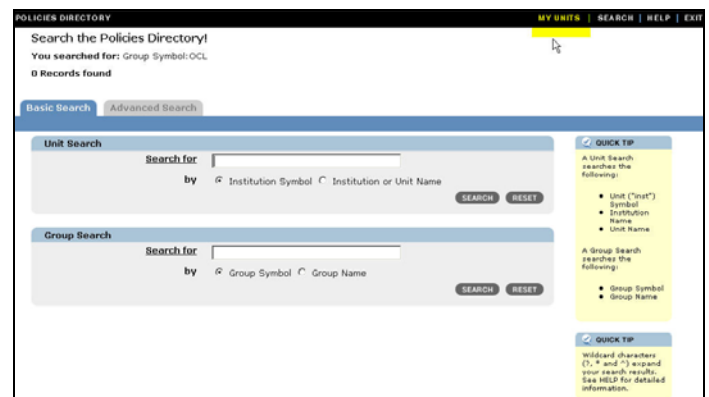
Logging On

Log on to the OCLC Policies Directory at <https://illpolicies.oclc.org/>. You need an OCLC ILL authorization and password to use the Policies Directory. Your ILL authorization and password can now be stored within the Policies Directory interface. Check the checkbox on the login screen if you would like the OCLC Policies Directory to remember your authorization and password.

Note: Browser cookies must be enabled on your computer to use this feature.

You may be prompted to update your policies periodically.

When you log on, click the **MY UNITS** link at the top of the screen to see a list of units that you can edit. A unit is defined as a library or institution, and can also be used to indicate a specific branch, collection or department within a library.



Searching

The Search screen is the first screen you will see after logging on. Or you may click the **SEARCH** button at the top of any screen to initiate a new search.

To find a symbol, type any information (unit or group name, unit or group symbol, institution name) on which you would like to search, then click the **SEARCH** button.

Basic Search

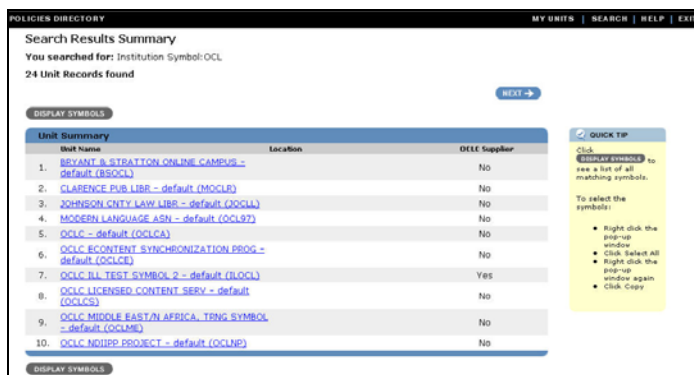
Use Basic Search to search any of the following:

- Unit (“institution”) symbol
- Unit name
- Institution name
- Group symbol
- Group name



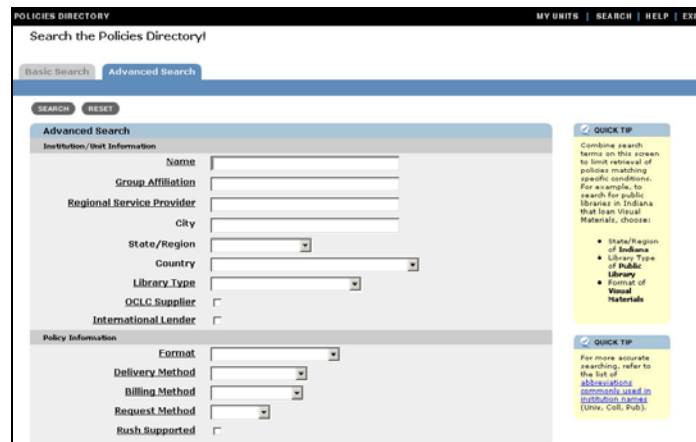
Note: Wildcard characters (?, * and ^) limit your search results. Enclose an OCLC institution symbol in quotation marks to indicate that the search should retrieve only the Policy record(s) for that specific institution. Example: “OCL” or “OCL”

A list of all units that match your search terms appears on the Search Results Summary screen.



