The Care and Feeding of Custom Holdings

Panelists:
Geneva Holliday, NOC
Pamela Johnston, INT
Lapis David Cohen, PAU
Sue Kaler, MLN and OCD

Moderator: Cassie Maringer, OQX
Remember the Bad Old Days?

Lender, who’s a Lender? Do you see license plates and think of lenders? Custom Holdings to the rescue!

<table>
<thead>
<tr>
<th>STATE</th>
<th>LOCATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH</td>
<td>AFL CIN EXP DMM LOG OCP TSH UTS WMC</td>
</tr>
<tr>
<td>AL</td>
<td>AARU</td>
</tr>
<tr>
<td>CA</td>
<td>CPL CFT CLB CLU CPE CPP CSL CSP CUI JTO LHR</td>
</tr>
<tr>
<td>CO</td>
<td>COI DUP</td>
</tr>
<tr>
<td>CT</td>
<td>TVC</td>
</tr>
<tr>
<td>DC</td>
<td>DDC dup</td>
</tr>
<tr>
<td>FL</td>
<td>DZM FED ORL TAH</td>
</tr>
<tr>
<td>GA</td>
<td>ALU GAP</td>
</tr>
<tr>
<td>IA</td>
<td>IOX</td>
</tr>
<tr>
<td>IL</td>
<td>CGP JIK JFD</td>
</tr>
<tr>
<td>IN</td>
<td>EIC IIO INF IMI INN IXT</td>
</tr>
<tr>
<td>KS</td>
<td>HAC HAM</td>
</tr>
<tr>
<td>KY</td>
<td>HAT KKS KTS</td>
</tr>
<tr>
<td>LA</td>
<td>LNC</td>
</tr>
<tr>
<td>MA</td>
<td>AMH AZG</td>
</tr>
</tbody>
</table>
OCLC custom holdings provide a way to organize and prioritize lenders based on reciprocal arrangements, geographic location, and special services.
How do you organize custom holdings?

Holdings Group - OCLC symbols of preferred lenders
ex. State1, LVIS, CostIFM, Duke

Holdings Path - Groups in order of borrowing preference
ex. Loan, Copy, Media
Why use Custom Holdings?
Help!

WorldShare ILL Online Help
https://www.oclc.org/support/help/ill/Default.htm

WorldShare ILL Training: ILL Custom Holdings on WorldShare ILL (Recording)  https://tinyurl.com/hj4kwj8

WorldShare ILL Tutorial: Creating and Editing Custom Holdings Groups and Paths in Service Configuration https://tinyurl.com/gq9rl3h

OCLC Service Configuration

Configure
Custom Holdings Groups
Create and Edit Custom Holdings

OCLC Service Configuration

ILLiad Resource Sharing Settings

FirstSearch Administrative Module
Welcome to the OCLC Service Configuration module

Here you can configure products and services, or create and edit your institutions.

Please select an institution from the drop-down list and click the Go button, or go to the WorldCat Registry menu choice to 1

If you do not have any menu choices in the left column, or have menu choices you were not expecting, please click here to.
### Configure Custom Holdings Groups

Required fields are marked with an asterisk (*).

Display groups: by group name | by symbol

<table>
<thead>
<tr>
<th>Custom Holdings Group Name</th>
<th>Description</th>
<th>OCLC Symbol(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>FREEDEL</td>
<td>Free lenders on Delivery</td>
<td>AMH, AMHERST COL, AUM, UNIV OF MASSACHUSETTS AMHERST, AZM, ASSUMPTION COL, BAB</td>
</tr>
</tbody>
</table>

[Create New Custom Holdings Group]
## Creating a New Custom Holdings Group

<table>
<thead>
<tr>
<th>Custom Holdings Groups</th>
<th>FREEDEL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Custom Holdings Groups Name:</strong></td>
<td>NEWGROUP</td>
</tr>
<tr>
<td>Description:</td>
<td>describe the logic of the group</td>
</tr>
<tr>
<td>OCLC Symbol(s)</td>
<td></td>
</tr>
<tr>
<td>Symbols currently in the group: 0</td>
<td></td>
</tr>
</tbody>
</table>
Add/Edit Symbols in an Existing Group
Creating a new Path

Custom Holdings Path

* Custom Holdings Path Name: TESTPATH

Description: This is an experimental path with no logic.

Drag and drop groups between these lists to configure your custom holdings path.

