

OCLC Policies Directory Best Practices February 2010

Jennifer Corsi
OCLC Delivery Services

Agenda for today's webinar



- What is the Policies Directory?
- Overview of new Policies Directory - user interface, new and changed features
- Best Practices
 - Searching and finding libraries
 - Updating your library's information
 - Deflection, copy and loan policies
- Further information - additional resources and who to contact with further questions

What is the Policies Directory?



The Policies Directory is a data source of OCLC WorldCat Resource Sharing libraries. It provides two main functions to enhance your workflow.

1. Search for potential lenders

to fill a specific request or to create custom holdings groups

2. Display information about your library, including:

- Your lending, copying and deflection policies
- Contacts at your library
- Your library collections
- Your resource sharing supplier status

The *New* Policies Directory



- Installed on Sunday, January 10th
- The Policies Directory was rewritten to update the underlying technology - a new database and platform. And in the process we created a new, more user friendly interface.
- Access continues via the existing URL <https://illpolicies.oclc.org> and via links in the WorldCat Resource Sharing and ILLiad interfaces

New/changed features



- Supplier status changes can be made in two different ways
 1. Scheduled ahead of time via the 'Schedules' tab or
 2. Changed real-time via the Profile tab
- Deflection, Copy, and Loan policies are all contained on one screen - less clicking to find the information that you need to help you make borrowing decisions.
- Search function now always available via the panel on the left side of the screen.
- Changes to searching to make it more useful
- Integration with WorldCat Registry

OCLC Policies Directory - Profile



OCLC™ Policies Directory Welcome
[OCLC, Online Computer Library Center \(OCLC\)](#)
OCLC - test [Sign Out](#) / [Help](#)

Princeton University Library

[Profile](#) [Collections](#) [Policies \(7\)](#) [Schedule](#) [Contacts](#)

Last updated Friday, January 15, 2010 12:08:09 PM EST

Summary

Name (Symbol): Princeton University Library (PUL)

Location: PRINCETON, NJ 08544-2098 US

Shipping Address: PUL-Interlibrary Services
Interlibrary Services - Princeton University Library
One Washington Rd
Princeton, NJ 08544-2098 US

Institution Type: Association of Research Library

OCLC Supplier: Yes

Non-Circulating: Periodicals; BA and Masters' Theses; Materials from Art and Archaeology Library, Architecture Library, Rare Books and Special Collections, Cotsen Children's Library, Government Documents, Microprints/microcards, Pliny Fisk Library, Music RARE Books & Scores

Periods: **Loan Period:** 4 Week(s)
Renew Period: 4 Week(s)

Fees: **Copies:** 20.00 USD [More...](#)
Loans: 20.00 - 30.00 USD [More...](#)

Request Methods: **Copies:** OCLC ILL, URL
Loans: ISO ILL, OCLC ILL, URL

Delivery Methods: **Copies:** Air Mail, Ariel - FTP, ILLiad - Odyssey, Post on Web Server
Loans: Air Mail, Courier

Group Affiliations: [LATIN AM RES RES PROJ](#) , [NEW JERSEY ULS](#) , [NORTHEAST GAC](#) , [OCLC TRAINING & ILLIAD PARTICIPANT](#) , [SHARES RLG PROGRAM GROUP](#) , [US NEWSP PROG](#)

WorldCat Registry integration



The Policies Directory has been integrated with the WorldCat Registry service. Policies Directory entries are now based on an institution's registry id and several data elements are being pulled in from the Registry including:

- Institution name & Also called name

- Institution symbols

- Institution type

- Location - city, state/province, country

- Lending, Library homepage & library catalog URLs

- Federal Employer ID Number (FEIN)

Changes to these fields in the Registry will be propagated to the Policies Directory via updates every two hours.

Accessing and updating WorldCat Registry data for your library



- Each Policies Directory screen contains links to the WorldCat Registry. Clicking the link will take you directly to the profile summary for the institution that you are viewing
- You edit your WorldCat Registry profile by logging in with either a WorldCat.org, Webjunction or OCLC Service Center account. Once you login you can authorize yourself to edit your library's profile by using your ILL authorization and password

WorldCat Registry Data used in Policies Directory



Institution name, Also called name

Institution type

City, State, Country

Home page

Online Catalog

Also,

FEIN and symbol(s) - Identifiers screen

Lending URL - Global Policies screen

Profile Summary

Miami University Libraries
King Library

Want to modify this profile? Your user account must be authorized to edit profile information.

