

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



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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

To build Custom Holding Groups by consortium

Search <input type="text"/>	Library Type - Any -	Catalog CCS	County - Any -	Apply
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Delivery route, ILDS stop/hub, etc.
FM0 GK5 GK5 GK7 GK8 GK9 GL4 GL7 GL9 GO 4 GO6 GO8 GP5 IHE IHY ILE INO IWE JAH JAI JAO JAR JAS JX7

- 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

WorldShare[®] Need Help? User support info

Metadata **Interlibrary Loan** Analytics Admin

Interlibrary Loan Home

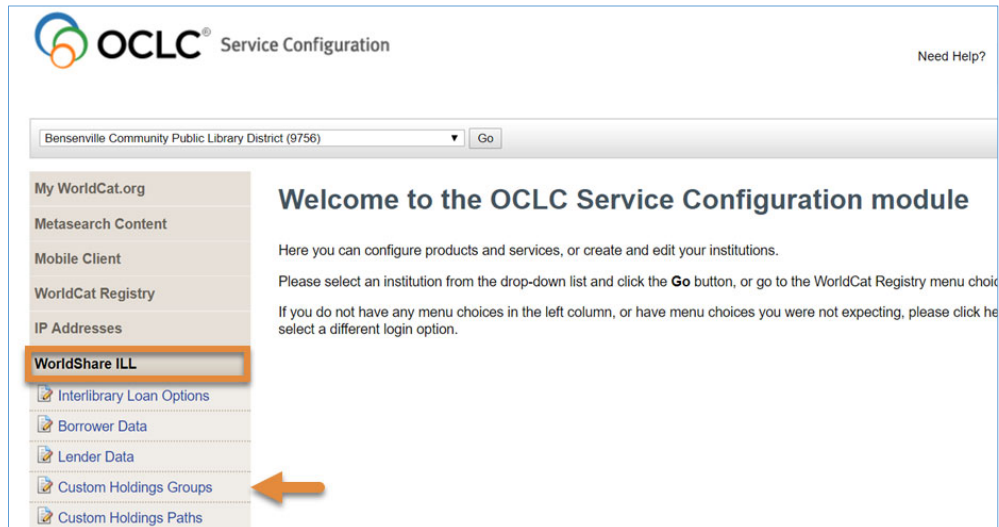
Interlibrary Loan Home

Search for requests
Request ID Go
☒ Active Requests ☐ Closed Requests

Quick Links

Borrowing:	Lending:	Other:
Produced (37)	Can You Supply? (1)	OCLC Policies Directory
In Transit (21)	New - Loans (1)	OCLC Service Configuration
Unfilled (2)	Supplied	OCLC Usage Statistics
Received	Returned	OCLC Article Exchange
Renewal Approved (4)	Returned/In Transit (13)	Resource Sharing News
Overdue (5)		WS ILL Training Resources
Returned		OCLC Community Center

Configuration –Custom Holdings Group



OCLC® Service Configuration [Need Help?](#)

Bensenville Community Public Library District (9756) [Go](#)

My WorldCat.org

- Metasearch Content
- Mobile Client
- WorldCat Registry
- IP Addresses
- WorldShare ILL**
 - Interlibrary Loan Options
 - Borrower Data
 - Lender Data
 - Custom Holdings Groups**
 - Custom Holdings Paths

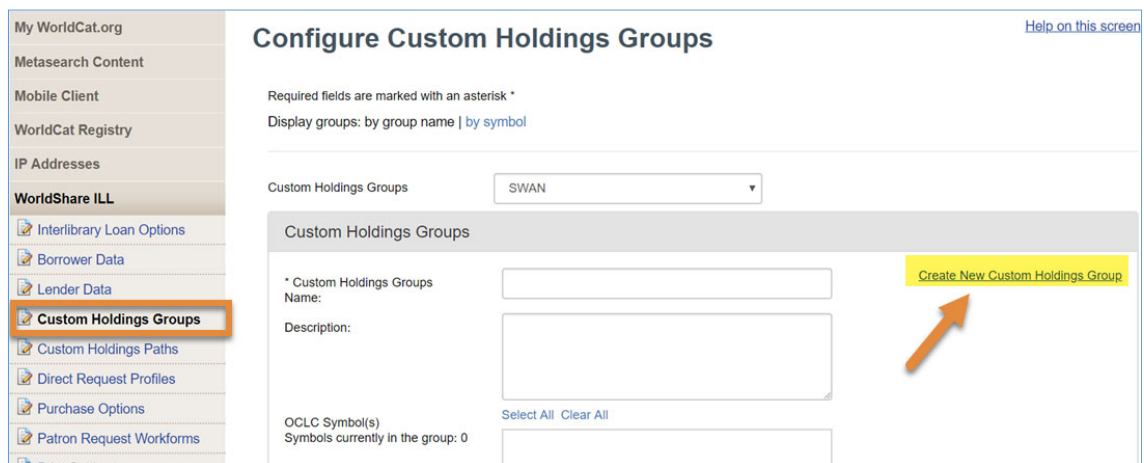
Welcome to the OCLC Service Configuration module

