



Getting Started with the OCLC Knowledge Base

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Introduction

- Benefits of using the OCLC Knowledge Base (KB)
- Overview of Setup
- Potential challenges
- Next steps



Benefits to Using the OCLC KB

- **Saves article request processing time:**
 - Borrowing article requests are sent unmediated to libraries who can fill the request from their electronic resources.
 - These requests will only be sent if they meet the criteria you set in your Direct Request profile.
 - They will be sent to libraries you selected for your OCLC KB custom holdings.
 - Lending receives unmediated article requests for which the request can be filled from electronic resources and the ILL licensing terms permit it.

Benefits to Using the OCLC KB

- Easily locate electronic resources you own:
 - Links to locally owned items provided directly in the request.

Awaiting Renewal Request Processing	2
Awaiting Direct Link Processing	2
Awaiting Stacks Searching	22

- Borrowing ILLiad example:

Article Info	Loan Info	Imported Request	Copyright	Billing	Additional	Library	Collections
Collection	ILL Terms	Instructions	URL				
Taylor & Francis Journals Current Content (1997-present)			http://link.worldcat.org/?rft.ins				

Date	Note
6/1/2015 3:28 PM	1. Request matched profile DIRECTAR./2. Held by your library

- Lending ILLiad example:

Article Info	Loan Info	Collections	Aeon Information	Invoice	Local Holdings	Imported Request	Copyright	Additional
Collection	ILL Terms	Instructions	URL					
Elsevier ScienceDirect Journals	Yes		http://link.worldcat.org/?rft.institution_id=110147&spage=131&pkgName=scif					



Overview of Setup

- Activate link for OCLC KB use.
- Get electronic holdings and ILL rights information into the OCLC KB.
- Create Custom Holdings of OCLC KB libraries to be used in your Direct Request electronic articles profile.
- Enable Direct Request and create a Direct Request profile for electronic articles.

Overview of Setup

- Activate link for OCLC KB use in firstsearch.oclc.org/admin Resource Sharing Options.

Home Authentication/Access **Resource Sharing** Linking Interface Display Exit →

Patron ILL Settings
- select an option -

Staff ILL Settings
Resource Sharing Options

OpenURL Links

ILL Authorization: 100070036 | FirstSearch Authorization: 100111450 | Symbol: CGU

Resource Sharing > Staff ILL Settings > Resource Sharing Options

Electronic Delivery Options changes saved

Resource Sharing Options Save Changes

Persistence:
Select whether you wish constant data records be automatically applied to each resource sharing request. If persistence is turned on, a default constant data record will automatically be applied, and if a modified constant data record is selected, that record will be applied to future requests. If persistence is turned off, users must manually select a constant data record for each resource sharing request. On ?

Knowledge Base

Activate link:
Select whether you wish to activate a link to the Library's WorldCat knowledge base for enhanced resource sharing of articles. On ?

Electronic Delivery Options



Overview of Setup

- Get electronic holdings and ILL rights information into the OCLC KB.
 - This can be done with:
 - PubGet
 - A spreadsheet exported from your electronic resources management system
 - Updated manually directly in the WorldShare Metadata module
 - Contact OCLC and your electronic resources staff to determine the best method to do this.

Overview of Setup

- Example of how to manually update electronic holdings directly in the WorldShare Metadata module.

The screenshot displays the WorldShare Metadata interface for a collection named "Taylor & Francis Journals Current Content (1997-present)". The interface is divided into a left sidebar and a main content area. The sidebar contains navigation options such as "Record Manager", "Collection Manager", "Activity History", "Approve Changes to Global Collections", "View Recent Collections", "Create a Collection", "Settings", "My Files", and "My Apps". The main content area shows the configuration for the selected collection, including options for "Maintain WorldCat Holdings", "Data Sources", "ILL allowed", and "ILL Requirement". A dropdown menu for "Export to Global Collection" is open, showing various options like "Print then mail or fax", "Print then send secure electronic", "Send electronic copy", "Print then mail or fax (Non-Profit only)", "Print then send secure electronic (Non-Profit only)", "Send electronic copy (Non-Profit only)", "Print then mail or fax (Same country only)", "Print then send secure electronic (Same country only)", "Send electronic copy (Same country only)", "Print then mail or fax (Same country only) (Non-Profit only)", "Print then send secure electronic (Same country only) (Non-Profit only)", "Send electronic copy (Same country only) (Non-Profit only)", "Same country only", "Non-Profit only", "Silent", and "Unknown".

Overview of Setup

- Create Custom Holdings of OCLC KB libraries to use in your Direct Request profile.
 - Create groups first, then add them to a path.
 - This can be done in firstsearch.oclc.org/admin or directly in ILLiad.

The screenshot shows the ILLiad administration interface for configuring Custom Holdings Paths. The page is titled "Resource Sharing > Staff ILL Settings > Custom Holdings Paths". It includes a navigation menu on the left with "Patron ILL Settings", "Staff ILL Settings" (selected), and "OpenURL Links". The main content area shows the configuration for a path named "DIRECTAR".

