How to deflect lending requests (License Manager)

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WorldShare Interlibrary Loan libraries can add an ILL term of use in Licenses and use a deflection policy to deflect lending requests for e-resources titles.

Overview

License Manager makes it easy to store a full set of license terms including ILL terms. If your library subscribes to WorldShare ILL or Tipasa and to License Manager, use the instructions on this page to add a Interlibrary Loan term to a license, set it to "No," and create a deflection policy. See Deflection scenarios to help you understand the deflection process.

If your library does not subscribe to License Manager, you can store ILL terms of use within a knowledge base collection and create a deflection policy. For instructions, please see How to deflect lending requests (knowledge base collections).

About License Manager subscriptions

<table>
<thead>
<tr>
<th>ACCESS AND/OR SUBSCRIPTION</th>
<th>WHERE TO STORE ILL TERMS OF USE</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLLECTION MANAGER</td>
<td>You are able to store ILL terms of use in your knowledge base collections. You also have the option to lend and to define your terms. &quot;No&quot; is the default selection for the ILL setting.</td>
</tr>
<tr>
<td>COLLECTION MANAGER AND LICENSE MANAGER</td>
<td>You have direct access to the full set of license terms and ILL settings. Configure your ILL terms within the Licenses tab of the WorldShare interface. You will not see the knowledge base collection ILL setting.</td>
</tr>
<tr>
<td>COLLECTION MANAGER AND LICENSE MANAGER (TRANSITIONING)</td>
<td>If you previously managed your ILL terms within knowledge base collections, your ILL settings are now available in the Licenses tab. You will no longer see the ILL setting in knowledge base collections. You have direct access to the full set of license terms and ILL settings. The default collection-level setting will be &quot;No.&quot; You only need to change the setting if you wish to lend a collection. In addition to &quot;Yes&quot; and &quot;No,&quot; you will have the &quot;Silent&quot; option.</td>
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Watch a video

Setting up deflections in License Manager (9:46)

This video shows how libraries can set up ILL deflections using License Manager.

Media, iframe, embed and object tags are not supported inside of a PDF.

Add a knowledge base collection

You must have added a knowledge base collection in Collection Manager before you can set up your interlibrary loan policies.

1. See Choose a method to add or create a knowledge base collection.
2. Add a knowledge base collection in Collection Manager.

Optional. View the list of collections that other libraries have enabled for interlibrary loan for help with your decision to lend.

Add an Interlibrary Loan term to a license

1. Expand Licenses and search for a license.
2. Click on the name of the license to open it.
3. Expand the Terms of Use accordion.
4. Click on the User Access tab.
5. Use the drop-down list to select the term Interlibrary Loan (Preferred).
6. For Terms Stated, select No from the drop-down list.

Create a deflection policy

Sign in to the OCLC Policies Directory:

1. Gather your ILL authorization and password or your WorldShare Interlibrary Loan username and password (OCLC Services account).
2. Sign in using one of two options:
   ◦ Sign in to the WorldShare interface and navigate to Interlibrary Loan > OCLC Policies Directory, or
   ◦ Sign in to the OCLC Policies Directory at https://illpolicies.oclc.org

Create a deflection policy:
1. Click the **Policies** tab.
2. Click the **Add** button at the end of the Deflections bar.
3. On the Add Deflection Policy window, enter a **Policy Name**.
4. Select the **Request type** from the list. OCLC recommends using **Copy or Loan**.
5. Select the **Deflection type** from the list. Select **Enable Real Time Deflection** to automatically deflect requests matching the specifications in the policy.
6. In the **Items** section, for **E-License Terms**, select **Include**.
7. Click the arrow, and select **No**. This is the setting that deflects lending requests for your collections set to **No**.

10. Click **Save**.

Your policy has been added. When another library requests to copy or loan an item, the request will be deflected. Collections set to **Yes** will be excluded from deflection. Therefore, you will receive requests for items from those collections.

You can return at any time to modify the policy. Use the **Edit** and **Delete** options if you need to modify your policy.

Note: You will still get ILL requests passed through for items that fall outside your coverage range or within embargo dates even though you make the above-mentioned change to your current deflection policy. OCLC Currently holds a "Do no harm" policy.

**Other methods to deflect lending requests**

**Create a deflection policy for all e-content based on format**

If your library does not loan ANY electronic items, you can deflect ILL requests on all eBooks and other electronic items by setting up a deflection policy to deflect on the formats:

- E-Audio Book
- E-Serial
- E-Text
- Internet Resource

For more information on deflection policies and example deflection policies, see the OCLC Policies Directory documentation.

**Create a deflection policy based information in your local holdings records (LHRs)**

You have the option to add or edit local holdings records (LHRs) to include will not lend in the 008 field (bytes 20 and 21 are used for information on lending and reproduction policies). You can then create a deflection policy to deflect on information in the 008 field of your LHRs.

For more information on LHRs, see the Local holdings records section of the Record Manager help.

For more information on deflection policies and example deflection policies, see the OCLC Policies Directory documentation.

**Activate the linking feature in lending and borrowing requests**

After your lending and deflection policies are in place, you are ready to start handling requests for your knowledge base titles.

To allow links to full-text items to be embedded in borrowing and lending requests:

1. Sign in to **OCLC Service Configuration**.
2. On the left panel, navigate to WorldShare ILL > Interlibrary Loan Options > Knowledge Base Active Link.
3. In the Knowledge Base section, check On.
4. Click Save at the bottom of the screen.

Additional configuration options (Optional)

See the Collection Manager site for help to:

- Set holdings in WorldCat on your knowledge base collections in Collection Manager. See Institution settings, WorldCat Holdings

See the WorldCat Discovery site for help to:

- Configure a request button for your patrons. Depending on how you configure your ILL button display, patrons might still see request options in WorldCat Discovery. However, requests will be deflected on the items covered by your deflection policy
- Add proxy information and a prompt for patrons' remote access options to subscription resources and ILL. Find the settings in OCLC Service Configuration > WorldCat Discovery and WorldCat Local > User Interface Options > Custom link(s).

See the WorldShare Interlibrary Loan or Tipasa sites for help with:

- Knowledge Base Active Link: Select whether you want the system to look through your WorldCat knowledge base collections
- Automations for articles and e-books: Define automations to allow patrons to initiate borrowing requests without assistance from library staff
- Article Exchange: Use a single, secure location where lending libraries can place requested articles