Collection Type Policy

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Use this screen to configure default item status, hold fulfillment availability, reshelving period, and in-processing status for items based on their location and material format.

To access this screen, sign in to OCLC Service Configuration, open the WMS Circulation left navigation, and select Collection Type Policy.

Collection-level settings are arranged into rules that can be assigned to multiple item locations and material formats. Once you have created a rule, you can add all applicable holding locations, shelving locations, and material formats. The shared rule settings can be changed to apply those changes to all items assigned to that rule and move a location from one rule to another.

Rules will sort in alphabetical order by rule name on the Collection Type Policy page.

**Implementing/migrating libraries:** Do not edit Collection Type Policy until your Implementation Manager has notified you that your migration is complete.

- If you change these settings before your migration is complete, all of your items will have these settings.
  - If you change Available to Unavailable, your items will have the status of Unavailable.
  - If you change In Processing Mode to Until Checked In, your items will have the status of In Processing until they are manually checked in.

**Filter rules by**

Use the Filter rules by drop-down to target a holding location or a combination of holding and shelving locations. The rule list will be filtered immediately to only include the applicable rule(s).

- Selecting the All option in the Shelving Location filter list will look for rules where the All parameter was intentionally selected in the Locations list; filtering for All will not return rules where any shelving location has been selected.
- The list of possible holding and shelving locations will only include currently configured locations. To find any rules that include item locations that are no longer valid for your library, click the Invalid Locations option.

**Processing order**

When determining which rule to apply to an item, the system evaluates your library's Collection Type Policy and selects the best match as follows:

- Match to a specific Holding Location, Shelving Location, and Material Format
- Match to a specific Holding Location and Shelving Location where Material Format is set to All
• Match to a specific Holding Location and Material Format where Shelving Location is set to All
• Match to a specific Holding Location where Shelving Location and Material Format are set to All

Collection Type Policy does not allow duplicate locations.

It is strongly recommended to have a row for each Holding Location where Shelving Location and Material Format are set to All to cover items in newly-created shelving locations or when new material formats are added to WorldCat.

**Create or edit collection type policies**

1. On the Collection Type Policy screen, click **CREATE RULE**.
2. Fill in the fields below:
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>Enter a name for the Rule.</td>
</tr>
</tbody>
</table>

**Default Item Status**

Select if items at this location show as Available or Unavailable in the WorldCat Local/Discovery.

- Items marked Unavailable are not available for circulation and cannot fulfill holds.
- Changing item availability on this screen does not automatically change the item status. Item status will only change after the item is checked in.
- For more information on how statuses appear to patrons and staff, see Check item status or location.

**Fulfill Holds for**

Select patrons for which staff (without an override) can place holds for items at this location. Settings vary, depending on whether your library has multiple branches or is part of a WMS group. See 6. Can Override Holds? below for more information on override settings.

- Library with a single location: You have two options.
  - **All patrons**: Hold requests are allowed.
  - **No patrons**: Hold requests are not allowed.
- Library with branch locations: You have three options.
  - **All patrons**: Items from this location can fulfill hold requests for any patron.
  - **Branch patrons only**: Only patrons whose Home Branch (in their patron record) matches the Location Policy of the item can place a hold on the title.
    - For titles where this is the only branch that holds a qualifying item:
      - The item may only be requested by patrons whose Home Branch matches the Holding Location of the item.
      - Patrons from other branches cannot request these items.
For titles where there are qualifying items across multiple branches:

- Items at the selected Holding Location may only be requested by patrons whose Home Branch matches the Holding Location of the item.
- Patrons from other branches cannot request the items from this Holding Location.
- However, there may be other location policies in place that allow the items at other Holding Locations to be requested by any patron, regardless of the patron's Home Branch.

  - **Other branch patrons only**: Items from this location can only fulfill hold requests for patrons of other branches.
  - **No patrons**: Items from this location cannot be used to fulfill hold requests.

Circulation groups have three additional options:

- **Other branch patrons from my institution only**
- **Institution patrons only**
- **Other institution patrons only**

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**In Processing Mode**

In the In Processing Mode field, select if newly added items should display the status of In Processing in WMS.

- **For Period**: A specified period of time, as set in the In Processing Period field (see step 9)
- **None**: Never
- **Until Checked In**: Until the item is checked in at the item's Holding Location

For more information on how statuses appear to patrons and staff, see [Check item status or location](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/OCLC_Service_Configuration_-_...).

