

OCCL Resource Sharing Webinar • January 28, 2020

Part 1: Fine-tune your Policies and Deflections

Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users

Today's presenters



Alena Miller

Product Manager,
Resource Sharing



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Product Analyst,
Resource Sharing



Audrey Heisel

Customer Support
Analyst III




WORKSHOP SERIES

Series topics

Topic	Webinar Date	Office Hours Date
Part 1: Policies and Deflections	Jan 30	Feb 7
Part 2: Custom Holdings	Feb 27	Mar 6
Part 3: Constant Data	TBD	TBD
Part 4: Automation (Direct Request)	TBD	TBD
Part 5: Usage Statistics	TBD	TBD

Policies Directory – main profile page

 **OCLC™** Policies Directory

Search

Institution Information

Search By

Institution Symbol

ue

Countries (0)

States/Provinces (0)

City

Institution Types (0)

☐ OCLC Supplier

Days To Respond - Copies (0)

Days To Respond - Loans (0)

☐ Rush Supported

International Lender (0)

Group Affiliation (0)

University of Evansville (IUE)

University of Evansville Libraries

Profile

Collections

Policies (5)

Schedule

Contacts

Last updated Sunday, July 7, 2019 12:00:11 AM EDT

Summary

Name (Symbol): University of Evansville (IUE)

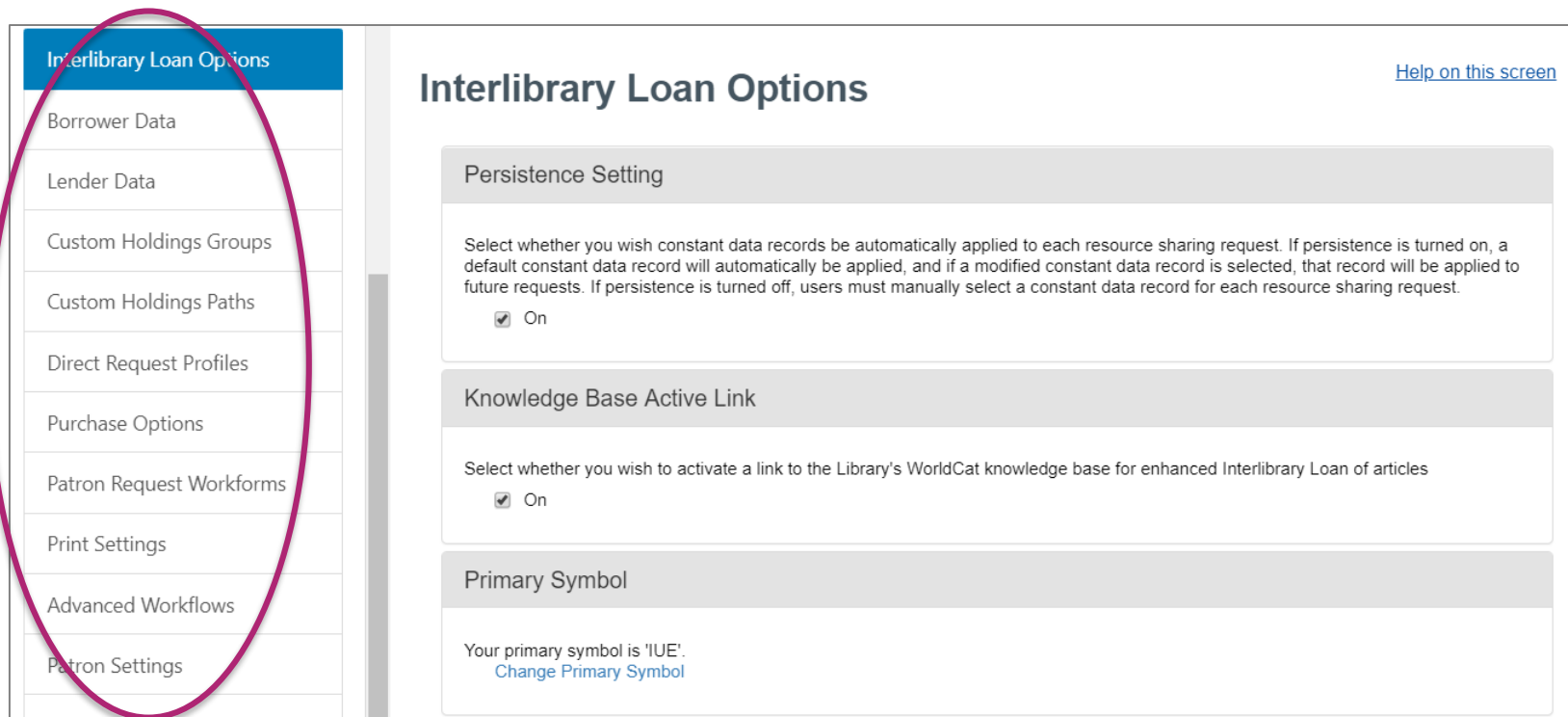
Also Called: University of Evansville Libraries

