SWAN OCLC WorldShare ILL – Setting Up Groups & Deflection

September 10, 2019

Agenda

1. Understanding OCLC Tools for Configuration
2. Creating Custom Groups
3. Using Custom Groups & Paths
4. Deflection
5. Using Custom Groups in Deflection
6. Automated Lending Restrictions through Deflection

OCLC Considerations

Request via OCLC?	SWAN Libraries	Non-SWAN Illinois Libraries
	NO (DEFLECT)	YES (PREFERRED)
Group or Path Name	Group - SWANPARTNERS	Path – NONSWAN Which includes: CCS, PCAT, RSA, PLC, ISHARE
Use to:	DEFLECT Requests We do not want to accept requests from SWAN Partners since we can directly place holds.	Desired lenders since we share delivery and free in Illinois. When making OCLC requests, desired lenders are other RAILS area consortium
Configuration Tool:	Create Group in: OCLC Service Configuration Create Deflection rule in: OCLC Policies Directory (from WorldShare ILL Home Page)	OCLC Service Configuration (from WorldShare ILL Home Page)

Building OCLC Custom Holding Groups

Use RAILS OCLC Custom Holdings Group Generator and search by catalog https://www.railslibraries.info/services/oclc_groups

Home » OCLC Custom Holdings Group Generator

OCLC Custom Holdings Group Generator

Use this form to create a list of OCLC institution codes of RAILS libraries to cut-and-paste into a Worldshare ILL Custom Holdings Group. For information about creating a Custom Holdings Group, see https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Serv...

Examples of groups you can create:

- Libraries on your RAILS delivery route
- Libraries on your ILDS stop/RAILS delivery hub
- Libraries in your shared catalog consortium
- Libraries in your county

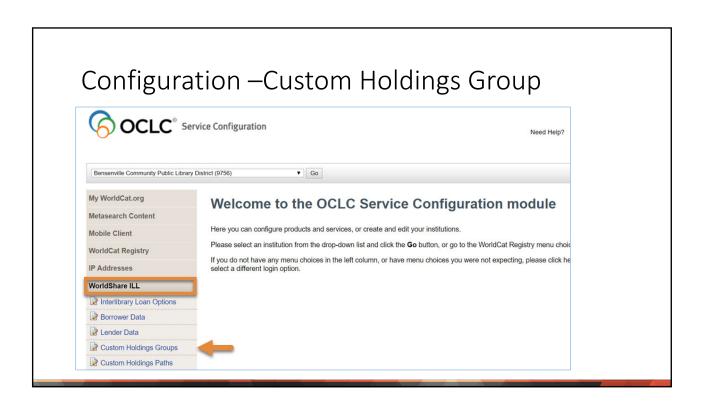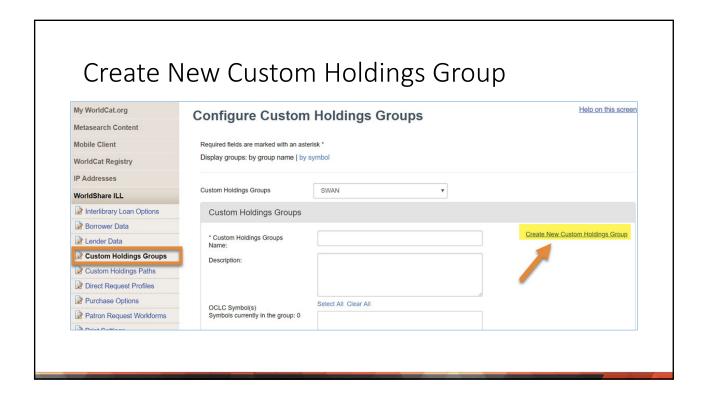| Search	Library Type	Catalog	County	
	- Any -	CCS	- Any -	Apply

To build Custom Holding Groups by consortium

- Choose catalog under dropdown
- Click Apply
- Then copy and paste codes into OCLC Create Custom Holding Groups interface

Verify that your OCLC symbol is correctly identified in your library's L2 information.