Advanced Search

Use Advanced Search to search the directory when you want to combine one or more fields. The Advanced Search assists in creating Custom Holdings locations, OCLC ILL Fee Management (IFM) data, and other specific information.



Custom Holdings

The Advanced Search function provides information to help create your Custom Holdings Groups. For example: you can search for libraries in LVIS, located in Michigan, that lend visual material, and prefer IFM:

Step	Action
1	Log on to the OCLC Policies Directory at https://illpolicies.oclc.org/ using your authorization and password.
2	Click Advanced Search .
3	Type ILLiad in the Group Affiliation field.
4	Choose Michigan from the State/Region drop-down list.
5	Choose Visual Material from the Format drop-down list.
6	Choose OCLC IFM from the Billing Method drop-down list.
7	Click the SEARCH button.
8	The Search Results Summary screen displays, listing matching units.
9	Click the Display Symbols button to see a list of symbols that can be copied and pasted into your Custom Holdings Groups in the WorldCat Services Administrative Module: http://firstsearch.oclc.org/admin/

Many other searches, simple or complex, can be performed to provide symbols for your Custom Holdings Groups, or to find specific lenders.

Note: Custom Holdings Groups are created in the **WorldCat Services Administrative Module**.

Unit Information

In the Policies Directory, data is provided at the institution level. This could be data specific to your library or the institution of which your library is a part. By editing a Unit record within the main Institution record, you provide borrowers and lenders with local data that identifies your library and informs others of your policies.

Note: The address shown on the Unit Information screen does not contain a street, post office box number or contact information.

Quick View

A unit or group's basic information is listed on the Quick View screen. To get to the Quick View screen, click a Unit from the Search Results Summary screen.

Information on this screen is created whenever you enter data on a workform in a field with the Quick View designation.

Unit Quick View screen

- Click any of the [More...](#) links for additional information about data in a field.
- Click the **Information** tab for details about the unit.
- Click the **Contacts** tab to see detailed contact information, such as departments, contact names and telephone numbers.
- Click the **Schedule** tab for details about an ILL department's operating schedule.
- Click the **Collections** tab to see a summary of the unit's collections.
- Click the **SUMMARY** button at the top right corner of the screen to go back to the Search Results Summary screen, or the **PREV** or **NEXT** button to see the previous or next units in the list.

Group Quick View screen

The Group Quick View screen appears after you search for a group symbol.

- Click the **SHOW MEMBERS** button to see a list of members in the group.
- Click the **Information** tab for details about the group.
- Click the **Contacts** tab to see detailed contact information for the group.
- Click the **SUMMARY** button at the top right corner of the screen to go back to the Search Results Summary screen, or the **PREV** or **NEXT** button to see the previous or next group in the list.

Creating a New Unit

If you have more than one library operating under one OCLC symbol, you might consider creating a Unit record for each library so that every library's collections and policies are represented. However, if all lending is controlled through one office, one record may be enough.

To create a new unit:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the NEW UNIT button.	The Unit workform displays. Institution Information is automatically filled in.
3	Fill out the workform as completely as possible. Required fields are indicated by an asterisk (*). Note: See the chart below for further details on what information is needed.	Note: Data entered in fields marked with the Quick View symbol will be automatically carried over to the Quick View screen.
4	Click CREATE to add the unit, or RESET to clear the form and start over.	

New Unit Fields

Field	What you enter
Unit	Library's name, as it would appear on a shipping label or billing address.
Show Directory Data To	Choose an option to determine whether your library's policies will be shared with OCLC members only or to all authorized libraries.
Reciprocal Lender	Check this box if there is a reciprocal agreement with another lender.
International Lender	Check this box if your library lends materials outside its own country.
Library Type	Choose the type from the drop-down list, then click ADD or DELETE .
Additional Symbols	Other symbols that you may operate under. Choose other symbols from the drop-down list, or enter new information. Then click ADD or DELETE .
Library Catalog (URL)	Your library's catalog URL.
Library Homepage (URL)	Your library's homepage URL.
Lending URL	Your library's lending web form URL (if used).
Federal Employer Identification Number (FEIN)	Your library's Federal Employer Identification Number (FEIN), if you have one.
Non-circulating	A list of non-circulating format types or materials.
Shipping Address/Return To Address	Ship To and Return To addresses.
Borrowing Information	FTP addresses for electronic document delivery.