Location: Evansville, IN 47722 US

Shipping Address: University of Evansville Libraries
Interlibrary Loan
1 S Frederick St
Evansville, IN 47714 US

Institution Type: Academic Library

Service Configuration – ILL options



The screenshot shows a web interface for configuring Interlibrary Loan (ILL) options. On the left is a vertical navigation menu with the following items: Interlibrary Loan Options (highlighted with a red oval), Borrower Data, Lender Data, Custom Holdings Groups, Custom Holdings Paths, Direct Request Profiles, Purchase Options, Patron Request Workforms, Print Settings, Advanced Workflows, and Patron Settings. The main content area is titled 'Interlibrary Loan Options' and includes a link for 'Help on this screen'. It contains three sections: 'Persistence Setting' with a checkbox for 'On' (checked), 'Knowledge Base Active Link' with a checkbox for 'On' (checked), and 'Primary Symbol' showing the current value as 'IUE' with a link to 'Change Primary Symbol'.

Interlibrary Loan Options
Borrower Data
Lender Data
Custom Holdings Groups
Custom Holdings Paths
Direct Request Profiles
Purchase Options
Patron Request Workforms
Print Settings
Advanced Workflows
Patron Settings

Interlibrary Loan Options

[Help on this screen](#)

Persistence Setting

Select whether you wish constant data records be automatically applied to each resource sharing request. If persistence is turned on, a default constant data record will automatically be applied, and if a modified constant data record is selected, that record will be applied to future requests. If persistence is turned off, users must manually select a constant data record for each resource sharing request.

☒ On

Knowledge Base Active Link

Select whether you wish to activate a link to the Library's WorldCat knowledge base for enhanced Interlibrary Loan of articles

☒ On

Primary Symbol

Your primary symbol is 'IUE'.
[Change Primary Symbol](#)

Welcome to OCLC Support

How can we help you?

Select a category



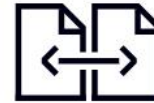
Discovery and Reference



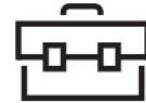
Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox

Videos



help.oclc.org



Today's topics

- Why Policies and Deflections?
- Importance of Schedule and Contacts
- Setting Policies
- Using Deflections to your advantage
- Assessing your Deflections
- Takeaways and getting assistance

WHY POLICIES AND DEFLECTIONS?

OCCLC Resource Sharing

A man with a backpack is looking at a smartphone at night. The background is a blurred city street with blue and white lights.

7,531

borrowing libraries
worldwide

7,540

lending libraries worldwide

57

countries

12.7

requests created per minute

Policies matter

From the Interlibrary Loan Code of the
United States

5.0 Responsibilities of the Supplying Library

5.1 Establish, promptly update, and make available an interlibrary lending policy, contact information, and a service schedule.

Common symptoms of Policy and Deflection problems

- Getting repeated requests for the same items you do not lend
- Using "Policy problem" as frequent Reason for No
- Drop in lending requests
- Requests only for items you will not lend
- You're closed but still receiving requests

Symptom: Getting repeated requests for the same items you do not lend

Resource Sharing Lender Reasons For No Report

Title	OCLC #	Imprint Date	Reason For No	Lender Unfilled Date
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER	250631679	2008	NON CIRCULATING	9/18/2019
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER	250631679	2008	NON CIRCULATING	9/19/2019
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER /	250631679	2008	NON CIRCULATING	9/4/2019
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER /	250631679	2008	NON CIRCULATING	9/5/2019
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER /	250631679	2008	NON CIRCULATING	9/21/2019
POOR CHARLIE'S ALMANACK : THE WIT AND WISDOM OF CHARLES T. MUNGER /	250631679	2008	NON CIRCULATING	9/25/2019

