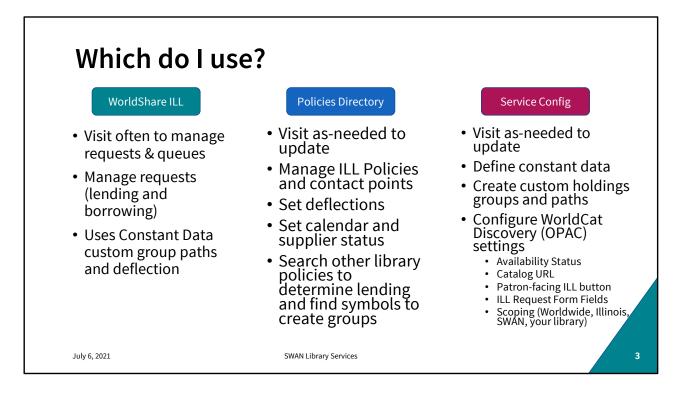


Good morning everyone! Welcome to July! My name is Helen Pinder, I'm the resource sharing consultant here at SWAN, and I'd like to welcome you to the fourth session of our Interlibrary Loan Boot Camp series. Today we'll be digging into the policy settings.

OCLC Toolset		
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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.

WorldShare I	LL Home Page	WorldShare ILL
Interlibrary Loan Home		
Search for requests Request ID Image: Constraint of the second seco	Go Closed Requests	
Quick Links Borrowing: Produced (4) In Transit (2) Received Renewal Approved (2) Overdue (1) Returned	Lending: Can You Supply? (2) New - Loans (2) Supplied Renewal Requested (1) Returned Returned/In Transit (3)	Other: OCLC Policies Directory OCLC Service Configuration OCLC Usage Statistics OCLC Article Exchange Resource Sharing News WS ILL Training Resources OCLC Community Center
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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.



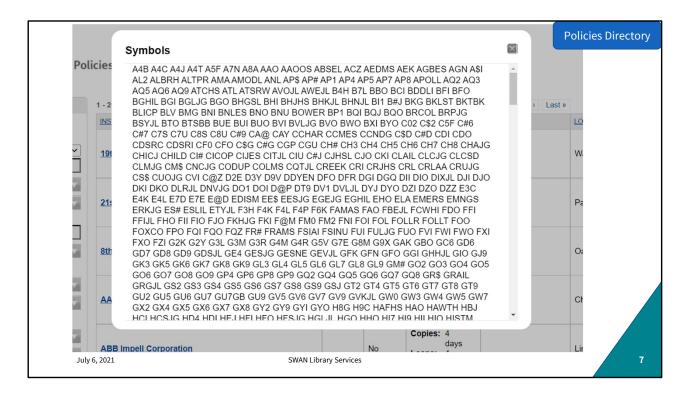
Groups are very useful things to have both for borrowing and lending. Expedite your requests by creating groups of nearby libraries or reliable suppliers. Or automatically respond "no" to libraries in a group by setting a deflection. Groups can be edited and deleted when no longer viable or relevant.

Institution Information Search By Institution Symbol		olicies Directory					Welcom SWAN.(PX Sign_Out / He
Countries (0)	Search	1 - 20 of 5000 Results	Displa	y Symbols	First 1 2 3	4 5 Next>	Last »
States/Provinces (0)	Institution Information	INSTITUTION -	SYMBOLS	SUPPLIER	DAYS TO RESPOND	FEES	LOCATION
City	Search By				Copies: 4		
	Institution Symbol V	19th Judicial Circuit	JUDCL	No	days Loans: 4		Waukegan , IL US
Institution Types (0)					days		
OCLC Supplier	Countries (0)				Copies: 4		
Days To Respond - Copies (0)	States/Provinces (1)	21st Century Preparatory CNT	ILTCP No	No Loans: 4		Park Forest , IL US	
Days To Respond - Loans (0)	City				days		
Rush Supported					Copies: 4		
International Lender (0)	Institution Types (0)	8th Day Consulting, Training & Software		No	days Loans: 4		Oak Forest , IL US
Group Affiliation (0)	OCLC Supplier				days		
	Days To Respond - Copies (0)				Copies: 4 days		
Policy Information	Days To Respond - Loans (0)	AALL		No	Loans: 4		Chicago , IL US
ee	Rush Supported				days		
	International Lender (0)				Copies: 4 days		
Currency (0)	Group Affiliation (0)	ABB Impeli Corporation		No	Loans: 4		Lincolnshire , IL US
Format (0)					days		
Request Method (0)	Policy Information	100.00			Copies: 4 days		
Delivery Method (0)	1.00	Abbott	ILABT	No	Loans: 4 days		Abbott Park , IL US
	· ··· ·				days		
Billing Method (0)							

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.

