ILL Boot Camp: Policies

July 1st, 2021

Good morning everyone! Welcome to July! My name is Helen Pinder, I'm the resource sharing consultant here at SWAN, and I'd like to welcome you to the fourth session of our Interlibrary Loan Boot Camp series. Today we'll be digging into the policy settings.

OCLC Toolset

Which do I use?

WorldShare ILL

- Visit often to manage requests & queues
- Manage requests (lending and borrowing)
- Uses Constant Data custom group paths and deflection

Policies Directory

- Visit as-needed to update
- Manage ILL Policies and contact points
- Set deflections
- Set calendar and supplier status
- Search other library policies to determine lending and find symbols to create groups

Service Config

- Visit as-needed to update
- Define constant data
- Create custom holdings groups and paths
- Configure WorldCat Discovery (OPAC) settings
  - Availability Status
  - Catalog URL
  - Patron-facing ILL button
  - ILL Request Form Fields
  - Scoping (Worldwide, Illinois, SWAN, your library)

The OCLC toolset is comprised of WorldShare Management Services, of which WorldShare Interlibrary Loan is an application.

The OCLC Policies Directory and Service Configuration are used for establishing interlibrary loan and wider discovery/patron interface settings for WorldCat Discovery. All these tools work in tandem and require the interlibrary loan expert in your library to manage settings and use all of these tools – but, of course, you can send in a support ticket to SWAN and we are happy to assist.

These are arranged here in order of use. Generally settings and configuration are not something you do in your daily work, so knowing where to turn can be confusing.

WorldShare is where you'll do most of your work. But what you do in WSILL is governed by your policies and Constant Data. You won't go into your policies very often, but it's a good idea to go in there periodically and take a look. Same with your service configuration. Visit once in a while, review your constant data, try your hand at creating groups and custom holdings paths. Your service configuration for WorldCat Discovery settings are all managed by SWAN. If you have any questions about these or want any changes made, please open a ticket.

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This is the WorldShare ILL Home Page ☺
where you track and manage your borrowing and lending requests. All of your policies and configuration settings are located under "Other." Whenever I'm doing any kind of work here, I like to have Policies Directory and Service Config open in tabs and I bounce back and forth.

WorldShare Groups

Custom holdings groups are used to organize groups of libraries for making requests (through custom holdings paths) and deflections

Groups are very useful things to have both for borrowing and lending. Expedite your requests by creating groups of nearby libraries or reliable suppliers. Or automatically respond "no" to libraries in a group by setting a deflection. Groups can be edited and deleted when no longer viable or relevant.

To create a group, you'll need to click on Policies Directory and search for institution symbols. You can do so by geography, response time, name, as well as policy. Click "Display Symbols" to get the list you'll need to create your group.

Also, keep in mind that RAILS has an OCLC Custom Holdings Group Generator at https://www.railslibraries.info/services/oclc_groups
This interface allows you to search by library catalog, making it easy to set up Custom Holdings Groups for CCS, Pinnacle, PrairieCat, RSA, and the academic network I-SHARE.
Caveat – make sure your library's OCLC symbol is updated in L2.

Here's your alphabet soup of Illinois libraries. Triple click to select all of them without needing to click and drag. Copy the list.

Next you'll want to go back to the WorldShare ILL Home Page and click on Service Configuration, then expand WorldShare ILL on the left hand nav. Select Custom Holdings Groups followed by Create New Custom Holdings Group.