Symptom: Using "Policy problem" as frequent Reason for No

200252939: Destiny of the republic : a tale of madness, medicine and the murder of a president Prev

Can you supply? ☐ Print Shipping Labels ☐ Print Book Straps/Stickers **Group Affiliations:** TEST

No - No reason given ▼

- No - No reason given
- No - In use/On loan
- No - Lacking volume/issue
- No - Not owned
- No - Non-circulating
- No - Not on shelf/Missing
- No - Policy problem**
- No - Item too new to loan
- No - On reserve
- No - Publisher embargo

Request **Staff Notes** 0

▼ Request Details (Request)

Status
Type
Source
OCLC
Lenders
Request Tags Choose...

Apply constant data: Actions:
 ▼ ▼

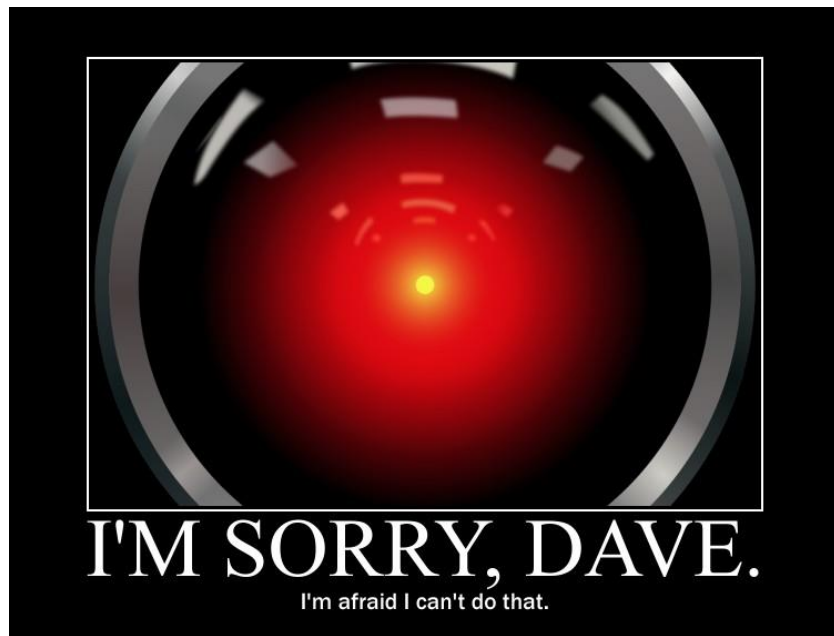
Borrower NDOSU
Max Cost USD 25.00
Need Before 01/31/2020
Requested on 11/26/2019
Due Date 02/01/2020
Item Barcode

Symptom: Drop in lending requests

Lender Activity Overview Report -- Institution

		History				
	Aug 2019	Jul 2019	Jun 2019	May 2019	Apr 2019	
Requests Received	9	868	1019	1109	1288	
Requests From WorldCat	9	864	1016	1101	1283	
Requests Cancelled	0	0	8	2	1	

Symptom: Requests **only** for items you will not lend



Symptom: You're closed but still receiving requests

Loans

Add

Book Loan

Edit

Delete

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None Loan Period: None Renewal Max: None Renewal Period: None	Per Item: • 1 - 11 : 15.00 Currency: United States Dollar Tax Included: No	Groups: ✓ Any Libraries: ✓ Any Locations: ✓ Any	Collections: ✓ Any Formats: ✓ Any	
Note: We'll be closed for the holidays from 12/15/2019 - 1/15/2020				

Closures

holiday break

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Holiday	01/03/2020 thru 01/15/2020	Yes	

Benefits of fixing these problems

- ILL staff spend much less time saying No to lending requests
- Requests more quickly get to libraries that can fulfill them
- Turnaround time improves across the entire network

IMPORTANCE OF SCHEDULE AND CONTACTS

Schedule and Contacts: Things to consider

- Are your Schedule and Contacts up to date?
- Are you adding your holidays and other closings to your Schedule? Or manually setting your library to non-supplier (“going lowercase”)?
- Is Article Exchange set up correctly under Contacts?

