

Basics of Deflections transcripts

Hi. Welcome to the Basics of Deflections session.

In this video, you will have an overview in how lending libraries can set up deflections by changing the supplier status, setting up category-level deflection in OCLC Policies Directory, and setting up item-level deflections in local holdings records (or LHRs), you will also see where to find information in how to contact support, find training materials and documentation.

Deflection is a feature that is such a time-saver because Lending libraries will often get requests for items that they do not lend over ILL- usually because their policies or license agreements dictate that certain items cannot be loaned through interlibrary loan. Deflection allows the system to say “no” to these requests on your behalf. It will skip your library in the lender string and move the request on to the next lender.

The types of deflection are supplier status, category-level, and item-level. We can consider supplier status as a type of deflection because once you set on the OCLC Policies Directory that your library is not a supplier for ILL, does not lend items via ILL, this action will automatically deflect all requests for your library. Let’s take a look at all the three types of deflection.

Supplier Status is set in the OCLC Policies Directory page. The best way to access the OCLC Policies Directory page is from the respective link on your OCLC interlibrary loan service homepage.

From there, go to the profile tab and click the Edit link on the OCLC Supplier field to change your supplier status. OCLC Supplier = Yes means that your library will loan materials via ILL. OCLC Supplier= No means that your library will not loan materials via ILL, then borrowing libraries will be unable to place requests to your library.

That’s why we consider the supplier status a type of deflection.

You can set OCLC Supplier temporarily to “no” for a period your library won’t lend materials and then edit it to change it back to “yes” after that period

You can also set up temporary supplier status for your library for closures dates.

You can change your temporary supplier status on the Schedule tab under the Closures option.

When you click on the Add button a form like this pops up so you can enter the name for your closure

select the type of closure, the start and end dates, and you can set your supplier status to “no” for that period when your library won’t answer to ILL requests.

Then you save your form.

The system then will automatically look at the closure dates and set your supplier status to “no” for those dates.

When libraries see your library listed on item search results, they will then notice that your library is not a supplier and they won’t be able to add your library to the lender string for that period. You can edit or delete this closure schedule at any time.

The other type of Deflection is Category-level, which is for items of a particular type, and it is managed through License Manager (or Collection Manager) and the OCLC Policies Directory.

In this video, we will concentrate on category-level deflection through the OCLC Policies Directory.

Please, refer to our training portal for category-level deflection via License Manager or Collection Manager.

So, let’s take look at how category-level deflection is set up using OCLC Policies Directory.

You can create deflection policies based on format, group, cost, and/or age of items categories. You can create multiple policies as needed.

After logging in to your account on your OCLC Interlibrary loan service, click on the link to the OCLC Policies Directory on the homepage.

Category-level deflection in OCLC Policies Directory is set up on the Policies tab under Deflections. You can edit or delete policies already created or you can click on the Add button to create a new deflection policy.

After you click on the Add button a form like this pops up for you to enter your deflection name and deflection options. On the Service section, you can select if your request type is for Copy, Loan, or both.

You can also define if your deflection type is real time, real time except when last in the lender string, or you can disable the deflection.

On the Fees section you can deflect by the maximum cost the borrower accepts (i.e. my library will deflect anything where the maximum cost is under \$10).

On the Borrower section you can include or exclude OCLC library groups from your deflection policies. An OCLC group is one OCLC has created at the requests of libraries in that group.

You can also create your own custom holdings groups on OCLC Service Configuration and include or exclude any of those groups from your deflection policy. Please, refer to our training portal to access training materials in how to create custom holding groups.

Scroll down on the form to the Items sections where you can include or exclude formats or e-license terms and select the formats to include or exclude on your deflection policy.

You can also include or exclude e-license terms and select the e-license terms to be part of this deflection policy. E-license terms are configured on Collection Manager in WorldShare Metadata or in WorldShare License Manager service if your library subscribes to this service.

Please, refer to our training portal to find training materials in how to set up e-license terms. Include means that those formats and/or e-license terms marked as “no” will be automatically deflected while exclude means they will not be automatically deflected.

You can also deflect by material age by selecting if the materials will be Less or More than certain age. You can also add any notes you find useful and then save your deflection form.

Here an example of a deflection policy where my library does NOT loan audio-visual materials over ILL. This is what your library and other libraries see on your policies page after you create any policy.

When creating category-level deflection, keep in mind what you want to include and/or exclude from your policy. Anything with the green mark is included in the policy while anything with the red X is excluded from the policy. Let’s see how this deflection form was filled.

I entered the name of my policy to be AV (or audio visual) Deflection Policy, I selected the request type to be Copy or Loan and the Deflection Type to be Enable Real Time Deflection.

I left the Fees field in blank because I’m deflecting by format and not costs. scrolling down on the form I also left the Borrowers section as None for both OCLC Group and Custom Holding Group because the deflection is for all libraries.

scrolling down on the form, in the Items section under Formats I marked Include and marked the formats Visual Material, Visual Material-DVD, and Visual Material-VHS.

scrolling down to the end of the form I added the Note: We do not loan AV items over ILL and then clicked Save to save my policy.

The other type of Deflection is Item-level, which is for a specific item and it is managed via Local Holdings Records or LHRs in the OCLC cataloging services Connexion Browser and Record Manager.

It requires full-level cataloging authorization. Note that there's no exceptions for item-level deflection. Let's take a look at how item-level deflection is set up.

Item-level deflection is done through Local Holding Records or LHRs. This is when you want to deflect specific materials such as serials title (print and or electronic) or non-circulating reference books, for example.

You can either edit or create LHRs by using Record Manager service on WorldShare Metadata or OCLC Connexion Browser, if your library has an OCLC cataloging subscription.

To define item-level deflection on LHRs, make sure that the encoding level at the leader is set to 2 or higher.

Then expand the 008 field by clicking on the plus sign and change the Lending policy (character position 20) and Reproduction policy (character position 21) as desired where "a" means your library will lend and/or reproduce the item, and "b" means your library will not lend and/or reproduce the item.

Then select "Add Record" option on the Action dropdown box. Please, visit our Training Portal if you want to learn in detail how to create LHRs.

If you have questions, please contact OCLC Support in your region at the url on the screen. Thanks for watching!