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**In Processing Period**

If you selected For Period in the In Processing Mode field, enter the amount of time that the item will display the status of In Processing in WMS after the
item is created in the In Processing Period field.

- For more information on how statuses appear to patrons and staff, see Check item status or location.

<table>
<thead>
<tr>
<th>Can Override Holds?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select if holds on items at this location can be overridden.</td>
</tr>
</tbody>
</table>

- **Can Override Holds**: Hold requests that are blocked based on the setting you selected in 5. Fulfill Holds for can be overridden by staff.

- **Cannot Override Holds**: Hold requests can never be overridden by staff. Select if hold requests should never be allowed based on the location policy.

- **Example**: You do not allow holds to be placed on items in your reference collection. (Shelving Location = Reference)
  - Select the following settings:
    - Fulfill Holds For = No patrons
    - Can Override Holds? = Cannot Override Holds

- **Example**: You do not allow holds to be placed on items in your Main Branch, New Books location. However, a title was specifically requested by a faculty member (Home Branch = Law Library) for preview, and you want to place a hold for them. (Shelving Location = New Books)
  - Select the following settings:
    - Fulfill Holds For = Branch patrons only
    - Can Override Holds? = Can Override Holds

- See Circulation Account roles, Overrides for more information.

<table>
<thead>
<tr>
<th>Fulfil Holds by Item Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Control when items can be requested and when available items may appear on the pull list. Options include:</td>
</tr>
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</table>

- **Any Item Status (Default)**: Items in any status may fulfill requests.
  - Patrons can request any materials otherwise allowed by your policies. Any eligible item at this location may appear on the pull list to
fulfill pending requests.

- **Available Items Only**: Only Available items can fulfill requests.
  - Patrons can only request a specific copy shelved at this location if that copy is currently Available and is otherwise requestable.

- **Not Available Items Only**: Only items that are not Available can fulfill requests.
  - Patrons can only request a specific copy shelved at this location if that copy is currently not available on the shelf and is otherwise requestable.

### Reshelving Period

Enter the reshelving period.

- For the amount of time you enter, the item will have the status of Recently Returned (Available) in WMS.
- If you do not want to set a reshelving period, enter 0.
- For more information on how statuses appear to patrons and staff, see Check item status or location.

3. Under **Locations**, use the **ADD LOCATION** button and enter the following information:

   - **Holding Location**: Holding Code, as set on the Holding Codes Translation Table screen. You must select a holding location in order to select a shelving location.
   - **Shelving Location**: Shelving Location, as set on the Holding Codes Translation Table screen. If an item has a temporary and permanent location in WMS, the circulation policy will use the temporary location.
   - **Material Format**: Material format is defined in an item's WorldCat record. For more information, see Material Type Names and Codes to determine how the WorldCat record provides material format.

4. Click **Save**.

Use the **Move Selected Locations** option to reorganize your collection type policies by moving your selected rows of locations to an existing rule or to create a new rule.

- The **Move Selected Locations** button will only move locations selected within a single rule. If you want to move locations out of multiple rules, you will need to repeat the move procedure for each of the original/source rules.

To edit a collection type policy, click the **EDIT** button. Alter the fields above as needed.

**Notes**:

- A collection type policy cannot be deleted while locations are assigned to the rule.
• If a collection type policy affects item availability, in some situations you may need to check the item in for the policy to apply.

Related policies

Location Policy depends upon:

• [Holding Codes Translation Table]

Location Policy is related to:

• [OPAC Statuses, Location and Circulation Policies]

Migration of Location Policy data

Your Location Policy data has been migrated automatically to Collection Type Policy. Rules were created based on all the combinations of policies that you currently support and assigned a number (e.g., 01, 02, 03, etc.). Rules names were chosen to sort rules with the most locations to the top of the list, e.g., rule 01 will have the most locations with the same policy settings. The number of migrated rules in Collection Type Policy will depend on the number of unique policy settings that you had configured in Location Policy.

You may wish to rename and/or reorganize your Collection Type Policy rules based on your local practices.

View archived Location Policy data

For your reference, your library's Location Policy data has been archived and is available for you to view until September 2022.

You will not be able to make changes via the Location Policy interface. Likewise, any updates that you make to Collection Type Policy will not be reflected in the read-only Location Policy screen.

If you need to update your policies, you must use the new Collection Type Policy interface.