Importance of Schedule

Profile Collections Policies (5) **Schedule** Contacts

Last updated Sunday, July 7, 2019 12:00:11 AM EDT

Operating Hours

Office Hours

DAYS	HOURS	NOTES
Monday thru Friday	8:00 AM to 5:00 PM	All times Central

Closures

July 4th

TYPE	CLOSED DATES	OCLC SUPPLIER	NOTES
Holiday	07/03/2019 thru 07/06/2019	No	

Edit Closure

* Required Fields

* Name: Fall Break

* Type: Closed

* Start Date (MM/DD/YYYY): 11/20/2019 End Date (MM/DD/YYYY): 11/25/2019

* OCLC Supplier? ☐ Yes ☒ No

Notes:

Cancel Save

Importance of Contacts

Profile

Collections

Policies (11)

Schedule

Contacts

Last updated Sunday, January 6, 2019 12:00:09 AM EST

▼ Contacts

Add

TYPE	CONTACT
Article Exchange	<div>URL: sourcefinder@nku.edu Edit Delete</div>
Billing	<div><div>Attention: Crissy Ross Edit Delete</div><div>Address: Northern Kentucky University, Steely Library SL 250 SourceFinder. Nunn Drive Highland Heights, Kentucky US 41099</div><div>Phone: 859-572-7621</div><div>E-mail: sourcefinder@nku.edu</div><div>Note: Contact for upper level questions.</div></div>
Borrowing Information	<div><div>Attention: Danny Lovell Edit Delete</div><div>Address: Northern Kentucky University Steely Library - RM 250 Highland Heights, Kentucky US 41099</div><div>Phone: 859.572.6143</div><div>E-mail: sourcefinder@nku.edu</div></div>

SETTING POLICIES

Policies versus Deflections

Profile Collections **Policies (5)** Schedule Contacts

Last updated Sunday, July 7, 2019 12:00:11 AM EDT

- Deflections + Add
- Copies + Add
- Loans + Add

[WorldCat Registry Profile](#)

Informational only

Actually auto-deflect requests

When reviewing Policies, consider...

- Are your Policies still accurate? Are they thorough?
- Does your loan period as stated match what you apply in practice (via Constant Data)?

Policies you can set...

▼ Copies

Copy

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies: <ul style="list-style-type: none">Photocopy	Per Request: <ul style="list-style-type: none">1 - 30 : No Charge31 - 50 : 5.0051 - 100 : 10.00 Currency: United States Dollar Tax Included: No	Groups: ✔ Any Libraries: ✔ Any Locations: ✔ Any	Collections: ✔ Any Formats: ✖ E-Text	Requests: <ol style="list-style-type: none">OCLC ILLALAFaxMailEmail Delivery: <ol style="list-style-type: none">Mail Billing: <ol style="list-style-type: none">OCLC IFM

▼ Loans

Loan

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Item Max: None Loan Period: 4 Week(s) Renewal Max: None Renewal Period: 2 Week(s)	Per Request: <ul style="list-style-type: none">No Charge Currency: United States Dollar Tax Included: No	Groups: ✔ Any Libraries: ✔ Any Locations: ✔ Any	Collections: ✔ Any Formats: <ul style="list-style-type: none">✖ Computer File✖ E-Audio Book✖ E-Serial✖ E-Text✖ Serial - Bound✖ Serial - Unbound✖ Thesis	Requests: <ol style="list-style-type: none">OCLC ILLFaxMailALAEmail Delivery: <ol style="list-style-type: none">Mail Billing: <ol style="list-style-type: none">Bills Not Issued

Ensuring consistency with practice

Loan

SERVICE

Loan Item Max: None
Loan Period: 4 Week(s)
Renewal Max: None
Renewal Period: 2 Week(s)



Description:

Default Constant Data record for Institution Symbol (NDOSU)

Due Date:
+28

Relative to today's date (format: +DDD)

Loan

SERVICE

Loan Item Max: None
Loan Period: 8 Week(s)
Renewal Max: None
Renewal Period: 8 Week(s)



Description:

Used for Notifications test setup/testing.

Due Date:
+14

Relative to today's date (format: +DDD)

USING DEFLECTIONS TO YOUR ADVANTAGE

Considerations for Deflections

- You'll save time manually saying No to requests you cannot fill due to local policies
- Do you have some Deflections set up?
- Do your Deflections make sense? Match your library policies? Can you describe in plain English what they are doing?
- Don't use Deflections to record notes about your collection
- Within Deflections, the criteria are ANDed together. Between Deflections, OR is used.

