

Custom Holdings for interlibrary loan transcripts

Hi welcome to Custom Holdings for interlibrary loan. Today you'll learn what custom holdings are and why you should think about using them. You'll see a quick comparison of the workflow for creating a borrowing request both with and without using custom holdings.

We'll take a quick look at some examples of established custom holdings then how to create and maintain custom holdings in the OCLC Service Configuration module. After that you'll see how to apply your custom holdings to your borrowing requests. Finally where you can find more training materials and documentation and how to contact OCLC customer support.

Think of custom holdings groups as the place where you collect the symbols of OCLC libraries that have a subject specialty that you're interested in or a loan policy you're looking for or are just geographically close by. They are great way to save all the research you do on potential lenders policies in the OCLC Policies Directory when requesting an item for interlibrary loan. Let's see an example of how this works.

First let's create an interlibrary loan request without using custom holdings: after searching for and find your item to create this request you have to review the OCLC Policies Directory profiles for each potential lender that you want to select and then you click the Yes link under the supplier column to manually add each lender to the lender string.

This process will need to be repeated for each potential lender and for every ILL request you want to create. On the other hand if you have set up your custom holdings groups you can search for your item and on your search results page next to the listed items you'll find the option to filter by your custom holdings path and after selecting it and clicking the Go button the system will automatically fill out the lender string with the symbols of the libraries listed on your selected custom holdings path. You are then ready to click the create request button located on the right side of the screen

Let's see how libraries decide to set up their custom holdings. Many libraries approach the process based on the types of policies lenders have set up for different material types: copies loans color copies dvds new materials and so on. Another approach can be related to the type of service lenders give when loaning items. Some libraries create customer holdings for lenders who prefer IFM or for lenders who can deliver items electronically in a variety of ways. Other custom holdings can pinpoint lenders who charge certain rates and group them together by those rates or identify lenders who have a fast turnaround when delivering items. Many libraries simply create custom holdings for libraries that are in the same region and or they may have a relationship with and want to refer to for certain items.

Custom holdings truly are custom any reason you can think of for the types of groups you'd like to create you can create and use it

Custom holdings are created in the OCLC Service Configuration module. There are two components to setting up custom holdings: first you need to create the groups and then create the path where you put your groups into a requesting order. The best way to access the OCLC Service Configuration is from your WorldShare ILL service home page clicking the respective link. From there on the left side panel click WorldShare ILL and then custom holdings groups in the middle section at the drop down arrow menu you can see the previous groups you have created. To create a new group click the create a new custom holdings group link located on the right side of the screen give a name to your group and add a brief description. Now you need to add the OCLC symbols of your preferred libraries for this group you do this clicking the add edit symbols button located on the bottom of the screen

When you click the add edit symbol button a box pops up for you to enter the symbols. You have two ways of doing this: copying and pasting symbols from your statistics reports or from the OCLC policies directory. You can use the OCLC usage statistics reports to select libraries of your preference based on past activities from your statistics report. You can copy library symbols from the institutional symbol column and paste them into a notepad

The other option is searching the OCLC Policies Directory which you can access from your WorldShare ILL service home page clicking the respective link. From the OCLC Policies Directory home page on the left side panel you can enter your search options. In this example I want to search for libraries in Pennsylvania offering loans for free so first I select the State to be Pennsylvania then on the fee field I enter 0 and then I click search to get my results

On my result page I can either copy the symbols of the libraries of my interest into a notepad or if i want all the libraries then I click the display symbols button located on the top. The system will automatically list all the symbols and I can select everything then right click to copy the information. Now I go back to the OCLC Service Configuration and paste that information into the add edit symbols box with the symbols I have added to the notepad from the statistics reports or from the OCLC Policies Directory. Then I click the

update symbols button located on the bottom. Save the group using the save as new button located at the bottom of the screen and the group is created. You can create more than one group in similar category. After you have created your group or groups in the same category, you need to create a path for them. In the OCLC Service Configuration on the left side panel click WorldShare ILL then custom holdings path. To create a new path click the create new custom holdings path located on the right side of the screen

Give a name and a brief description to your custom holdings path. You'll find two boxes below from the left box select the line then click add button for the group to be added to this path. You can put the groups on your preferred order for the system to look for. After you finish click the save as new button located on the bottom of the screen. After you set up some paths you can go to the OCLC Service Configuration on the left side panel click WorldShare ILL custom holdings path to start managing your path. In the middle section on the drop down arrow you can select the option to begin maintaining your path. You'll be able to add or remove groups in the path you have created and save the additional information as needed.

Now let's see how you can apply this path to a request: first go to your WorldShare ILL service home page on the left side panel click Discover items to either start a basic search or an advanced search for an item. When you get your search results the column on the far right will give you the option to filter by custom holdings path and the ability to choose the group you have created from the list. After you click the Go button, the system automatically populates the lender string with the library symbols from the libraries part of the groups in the custom holdings path. The system goes in the order of your groups in the path and does a comparison on those libraries to determine which ones have holdings on the item you are attempting to request. Then the system randomly selects libraries with holdings on the item to put them into the lender string

After you start using custom holdings you can evaluate the effectiveness with some other statistics reports from the statistics portal. If you notice a lot of reasons for no being aged to next lender you may want to edit the custom holdings groups and remove those libraries from your groups. Reason for no lacking indicates that the title is held but not the piece or page requested, to avoid this include year and the volume in the field by section when applying custom holdings. Because lenders change their policies frequently you should edit your custom holdings at least once a year so that you don't encounter any surprise when requesting items. When editing custom holdings in the OCLC Service Configuration

you can search to see how many of your groups the library's symbol is in and click on the left side panel in WorldShare ILL and custom holdings groups then click on by symbol link under Display groups enter the symbol you are interested in click the search button then use the yes or no button to select the group you want to move a symbol to or delete a symbol from and then click save. If a custom holdings group is using one or more custom holdings path to delete the group first you need to remove the group from the respective custom holdings path and then delete the group. You won't be allowed to delete the group without removing it from the path. You can contact OCLC support and find all types of training materials and documentation at the url on the screen. Thanks for watching