Using ACOV and BCOV Profiled Groups

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Tasks to accomplish

- Definitions of two new profiled groups
- Decide what/if you can supply as a lender
- Adjust supplier status as a result
- Update days to respond for loans
- Adjust deflections based on what you can supply
- Using the new profiled groups when borrowing
- Workflows for requesting e-books
ACOV and BCOV: What are they?

OCLC has set up two new Profiled Groups:

• **ACOV**: Lenders who can supply article requests electronically
  – 16 days to respond for loans: Can supply articles from print and e-serials
  – 20 days to respond for loans: Can supply articles from e-collections only

• **BCOV**: Lenders who can supply e-books (as copy requests)
YOUR STATUS AS A LENDER
What are you able to supply as a lender?

• Can you supply/lend at all?
  – If no, change your status to non-supplier
  – If yes, make sure you are still a supplier
DEMO: CHECKING/ADJUSTING SUPPLIER STATUS
Can you supply/loan at all?

Yes
Confirm that you are a supplier

Set days to respond for loans to 16

Join Profiled Group ACOV

Set days to respond for loans to 20

Join Profiled Group BCOV

No
Set your status to non-supplier

Print and digital collections

Join Profiled Group ACOV

Digital items only

E-books

To join either/both new Profiled Groups, complete the form here:

oc.lc/covgroups
DEMO: CHANGING DAYS TO RESPOND
What are you able to supply as a lender?

• Can you ship physical items from your print collection?
  – If no, set up a deflection for all loan requests
  – If yes, make sure requesting libraries are prepared to receive physical materials before shipping
DEFLECTION POLICIES
Deflection policies for loans

- If you cannot ship from your physical collection, you can set up a temporary deflection for all loan requests.
- It is not necessary to specify every format.
- It is not necessary to specify each group.
- Set up a deflection for Loans that Enables Real Time Deflection.
- This deflection will apply to all loan requests.
DEMO: SETTING UP A DEFLECTION FOR ALL LOAN REQUESTS
Loan Deflection deflecting all loans

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<th>SERVICE</th>
<th>FEES</th>
<th>BORROWERS</th>
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<tr>
<td>Requests: Loan Deflection Type: Enable Real Time Deflection</td>
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Note: The library is closed during the COVID-19 crisis and we cannot access our physical collection.
Deflection policies for copies

• If you have joined ACOV, you should **not** be deflecting copy requests for:
  – Computer File
  – E-Serial

• If you have joined BCOV, you should **not** be deflecting copy requests for:
  – E-Text
Deflection policies for copies

• If you do not have access to your physical collection to provide scans:
  – You may wish to deflect copy requests for all but the formats you can access and supply

• If you can still access your physical collection:
  – Be sure you are not deflecting copy requests for any formats you can scan and deliver electronically
DEMO: EDITING COPY
DEFLECTIONS
Copy Deflection for all but e-journal articles

We cannot access our physical collection to supply scans during COVID-19

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<td>Deflection Type: Enable</td>
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<td>Real Time Deflection</td>
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Note: Our library can provide electronic versions of articles from our e-collections only during our COVID-19 closure. We also cannot supply e-books.

Example for an ACOV library with 20 days to respond for loans
Copy Deflection for all but e-articles and e-books

We cannot access our physical collection to supply scans during COVID-19

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Note: Our library can provide electronic versions of articles from our e-collections and copies of e-books only during our COVID-19 closure.

Formats:
- Computer File
- E-Serial
- E-Text

Example for an ACOV and BCOV library with 20 days to respond for loans
HOW TO USE THE NEW PROFILED GROUPS AS A BORROWER
Notes about ACOV and BCOV

• You do not have to be a member of ACOV or BCOV to request from these libraries

• Some libraries in ACOV and BCOV charge IFM fees
  – If you are joining these groups as a lender, consider temporarily suspending your usual charges

• Prior to adding a library to ACOV or BCOV, we'll review existing deflection policies to see if any are in direct conflict with the purposes of these groups
TWO METHODS FOR USING ACOV AND BCOV TO BUILD LENDER STRINGS
Methods of using ACOV and BCOV

Method 1: Use symbols in these groups to create new Custom Holdings Groups and Paths for requesting articles and e-books

   Benefit: Lender string gets built automatically

Method 2: Select the profiled groups from the drop-down menu on the Library Holdings screen in the staff interface
How to use ACOV and BCOV – Method 1

• Use the symbols in these two groups to create two new Custom Holdings Groups

• Create two new Custom Holdings Paths
  – ACOV
  – BCOV

• This method allows you to use the new paths in automations (formerly Direct Request) and to auto-populate the lender string in the staff interface
Finding all symbols in ACOV and BCOV

• Use the Policies Directory to search by each group symbol (one at a time)
• On the search results screen, click the blue Display Symbols button
• Copy the symbols from the window that opens
• Keep them on your clipboard to paste into a new Custom Holdings Group you create in Service Configuration
DEMO: SELECTING ALL SYMBOLS FROM ACOV AND BCOV
Creating new Custom Holdings Groups

- In Service Configuration, go to WorldShare ILL > Custom Holdings Groups
- Create new Custom Holdings Groups (CHGs) for ACOV and BCOV (or just one if you do not need to use both)
- Name the new CHG (ACOV or BCOV)
- Paste the symbols from your clipboard into the Add/Edit Symbols window
- Save your group as a New CHG
DEMO: CREATING A NEW CUSTOM HOLDINGS GROUP
Creating new Custom Holdings Paths

• In Service Configuration, go to **WorldShare ILL > Custom Holdings Paths**
• Create new Custom Holdings Paths (CHPs) for ACOV and BCOV (or just one if you do not need to use both)
• Name the new CHP (ACOV or BCOV)
• Select the ACOV or BCOV Custom Holdings Group you just created and put it in the path
• Save your path as a **New CHP**
DEMO: CREATING A NEW CUSTOM HOLDINGS PATH
How to use ACOV and BCOV – Method 2

• Manually build lender strings after filtering holding libraries by Profiled Group to ACOV (for requesting articles) or BCOV (for requesting e-books)

• After filtering holdings with the drop-down menu, manually select lenders for the lender string by clicking on Yes in the Supplier column
BORROWING WORKFLOWS WITH ACOV AND BCOV
Notes for using ACOV

• Be sure to pay attention to the format of the material you are requesting: ePeriodical or Periodical/Article

• If requesting an ePeriodical, all resulting libraries in ACOV should be able to supply if they have the date you need

• If requesting a print article (Periodical/Article), only libraries with 16 days to respond for loans will be able to supply (as they have access to their print collection)

• If needed, search WorldCat for the ePeriodical version and use that OCLC Number for your request
Notes for using BCOV

• If your patron requests a print book and you want to try to obtain an e-book version, change the request from a Loan to a Copy
• Make sure you are mediating patron requests for books and not sending automatically to lenders
• Search WorldCat by Title (using the magnifying glass in the staff interface in the Request Detail) to locate the e-book version of the title
• Apply the bib data from the e-book version to your request
• Search for libraries in BCOV that hold the item
DEMO: USING ACOV AND BCOV TO BUILD LENDER STRINGS
Where to go for more help

• Tuesday, 4/7 office hours: 1:00-2:00 pm Eastern
  – Submit your questions in advance in the Discussion on the Resource Sharing Research page (accessible by ILLiad, WorldShare ILL, and Tipasa subscribers)

• OCLC’s COVID-19 Resources page
  – oc.lc/covid19-service-info

• OCLC Support: support@oclc.org
Thank you!

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Because what is known must be shared.

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