				Service Conf
OCLC.				Need Help? SWAN Support
WorldCat Discovery and WorldCat Local	St Charles Public Library (10174)			Change
Third-Party Integrations	Configure Custom Ho	dings Groups		Help on this screen
Metasearch Content	Required fields are marked with an asterisk *			
WorldCat Registry	Display groups: by group name by symbol	£		
IP Addresses	Custom Holdings Groups	ccov 🗸		
WorldShare ILL	Custom Holdings Groups			
]	* Custom Holdings Groups Name:	CCOV		3 Create New Custom Holdings Group
Interlibrary Loan Options	Description:	LIBRARIES SUPPLYING PHYSICAL COLLECT CRISIS	TION DURING COVID-19	
Borrower Data		7/20/2020	4	
Lender Data	OCLC Symbol(s)	Select All Clear All		
Custom Holdings	Symbols currently in the group: 537	APPALACHIAN SCH OF LAW LIBR	۲	
Groups 🍯 🧳		AAI AMRIDGE UNIV	۵	
Custom Holdings Paths		ABY ALBANY PUB LIBR	۲	
Automated Request Manager		AGL NATIONAL AGR LIBR	•	
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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.

Configure Custom Ho	oldings Groups	Help on Service Co
Required fields are marked with an asterisk * Display groups: by group name by symbol	l	
Custom Holdings Groups	ccov ~	
Custom Holdings Groups		
* Custom Holdings Groups Name:	ILLINOISLIBS	Create New Custom Holdings Group
Description:	All libraries in Illinois	
OCLC Symbol(s) Symbols currently in the group: 0	Belect All Clear All	
	Clear selected symbols Add/Edit symbolis 3	
Delete Custom Holdings Record		4 Save As New Save Cancel
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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

OCLC.					Need Help? SWAN Support
WorldShare ILL	Acom Public Library District (9718)				Change
Interlibrary Loan Options	Configure Custom H	oldings Paths			Help on this screen
Borrower Data	Required fields are marked with an asterisk *				
Lender Data	Custom Holdings Path	FREEDVDS	~		
Custom Holdings Groups	Custom Holdings Path				
Custom Holdings Paths	* Custom Holdings Path Name	FREEDVDS			Create New Custom Holdings Path
Automated Request Manager	Description:	Free Suppliers of DVI	Ds 4/09		
Purchase Options				<u>//</u>	
Patron Request Workforms	Add ar Choose from available Custom Holdings (ists to configure your cus	stom holdings path. Drag and drop to order yo Groups chosen for this path (1)	jur custom holdings path.
Print Settings	ILLINOIS SWAN		Add	+ ILDVDS	
Advanced Workflows	TEST				
Patron Settings					
Contacts					

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.

Required fields are marked with an asterisk *		
Custom Holdings Path	NONSWAN	
Custom Holdings Path		
* Custom Holdings Path Name	1 NONSWAN	Create New Custom Holdings Path
Description:	2 RAILS Consortium Libraries - Non-SWAN	
	Drag and drop groups between these lists to configure your custom holdings pat	n.
Choose from available groups (3)	Groups chosen for this path (5)	
+ LINC + SWAN + SWANMLS	3 + ccs + pca + pc + RSA + ISMARE	
		1

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.

			WorldShare ILL
🤣 WorldShare'			Need Help? Vawne Tortorella Vaser support Info
Metadata Interlibrary Loa	n Analytics Admin		
Interlibrary Loan Home	Search: Title = george rodrigue prints (All WorldCat)		
▼ Discover Items	Advanced Search		
Search Scope Jall WondCat • Index Keyword • Term(s) Search Clear Advanced Search Clear Advanced Search Clear Advanced Search	Results 1 - 3 of 3 Conduct your search within W Sort by Library Count (Highest First)	• Not Held by my library State Holdings Regional Holdings All Holdings (193)	Ruvs 10 •
2. Select t	r: Custom Holdings Path he desired path Request		
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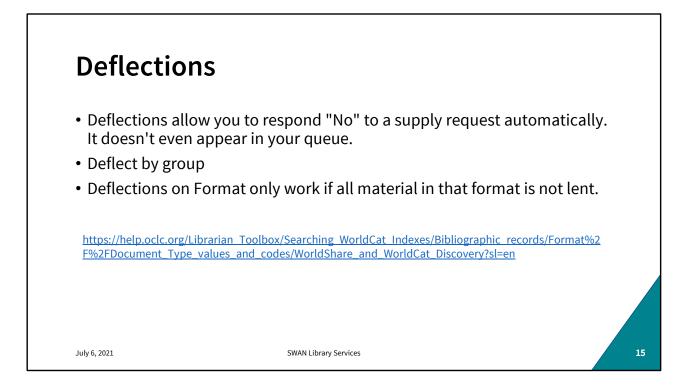
When you do a search for an item in WSILL, you can filter on the right side by your Custom Holdings path. Select your path and create your request.