Profile Summary

[Download this Profile as XML](#)

Name and Location

Identifiers

Relationships:

[Branches](#)

[Affiliations](#)

Services:

[IP Addresses](#)

[Online Catalog](#)

[OpenURL Resolvers](#)

[Virtual Reference](#)

Administrative Information

Contacts

Global Policies

Last updated on 2009-11-04

Institution Name: Miami University Libraries
Also Called: King Library
Institution Type: Academic Library

Street Address:

EDGAR W KING LIBR
OXFORD, Ohio 45056-1678
United States

Business Address:

PERIODICAL REC 500 E HIGH ST
OXFORD, Ohio 45056-1602
United States

Phone: (513) 529-4141

Fax:

E-mail Address:

Home Page: <http://www.lib.muohio.edu/>

Information Page: <http://www.lib.muohio.edu/hours/>

Services:

IP Addresses:

Online Catalog: <http://holmes.lib.muohio.edu/search/>

OpenURL Resolvers: <http://olinks.ohiolink.edu/olinks.php>

Virtual Reference:

Registry identifiers screen



[Profile Summary](#) / Identifiers

Miami University Libraries King Library

[Profile Summary](#)

[Download this Profile as XML](#)

[Name and Location](#)

[Identifiers](#)

Relationships:

[Branches](#)

[Affiliations](#)

Services:

[IP Addresses](#)

[Online Catalog](#)

[OpenURL Resolvers](#)

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[Global Policies](#)

Last updated on 2009-11-04

Identifiers

What are the identifying codes assigned by OCLC and other industry and standards organizations? List them here. (The ID assigned by the WorldCat Registry is included.)

You must [Sign In](#) to edit this information.

Last Updated: 2009-07-11

Identifiers

WorldCat Registry ID: 2292

OCLC Symbol: MIA

OCLC Account Name: MIAMI UNIV;MIAMI UNIV LIBR

International Standard Identifier for Libraries (ISIL): OCLC-MIA

MARC Organization Code: OOXM

FEIN Identifier: 31-6402089

SAH Identifier:

NCES Identifier:

Global Policies in WorldCat Registry



You are not signed in ([Sign In](#) or [Register](#)) [My Account](#)

WorldCat® Registry [Registry Home](#) [About](#) [FAQ](#) [Get E-mail Updates](#) [Feedback](#)

Search for Institutions: [Advanced Search](#)

[Create a new WorldCat Registry profile](#)

[Profile Summary](#) / Global Policies

Wisconsin Historical Society

[Profile Summary](#)
[Download this Profile as XML](#)

[Name and Location](#)

[Identifiers](#)

Relationships:
[Branches](#)
[Affiliations](#)

Services:
[IP Addresses](#)
[Online Catalog](#)
[OpenURL Resolvers](#)
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[Global Policies](#)

Last updated on 2009-05-06

Global Policies

Below are the current resource sharing settings.
NOTE: These global policies may not apply for all inter-lending and are subject to change.

Last Updated: 2009-05-06

Global Policies

Copy Policy
My institution sends copies within my home country for **a fee**

My institution sends copies outside my home country for **a fee**

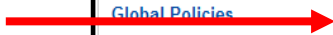
Loan Policy
My institution loans within my home country for **a fee**

My institution loans outside my home country for **a fee**

Lending URL

<http://www.wils.wisc.edu/lend/>

Lending URL



Search

Institution Information

Search By

Institution Symbol

osu

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Format (0)

Search

Ohio State University Libraries

Profile

Collections

Policies (8)

Schedule

Contacts

Last updated Monday, February 1, 2010 8:14:10 AM EST

Summary

Name (Symbol): Ohio State University Libraries (OSU)

Location: Columbus, OH 43210 US

Shipping Address: Ohio State University Libraries
Thompson Library, Interlibrary Services
1858 Neil Ave Mall
Columbus, OH 43210 US

Institution Type: Association of Research Library

OCLC Supplier: Yes

Non-Circulating: Many print periodicals; course reserve holdings, including textbooks, and reference materials; Rare Books and Manuscripts; Cartoon research materials, including comic books

Periods: **Loan Period:** 4 Week(s)
Renew Period: 4 Week(s)

Fees: **Copies:** 15.00 - 20.00 USD [More...](#)
Loans: 15.00 - 35.00 USD [More...](#)

Request Methods: **Copies:** Fax, ALA, Mail, OCLC ILL
Loans: Fax, ALA, Mail, OCLC ILL

Delivery Methods: **Copies:** Ariel - FTP, Fax, ILLiad - Odyssey, Post on Web Server

Group Affiliations: [COMMITTEE ON INSTITUTIONAL COOPERATION](#) , [FIRSTSEARCH IN WISCONSIN & MINNESOTA](#) , [GIF-N AM COORD COUN ON JAPANESE LIBR RES](#) , [LATIN AM RES RES PROJ](#) , [OCLC TRAINING & ILLIAD PARTICIPANT](#) , [OCLC UNION LISTING DEMONSTRATION](#) , [OHIOLINK CONSORTIUM](#) , [RECIPROCAL FACULTY BORROWING PROG](#) , [SERIALS IN OHIO UL](#) , [US NEWSP PROJ](#)