Deleting a Unit

You may want to delete a unit that is no longer part of your group, or if there is duplicate information in the Policies Directory.

To delete a unit:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the DELETE button for the Unit you would like to delete.	A confirmation box will display.
3	Click OK to delete the Unit.	You will receive a confirmation message that the unit has been deleted.

Editing Group Information

Entering policies and restrictions based on group, consortial, or reciprocal agreements. When entering your information, you should consider any reciprocal lending agreements your library has entered into based on membership in groups and/or consortia, or agreements outside these relationships with individual libraries. OCLC-profiled groups may also have entered policy information applicable to your library. Materials from specific collections or particular formats of items should also be addressed.

If you are a group administrator, you may edit your group's information.

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Scroll to the bottom of the screen and enter your symbol in the Group Symbol box.	
3	Click the SUBMIT button.	The Group Quick View screen displays. MY GROUP is now listed at the top of the screen, instead of MY UNITS .
4	Click the Information tab.	The Group Detail screen displays.
5	Click the EDIT button to make changes.	The Group Information screen displays.
6	Change any necessary data.	Note: Data entered in fields marked with the Quick View symbol will be automatically carried over to the Quick View screen.
7	Click SAVE to save changes, or RESET to clear the form and start over.	

The screenshot shows the 'Group Information' form for 'OCLC TRAINING & ILLIAD PARTICIPANT (ILLD)'. The form is titled 'OCLC TRAINING & ILLIAD PARTICIPANT (ILLD)' and has tabs for 'Group', 'Policies', 'Quick View', 'Information', and 'Contacts'. The 'Information' tab is active. The form contains the following fields:

- Group:** OCLC TRAINING & ILLIAD PARTICIPANT
- Symbol:** ILLD
- Catalog (URL):** [Empty field]
- Homepage (URL):** http://www.oclc.org/illiad
- Policies Shown Only to Group Members:**
- Group Address:**
 - Address Line 1:** OCLC, Inc
 - Address Line 2:** 6565 Frantz Rd
 - City:** Dublin
 - State/Region:** Ohio
 - Zip/Postal Code:** 43017
 - Country:** United States

A **QUICK TIP** box on the right states: 'Data entered in fields with a [Quick View symbol] will be automatically carried over to the Quick View screen.'

Creating Contacts

Through the Policies Directory, you can create multiple contacts within a single unit or group record. We highly recommend that you maintain current contact information for your resource. This Directory currently supports only those contacts that operate within interlibrary loan or document delivery.

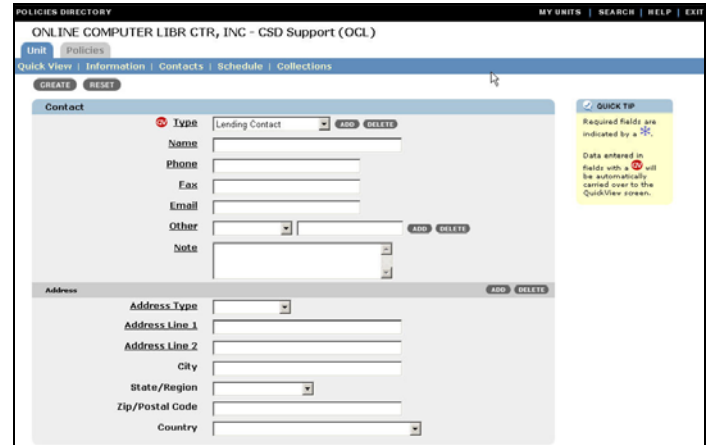
Have the following information available:

- A list of all relevant contacts for interlibrary loan or document delivery. We suggest listing contacts for lending and borrowing as a start. In many cases, this contact may be one person. Other contacts might be in billing, systems, administration, etc. A complete list of contact types is located in the drop-down box on the Contact workflow.
- A list of each contact's phone, e-mail, fax or other communication numbers or addresses.