						WorldShare ILL
Interlibrary Loan Home	George Rodrig	gue prints : a catalogue raisonné, ′	1970-2007			JOY Reg ID: 9756
Search Scope All WorldCat • Index Keyword •	Send Request Multiple Requests	Save For Review	request mu		now you can s to facilitate ests?	Apply constant data: Actions:
Term(s)	Request Quantity Name Lender String					
Search Clear Advanced Search Close All Tabs	✓ Request Details (Re					
Search: Title = george rodrigue prints (All Worl	Title / Journal Uniform Title	George <u>Rodrigue</u> prints : a <u>catalogue raisonn</u>	ė, 1970-2007		Search my library's online Local ID	<u>catalog</u>
Borrowing Requests Lending Requests	Author Publisher	Rodrigue, George; Rodrigue, Wendy Wolfe New York : Abrams, 2008.			Open Access No links found	<i>A</i>
Purchasing Requests	ISBN	9780810995178 0810995174		9	Search Google Scholar	
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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.



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 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.

		Policies Directory
Group Deflectio	n	
	Edit Deflection Policy	*Required Fields
	Borrowers	
	OCLC Group: None Include Exclude	
	Select the OCLC Groups for this policy Custom Holding O None O Include Scoup:	M
	Select the Custom Holding Groups for this policy	
	□ ILDVDS ☑ ILLINOIS □ SWAN □ TEST	
I'M NOT NOT LICKING TOADS.	Deselect All	
	Items	
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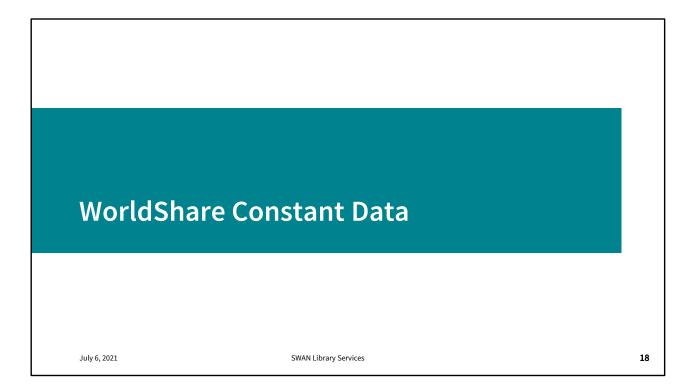
The structure of a deflection is logical in a way that doesn't make sense semantically. For example, you need to exclude the Illinois custom holdings group to limit loan requests to in-state only.

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.

				Policies Direc
rofile Collections Policies (4) S	chedule	Contacts	;	
			Last updated Monday,	June 28, 2021 4:22:40 PM EDT
eflections				O Add
SWAN Request				Z Edit 👔 Delete
SERVICE		5550	BORROWERS	ITEMS
SERVICE		FEES	BORROWERS	TTEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			Custom Holding Groups: SWAN	
Note: Deflect all requests from SWAN Libraries since those	are handled thr	ough the SV	VAN catalog directly.	
llinois Only				Z Edit 👚 Delete
SERVICE	FEES	BORRO	OWERS	ITEMS
SERVICE Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	FEES	Custo	WERS Im Holding Groups: LINOIS	ITEMS
Requests: Copy or Loan		Custo Custo	m Holding Groups: LINOIS	
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection Note: Restrictions added 10/28/2020 - Lending only to Illing		Custo Custo	m Holding Groups: LINOIS	

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.



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

					Service Con
Interlibrary Loan Options	Configure Lender Co	onstant Data			
Borrower Data	Required fields are marked with an asterisk *				
Lender Data	Constant Data Record	DEFAULT	~		
Custom Holdings Groups	Lending Library Information				
Custom Holdings Paths	* Constant Data Record Name:	DEFAULT			
Automated Request Manager	Description:				
Purchase Options	Due Date:	+21	Recommendatio	on: +35 days	
Patron Request		Relative to today's	date (format: +DDD)		
Workforms	Shipped Date:	-0			
Print Settings		Relative to today's	date (format: -DD)		
Advanced Workflows	Add ILL Management Fee (IFM):				
Patron Settings	Lending Charges:	0.00	Currency:	USD	~
Contacts	Insurance Amount:		USD		
Contacto	Lending Notes:	No fee to recipro	ating libraries.		
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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).

