Deflection Policy Fields: Categories and Category Exceptions

Definitions and notes on the categories and the exceptions (moving from the top to the bottom of the screen):

**General**
- Required fields are marked by the red asterisk (*).
- The different categories can be combined. [Boolean AND is used to combine categories]
- The category can have more than one value (e.g. more than one format). [Boolean OR is used to combine multiple values of one category]

**Policy Name**
- Must be unique
- Can be seen by other libraries - be descriptive.

**Service**

**Request Type:**
- Is the deflection policy for loan requests, copy request, or both?
- Select Loan or Copy if you desire to make the deflection policy specific to one category of requests. Otherwise, select Copy or Loan.

**Deflection Type:**
- The entire deflection policy can be disabled, if needed,
- The exception for the last lender in the string is in this dropdown box.

**Fees**
- If the borrower’s maximum cost is less than the value entered, the request will be deflected.
- Enter only a single number as a currency value (no symbols such as $).
- The number may include a decimal point but does not have to be a full dollar amount.
- *Examples:* 10, 10.00, 10.25

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**Borrowers**
- **None** means there are no limits or exceptions to your deflection policy; in other words, your deflection policy applies to everyone.
- **Include** is a Limiter – it limits the deflection to only the selected groups/formats OR
- **Exclude** creates an Exception to the policy for the selected groups/formats

**OCLC Group:**
- A 4-letter group access code (GAC) or Union List code (UL).
- Click inside drop-down menu to display full list of OCLC Groups to choose from

**Custom Holdings Group:**
- Your custom holdings groups are listed in the dropdown box.
- Click inside drop-down menu to display full list of OCLC Groups to choose from
Items

Format:

- Based on the format of the linked bibliographic master record from WorldCat.
- For specific format definitions, see the table of deflection formats on pp. 9-10 in the OCLC™ Policies Directory Quick Reference.

Material Age:

- If the item is of a specified age, the request will be deflected.
- Matches against the publication date listed in the linked bibliographic record.
- Can be less than 1-10 years, more than 10-500 years, or a combination of both. [Boolean OR used to combine values selected for Material age]

Notes:

- Consider adding a description of deflection intention.
- Consider providing a date stamp and staff initials in notes.

Combining criteria considerations:

If you add a second criteria to the policy in a text or selection box on the deflection policy entry screen, such as Format = AV / Material age = less than one year, the system treats this as a Boolean AND and not as a Boolean OR. You will still receive requests for items that are less than one year old. If you wish to deflect all AV materials and all materials less than one year old (i.e. you need a Boolean OR type of result), you will need a second deflection policy.
Step by Step Instructions to Create a Local Holdings Record (LHR) for Deflection

1. Using the cataloging authorization and password supplied to you, logon to the Connexion Bowser by logging on directly at: http://connexion.oclc.org

2. Click on the Search button beneath the Cataloging tab to bring up the search screen.

3. In the Keyword/Numeric Search section of the screen, click on the dropdown box to select your search index. Then, enter your search key. The example below illustrates how you would search on an ISBN. When you are finished, click on the Search button.

4. The bibliographic record comes up. In the top middle of the screen, click on the Action dropdown box and select Create Local Holdings.

5. This brings up the LHR workform. Click on the plus sign to the left of the Leader field and fill it in as follows:

   Encoding level must be step to Level 2 or higher. If editing an existing LHR, do not set an
encoding level lower than currently set in the record. Click Apply when finished.

Now, click the plus sign to the left of the 008 field. Using the dropdown boxes in Byte 20 (Lending policy) and Byte 21 (Reproduction policy), select the policy desired. Click Apply when finished.
6. Delete any and all fields that are below the 852 field. Do this for each field one at a time by clicking on the **Functions** dropdown box to the right of the field line and selecting **Delete field**.

If these fields do contain volume and issue information, check with your cataloging department before removing these fields. Usually deleting the 853 field automatically deletes 866.

7. To save the record and activate it, click on the Action dropdown box in the top middle of the screen and select **Add record**. The system will confirm that it has added the LHR.

To add additional LHRs, repeat steps 2-7. When you are ready to exit Connection, go to the black bar in the upper right part of the screen and click on **Logoff**.