What can I deflect on?





- Service
 - Loan
 - Copy
 - Loan or Copy
- Borrowers
 - OCLC Profiled Group
 - Custom Holdings Group
- Fees
 - Borrower max cost
- Item
 - Format
 - E-License Terms
 - Material Age
- Combinations

Examples of common Deflections

- Deflecting very new or very old materials
- Deflecting e-books
- Deflecting based on max cost – *can exclude groups*
- Deflecting knowledge base collections

eBooks

 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">  E-Audio Book  E-Serial  E-Text  Internet Resource

Note: UEL cannot lend eBooks - can copy chapters.

Sound Recording--LP





 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection		Groups: <ul style="list-style-type: none">  IALI  ILSU 	Formats: <ul style="list-style-type: none">  Sound Recording - LP

Note: Indiana Libraries CAN borrow LPs; NO RENEWALS

eBooks




 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">  E-Audio Book  E-Serial  E-Text  Internet Resource

Note: UEL cannot lend eBooks - can copy chapters.


Sound Recording--LP

 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection		Groups: <ul style="list-style-type: none">  IALI  ILSU 	Formats: <ul style="list-style-type: none">  Sound Recording - LP

Note: Indiana Libraries CAN borrow LPs; NO RENEWALS

Charge Fees to Everyone Except Consortia

SERVICE	FEES	BORROWERS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	Max Cost: < 10.00	Custom Holding Groups:  TESTINSTITUTIONS
Note:		

Charge Fees to Everyone Except Consortia

SERVICE	FEES	BORROWERS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	Maximum Fee: < 10.00	Custom Holding Groups: ❌ TESTINSTITUTIONS
Note:		

Examples of what NOT to do!

Journal of Personality and Social Psychology

 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
---------	------	-----------	-------

Requests: Copy or Loan

Deflection Type: Enable Real Time Deflection

Note: NDHCO only owns Volumes 24-26 of this title. We will not supply color copies.

We don't lend e-books

 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
---------	------	-----------	-------

Requests: Loan

Deflection Type: Disable Deflection

Note:

Examples of what NOT to do!

Journal of Personality and Social Psychology

 [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			
Note: NDHCO only owns Volumes 24-26 of this title. We will not purchase other copies.			

We don't lend e-books

 [Edit](#)  [Delete](#)



SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Disable Deflection			
Note:			

If you have a note to add about your specific holdings or formats you supply, add it to the Copy or Loan Policies.



Instead... do this

Remember... if you set no criteria in a Deflection, your Deflection will apply to **everything**.

We don't lend ebooks [Edit](#)  [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none"><input checked="" type="checkbox"/> E-Audio Book<input checked="" type="checkbox"/> E-Text<input checked="" type="checkbox"/> Internet Resource
Note:			

Examples of what NOT to do!

Deflections

Add

journal article deflection

EditDelete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">✓ Computer File✓ E-Serial✓ Microform✓ Newspaper✓ Serial
Note:			

No lending when license terms say No

EditDelete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			E-License Terms: <ul style="list-style-type: none">✓ No
Note:			

Examples of what NOT to do!

Deflections Add

journal article deflection Edit Delete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">✓ Computer File✓ E-Serial✓ Microform✓ Newspaper✓ Serial
Note:			

No lending when license terms say No Edit Delete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			E-License Terms: <ul style="list-style-type: none">✓ No
Note:			



Instead... do this

If you want to deflect by license terms, use an e-license deflection policy alone.

▼ Deflections

Add

No lending when license terms say no

Edit

Delete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			E-License Terms: <div><div>✓</div>No</div>
Note:			

Examples of what NOT to do!

Test 1/29

 [Edit](#)  [Delete](#)


SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection	Max Cost: < 10.00	Custom Holding Groups: <input checked="" type="checkbox"/> NDCLV1 <input checked="" type="checkbox"/> NDCLV2	Formats: <input checked="" type="checkbox"/> Book <input checked="" type="checkbox"/> Map <input checked="" type="checkbox"/> Visual Material - DVD <input checked="" type="checkbox"/> Visual Material - VHS Material Age: < 2

Note:

Examples of what NOT to do!