Finding the Custom Holdings Group interface

Configuration –Custom Holdings Group

Create New Custom Holdings Group

Create a group

1. Add Name and description
2. Add/Edit symbols at bottom of screen
3. Enter symbols (cut/paste)
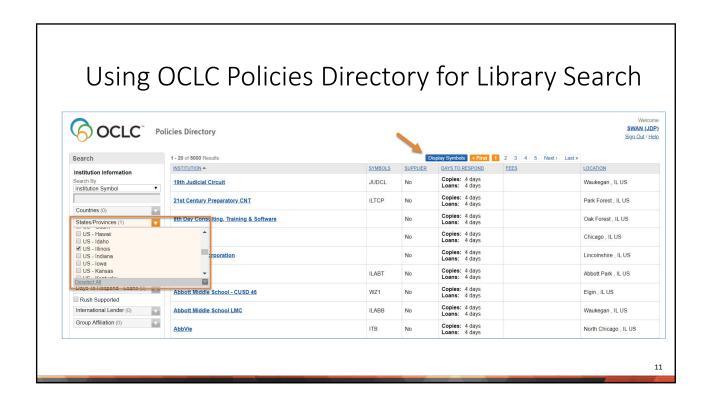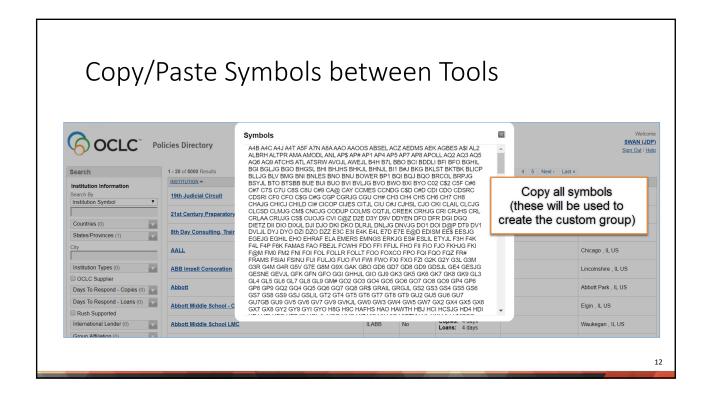4. Update Symbols

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Create multiple groups
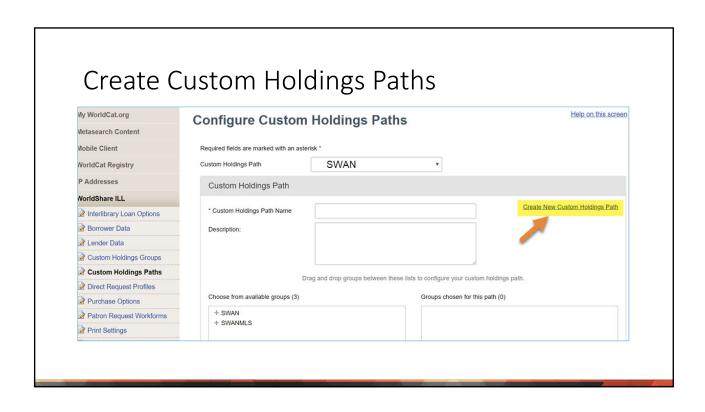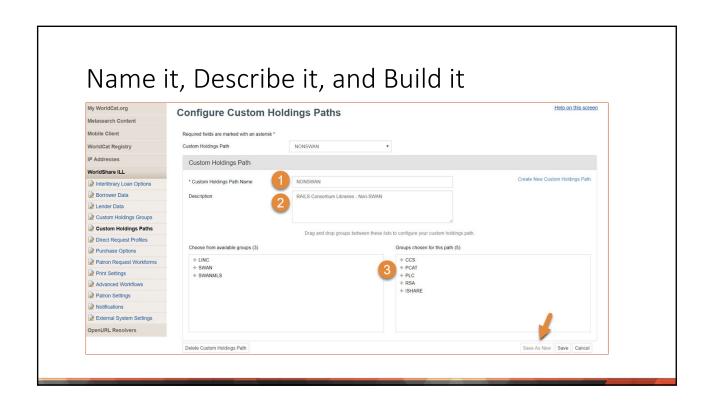
- Create a group for all the shared catalogs in Illinois
  - CCS
  - Pinnacle
  - PrairieCat
  - RSA
  - I-Share/CARLI
  - SHARE – Heartland
- Create state-wide groups
- Preferred Lenders
- Delinquent Borrowing Libraries

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Using OCLC Policies Directory for Library Search

Copy/Paste Symbols between Tools

Create Custom Holdings Paths

Name it, Describe it, and Build it

Use It

1. Filter by: Custom Holdings Path
2. Select the desired path
3. Create Request

Request It

By the way – Did you know you can request multiple copies to facilitate Bookclub requests?