Reset Default Values					Save As Nev	Save	Cancel
Return Via:	Library Rate, ILDS stop XGV,U.S. m	nail					
	Postal Code:	601	108				
	State/ Province/ Region:	Illin	nois	~			
	Country:	Ur	nited States	~			
	City:	Blo	omingdale				
	Address Line 2:	101	1 Fairfield Way				
	Address Line 1:	Blo	omingdale Public Library				
Return 10.	Attention:	Mik	e McGlauchlen				
Return To:							
Lending Restrictions:			1				
Lending Notes:							
Insurance Amount:		USD					
Lending Charges:		Currency:	USD	*			

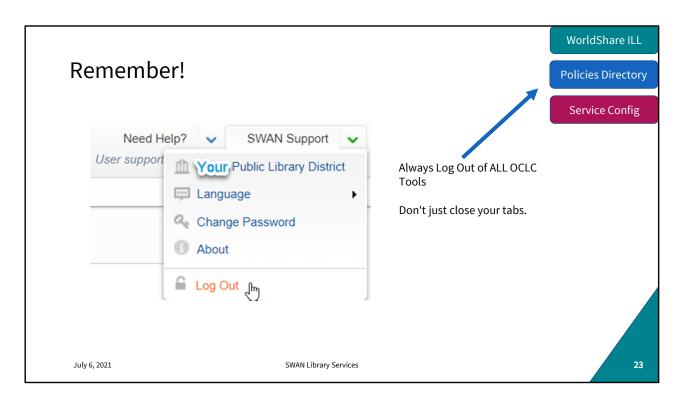
Farther down on that same data record, you'll see your delivery preferences, return address and attention lines. Most of this will remain the same, but it's a good idea to check in from time to time. If for no other reason than to help you remember where it is.

orldShare ILL	Acorn Public Library District (9718)			Change
Interlibrary Loan Options	Configure Borrower	Constant Data		Help on this screen
Borrower Data	Required fields are marked with an asterisk *			
Lender Data	Constant Data Record	DEFAULT	~	
Custom Holdings Groups	Borrowing Library Information			
Custom Holdings Paths	* Constant Data Record Name:	DEFAULT		Create New CD record
Automated Request Manager	Description:			
Purchase Options	Need Before:	+30		
Patron Request Workforms		Relative to today's date (format +DD)		
Print Settings	Request Type:	LOAN	~	
	Editions			
Advanced Workflows	Shipping and Contact Info	Attention:	Acom Public Library	
Patron Settings		Address Line 1:	15624 Central Ave.	
Contacts		Address Line 2:		
Notifications		City:	Oak Forest	
External System		Country:	United States	
Settings		State/ Province/ Region:	Illinois	

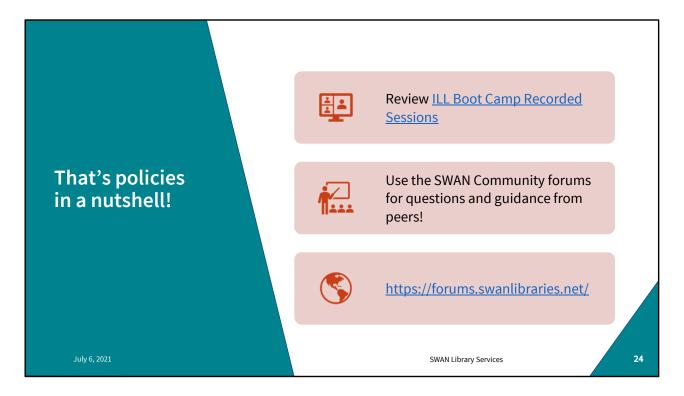
Similarly, you should review your Borrower constant data. Just like the due date assignment, your "need by" date is defined here. Your shipping and contact information.

				Service Config
	Postal Code:	60452		
	Fax / Phone Number:	708-687-3700		
	E-mail:	reference@acornlibrary.org		
Bill to:	Copy From Shipping Info.			
	Attention:	Acorn Public Library		
	Address Line 1:	15624 Central Ave.		
	Address Line 2:			
	City:	Oak Forest		
	Country:	United States ~	·	
	State/ Province/ Region:	Illinois	•	
	Postal Code:	60452		
Ship Via	ILDS: XBR			
Electronic Delivery:	Add new Electronic Delivery methods via OC options in the Policies Directory)	CLC Policies Directory (refresh this Constant Data	page once you've added new	
	Optionally select your preferred choices of El cannot select the same delivery option more	lectronic Delivery method in order of preference fe than once.	or this constant data record. You	
	OCLC product, service and business names business names are trademarks and/or servi			
	Electronic Delivery Service choice 1:	Article Exchange	~	
	Electronic Delivery Service choice 2:	Article Exchange	~	
	Electronic Delivery Service choice 3:	Article Exchange	~	
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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.



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 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.



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	t	
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Questions?

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