International Lender: Australia, Switzerland, Czech Republic, Germany, Denmark, Spain, France, United Kingdom, Hong Kong, Hungary, Ireland, Israel, Italy, Japan, Korea, Republic Of, Netherlands, Norway, New Zealand, Sweden, Slovenia, Taiwan, South Africa

International Lender is defined by the countries that you have defined in your copy/loan policies

Copy/Loan policies 'feed' International Lender on Profile screen



International (IFM)

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 4 Week(s) Renewal Period: 4 Week(s)	Per Item: <ul style="list-style-type: none"> • 30.00 Currency: United States Dollar Tax Included: No	Groups: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Any Libraries: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Any Locations: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Australia <input checked="" type="checkbox"/> Canada <input checked="" type="checkbox"/> Czech Republic <input checked="" type="checkbox"/> Denmark <input checked="" type="checkbox"/> France <input checked="" type="checkbox"/> Germany <input checked="" type="checkbox"/> Hong Kong <input checked="" type="checkbox"/> Hungary <input checked="" type="checkbox"/> Ireland <input checked="" type="checkbox"/> Israel <input checked="" type="checkbox"/> Italy <input checked="" type="checkbox"/> Japan <input checked="" type="checkbox"/> Korea, Republic Of <input checked="" type="checkbox"/> Netherlands <input checked="" type="checkbox"/> New Zealand <input checked="" type="checkbox"/> Norway <input checked="" type="checkbox"/> Slovenia <input checked="" type="checkbox"/> South Africa <input checked="" type="checkbox"/> Spain <input checked="" type="checkbox"/> Sweden <input checked="" type="checkbox"/> Switzerland <input checked="" type="checkbox"/> Taiwan <input checked="" type="checkbox"/> United Kingdom <input checked="" type="checkbox"/> United States 	Collections: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Any Formats: <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Any 	Requests: <ol style="list-style-type: none"> 1. OCLC ILL Billing: <ol style="list-style-type: none"> 1. OCLC IFM

Note: We do not provide Rush service for international loans.

New Policies screen - copies, loans and deflections all available in one display



Number of policies defined included on tab

Each section is collapsible

Washington County Cooperative Library Services
WCCLS

Profile Collections **Policies (3)** Schedule Contacts

▼ Deflections

E-audio, E-text, Microform, Newspaper

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Formats: <input checked="" type="checkbox"/> E-Audio Book <input checked="" type="checkbox"/> Microform <input checked="" type="checkbox"/> E-Text <input checked="" type="checkbox"/> Newspaper
Note:			

▼ Copies

Copies

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies: • Photocopy	Per Page: No Charge Currency: United States Dollar Tax Included: No	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Any	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Serial - Bound <input checked="" type="checkbox"/> Serial - Unbound <input checked="" type="checkbox"/> Book	Requests: 1. ALA 2. Email 3. OCLC ILL Delivery: 1. Mail Billing: 1. Bills Not Issued
Note: FYI: we often lend entire issues of serials to fill photocopy requests.				

▼ Loans

Loans

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 42 Day(s) Renewal Period: 30 Day	Per Item: No Charge	Groups: <input checked="" type="checkbox"/> Any	Collections: Washington County Cooperative Library	Requests: 1. OCLC ILL

Schedule



Policies Directory

Welcome
[Princeton University Library \(PUL\)](#)
[Sign Out](#) / [Help](#)

Search

Institution Information

Search by

Institution Symbol

Countries (0)

States/Provinces (0)

City

Library Types (0)

OCLC Supplier
 Rush Supported
 International Lender

[More options](#)

[Reset](#) [Search](#)

Princeton University Library

[Profile](#) [Collections](#) [Policies \(8\)](#) [Schedule](#) [Contacts](#)

Last updated 2009-01-05 00:15:15.863333 2009/04/20 12:30 pm (GMT)

Operating Hours [Add](#)

Normal Hours [Edit](#) [Delete](#)

NAME	DAYS	HOURS	NOTES
------	------	-------	-------

Closures [Add](#)

Winter Holiday Schedule [Edit](#) [Delete](#)

NAME	TYPE	CLOSED DATES	SUPPLIER	NOTES
Normal ILS Schedule	Closed	2008-12-10 14:15:50.0 thru	No	Office hours are Monday - Friday 8:45am-5pm during the academic year and 8:30am-4:30pm during the summer
Holiday 2008-2009 Closings	Closed	2008-12-24 00:00:00.0 thru 2009-01-04 00:00:00.0	No	Please do not email, fax, or mail requests during this period as PUL does NOT accept ALA requests .



