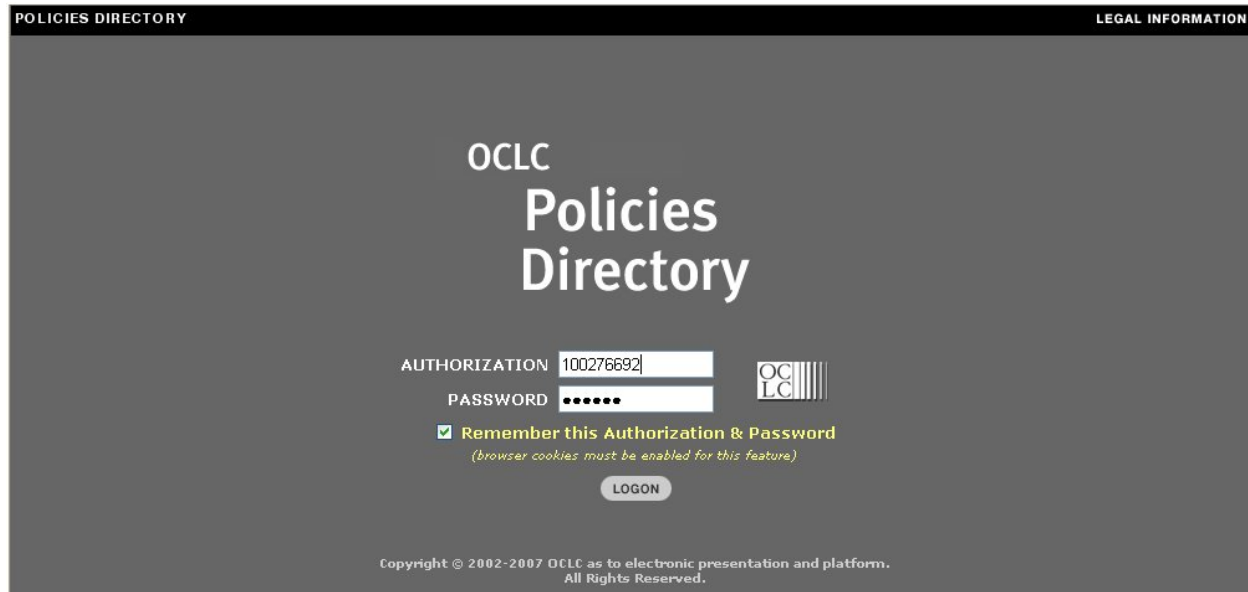


ILL Policies Directory:
<http://illpolicies.oclc.org>

Full documentation is available at:
<http://www.oclc.org/support/documentation/resourcesharing/libpolicies/getstart/default.htm>

And can be printed out as a .PDF from:
http://www.oclc.org/support/documentation/resourcesharing/libpolicies/getstart/ILL_policies_ref_card.pdf

Logon using your WCRS autho and password



Policies Directory and WorldCat Resource Sharing Auto-Deflection of non-SHARES Requests

WorldCat Resource Sharing will auto-deflect resource sharing requests based on policies defined in the Policies Directory. Users of the Policies Directory will be able to set deflection criteria for borrowing requests to bypass the request manager. The deflection will be based on the request service type, group membership, and format type

Instead of an unfilled request remaining in the pending status, the Request Manager “skips” lenders based on deflection policies and automatically moves the request to the next lender. This will speed up processing by allowing libraries to not see requests they cannot fill, and make the response time and the delivery quicker to the end user.

Create a deflection policy in the Policies Directory:

After you login, click on My Units in the upper right-hand corner of the screen. This will take you to the record for your institution that you are allowed to edit. At a minimum, you may wish to set a deflection policy that only allows SHARES requests to you and deflects all requests from other institutions.

POLICIES DIRECTORY MY UNITS | SEARCH | HELP | EXIT

Welcome, !
You will be using the Policies Directory in Master mode.

Basic Search Advanced Search

Unit Search

Search for

by Institution Symbol Institution or Unit Name

QUICK TIP

A Unit Search searches the following:

- Unit ("inst") Symbol
- Institution Name
- Unit Name

A Group Search searches the following:

- Group Symbol
- Group Name

Group Search

Search for

by Group Symbol Group Name

A quick view of your institution's policy will appear:

UNIV OF CALIFORNIA,DAVIS, MABIE LAW LIBR - default (UCDLL)

Unit Policies

Quick View | Information | Contacts | Schedule | Collections

Unit

General Information

Unit Name and Symbol	UNIV OF CALIFORNIA,DAVIS, MABIE LAW LIBR - default (UCDLL)
OCLC Supplier	No Change
Regional Service Provider	OCLC WESTERN
Reciprocal Lender	No
International Lender	No
Group Affiliations	SHRS

Navigate to Deflection policies.

