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