Feedback link – send comments about incomplete or missing information and OCLC will follow up with the library to get the information added to Policies

Policies Directory

[Help](#)

[Feedback](#)

[Terms and Conditions](#)

Collections



Search

Institution Information

Search By

Institution Symbol

tkn

Countries(0)

States/Provinces(0)

City

Institution Types(0)

- OCLC Supplier
- Rush Supported

International Lender(0)

Group Affiliation(0)

Policy Information

Format(0)

Request Method(0)

Delivery Method(0)

Billing Method(0)

Reset

Search

University of Tennessee John C. Hodges Library

Profile

Collections

Policies (7)

Schedule

Contacts

Last updated Monday, January 11, 2010 5:05:48 PM EST

▼ Collections

Preston Medical Library

CIRCULATES?	URL:	NOTES:
<input checked="" type="checkbox"/> No	http://gsm.utmck.edu/library/	This is the University of Tennessee Graduate School of Medicine Library, located in Knoxville. UTGSM shares the catalog with UT Knoxville. Their Docline LIBID is TNUTNK.

Social Work Library, Nashville

CIRCULATES?	URL:	NOTES:
<input checked="" type="checkbox"/> No		Articles-ILL - NO

Special Collections

CIRCULATES?	URL:	NOTES:
<input checked="" type="checkbox"/> No	http://www.lib.utk.edu/spcoll/	The items from these collections are non-circulating. Occasionally a photocopy can be made for ILL. However, in many cases the patron will need to negotiate directly with the Special Collections staff to obtain the materials they need. Your patron may contact them directly at special@utk.edu or by phone 865-974-4480.

Contacts



Search

Institution Information

Search By
Institution Symbol

Countries(0)

States/Provinces(0)

City

Institution Types(0)

OCLC Supplier
 Rush Supported

International Lender(0)

Group Affiliation(0)

Policy Information

Format(0)

Request Method(0)

Delivery Method(0)

Billing Method(0)

[Reset](#) [Search](#)

University of Toronto Robarts Library

- Profile
- Collections
- Policies (4)
- Schedule
- Contacts**

Last updated Saturday, January 9, 2010 1:10:52 AM EST

TYPE	CONTACT
Borrowing Information	Attention: Jane Lynch Phone: 416-978-7624 Fax: 416-978-1608 E-mail: ybxinfo.robarts@utoronto.ca
Lending Information	Attention: Anne Marie Crotty Phone: 416-978-6439 Fax: 416-978-1608 E-mail: roba.llinfo@utoronto.ca
Ariel	Attention: UTO-Humanities & Social Sciences Research Library URL: 142.150.192.201
General	Attention: Susan Stone Phone: 416-978-7693 Fax: 416-978-1608 E-mail: susan.stone@utoronto.ca Note: Assistant Department Head
ILLiad	Attention: UTO-Humanities & Social Sciences Research Library URL: 142.150.192.201/ILL

Search functionality



Search by:
Institution Name
Institution Symbol
Group Name
Group Symbol

Select multiple
items to search by
such as Formats,
Billing Method and
Supplier status

The screenshot shows the OCLC Policies Directory interface for Auburn University. On the left is a search filter panel with sections for 'Institution Information' and 'Policy Information'. The 'Institution Information' section includes dropdowns for 'Institution Symbol' (set to 'aaa'), 'Countries(0)', 'States/Provinces(0)', 'City', 'Institution Types(0)', and 'Group Affiliation(0)'. There are checkboxes for 'OCLC Supplier' and 'Rush Supported', and dropdowns for 'International Lender(0)'. The 'Policy Information' section includes dropdowns for 'Format(0)', 'Request Method(0)', 'Delivery Method(0)', and 'Billing Method(0)'. A 'Search' button and a 'Reset' link are at the bottom of the filter panel. The main content area is titled 'AUBURN UNIVERSITY' and has tabs for 'Profile', 'Collections', and 'Policies (2)'. A 'Summary' section displays the following information:

Name (Symbol):	AUBURN UNIVERSITY
Location:	AUBURN, AL 36849-5600
Shipping Address:	AAA-default 231 Mell Street Auburn University, AL 36849-5600
Institution Type:	Association of Research Libraries
OCLC Supplier:	No
Non-Circulating:	Not Defined
Periods:	Loan Period: 28 Days Renew Period: 14 Days
Request Methods:	Copies: Email, Fax, AL Loans: Email, Fax, AL
Delivery Methods:	Copies: Ariel - FTP, Fax Loans: Mail