Deflect Requests from SWAN Libraries

Add a Deflection Policy

Add a Deflection Policy

1. Name Policy
2. Request Type – Loan
3. Enable Real Time Deflection
4. Choose Borrowers – Custom Holding Group
   1. INCLUDE
5. Select SWAN
6. Scroll down and SAVE

Requests accidentally sent from other SWAN libraries will automatically deflect

We do not want to fill OCLC requests from our SWAN partner libraries – those requests are made directly through SWAN and placing holds. Deflection makes that automatic.
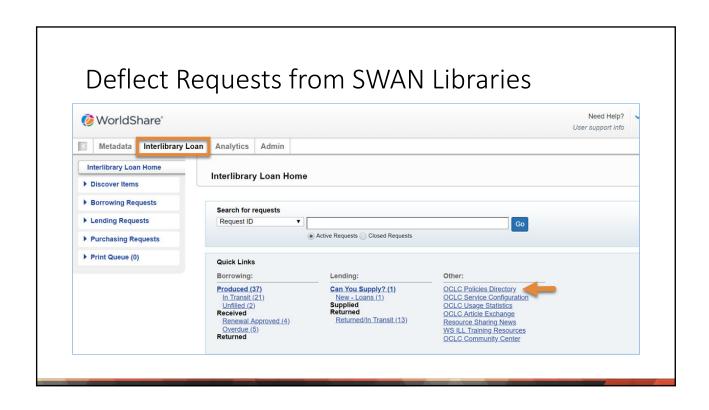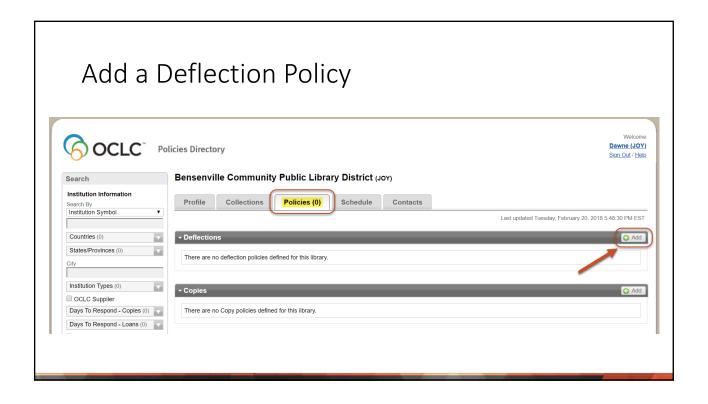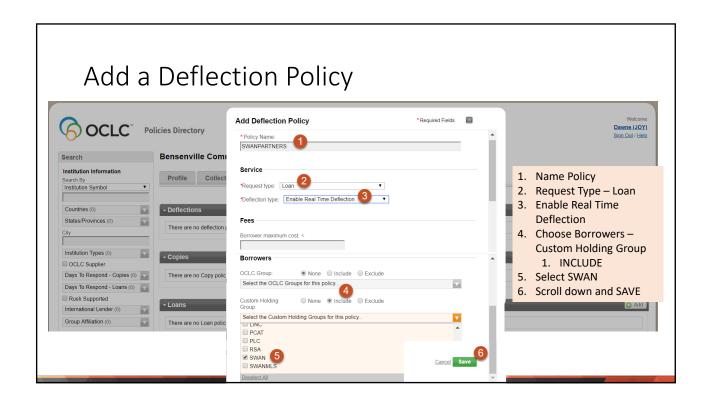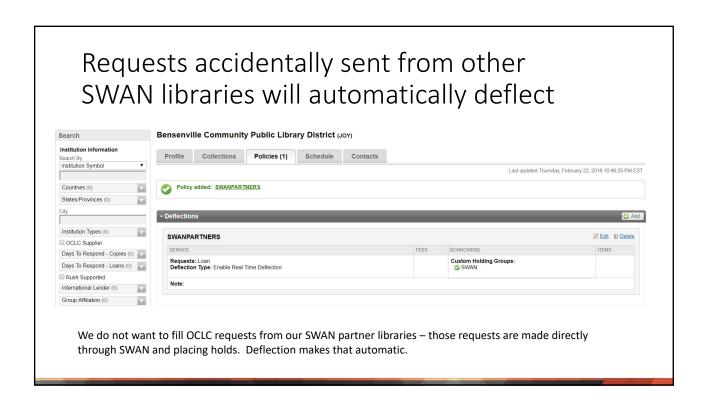
Additional Deflection Policies to consider

- Material Type (e.g. media, magazines)
- Copy requests
- New Material (< 1 yr – based on Publication Year)
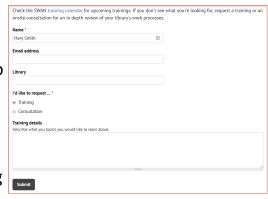- Out-of-State

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Questions & Follow-up

Send questions to our online ticketing system at help@swanlibraries.net

Visit the SWAN Support Site for access to recorded sessions.
https://support.swanlibraries.net

Submit a request for additional training topics.
Help > Request Forms > Request Training or Consultation

Check the SWAN training calendar for upcoming trainings. If you don't see what you're looking for, request a training or an onsite consultation for an in depth review of your library's work processes.

Name *

Mary Smith

Email address

Library

I'd like to request ... *

○ Training
○ Consultation

Training details
Describe what you topics you would like to learn about.

Submit

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