Here you can configure products and services, or create and edit your institutions.

Please select an institution from the drop-down list and click the **Go** button, or go to the WorldCat Registry menu choice.

If you do not have any menu choices in the left column, or have menu choices you were not expecting, please click here to select a different login option.

Create New Custom Holdings Group



Configure Custom Holdings Groups [Help on this screen](#)

Required fields are marked with an asterisk *

Display groups: [by group name](#) | [by symbol](#)

Custom Holdings Groups

Custom Holdings Groups

* Custom Holdings Groups Name:

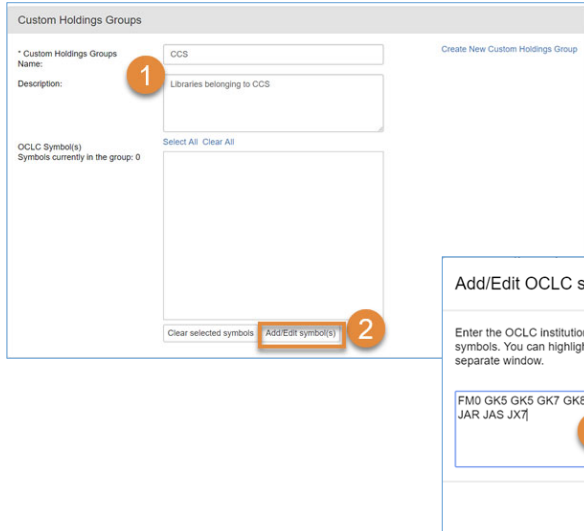
Description:

OCLC Symbol(s) [Select All](#) [Clear All](#)

Symbols currently in the group: 0

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

Add/Edit OCLC symbols

Enter the OCLC institution codes of the libraries you want in this group below. Use spaces to separate the symbols. You can highlight and delete codes as well. [Click here](#) to open the policies directory in a separate window.

FM0 GK5 GK7 GK8 GK9 GL4 GL7 GL9 GO 4 GO6 GO8 GP5 IHE IHY ILE INO IWE JAH JAI JAO JAR JAS JX7

4 Update Symbols Cancel

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

Create Custom Holdings Paths

Configure Custom Holdings Paths [Help on this screen](#)

Required fields are marked with an asterisk *

Custom Holdings Path: SWAN

Custom Holdings Path

* Custom Holdings Path Name:

Description:

[Create New Custom Holdings Path](#)

Drag and drop groups between these lists to configure your custom holdings path.

Choose from available groups (3):

- + SWAN
- + SWANMLS

Groups chosen for this path (0):

Name it, Describe it, and Build it

Configure Custom Holdings Paths [Help on this screen](#)

Required fields are marked with an asterisk *

Custom Holdings Path: NONSWAN

Custom Holdings Path

* Custom Holdings Path Name: NONSWAN

Description: RAILS Consortium Libraries - Non-SWAN

[Create New Custom Holdings Path](#)

Drag and drop groups between these lists to configure your custom holdings path.

Choose from available groups (3):

- + LINC
- + SWAN
- + SWANMLS

Groups chosen for this path (5):

- + CCS
- + PCAT
- + PLC
- + RSA
- + ISHARE

[Delete Custom Holdings Path](#) [Save As New](#) [Save](#) [Cancel](#)

Use It

WorldShare®

Need Help? [User support info](#) Dawne Tortorella

Metadata Interlibrary Loan Analytics Admin

Interlibrary Loan Home

Discover Items

Search

Scope: All WorldCat

Index: Keyword

Term(s):

Search Clear

Advanced Search

Close All Tabs

Search: Title = george rodrigue prints (All WorldCat)