Searching hints - locating by institution name



- Name and 'Also called' name are both included in the Institution name search
- Use wildcards for those often abbreviated words such as St. (S*) and Univ (univ*)
- Two wildcards are used
 - ? Single character
 - * unlimited characters
- Search results list includes fee information to help you make an informed choice

Search Results List





Policies D

Search criteria:
s* mary

Welcome

[OCLC. Online Computer Library Center \(OCL\)](#)

OCLC-test [Sign Out / Help](#)

Search

1 - 20 of 156 Results

Institution Information

Search By

Institution Name

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

INSTITUTION ▲	SYMBOLS	SUPPLIER	FEES	LOCATION
ASSUMPTION OF MARY SCHOOL		No		REDFORD , NY US
BASILICA OF ST MARY	MNBSM	No		Minneapolis , MN US
Bon Secours Saint Mary's Hospital	VB6	Yes		RICHMOND , VA US
Bon Secours Saint Marys Hospital	VABSE	No		Richmond , VA US
College of Saint Mary Library	STM	Yes	Copies: 0.00 USD Loans: 0.00 USD	Omaha , NE US
College of Southern Maryland La Plata Campus Library	CLSMD	No		LA PLATA , MD US
Elmbrook Memorial Hospital, Mary Beth Curtis Library	WLK	No		BROOKFIELD , WI US
Georgian Court University S. Mary Joseph Cunningham Library	GGN	Yes	Copies: 0.00 - 5.00 USD Loans: 0.00 USD	LAKESWOOD , NJ US
Jewish Hist Society of Maryland Library	JH@	No		BALTIMORE , MD US
Maryland Newsp Project, St Mary's County	XKW	No		BALTIMORE , MD US
Morrison & Mary Wiley Library	IPM	No		ELMWOOD , IL US
Most Pure Heart of Mary Elementary	K2Z	No		TOPEKA , KS US
Mount Saint Mary College Curtin Memorial Library	VFQ	Yes	Copies: 0.00 USD Loans: 0.00 USD	Newburgh , NY US
Mount St Mary Acad Library	MSMAL	No		Little Rock , AR US
Mount St Mary's College Phillips Library	MSM	Yes	Copies: 0.00 USD Loans: 0.00 USD	EMMITSBURG , MD US
Mount St Mary's Hospital of Niagara Falls	YKQ	No		LEWISTON , NY US
MOUNT ST MARYS ACAD		No		KENMORE , NY US
Mount St Marys College Coe Memorial Library	CMM	Yes	Copies: 10.00 USD Loans: 0.00 USD	LOS ANGELES , CA US
NATIVITY OF THE BLESSED VIRGIN MARY SCHOOL		No		BLOOMINGTON , MN US
Nestle R&D Center, Marysville	WR2	No		MARYSVILLE , OH US



Search

Institution Information

Search By

Institution Name

s* mary

Countries (0)

States/Provinces (0)

City

Institution Types (0)

OCLC Supplier

Rush Supported

International Lender (0)

Group Affiliation (0)

Policy Information

Format (0)

Request Method (0)

Delivery Method (0)

Billing Method (0)

[Reset](#)

[Search](#)

Mount Saint Mary College

Curtin Memorial Library

[Profile](#)

[Collections](#)

[Policies \(2\)](#)

[Schedule](#)

[Contacts](#)


Last updated Friday, January 8, 2010 11:55:33 PM EST

Summary

Name (Symbol):	Mount Saint Mary College (VFQ)
Also Called:	Curtin Memorial Library
Location:	Newburgh, NY 12550 US
Shipping Address:	VFQ-Curtin Memorial Library Mount Saint Mary College 330 Powell Ave. Newburgh, NY 12550 US
Institution Type:	Academic Library
OCLC Supplier:	Yes
Non-Circulating:	Newspapers, Periodicals, Reference, Curriculum Books, Tests, Audios
Periods:	Loan Period: 3 Week(s) Renew Period: 3 Week(s)
Fees:	Copies: 0.00 USD More... Loans: 0.00 USD More...
Request Methods:	Copies: Email, Fax, ALA, Mail, OCLC ILL, Phone Loans: Email, Fax, ALA, Mail, OCLC ILL, Phone
Delivery Methods:	Copies: Ariel - FTP, Courier, Fax, Mail Loans: Courier, Mail
Group Affiliations:	LIBRARIES VERY INTERESTED IN SHARING , NEW YORK CONSOLIDATED ULS , NEW YORK STATEWIDE GAC , NORTHEAST GAC , NYLINK INTERLIBRARY CODE GROUP , SOUTHEASTERN NEW YORK GAC , SOUTHEASTERN NEW YORK LIBR COUN ULS , US NEWSP PROG

