

## **Deflecting knowledge base collections transcripts**

Hi welcome to the Deflecting knowledge  
base collections session. In this video

you'll have an overview in how to deflect  
your knowledge base collections through

license terms using either WorldShare  
Collection Manager or WorldShare License Manager

service if your library subscribes to  
this service. You'll also see how to contact

support and access more training  
materials and documentation. If your

library maintains electronic collections  
through the knowledge base using

Collection Manager you can set e-license  
the terms related to interlibrary loan

per collection. This level of detail  
allows deflection to be applied

based on license terms. First add your collection to the knowledge base from

Collection Manager which is included with your full cataloging subscription

This work is generally managed by your electronic resources librarian. ILL staff

should work with them to fine-tune how best to respond to ILL requests for

articles in these collections. Next depending on the subscription services

your library has you can manage ILL terms of usage or e-license terms within

Collection Manager or using an added service License Manager if your library

subscribes to this service. Using Service Configuration turn on knowledge base

settings in an interlibrary loan configuration to activate a link to your

knowledge base collections for enhanced  
interlibrary loan of articles

including display of ILL terms of use  
within your interlibrary loan request

form. Finally to have the system  
automatically say no to request for

titles within your knowledge base  
collections which do not allow resource

sharing and set deflection policies in the  
OCLC Policies Directory

To add collection to your knowledge  
base first search for the collection

within Collection Manager under the  
Metadata tab. Once the collection is

identified

select the collection to add it. After

the collection is added you can further  
configure the settings. Training sessions

videos and documentation are available in Collection Manager. If your library has a full cataloging subscription you have access to use Collection Manager. This slide illustrates that there are two methods of setting ILL terms of use on your collections: Collection Manager on the left and License Manager on the right, both run in the WorldShare platform. If you have a subscription to License Manager, you manage your ILL rights within that too. Those rights can be accessed by your interlibrary loan services to determine if a request can or cannot be filled through knowledge base collection settings. Again we have additional training videos and

documentation on these services Collection

Manager and License Manager. You can  
activate your knowledge base for

enhanced ILL in OCLC Service

Configuration. The best way to access the

OCLC Service Configuration is by

clicking on the respective link on your

OCLC interlibrary service home page. From there

click on interlibrary loan options. After

you have collection set in the

knowledge base activate a link to these

collections from the ILL request form.

This enables ILL staff to see what

requests may be filled from a

knowledge base collection and ILL rights

set will display indicating special

Terms of Use if applicable. For example,

one license may allow ILL within the same country and if shared through a

secure site such as Article Exchange.

Then you create your deflection policies

in OCLC Policies Directory by clicking the respective link you can find on your

OCLC interlibrary loan services home page. If you have collections that cannot be

shared through ILL indicate this restriction in the

ILL terms of use. Since it's license forbid sharing it will save staff time

and potential license violations by setting up a deflection policy based on

e-license terms. You can create your e-license deflection form in OCLC Policies

Directory under the Policies tab by clicking the Add button on the

deflections option. This example illustrates how you should fill your

e-license deflection form. If the terms are set to no it will automatically deflect

requests for the title or articles within those collections. Reviewing these

steps: once your collections are added to the knowledge base and ILL terms

established, you can activate the link to your knowledge base collections within

your interlibrary loan service then save staff time and automatically follow

license terms, create a deflection policy based on e-license terms. If you have

questions, please contact OCLC support in your region at the URL on the screen.

Thanks for watching