Note: You may list as much contact information as each contact wishes to be made public.
- Addresses for each contact, if they differ from the main shipping address.

To create, edit or delete contacts:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the Unit for which you would like to enter a contact.	
3	Click the Contacts tab.	
4	To edit contacts, click the contact name, make changes, and click the EDIT button. OR	The Contact Detail screen displays.
5	Click DELETE to remove an item. OR	A confirmation box displays.
6	Click the NEW button.	The Contact workflow displays.
7	Provide any contact information. Required fields are indicated by an asterisk (*). Note: Type any text in the Note field for which there is no other defined field. This field is not searchable.	Note: Data entered in fields marked with the Quick View symbol will be automatically carried over to the Quick View screen.
8	To add more items, choose from the drop-down list and click ADD .	
9	Click CREATE to create the contact, or RESET to clear the form and start over.	



Creating Schedules

You may list any variations in your department's operating schedule, such as holiday breaks, regular "closed" days, etc.

Note: Editing this schedule does not impact your supplier status. Use the Change OCLC ILL Supplier Status screen to make any changes in your status.

To edit schedule information:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the Unit for which you would like to edit schedule information.	
3	Click the Schedule tab.	
4	Click the EDIT button to edit information. Or click DELETE to remove an item. If there is no schedule defined for your unit, click the NEW button.	The Schedule workflow displays. If you click DELETE , a confirmation box will display.
5	Change any schedule information. Required fields are indicated by an asterisk (*). Note: Click the calendar icon for help with dates. Dates must be entered in [YYYYMMDD] format. Type any text in the Note field for which there is no other defined field. This field is not searchable.	
6	Click SAVE to save changes, or RESET to clear the form and start over.	

OCLC Policies Directory Quick Reference

7 To add more items, click **ADD**, or click **DELETE** to remove an item.

Creating Collections (optional)

You can create descriptions of each collection that you supply (or do not supply) to borrowing libraries. If you have a URL link to a collection's description, enter it on the **Collection** screen.

Note: If you enter collections here, the collection names are provided in a drop-down list for selection in creating loan or copy policies.

To create a collection:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the Unit for which you would like to create a collection.	
3	Click the Collections tab.	
4	Click the NEW button.	The Collection workform displays.
5	To edit collections, click the EDIT button. Or click DELETE to remove an item.	The Collection workform displays. If you click DELETE , a confirmation box will display.
6	Enter any detailed information about a collection. Required fields are indicated by an asterisk (*). Note: Type any text in the Note field for which there is no other defined field. This field is not searchable.	
7	Click CREATE to create the collection or RESET to clear the form and start over.	

Creating Policies

Use the OCLC Policies Directory to describe in general or highly-specific terms your lending policies for any library type, group or geographic location for copies or loans. For example, you can create a loan policy for libraries within your state, or consortia for which you have a special reciprocal relationship. You may also list a copy policy for libraries outside your state with which you may not have any lending relationship. In that case, charges may apply and can be included.

Tip: If you are a reciprocal lender, enter **Reciprocal Lender** as the policy name so that other lenders can find this information easily.

When entering your policies, have the following information available:

- The different groups to whom you lend. Include them in your policies. Only groups that have been profiled in the OCLC system will display.
- The fees that you charge to libraries for your ILL services. These may include flat or per page/exposure charges, taxes, shipping, service or rush fees. You may always indicate a zero charge in any policy. Enter 0.00 in the fee field if there is no fee.
- The billing methods that you support. These may include IFM or "invoice with item" methods, for example. You can also indicate a billing method preference.
- The delivery methods that you support. These could include USPS, courier or commercial services such as UPS or FedEx.
- Specific loan and renewal periods.

To create a policy:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the Unit for which you would like to create a policy.	
3	Click the Policies tab.	
4	Click either Copies or Loans for which type of policy you would like to create.	
5	Click the NEW button.	The Policy Detail workform displays.