Patron ILL Settings: - select an option -

Staff ILL Settings: Custom Holdings Paths

OpenURL Links

ILL Authorization: 100070036 | FirstSearch Authorization: 100111450 | Symbol: CGU

Resource Sharing > Staff ILL Settings > Custom Holdings Paths

View/Print New Blank Record Delete Record Save Changes

To edit a specific Custom Holdings Path:

Select: DIRECTAR Custom Holdings Path OR enter an existing Path Name: DIRECTAR

Go

View/Print Path Descriptions

General Record Information

*Path Name: DIRECTAR Last Modified Date: 20130904

Path Description: Direct request for Articles

Groups available to be included in the path:

- 05DIRECT.....Loan for \$5 or less
- 0DIRECT.....Free loans outside of CIC and Illi
- 10DIRECT.....Loan for \$10 or less
- 15DIRECT.....Loan for \$15 or less
- 20DIRECT.....Loan for \$20 or less
- 25DIRECT.....Loan for \$25 or less
- 30DIRECT.....Loan for over \$25
- AVCHL.....Libraries in the Chicago Metropolita

Groups chosen to be included in the path:

- DIRARCIC.....Direct request for articles CIC
- DIRARFRE.....Direct request for articles Free Lib
- DIRAR05.....Direct request for articles libraries th
- DIRAR10.....Direct request for articles libraries th
- DIRAR15.....Direct request for articles libraries th
- DIRAR20.....Direct request for articles libraries th

Add Remove Up Down

Overview of Setup

- Enable Direct Request and create a Direct Request profile for articles.
- This can be done in firstsearch.oclc.org/admin or directly in ILLiad.

The screenshot shows the 'Profile Information' configuration page in ILLiad. The profile name is 'DIRECTAR' (Last Modified Date: 20100803). The description is 'Direct request for articles'. Under 'Request Types', 'Loan' and 'Copy' are selected. The 'Bibliographic Formats' dropdown is set to 'Newspapers'. The 'Language' dropdown is set to 'Greek'. The 'Route to Review File Options' section includes: 'If Potential Duplicate Request: Yes', 'If Held By Your Institution: Yes', and 'If Held By Custom Holdings Group: - Group Names -'. The 'Additional Profile Options' section includes: 'Constant Data Record: DEFAULT', 'Minimum Number in Lender String: 1', '* Custom Holdings Path: DIRECTAR', 'Produce The Request: Yes', and 'Prefers E article processing: E within group'. A note at the bottom states: 'Note: E article processing requires Knowledge Base activation.' An asterisk (*) indicates a required field.

Overview of Setup

CGU ILLiad Direct Request profile

Name: DIRECTAR
Description: Direct request for articles

Request Sources		Add	Remove
Patron Statuses		Add	Remove
Patron Departments		Add	Remove
Patron Will Pay Up To			
Need At Earliest			
But No Later Than			
Age of Material			
But No Older Than			
WorldCat Direct	Unassigned		

Request Types
 Copy Loan

Bibliographic Formats

- Archival/Mixed Materials
- Books
- Computer Files
- E-Audio
- E-Serials
- E-Texts
- Government Documents
- Integrated Resources
- Internet Resources
- Kits
- Manuscripts
- Maps
- Microforms
- Music Scores
- Newspapers
- Serials
- Sound Recordings
- Sound Recordings - Cassettes
- Sound Recordings - CDs
- Sound Recordings - LPs
- Visual Materials
- Visual Materials - DVDs
- Visual Materials - VHSs

Languages

- Arabic
- Bulgarian
- Chinese
- Danish
- Dutch
- English

Route To Review File Options

- If Potential Duplicate Request
- If Held By Your Institution
- If WorldCat Direct Requested
- If Held By Custom Holdings Group

Additional Profile Options

- Constant Data Record: DEFAULT
- Minimum Number in Lender String: 1
- Custom Holdings Path: DIRECTAR
- Prefers E Article Processing: E within group
- Produce The Request: Yes



Overview of Setup

- **E within group vs E across group**
 - E within group: Lending strings will first be made of lenders within each group where there are electronic holdings and then print holdings moving group by group in the order you listed them.
 - E across group: Lending strings will first be made of lenders across all your custom holding groups that have electronic holdings, then will start at the beginning of your groups again to select libraries with print records.

Overview of Setup

- CGU uses 'E within group' so we exhaust free lenders first before moving to lenders that charge.