Test 1/29 [Edit](#) [Delete](#)

SERVICE	FEE	POWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection	Max C 10.00	Custom Holding Groups: <input checked="" type="checkbox"/> NDCLV1 <input checked="" type="checkbox"/> NDCLV2	Formats: <input checked="" type="checkbox"/> Book <input checked="" type="checkbox"/> Map <input checked="" type="checkbox"/> Visual Material - DVD <input checked="" type="checkbox"/> Visual Material - VHS Material Age: < 2
Note:			



Instead... do this

Create multiple deflections to represent each conceptual reason you are deflecting.

We don't lend to these groups

[Edit](#) [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection		Groups: ✓ SH#P ✓ OWOR	
Note: We do not lend or supply copies to libraries in these 2 groups.			

Deflect requests when max cost is less than what I charge

[Edit](#) [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	Max Cost: < 10.00		
Note: This deflects all copy and loan requests from all borrowers whose max cost is less than \$10, which is what I charge.			

We don't lend new videos, maps, or books

[Edit](#) [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: ✓ Book ✓ Map ✓ Visual Material ✓ Visual Material - DVD ✓ Visual Material - VHS Material Age: < 2
Note: This policy deflects all loan requests from all borrowers for maps, videos, and books published in the last 2 years.			

AND versus OR – Incorrect

Can you spot the problem with this policy?

We don't lend theseEditDelete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">✓ Sound Recording✓ Sound Recording - Cassette✓ Sound Recording - CD✓ Sound Recording - LP✓ Visual Material✓ Visual Material - DVD✓ Visual Material - VHS E-License Terms: <ul style="list-style-type: none">✓ No
Note:			

AND versus OR – Incorrect

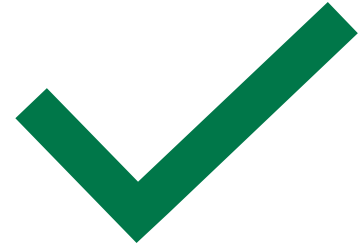
Can you spot the problem with this policy?

We don't lend theseEditDelete

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			Formats: <ul style="list-style-type: none">✓ Sound Recording✓ Sound Recording - Cassette✓ Sound Recording - CD✓ Sound Recording - LP✓ Visual Material✓ Visual Material - DVD✓ Visual Material - VHS E-License Terms: <ul style="list-style-type: none">✓ No

Note:

AND versus OR – Correct!



E-License Terms Deflection [Edit](#) [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy Deflection Type: Enable Real Time Deflection			E-License Terms: ✔ No

Note: We don't supply any materials from collections in which our e-license terms are set to no.

We don't lend AV [Edit](#) [Delete](#)

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection			Formats: ✔ Sound Recording ✔ Sound Recording - Cassette ✔ Sound Recording - CD ✔ Sound Recording - LP ✔ Visual Material ✔ Visual Material - DVD ✔ Visual Material - VHS

Note: We do not lend any AV formats.

Tips for Deflections

- Base your Deflections on request type, item format, fees, groups, or some combination of these
- But keep it simple – just one or two attributes per deflection
- And review Policies periodically

Auto-deflecting helps get requests more quickly into the hands of lenders that can supply them

ASSESSING YOUR DEFLECTIONS

Tools to access your Deflections

OCLC Usage Statistics

Resource Sharing Lender
Reasons for No Report

The screenshot displays the OCLC Usage Statistics web application. On the left is a sidebar with navigation buttons: WorldCat Discovery, WorldCat.org, OCLC WorldShare Management Services (WMS), OCLC WorldShare Interlibrary Loan, Cataloging, COUNTER, Digital Collections, Link Resolver, WebDewey, and Assessment Tools. The main area at the top shows filters for 'Period' (September 2019), 'Months' (6), and an 'Update' button. Below these is a dropdown for 'Institution: OMB'. A list of reports follows, each with a download icon and an envelope icon. The report 'Resource Sharing Lender Reasons For No Report' is highlighted with a blue rectangular box. Other reports in the list include WorldShare ILL Purchase Request, Resource Sharing Borrower Reasons For No Report, Borrower Resource Sharing Stats Report, Lender Resource Sharing Stats Report, Strategic Union List Report, Borrower Activity Overview Report, Lender Activity Overview Report, Borrower Transaction-Level Detail Report, Lender Transaction-Level Detail Report, eSerials Requests by Journal Title Report, Serials Request Overview Report, Copyright Compliance Payment Report, Daily Article Exchange Lending Report, and Institution Article Exchange Monthly Uploads.