Advanced Search

Results 1 - 3 of 3

Conduct your search within WorldShare ILL

Sort by: Library Count (Highest First)

Rows: 10

 **George Rodrigue prints : a catalogue raisonné, 1970-2007**
by Rodrigue, George; Rodrigue, Wendy Wolfe
Print book, English
Publisher: New York : Abrams, 2008.
ISBN#: 9780810995178 | OCLC#: 171048974
[Search for versions with same title and author](#)

Not Held by my library
[State Holdings](#)
[Regional Holdings](#)
[All Holdings \(193\)](#)

3 Create Request

Filter by: Custom Holdings Path

1

Select

Year:

LINC

2 NONSWAN

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

Request It

Interlibrary Loan Home

Discover Items

Search

Scope: All WorldCat

Index: Keyword

Term(s):

Search Clear

Advanced Search

Close All Tabs

Search: Title = george rodrigue prints (All WorldCat)

Borrowing Requests

Lending Requests

Purchasing Requests

George Rodrigue prints : a catalogue raisonné, 1970-2007

JOY Reg ID: 9756

Send Request Save For Review

Multiple Requests

Request Quantity: 1

Name:

Lender String:

Request Details (Request ID NEW)

Title / Journal: George Rodrigue prints : a catalogue raisonné, 1970-2007

Uniform Title:

Author: Rodrigue, George; Rodrigue, Wendy Wolfe

Publisher: New York : Abrams, 2008.

ISBN: 9780810995178 0810995174

Search my library's online catalog

Local ID:

Open Access: No links found

Search Google Scholar

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

Deflect Requests from SWAN Libraries

WorldShare[®] Need Help? User support info

Metadata **Interlibrary Loan** Analytics Admin

Interlibrary Loan Home

Discover Items
Borrowing Requests
Lending Requests
Purchasing Requests
Print Queue (0)

Interlibrary Loan Home

Search for requests
Request ID Go
Active Requests Closed Requests

Quick Links

Borrowing:
Produced (37)
In Transit (21)
Unfilled (2)
Received
Renewal Approved (4)
Overdue (5)
Returned

Lending:
Can You Supply? (1)
New - Loans (1)
Supplied
Returned
Returned/In Transit (13)

Other:
OCLC Policies Directory
OCLC Service Configuration
OCLC Usage Statistics
OCLC Article Exchange
Resource Sharing News
WS ILL Training Resources
OCLC Community Center

Add a Deflection Policy

OCLC[™] Policies Directory

Welcome Dawne (JOV) Sign Out / Help

Bensenville Community Public Library District (JOV)

Profile Collections **Policies (0)** Schedule Contacts

Last updated Tuesday, February 20, 2018 5:48:30 PM EST

Search

Institution Information
Search By
Institution Symbol
Countries (0)
States/Provinces (0)
City
Institution Types (0)
OCLC Supplier
Days To Respond - Copies (0)
Days To Respond - Loans (0)

Deflections
There are no deflection policies defined for this library. Add

Copies
There are no Copy policies defined for this library. Add

Add a Deflection Policy

The screenshot shows the 'Add Deflection Policy' form in the OCLC Policies Directory. The form is for the institution 'Bensenville Community Public Library District'. The following steps are highlighted with numbered callouts:

- 1. Name Policy:** The 'Policy Name' field is set to 'SWANPARTNERS'.
- 2. Request Type – Loan:** The 'Request type' dropdown is set to 'Loan'.
- 3. Enable Real Time Deflection:** The 'Deflection type' dropdown is set to 'Enable Real Time Deflection'.
- 4. Choose Borrowers – Custom Holding Group 1. INCLUDE:** The 'Borrowers' section has 'Include' selected for the 'OCLC Group' and 'Custom Holding Group'.
- 5. Select SWAN:** In the 'Custom Holding Groups' list, 'SWAN' is selected with a checkmark.
- 6. Scroll down and SAVE:** The 'Save' button is highlighted at the bottom right of the form.

Requests accidentally sent from other SWAN libraries will automatically deflect

The screenshot shows the 'Bensenville Community Public Library District (JOY)' profile page. A green message at the top states 'Policy added: SWANPARTNERS'. Below this, the 'Deflections' section shows the details for the 'SWANPARTNERS' policy:

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection		Custom Holding Groups: ✓ SWAN	
Note:			

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 *

Email address

Library

I'd like to request ... *

☒ Training
☐ Consultation

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



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