Name your new group. It must be a single character string. Enter the group description. Click the add/edit symbols button and paste the symbols into the box that pops up. Click Save as New when you're done.
(Switch out to live demo) of "PASTDUE" group creation
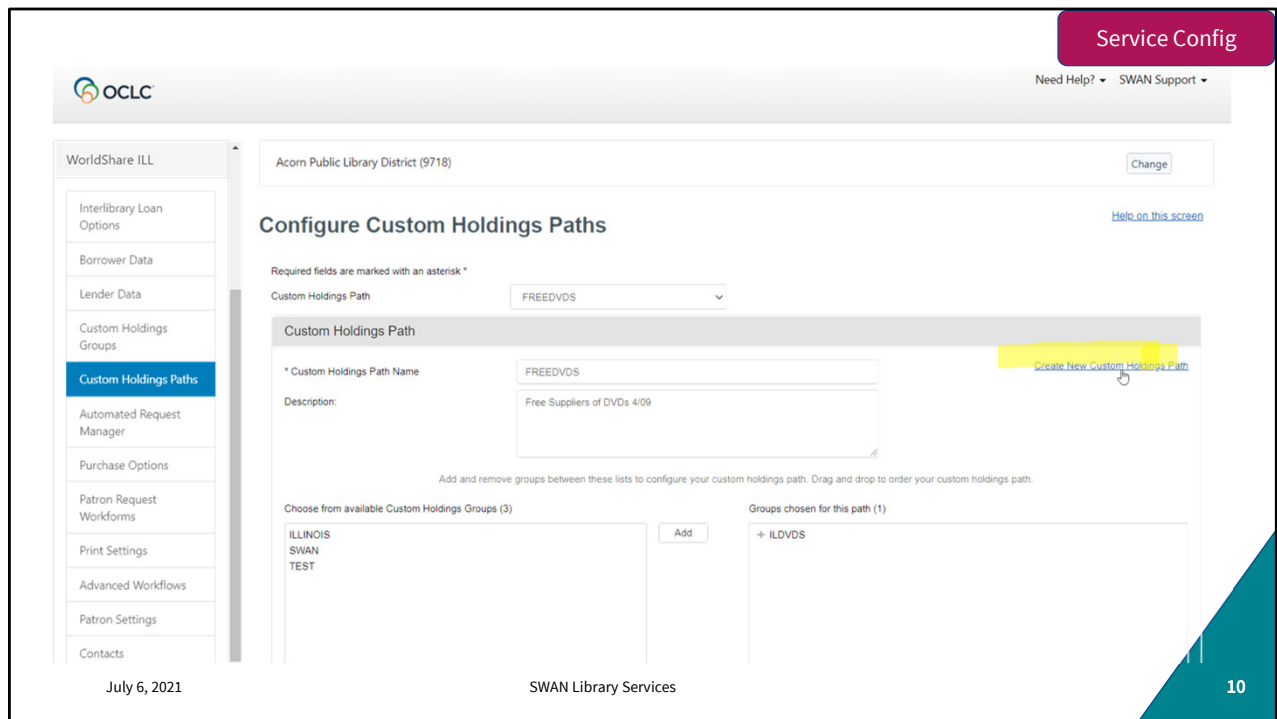
Custom holdings path are derived from custom holding groups. They're only used for borrowing but really expedite your requests by saving you search time, populating your lender string, and cutting down travel time.

When a custom holdings path is used, behind the scenes the system first looks at each group to determine if the institution holds the title and if availability is activated, it checks if the title is available. It then randomly orders the symbols in the lender string, going through each custom holdings group in order until the lender string is 15 lenders long, or finds no more institutions in the groups. This load balances requests so that resource sharing is indeed shared across all institutions in the group.

Name it and describe it just as you did with your custom group, then select the groups you want to add and click Save as New. The group order is important, groups are searched as lenders in group order.

When you do a search for an item in WSILL, you can filter on the right side by your Custom Holdings path. Select your path and create your request.

Using the custom path, your lender string will populate by itself. This is particularly helpful in the case of multi-copy requests. The requests will be spread out among the libraries in the path selected saving a great deal of search time.