OCLC® Usage Statistics

Period: September 2019 Months: 6 Update

▼ Institution: OMB

- WorldShare ILL Purchase Request
- Resource Sharing Borrower Reasons For No Report
- Resource Sharing Lender Reasons For No Report**
- Borrower Resource Sharing Stats Report
- Lender Resource Sharing Stats Report
- Strategic Union List Report
- Borrower Activity Overview Report
- Lender Activity Overview Report
- Borrower Transaction-Level Detail Report
- Lender Transaction-Level Detail Report
- eSerials Requests by Journal Title Report
- Serials Request Overview Report
- Copyright Compliance Payment Report
- Daily Article Exchange Lending Report
- Institution Article Exchange Monthly Uploads

Resource Sharing Lender Reasons For No Report

REPORTING PERIOD:
December 2019

INSTITUTION:
ND HENNEPIN CNTY LIBR

SYMBOL:
NDHCO

ILL Record Number	Illiad TN	Title	OCLC #	Imprint Date	Article(Citation)	Date(Citation)	Borrower Symbol	Borrower Full Name	Reason For No	Lender Unfilled Date
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AUTO-DEFLECTION:
FORMAT TYPE

DEFLECTION - NOT
CURRENTLY A SUPPLIER

DEFLECTION - CUSTOM
GROUP

DEFLECTION - E-LICENSE
TERM

DEFLECTION - E-LICENSE
TERM

TAKEAWAYS AND GETTING ASSISTANCE

Suggested to-do list

- Review the checklist
 - Schedule and Contacts
 - Loan and Copy Policies
 - Deflections
 - Usage Statistics
- Attend office hour

Checklist: Fine-tune your Policies and Deflections

Part 1 of the OCLC Resource Sharing Workshop Series

Policies Directory – Schedule tab

Operating Hours

- List your department's regular operating hours
- If you have multiple locations, you can have multiple entries

Closures

- If you know about any closures in advance (e.g., holiday breaks), set them up
- Create start and end dates for the closure and a closure type
- Be sure to set yourself to OCLC Supplier? **No** during these closures
- Include any notes if necessary (but remember the notes are informational only)

Policies Directory – Contacts tab

- Be sure your contact information is up to date
- You can create or edit separate entries for borrowing, lending, billing, and shipping contacts if needed
- Delete any out-of-date information (e.g., Ariel address)

Policies Directory – Policies tab

Policies

- Remember, these are **informational only**
- Do you have a copy policy? Is it up to date? Do you list what you charge?
- Do you have a loan policy? Is it up to date? Do you list what you charge?
- Does the loan period listed in your loan policy match what you apply in practice (with constant data)?

Deflections

- Do you have deflections set up to match your lending policies? (e.g., you don't lend AV, you charge a fee to supply requests)
- Can you read your policies in plain English and know what they are doing?
- Make sure your policies are simple and do not combine too many criteria; remember, within one policy, the criteria are ANDed together. Between policies, OR is used.

Assessing your Deflections

OCLC Usage Statistics (www.stats.oclc.org)

- Review the **Resource Sharing Lender Reasons For No Report**
- Access this report monthly
- Look for entries about deflections
- Did you intend to deflect the requests that were deflected?
- Do you see Policy Problem as a common Reason For NO? If so, you may need a new deflection policy
- Based on information you see in this report, review your deflection policies in Policies Directory



Office Hour: Friday, February 7

1:00-2:00 pm ET



Register for Office Hours: Fine-tune your Policies and Deflections

Please provide the following information to register for this training session. You will receive an email confirmation of your registration.

Session Information

Topic:	Office Hours: Fine-tune your Policies and Deflections
Session status:	Not Started
Session dates:	Friday, February 7, 2020
Starting time:	1:00 pm, Eastern Standard Time (New York, GMT-05:00)
Duration:	1 hour
Presenters:	Alena Miller, Jenny Rosenfeld
Description:	
Host's name:	Delivery Community
Host's email:	delivery-community@oclc.org

Welcome to OCLC Support

How can we help you?

Select a category



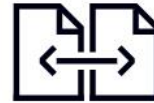
Discovery and Reference



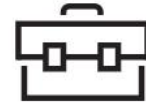
Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox

OCLC Resource Sharing team



Thank you!

Your Resource Sharing team

support@oclc.org

**Because
what is
known must
be shared.®**