6	Provide your policy information. Required fields are indicated by an asterisk (*).	Note: Data entered in fields marked with the Quick View symbol will be automatically carried over to the Quick View screen.
7	To add more items, choose from the drop-down list and click ADD , or click DELETE to remove an item.	
8	Click the NEXT button to continue.	The Borrowers workform displays.
9	Add borrower information to your copy policy.	
10	To add more items, choose from the drop-down list and click ADD , or click DELETE to remove an item.	
11	Click the NEXT button to continue.	The Fees workform displays.
12	Add fee information to your copy policy.	Note: Data entered in fields marked with the Quick View symbol will be automatically carried over to the Quick View screen.
13	To add more items, choose from the drop-down list and click ADD , or click DELETE to remove an item.	
14	Click the NEXT button to continue.	The Policy Review screen displays.
15	Review the information you have entered.	
16	Click the CREATE button to create the policy, or click EDIT to make changes.	

Creating Deflection Policies

Deflection uses filtering¹ to ensure that an unfilled request does not remain in Request Manager in WorldCat Resource Sharing as **Pending**, waiting for potential lenders to manually deny the request.

If the borrower returns to the request after it has been placed, the asterisk indicating the current lender will have moved to the next lender. The Request History will indicate the Reason for No:

- Auto-Deflection: Format Type
- Auto-Deflection: Profiled Group
- Auto Deflection: Maximum Cost
- Auto Deflection: Age of Material
- Auto Deflection: Multiple Reasons
- Auto Deflection: Request Type

Deflection may be based on the request service type, format type, OCLC profiled group membership, maximum cost and material age in years. Exceptions can also be set, based on format type and OCLC profiled group membership. The default setting is for no deflection policies to be set.

If you have multiple deflection policies, requests will be processed in the order the policies are created.

The hierarchy for deflection is:

1. Non-supplier status—if a lender is a non-supplier, nothing can be loaned or copied
2. Local Holdings Record (LHR)—bytes 20 and 21 override deflection settings
3. Deflection Type—enabled or disabled
4. Deflection Profile—deflection by policies set up in the Policies Directory

¹ Filtering is a process that chooses lenders based on holdings data and other information from the holdings record before the request is created (produced). It takes place before the lender string is built. The Policies Directory is not involved with this processing.

Note: Filtering impacts the lender string that is created, i.e., a symbol can be excluded from the lender string based on the filter that is applied. The only filtering that WorldCat Resource Sharing supports is the filtering of custom holdings paths/groups based on volume and year data in the local holdings record.

How it works

A simple scenario for deflection by format would be:

1. The borrowing library creates a request choosing lenders that appear to be suppliers for the material.
2. WorldCat Resource Sharing (WCRS) searches the first lender's policies in the Policies Directory to see if they will loan that format. For example, the format is "musical score" and the first lender has created a deflection policy to indicate that it does not loan musical scores.
3. WCRS gets that answer from the Policies Directory, and instead of the lender getting the request as Pending, it skips that lender and automatically deflects to the next lender.
4. WCRS goes back to step 2 above, and the request moves through the string until it identifies a lender that might supply it.

To create, edit or delete a deflection policy:

Step	Action	Result
1	Click MY UNITS from any screen.	The Unit Summary screen displays.
2	Click the Unit for which you would like to edit deflection policies.	
3	Click the Policies tab.	
4	Click Deflections .	
5	Click the EDIT button to edit current information. Click the COPY button to copy information to another policy. Click DELETE to remove an item. To create a new policy, click the NEW button.	The Deflection Policy workform displays. If you click DELETE , a confirmation box will display.
6	Provide your policy information. Required fields are indicated by an asterisk (*). Note: See the "Deflection Policy Formats" chart.	
7	Click SAVE to save changes, or RESET to clear the form and start over.	

Deflection Exceptions

If you select Format or OCLC Group as deflection criteria, you cannot select those criteria as exceptions.

Example policy	Deflection option(s) selected	Exception criteria available
I do not loan e-serials.	Format	OCLC Group
I do not loan e-serials to profiled group XXXX.	Format OCLC Group	NONE
I do not loan to profiled group XXXX.	OCLC Group	Format
I charge \$15.	Borrower Maximum Cost	Format OCLC Group
I loan books only.	Format ²	OCLC Group
I loan books only.	NONE	Format ³ OCLC Group
I only loan to all members of group XXXX.	NONE	Format ⁴ OCLC Group

² **Note:** There are two ways to create this policy. Here all formats are selected for deflection except for "book." This is a listing of all formats not loaned.