Searching for Custom Holdings groups






Policies Directory

Welcome
[OCLC, Online Computer Library Center \(OCL\)](#)
OCLC - test [Sign Out / Help](#)

Display symbols



Search

Institution Information

Search By
 Institution Symbol ▼

Countries(0) ▼

States/Provinces(1) ▼

City

Institution Types(0) ▼

OCLC Supplier

Rush Supported

International Lender(0) ▼

Group Affiliation(1) ▼

Policy Information

Format(0) ▼

Request Method(0) ▼

Delivery Method(0) ▼

Billing Method(0) ▼

[Reset](#) [Search](#)

1 - 20 of 78 Results


INSTITUTION ▲	SYMBOLS	SUPPLIER	FEES	LOCATION
Act Information Res Center	UIC	Yes		IOWA CITY , IA US
Ames Public Library	UIB	Yes	Copies: 0.00 USD Loans: 0.00 USD	AMES , IA US
Ashford University Library	IO9	Yes		CLINTON , IA US
Bettendorf Public Library	LE#	Yes	Copies: 0.00 USD Loans: 0.00 USD	BETTENDORF , IA US
Brier Cliff University Bishop Mueller Library	IOB	Yes		SIoux CITY , IA US
BUENA VISTA UNIVERSITY	IOE	Yes	Copies: 0.00 USD Loans: 0.00 USD	STORM LAKE , IA US
Burlington Public Library	BUP	Yes		BURLINGTON , IA US
Central College Geisler Library	IOP	Yes		PELLA , IA US
Clarke College Nicholas J. Schrup Library	IOC	Yes	Copies: 0.00 USD	DUBUQUE , IA US
Clinton Community College Library	ZBY	Yes		CLINTON , IA US
Clive Public Library	C@V	Yes	Copies: 0.00 USD Loans: 0.00 USD	CLIVE , IA US
COE COLLEGE Stewart Memorial Library	ION	Yes	Copies: 0.10 USD Loans: 0.00 USD	CEDAR RAPIDS , IA US
CORNELL COLLEGE Cole Library	IMV	Yes	Copies: 0.00 USD Loans: 0.00 USD	MT VERNON , IA US
Council Bluffs Public Library	IWB	Yes		COUNCIL BLUFFS , IA US
DAVENPORT PUBLIC LIBRARY	IOS	Yes		DAVENPORT , IA US

[Display Symbols](#)

[◀ First](#)
1
2
3
4
[Next >](#)
[Last >>](#)

Display symbols





Welcome
[OCLC, Online Computer Library Center \(OCL\)](#)
OCLC - test [Sign Out / Help](#)

Policies Directory

1 - 20 of 78 Results

Search

Institution Information

Search By
 Institution Symbol

Countries(0)

States/Provinces(1)

City

Institution Types(0)

OCLC Supplier
 Rush Supported

International Lender(0)

Group Affiliation(1)

Policy Information

Format(0)

Request Method(0)

Delivery Method(0)

Billing Method(0)

[Reset](#) [Search](#)

Symbols

BKU BUP C@V DAB DAQ E9B EC8 FQ5 HL6 HL9 HN5 HQ4 IMV IO3 IO7 IO8 IO9 IOB IOC
 IOD IOE IOF IOG IOH IOI IOJ IOK IOL IOM ION IOO IOP IOS IOT IOU IOV IOW IOX IOY IW3
 IW9 IWB IWG IWH IWN IWP IWS IWT IWX IX2 IX3 IX4 IX5 JIE JII JIJ JIK JIM JIN JIP JIU JIW
 JUH LE# LYZ UIB UIC UII UIJ UIM UIN UIP UIR UIW X0X Y4Q ZAT ZAY ZBY ZLY ZQZ

Table

INSTITUTION	Symbol	Yes	Loans	Location
Act Information Res C				IOWA CITY, IA US
Ames Public Library				AMES, IA US
Ashford University Lib				CLINTON, IA US
Bettendorf Public Libr				BETTENDORF, IA US
Briar Cliff University Bishop Mueller Library				SIoux CITY, IA US
BUENA VISTA UNIVER				STORM LAKE, IA US
Burlington Public Libr				BURLINGTON, IA US
Central College Geisler Library				PELLA, IA US
Clarke College Nicholas J. Schrup Library				DUBUQUE, IA US
Clinton Community Coll				CLINTON, IA US
Clive Public Library				CLIVE, IA US
COE COLLEGE Stewart Memorial Library	ION	Yes	Loans: 0.00 USD Copies: 0.10 USD	CEDAR RAPIDS, IA US
CORNELL COLLEGE Cole Library	IMV	Yes	Loans: 0.00 USD Copies: 0.00 USD	MT VERNON, IA US
Council Bluffs Public Library	IWB	Yes		COUNCIL BLUFFS, IA US
DAVENPORT PUBLIC LIBRARY	IOS	Yes		DAVENPORT, IA US

