Deflect lending requests (knowledge base collections)

Last updated: Tue, 11 Feb 2020 21:56:21 GMT

WorldShare Interlibrary Loan libraries can store ILL terms of use in knowledge base collections to deflect lending requests for e-resources titles.

About ILL terms

The knowledge base database can store and retrieve ILL terms of use associated with your license. If your library subscribes to WorldShare ILL or Tipasa, use the instructions on this page to set your ILL terms to "No" in your knowledge base collections and create a policy to deflect on collections set to "No."

WorldShare License Manager libraries

If your library subscribes to WorldShare License Manager (the Licenses tab in the WorldShare interface), see How to deflect lending requests (License Manager).

About License Manager subscriptions

<table>
<thead>
<tr>
<th>ACCESS AND/OR SUBSCRIPTION</th>
<th>WHERE TO STORE ILL TERMS OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLLECTION MANAGER</td>
<td>You are able to store ILL terms of use in your knowledge base collections. You also have the option to lend and to define your terms. &quot;No&quot; is the default selection for the ILL setting.</td>
</tr>
<tr>
<td>COLLECTION MANAGER AND LICENSE MANAGER</td>
<td>You have direct access to the full set of license terms and ILL settings. Configure your ILL terms within the Licenses tab of the WorldShare interface. You will not see the knowledge base collection ILL setting.</td>
</tr>
<tr>
<td>COLLECTION MANAGER AND LICENSE MANAGER (TRANSITIONING)</td>
<td>If you previously managed your ILL terms within knowledge base collections, your ILL settings are now available in the Licenses tab. You will no longer see the ILL setting in knowledge base collections. You have direct access to the full set of license terms and ILL settings. The default collection-level setting will be &quot;No.&quot; You only need to change the setting if you wish to lend a collection. In addition to &quot;Yes&quot; and &quot;No,&quot; you will have the &quot;Silent&quot; option.</td>
</tr>
</tbody>
</table>
Add a knowledge base collection

You must have added a knowledge base collection in Collection Manager before you can set up your interlibrary loan policies.

1. See Choose a method to add or create a knowledge base collection.
2. Add a knowledge base collection in Collection Manager.

Optional. View the list of collections that other libraries have enabled for interlibrary loan for help with your decision to lend.

Set the collection-level ILL setting in your knowledge base collection

Your WorldCat knowledge base collections each have an ILL setting that is set to No by default. The deflection policy described below will deflect lending requests for all collections that are set to No. To confirm a collection is set to No:

1. Search for the collection in Collection Manager and click on the name of the collection to open it.
2. Expand the Holdings and MARC Records accordion.
3. Confirm or set the ILL allowed setting to No.
4. Click Save. If at any time you want to receive lending requests for titles, you can change a collection’s ILL setting to Yes.

Follow the steps below to create a deflection policy for the collections you do not want to lend.
Create a deflection policy

Sign in to the OCLC Policies Directory:

1. Gather your ILL authorization and password or your WorldShare Interlibrary Loan username and password (OCLC Services account).
2. Sign in using one of two options:
   ◦ Sign in to the WorldShare interface and navigate to Interlibrary Loan > OCLC Policies Directory, or
   ◦ Sign in to the OCLC Policies Directory at https://illpolicies.oclc.org

Create a deflection policy:

1. Click the Policies tab.
2. Click the Add button at the end of the Deflections bar.
3. On the Add Deflection Policy window, enter a Policy Name.
4. Select the Request type from the list. OCLC recommends using Copy or Loan.
5. Select the Deflection type from the list. Select Enable Real Time Deflection to automatically deflect requests matching the specifications in the policy.
6. In the Items section, for E-License Terms, select Include.
7. Click the arrow, and select No. This is the setting that deflects lending requests for your collections set to No.

10. Click **Save**.

Your policy has been added. When another library requests to copy or loan an item, the request will be deflected. Collections set to **Yes** will be excluded from deflection. Therefore, you will receive requests for items from those collections.

You can return at any time to modify the policy. Use the **Edit** and **Delete** options if you need to modify your policy.

Note: You will still get ILL requests passed through for items that fall outside your coverage range or within embargo dates even though you make the above-mentioned change to your current deflection policy. OCLC Currently holds a "Do
no harm" policy.

Other methods to deflect lending requests

Create a deflection policy for all e-content based on format

If your library does not loan ANY electronic items, you can deflect ILL requests on all eBooks and other electronic items by setting up a deflection policy to deflect on the formats:

- E-Audio Book
- E-Serial
- E-Text
- Internet Resource

For more information on deflection policies and example deflection policies, see the OCLC Policies Directory documentation.

Create a deflection policy based information in your local holdings records (LHRs)

You have the option to add or edit local holdings records (LHRs) to include will not lend in the 008 field (bytes 20 and 21 are used for information on lending and reproduction policies). You can then create a deflection policy to deflect on information in the 008 field of your LHRs.

For more information on LHRs, see the Local holdings records section of the Record Manager help.

For more information on deflection policies and example deflection policies, see the OCLC Policies Directory documentation.

Activate the linking feature in lending and borrowing requests

After your lending and deflection policies are in place, you are ready to start handling requests for your knowledge base titles.

To allow links to full-text items to be embedded in borrowing and lending requests:

1. Sign in to OCLC Service Configuration.
2. On the left panel, navigate to WorldShare ILL > Interlibrary Loan Options > Knowledge Base Active Link.
3. In the Knowledge Base section, check On.
4. Click Save at the bottom of the screen.

Additional configuration options (Optional)

See the Collection Manager site for help to:

- Set holdings in WorldCat on your knowledge base collections in Collection Manager. See Institution settings, WorldCat Holdings
See the [WorldCat Discovery](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…) site for help to:

- Configure a request button for your patrons. Depending on how you configure your ILL button display, patrons might still see request options in WorldCat Discovery. However, requests will be deflected on the items covered by your deflection policy.
- Add proxy information and a prompt for patrons’ remote access options to subscription resources and ILL. Find the settings in [OCLC Service Configuration > WorldCat Discovery and WorldCat Local > User Interface Options > Custom link(s)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…).

See the [WorldShare Interlibrary Loan](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…) or [Tipasa](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…) sites for help with:

- Knowledge Base Active Link: Select whether you want the system to look through your WorldCat knowledge base collections.
- Direct Request for articles and e-books: Define profiles to allow patrons to initiate borrowing requests without assistance from library staff.
- Article Exchange: Use a single, secure location where lending libraries can place requested articles.