³ No deflection criteria are selected. Service type "loan" with no deflection criteria indicates that no formats are loaned. However, the exception format "book" indicates that only books are loaned.

⁴ The institution only loans material to a selected profiled group. Choosing the exception eliminates the selection of the (long list of) individual profiled groups.

Example Deflection Policies

Policy	Policy field	What you enter
I will not copy or loan e-Serials to anyone	Policy Name Service Type Deflection Type Deflect Format	E-Serials Copy or Loan Enable Real Time Deflection E-Serial
I charge \$10 for DVDs, and \$0 for everything else	Policy Name Service Type Deflection Type Deflect Format Borrower Maximum Cost	DVD at \$10 Loan Enable Real Time Deflection Visual Material – DVD 10
I charge \$25 for libraries not in ILLD	Policy Name Service Type Deflection Type Deflect Borrower Maximum Cost Exceptions Format OCLC Group	\$25 not in ILLD Copy or Loan Enable Real Time Deflection 25 N/A ILLD
I will not loan materials less than three years old or more than 100 years old	Policy Name Service Type Deflection Type Deflect Format OCLC Group Borrower Maximum Cost Material Age	No lend new and old Loan Enable Real Time Deflection N/A N/A N/A less than three years old, or more than 100 years old
I don't loan or copy serials unless I'm the last in the lender string	Policy Name Service Type Deflection Type Deflect Format	No Serials Copy or Loan Enable Real Time Deflection – except when I am last in the lender string Serial

Note: Fields not listed are left blank.

Deflection Policy Formats

Deflection Format	Description	Bibliographic Definition of Formats
Archival/Mixed Material	Materials in two or more forms that are usually related by virtue of their having been accumulated by or about a person or body. This category includes comprehensive archives and manuscript collections of mixed forms of materials, such as text, photographs, and sound recordings.	Leader/06 is "p"
Book	Books, pamphlets, technical reports, typescripts, theses, dissertations, manuscripts and other written works.	Leader/06 is "a" or "t" AND Leader/07 is "a" or "c" or "d" or "m"
Computer File	Items in the following classes of electronic resources: computer software (including programs, games, images, graphics, sounds, and fonts), numeric data, computer-oriented multimedia, interactive multimedia, computer-oriented documents.	Leader/06 is "m"
E-Audio Book	Leader value of sound recording and cataloged as website with no dimension (300/c) information provided.	Leader/0t is "i" (lower case letter i) or "j" AND material type is "url" AND no 300/c is in the record.
E-Serial	Serial material cataloged as a website.	Leader/06 is "a" or "t" AND Leader/07 is "s" or "b" AND material type is "url"
E-Text	Non-serial material cataloged as a website.	Leader/06 is "a" or "t" AND Leader/07 is "a" or "c" or "d" or "m" AND material type is "url"
Government Document	Any material type code for Government publication.	Material type is "gpd"
Integrated Resource	Continually updated resources.	Leader/06 is "a" or "t" AND Leader/07 is "i"
Kit	Mixtures of various components issued as a unit and intended primarily for instructional purposes.	Material type is "kit"
Manuscript	Any material type code for Government publication.	Material type is "mss"
Map	Maps, map manuscripts, globes, atlases, aeronautical charts, navigational charts, celestial charts, remote-sensing images, computer-generated maps, and other cartographic material.	Leader/06 is "e" or "f"
Microform	Original microform publications.	Material type is "mic"
Musical Score	Printed music materials, including full score, choirs score, close score, condensed score, miniature score, part, music manuscript, books of musical studies and exercises.	Leader/06 is "c" or "d"
Newspaper	Serial publications in newspaper format.	Material type is "new"
Serial	Serial publications such as periodicals, newspapers, annuals, journals, memoirs, proceedings, monographs.	Leader/06 is "a" or "t" AND Leader/07 is "s" or "b"
Sound Recording	Both musical and non-musical sound recordings. Nonmusical sound recording may include sound effects; bird calls; physical exercise recordings (for example, aerobic workouts) that consist of spoken, shouted, sung, or chanted instructions over musical accompaniment; stories read over incidental music accompaniment; and plays with incidental music.	Leader/06 is "i" or "j"
Sound Recording – Cassette	Material type: cassette recording.	Leader/06 is "i" or "j" AND material type is "cas"
Sound Recording – CD	Material type: CD audio.	Leader/06 is "i" or "j" AND material type is "cda"
Sound Recording – LP	Material type: LP records.	Leader/06 is "i" or "j" AND material type is "lps"