Best Practices

Deflection Policies - best practices



Any request for the specified format will be deflected, except if the library is a member of SL#N

Profile Collections **Policies (7)** Schedule Con

▼ Deflections

SERVICE	FEEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection		Groups: SL#N	Formats: <input checked="" type="checkbox"/> Sound Recording <input checked="" type="checkbox"/> Visual Material - VHS <input checked="" type="checkbox"/> Visual Material - DVD <input checked="" type="checkbox"/> Visual Material <input checked="" type="checkbox"/> Sound Recording - CD <input checked="" type="checkbox"/> Sound Recording - LP <input checked="" type="checkbox"/> Sound Recording - Cassette

Note:

▼ Copies

Deflections - by cost



Profile Collections **Policies (7)** Schedule Contacts

11/15/2018 10:00:00 PM EST

▼ Deflections

\$10 SHARES

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	Max Cost: < 10.00	Groups: ✔ SHRS	
Note:			

\$20 Not SHARES

SERVICE	FEES	BORROWERS	ITEMS
Requests: Copy or Loan Deflection Type: Enable Real Time Deflection	Max Cost: < 20.00	Groups: ✘ SHRS	
Note:			

This deflection applies to members of the group SHRS

This deflection policy applies to everyone except libraries in the SHRS group

Deflect by Material age



Profile

Collections

Policies (15)

Schedule

Contacts

Last updated Saturday, January 9, 2010 12:15:39 AM EST

▼ Deflections

Wangensteen

SERVICE	FEES	BORROWERS	ITEMS
Requests: Loan Deflection Type: Enable Real Time Deflection			Material Age: > 100
Note:			

▼ Copies

Copy policies clearly identify different prices for different groups and payment method

Range of prices listed on Profile screen. Clicking 'more' takes you to the Copy Policies section to

▼ Copies

IFM

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies:	Per Request: <ul style="list-style-type: none"> < 50 : 15.00 Currency: United States Dollar Tax Included: Yes	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Any	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Any	Requests: 1. OCLC ILL Delivery: 1. Mail / USPS 2. Fax 3. Ariel - FTP 4. ILLiad - Odyssey Billing: 1. OCLC IFM

Note: We charge \$2.50 for each additional 1-10 pages after 50. Copies from microform carry an additional \$0.50 per page charge.

Michigan Libraries

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies:	Per Request: <ul style="list-style-type: none"> < 50 : 9.00 Currency: United States Dollar Tax Included: Yes	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Michigan	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Any	Requests: 1. OCLC ILL 2. Fax 3. Email 4. Mail Delivery: 1. Ariel - FTP 2. Fax 3. Mail / USPS Billing: 1. OCLC IFM 2. Invoice Monthly

Note: We charge \$2.50 for each additional 1-10 pages after 50. Copies from microform carry an additional \$0.50 per page charge.

NON-IFM

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Copies:	Per Request: <ul style="list-style-type: none"> < 50 : 20.00 Currency: United States Dollar Tax Included: Yes	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Any	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Any	Requests: 1. OCLC ILL 2. Fax 3. Mail 4. Email Delivery: 1. Ariel - FTP 2. Fax

▼ Loans

Loans (For Profit Organizations)

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 3 Week(s) Renewal Period: 3 Week(s)	Per Request: <ul style="list-style-type: none"> 22.00 Currency: United States Dollar Tax Included: No	Groups: <ul style="list-style-type: none"> Any Libraries: <ul style="list-style-type: none"> Any Locations: <ul style="list-style-type: none"> United States 	Collections: <ul style="list-style-type: none"> Book Formats: <ul style="list-style-type: none"> Book 	Requests: <ol style="list-style-type: none"> DocLine OCLC ILL ALA Delivery: <ol style="list-style-type: none"> Mail Billing: <ol style="list-style-type: none"> OCLC IFM EFTS Invoice with Item

Note: Books are renewed if not in demand.

Loans (Non Profit Organizations)

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 3 Week(s) Renewal Period: 3 Week(s)	Per Request: <ul style="list-style-type: none"> 11.00 Currency: United States Dollar Tax Included: No	Groups: <ul style="list-style-type: none"> Any Libraries: <ul style="list-style-type: none"> Any Locations: <ul style="list-style-type: none"> United States 	Collections: <ul style="list-style-type: none"> Book Formats: <ul style="list-style-type: none"> Book 	Requests: <ol style="list-style-type: none"> OCLC ILL DocLine ALA Delivery: <ol style="list-style-type: none"> Mail Billing: <ol style="list-style-type: none"> EFTS OCLC IFM Invoice with Item

Note: Books are renewed, if not in demand.