WorldShare Deflections

Learn more at https://support.swanlibraries.net/tutorial/66838

Deflections are rules you can set in your policy and configuration to automatically reject requests. In-depth training available at https://support.swanlibraries.net/tutorial/66838

Deflections

- Deflections allow you to respond "No" to a supply request automatically. It doesn't even appear in your queue.
- Deflect by group
- Deflections on Format only work if all material in that format is not lent.

https://help.oclc.org/Librarian_Toolbox/Searching_WorldCat_Indexes/Bibliographic_records/Format%2F%2FDocument_Type_values_and_codes/WorldShare_and_WorldCat_Discovery?sl=en

Deflections are real-time and are based on either Group or material type. It's important to note the material type is defined in WorldCat, based on the MARC record in WF. It does not consider item types in WorkFlows. The link here is to a glossary explaining how that works. Material deflection will work only if you don't supply all items in a particular format. "e-book" for example, is a deflection that works because you can't lend any e-books. There are no e-books you could supply. A material type of "book," on the other hand, could have one of many non-circing or non-holdable locations or item types: NEW_BOOK, REFERENCE, RESERVE, but others are just "Book" or Book_A, or Jbook and would be lendable. Some books but not all books are lendable- which is why you can't deflect on it. Additionally, Format deflections can only be set from the types found in the dropdown list. Deflections can be set by Publication Year, but not by month. So those of you hoping to deflect requests on new material; this won't really help.

Group Deflection

Edit Deflection Policy

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The structure of a deflection is logical in a way that doesn't make sense semantically. For example, you need to exclude the Illinois custom holdings group to limit loan requests to in-state only.

All of you have the group deflection Including the SWAN group. This prevents SWAN libraries requesting materials from other SWAN libraries by Including the SWAN group for deflection.

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So to briefly review, the first step in creating a deflection is finding or creating a group. Then including or excluding one or more groups in the list for real time request rejection. Remember, anything you put in the policies, including your deflect or policy name and notes can be seen by libraries worldwide. So, be factual and non-judgmental when maintaining this data.
(Switch out to live demo deflection creation for "PASTDUE" group.

WorldShare Constant Data

On a quarterly basis, you'll want to review your Constant Data

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. Most of this will remain the same, but it's a good idea to check in from time to time. If for no other reason than to help you remember where it is.

Similarly, you should review your Borrower constant data. Just like the due date assignment, your "need by" date is defined here. Your shipping and contact information.
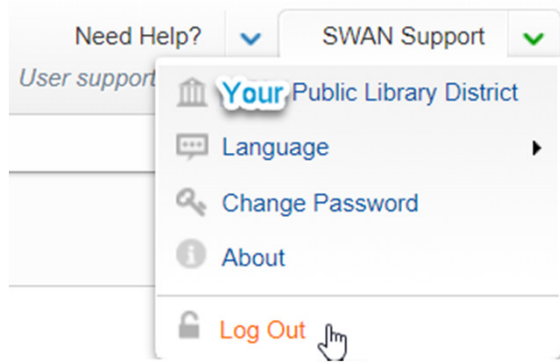
And farther down your billing, shipping, and electronic delivery preferences. If you do nothing else with this quarterly, look at your borrower email address. That is what WSILL will use when the Email Now button is clicked. It's a good idea to use your aliased email or a shared email so multiple people can be checking those communications.

Remember!

WorldShare ILL

Policies Directory

Service Config

Need Help? ⌄ SWAN Support ⌄

User support

🏛 **Your** Public Library District

💬 Language ▶

🔑 Change Password

ℹ About

🔒 Log Out 👆

Always Log Out of ALL OCLC Tools

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.

That's policies in a nutshell!

Review ILL Boot Camp Recorded Sessions

Use the SWAN Community forums for questions and guidance from peers!

https://forums.swanlibraries.net/

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That's it for the scheduled bootcamps! Pop on to the forums to find the thread on future boot camp topics. If these have been helpful for you but there's something I haven't covered, please let us know and we'll cook up a few more of these.

Keep going!

ILL Users Group

OCLC WorldShare Training Resources

SWAN Office Hours

SWAN Library Services

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. Bonus points for those of you who post training links in the forums for easy access and discussion with your ILL counterparts.

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?

help@swanlibraries.net

Questions?
If you have any questions about Worldshare, WorldCat Discovery, anything at all, please open a support ticket.