POLICIES DIRECTORY MY UNITS | SEARCH | HELP | EXIT

UNIV OF CALIFORNIA,DAVIS, MABIE LAW LIBR - default (UCDLL)

Unit Policies

Copies Loans | Deflections

Copy Policies Summary

There are currently no Copy Policies defined for this Unit

UNIV OF CALIFORNIA,DAVIS, MABIE LAW LIBR - default (UCDLL)

Unit Policies

Copies | Loans | Deflections

SAVE RESET

Deflection Policy

* Policy Name SHARES-only

* Service Type Copy or Loan

Deflection Type Enable Real Time Deflection

Formats Applies to all. Only deflect for the following: Do not deflect for the following:

Format

Groups Applies to all. Only deflect for the following: Do not deflect for the following:

OCLC Group SHRS

SAVE RESET

1. Once you are in the Deflection Policies area, name your policy SHARES-only (or another meaningful name).
2. Apply the Service Type to Copy or Loan
3. Enable Real Time Deflection
4. Skip down to Groups and click the radio button for Do not deflect for the following: and select SHRS from the drop down box of OCLC Groups
5. Save your policy

After you've saved your policy the *Deflection Policy Summary Screen* below will be displayed.

UNIV OF CALIFORNIA,DAVIS, MABIE LAW LIBR - default (UCDLL)

Unit Policies

Copies | Loans | Deflections

NEW

Deflection Policies Summary

Policy Name	Deflection Level	Deflection Policy	
1. SHARES-only	Enable Real Time Deflection	Deflect: Copy or Loan Requests	<input type="button" value="EDIT"/>
		Except For Groups: SHRS	<input type="button" value="COPY"/>
			<input type="button" value="DELETE"/>

NEW

When you are in the Policies Directory, you should also consider setting up Copy and Loan policies for your institution.

The Policies Directory is also used to create lists of libraries in a group. Our plan is to automate this process on your behalf, but in the beginning it will be done manually by OCLC staff, but it is a useful process to understand.

When you logon to the Policies Directory you are first taken to a search screen. Enter the 4-character group code for SHARES—SHRS in the Group Symbol search field (bottom search field).

Basic Search Advanced Search

Unit Search

Search for

by Institution Symbol Institution or Unit Name

SEARCH RESET

Group Search

Search for

by Group Symbol Group Name

SEARCH RESET

You will be taken to a quick view policy for SHRS. From here, click on the SHOW MEMBERS button.

SHARES RLG PROGRAM GROUP (SHRS)

Group Policies

Quick View | Information | Contacts

SHOW MEMBERS

Group

General Information

Group	SHARES RLG PROGRAM GROUP
Symbol	SHRS
Policies Shown Only to Group Members	No

SHOW MEMBERS

Currently acting as institution OCL

You will see a complete list of all libraries that participate in SHARES along with links to their complete policies.

Search Results Summary

You searched for: Group Affiliation:"SHRS"

115 Unit Records found

NEXT →

DISPLAY SYMBOLS

Unit Summary		
Unit Name	Location	OCLC Supplier
1. AMERICAN ACAD IN ROME - default (RPY)		No
2. AMERICAN UNIV IN CAIRO LIBR - Interlibrary Loan, Document Delivery Services (MEAUC)	Cairo / Egypt	No
3. AMERICAN UNIV OF SHARJAH - default (A7U)		No
4. AMON CARTER MUS LIBR - default (ASQ)		No
5. ART INST OF CHICAGO - default (BP1)		No
6. BARD GRAD CTR FOR STUDIES/DECORATIVE ART - default (ZVP)		No
7. BIBLIOTHEQUE NATIONALE DE FRANCE - default (BDF)		No
8. BOSTON UNIV, PAPPAS LAW LIBR - ILL Department (BOP)	Boston / Massachusetts	Yes
9. BRANDEIS UNIV LIBR - Brandeis University Libraries (MBB)	Waltham / Massachusetts	Yes
10. BRIGHAM YOUNG UNIV LIBR - Harold B. Lee Library (UBY)	PROVO / Utah	Yes

Click on the DISPLAY SYMBOLS button. A pop-up with all the symbols of SHARES libraries comes up. This is useful in creating Custom Holdings Groups and Paths in the WorldCat Services Administrative Module to help automate processing of requests.



Cut and paste these symbols in a Word or text document. These will be used to set up Custom Holdings Groups and Paths.

You can also conduct an advanced search for libraries in SHRS, for example SHRS libraries in the United States, depending on how you would like your Custom Holdings set up.