Different loan policies for different library groups – including different currencies, costs, and request methods

SHARES loans (non-UK)				
SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 6 Week(s) Renewal Period: 3 Week(s)	Per Request: <ul style="list-style-type: none"> ▪ 30.00 Currency: United States Dollar Tax Included: No	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Any	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Visual Material <input checked="" type="checkbox"/> Map <input checked="" type="checkbox"/> Serial <input checked="" type="checkbox"/> E-Text <input checked="" type="checkbox"/> Thesis	Requests: 1. OCLC ILL 2. ISO ILL Billing: 1. OCLC IFM
Note:				
UK Loans (non-SHARES)				
SERVICE	FEES	BORROWERS	ITEMS	DETAILS
Loan Period: 6 Week(s) Renewal Period: 3 Week(s)	Per Request: <ul style="list-style-type: none"> ▪ 15.00 Currency: Pound Sterling Tax Included: No	Groups: <input checked="" type="checkbox"/> Any Libraries: <input checked="" type="checkbox"/> Any Locations: <input checked="" type="checkbox"/> Any	Collections: <input checked="" type="checkbox"/> Any Formats: <input checked="" type="checkbox"/> Newspaper <input checked="" type="checkbox"/> Map <input checked="" type="checkbox"/> Microform <input checked="" type="checkbox"/> E-Text	Requests: 1. OCLC ILL 2. ISO ILL 3. Mail 4. Email Billing: 1. OCLC IFM
Note:				

Adding/editing policies



Book Policy

SERVICE

Loan Period:
Renewal Period:

Note:

General Loan

SERVICE

Loan Period:
Renewal Period:

Note: this is for

Add Loan Policy

*Policy Name:

*Required Fields

- Service

Loan Item Maximum: Loan Period: Day(s) ▼

Renewal Maximum: Renewal Period: Day(s) ▼

- Fees

	INCREMENT	FROM A MINIMUM	THROUGH A MAXIMUM	FEE
<input type="checkbox"/>				
<input checked="" type="checkbox"/>				

[Add Loan Fee](#)

Currency: Select... ▼

[Edit](#) [Delete](#)

DETAILS

on added 1/9/2010
aterials

Requests:
1. OCLC ILL
2. ISO ILL

Delivery:
1. Mail

Billing:
1. OCLC IFM

[Edit](#) [Delete](#)

ITEMS

Collections:
✓ Any

Formats:
✓ Any

Requests:
1. OCLC ILL
2. Fax

Handling:
1. Rush

Delivery:
1. Courier

[Edit](#) [Delete](#)

Group B Loans

SERVICE	FEES	BORROWERS	ITEMS	DETAILS
<p>Loan Period: 4 Week(s) Renewal Period: 4 Week(s)</p>	<p>Per Request: • 1.00</p> <p>Currency: Eu Euro Tax Included: No</p>	<p>Groups: ✓ LEGL ✓ NAAL</p> <p>Libraries: ✓ Any</p> <p>Locations: ✓ Alabama</p>	<p>Collections: ✓ Any</p> <p>Formats: ✓ Visual Material ✓ Book ✓ Sound Recording ✓ Musical Score</p> <p>Restrictions: • No Reproduction</p>	<p>Requests: 1. OCLC ILL 2. DocLine 3. Fax 4. URL</p> <p>Handling: 1. Rush - 5.00</p> <p>Delivery: 1. Air Mail 2. Courier / bob the courier</p> <p>Billing: 1. OCLC IFM</p>

- **Define your policies!**
Add at least 1 policy for copies and 1 for loans. More if your practices vary for different groups, locations or formats.
- **Specify costs, loan periods and who you will loan to**
- **Be as clear as possible.** Define multiple policies if you have different rates for different groups or for different billing methods (IFM). Name your policy according to the group it applies to.
- **Add notes to clarify**

Further information



- OCLC Policies Directory Help
<http://www.oclc.org/support/help/policies/>
- Overview of changes to the Policies Directory
<http://www.oclc.org/info/policies/>
- WorldCat Registry
<http://www.worldcat.org/registry/Institutions/>
- WorldCat Registry instructions for accessing your library's profile
<http://worldcat.org/webservices/registry/xsl/faq#regfaq-useraccount>

- Custom Holdings tutorial
<http://www5.oclc.org/downloads/tutorials/firstsearch/rs/customholdings.html>
- Any other questions or comments
contact customer support 1-800 848-5800
<https://www3.oclc.org/app/contact/>
or Jennifer Corsi
jennifer_corsi@oclc.org