The screenshot displays the 'Resource Sharing > Staff ILL Settings > Custom Holdings Paths' page. The breadcrumb trail is 'Resource Sharing > Staff ILL Settings > Custom Holdings Paths'. The page includes a navigation menu on the left with 'Patron ILL Settings', 'Staff ILL Settings' (selected), and 'OpenURL Links'. The main content area shows a form for editing a specific Custom Holdings Path. The 'Select' dropdown is set to 'DIRECTAR' and the 'Custom Holdings Path OR enter an existing Path Name' field contains 'DIRECTAR'. Below this is a 'Go' button and a 'View/Print Path Descriptions' link. The 'General Record Information' section shows 'Path Name: DIRECTAR' and 'Last Modified Date: 20130904'. The 'Path Description' field contains 'Direct request for Articles'. At the bottom, there are two lists of groups: 'Groups available to be included in the path:' and 'Groups chosen to be included in the path:'. The available groups list includes '05DIRECT.....Loan for \$5 or less', '0DIRECT.....Free loans outside of CIC and Illi...', '10DIRECT.....Loan for \$10 or less', '15DIRECT.....Loan for \$15 or less', '20DIRECT.....Loan for \$20 or less', '25DIRECT.....Loan for \$25 or less', '30DIRECT.....Loan for over \$25', and 'AVCHL.....Libraries in the Chicago Metropolita...'. The chosen groups list includes 'DIRARCIC.....Direct request for articles CIC', 'DIRARFRE.....Direct request for articles Free Lib', 'DIRAR05.....Direct request for articles libraries th', 'DIRAR10.....Direct request for articles libraries th', 'DIRAR15.....Direct request for articles libraries th', and 'DIRAR20.....Direct request for articles libraries th'. There are 'Add', 'Remove', 'Up', and 'Down' buttons between the lists.



Potential Challenges

- Maintaining accurate holdings in the OCLC KB.
- Including ILL permissions information in the OCLC KB.
- Custom holdings maintenance.



CGU OCLC KB Statistics

Number of Article Requests Processed by the OCLC KB	July 1, 2013- June 30, 2014
Lending	6293
Borrowing Unmediated	1832
Borrowing Locally Owned	301

Percentage of Article Requests Processed by the OCLC KB	July 1, 2013- June 30, 2014
Lending	17%
Borrowing Unmediated	20%
Borrowing Locally Owned	3%

Next Steps

- Create a custom holdings group for OCLC KB libraries.
 - There are 394 libraries in the KBIL OCLC group.

The screenshot displays the OCLC Policies Directory interface. The search criteria are set to 'Group Symbol' with the value 'KBIL'. The results table shows the following data:

INSTITUTION	SYMBOLS	SUPPLIER	DAYS TO RESPOND	FEES	LOCATION
AORN Research and Information Center ARIC	DNF	Yes	Copies: 4 days Loans: 4 days	Copies: 0.00 USD Loans: 11.00 USD	Denver , CO US
Acadia University Vaughan Memorial Library	AUW	No	Copies: 4 days Loans: 4 days		Wolfville , NS CA
Adler University Harold and Birdie Mosak Library	KDU	No	Copies: 4 days Loans: 4 days	Copies: 0.00 USD Loans: 0.00 USD	Chicago , IL US
Air University Library Muir S. Fairchild Research Information Center	AAU	Yes	Copies: 4 days Loans: 4 days	Copies: 0.00 USD Loans: 0.00 USD	Maxwell AFB , AL US
Alabama State University Levi Watkins Learning Center	AMU	Yes	Copies: 4 days Loans: 4 days	Copies: 0.00 USD Loans: 0.00 USD	Montgomery , AL US

Next Steps

- And use this custom holdings for requests like this one, where the serial record has been exhausted, but there are 47 libraries with the electronic version.

The screenshot shows a library system interface with a search results table. The table has columns for Record, Main Entry, Title, Format, OCLC, Standard Number, Year, Publisher, Owned, Holdings, and L. The first row is highlighted, showing 47 holdings for the electronic version of the journal.

Record	Main Entry	Title	Format	OCLC	Standard Number	Year	Publisher	Owned	Holdings	L
1		Cambridge journal of postcolonial literary inquiry	Internet Resource	882612084	2052-2622	2014;9999		<input type="checkbox"/>	47	
2		Cambridge journal of postcolonial literary inquiry.	Serial	876883462	2052-2614	2014;9999		<input type="checkbox"/>	13	
3		Cambridge journal of postcolonial literary inquiry	Internet Resource	896878071	2052-2622	2014;9999	Cambridge Univ. Press.	<input type="checkbox"/>	9	
4		Cambridge journal of postcolonial literary inquiry	Serial	880364126	2052-2622	2014;9999	Cambridge Univ. Press.	<input type="checkbox"/>	7	
5		Cambridge journal of postcolonial literary inquiry	Internet Resource	869153328	2052-2622	2014;9999	Cambridge University Pr...	<input type="checkbox"/>	2	

Request Finished 5 of 5 results displayed



Next Steps

- Besides setting up your OCLC KB custom holdings...
- Discuss with OCLC and your electronic resources staff how to get your data populated in the OCLC KB.
- Setup your Direct Request profile.
- See it work for you!



Thank you!

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