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
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.

- Borrowing ILLiad example:

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

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.
### Overview of Setup

**CGU ILLiad Direct Request profile**

<table>
<thead>
<tr>
<th>Name</th>
<th>DIRECTAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Direct request for articles</td>
</tr>
</tbody>
</table>

#### 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
- Sound Recordings - Tapes
- Visual Materials
- Visual Materials - DVDs
- Visual Materials - VHSLs

#### 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
- Produces the Request: Yes

#### Languages
- Arabic
- Bulgarian
- Chinese
- Danish
- Dutch
- English
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.
CGU uses ‘E within group’ so we exhaust free lenders first before moving to lenders that charge.
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

<table>
<thead>
<tr>
<th></th>
<th>July 1, 2013-June 30, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lending</td>
<td>6293</td>
</tr>
<tr>
<td>Borrowing Unmediated</td>
<td>1832</td>
</tr>
<tr>
<td>Borrowing Locally Owned</td>
<td>301</td>
</tr>
</tbody>
</table>

#### Percentage of Article Requests Processed by the OCLC KB

<table>
<thead>
<tr>
<th></th>
<th>July 1, 2013-June 30, 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lending</td>
<td>17%</td>
</tr>
<tr>
<td>Borrowing Unmediated</td>
<td>20%</td>
</tr>
<tr>
<td>Borrowing Locally Owned</td>
<td>3%</td>
</tr>
</tbody>
</table>
Create a custom holdings group for OCLC KB libraries.
- There are 394 libraries in the KBIL OCLC group.
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.
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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