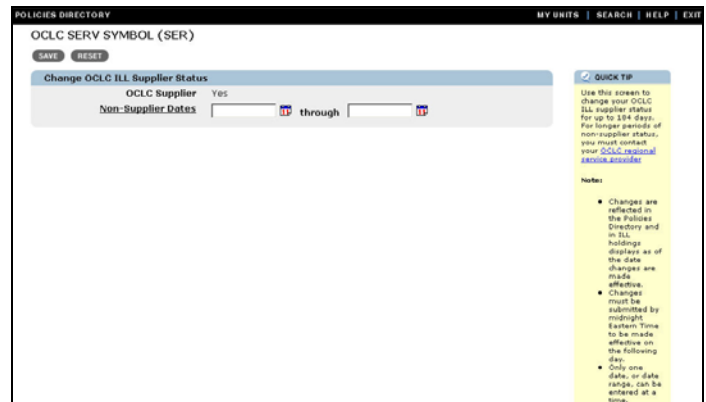
Visual Material	<p>Projected media—Motion pictures, videorecordings, filmstrips, slides, transparencies, and overhead projections or projected images.</p> <p>Two-dimensional nonprojected graphics—activity cards, charts, collages, drawings, duplication masters, flash cards, graphics, original artwork, paintings, photonegatives, photoprints, pictures, postcards, posters, prints, spirit masters, study prints, technical drawings, transparency masters, photomechanical reproductions, and reproductions of any of these.</p> <p>Three-dimensional artifacts and naturally occurring objects—models, dioramas, games, puzzles, simulations, sculptures, and other three-dimensional art works, exhibits, machines, clothing, toys, and stitchery. Also may include microscope specimens (or representations of them) and other specimens mounted for viewing.</p>	Leader/06 is "g" or "k" or "o" or "r"
Visual Material – DVD	Material type: videodisc.	Leader/06 is "g" or "k" or "o" or "r" AND material type is "vdc"
Visual Material – VHS	Material type: VHS.	Leader/06 is "g" or "k" or "o" or "r" AND material type is "vca"

Changing Supplier Status

You may request a temporary change to your supplier status, for up to 184 days. For longer periods of non-supplier status, contact your [OCLC regional service provider](#). The status listed in the **OCLC Supplier** field only indicates your current supplier status. It does not change when **Non-Supplier Dates** are entered. Changes are reflected in the Policies Directory and in ILL holdings displays as of the date changes are made effective.

You may want to change your supplier status for periods of time when you are unable to fill requests. These situations might include vacations, library holidays, or situations when your collections will be inaccessible, such as when a library or collection is being moved, or during renovations.

Click [Change](#) from any screen where **OCLC Supplier** status is listed to access the form. Or click **MY UNITS**, then click the **CHANGE SUPPLIER STATUS** button. The following screen displays:



To change Supplier Status:

Step	Action
1	Enter Non-Supplier Dates for which you will not be able to supply loans. Note: Click the calendar icon for help with dates. Dates must be entered in [YYYYMMDD] format.
2	Click SAVE to save your changes, or RESET to clear the form and start over. Note: If you are currently a Non-Supplier, you may set your status to Supplier by putting today's date as the end date and the change will be made effective at midnight Eastern Time. Only one date, or date range, can be entered at a time.

Support

OCLC support staff:

E-mail: support@oclc.org

Telephone: 1-800-848-5800 (USA) or +1-614-793-8682
(7:00 a.m. to 9:00 p.m., U.S. Eastern time, Monday–
Friday)

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