Choose from available groups (105):

- BRANCHONLYCHEAP10
- CHEAPDEL10
- DELMIDDLE11TO10
- DELRI
- FREEALASKA
- FREEATL
- FREEATL2X
- FREECANADA
- FREEFORN
- FRFFHAWAII

Groups chosen for this path (1):

- FREEDEL
Configure Custom Holdings Paths

Required fields are marked with an asterisk *

Custom Holdings Path: BOOKS

Custom Holdings Path Name: BOOKS

Description: Book lenders from near to far and from free to expensive.

Groups chosen for this path (48):
- FREEDEL
- USEFORM
- DELRI
- MAYBEINHOUSEDEL
- FREEEPL
- FREEEAC
- FREEENY
- FREEATL2X
- FREEATL
- FREEATL3X
- FREESOUTH
<table>
<thead>
<tr>
<th>Library</th>
<th>Supplier</th>
<th>Days To Respond</th>
<th>Location</th>
<th>Symbol</th>
<th>Group</th>
<th>Cost</th>
<th>IFM</th>
</tr>
</thead>
<tbody>
<tr>
<td>OLD COLONY LIBR NETWORK</td>
<td>Yes</td>
<td>8 days</td>
<td>US, MA</td>
<td>OCD</td>
<td>FREEDEL</td>
<td>Copies: 0.00 - 35.00 USD Loans: 0.00 - 35.00 USD</td>
<td>Yes</td>
</tr>
<tr>
<td>SIMMONS COL</td>
<td>Yes</td>
<td>4 days</td>
<td>US, MA</td>
<td>SCL</td>
<td>FREEDEL</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td></td>
</tr>
<tr>
<td>BOSTON PUB LIBR</td>
<td>Yes</td>
<td>8 days</td>
<td>US, MA</td>
<td>BRL</td>
<td>MAYBEINHOUSEDEL</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td>Yes</td>
</tr>
<tr>
<td>REDWOOD LIBR &amp; ATHENAEMUM</td>
<td>Yes</td>
<td>4 days</td>
<td>US, RI</td>
<td>RA8</td>
<td>FREENEPL</td>
<td>Copies: 0.00 - 2.00 USD Loans: 0.00 USD</td>
<td></td>
</tr>
<tr>
<td>WEST HARTFORD PUB LIBR</td>
<td>Yes</td>
<td>4 days</td>
<td>US, CT</td>
<td>WHP</td>
<td>FREENEPL</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td></td>
</tr>
<tr>
<td>FAIRFIELD UNIV</td>
<td>Yes</td>
<td>4 days</td>
<td>US, CT</td>
<td>FAU</td>
<td>FREENEAC</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td>Yes</td>
</tr>
<tr>
<td>KEENE STATE COL</td>
<td>Yes</td>
<td>4 days</td>
<td>US, NH</td>
<td>KNM</td>
<td>FREENEAC</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td></td>
</tr>
<tr>
<td>THREE RIVERS COM COLL</td>
<td>Yes</td>
<td>4 days</td>
<td>US, CT</td>
<td>MHG</td>
<td>FREENEAC</td>
<td>Copies: 0.00 USD Loans: 0.00 USD</td>
<td>Yes</td>
</tr>
<tr>
<td>GENESEE</td>
<td>Yes</td>
<td>4 days</td>
<td>US, NY</td>
<td>YJIA</td>
<td>FRENY</td>
<td>Copies: 0.00 USD</td>
<td></td>
</tr>
</tbody>
</table>
ILLiad Resource Sharing Settings
Step 1: Groups
Step 2: Paths

Custom Holdings Paths

Name: COPYMAX
Description: LIBRARIES THAT CHARGE WITHIN OUR MAXCOST FOR COPIES

Selected Groups:
- FREECOPY
- COPYMAX1
- COPYMAX2

Available Groups:
- AMIARIZ
- AMIARK
- AMICA
- AMIMLNC
- AMINM
- AMIOKLA
- AMITEX
**Where is YUS? (Service Configuration View)**

Custom Holdings Groups Symbol Search

Required fields are marked with an asterisk *
Display groups: by group name | by symbol

* Enter symbol: yus

<table>
<thead>
<tr>
<th>Institution Symbol: YUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>IFMCANADACHEAP10</td>
</tr>
<tr>
<td>IFMCANADAEXP20ORMORE</td>
</tr>
<tr>
<td>IFMCANADAMID11TO19</td>
</tr>
<tr>
<td>IFMEASTCHEAP10</td>
</tr>
<tr>
<td>IFMEASTEXP20ORMORE</td>
</tr>
<tr>
<td>IFMEASTMID11TO19</td>
</tr>
<tr>
<td>IFMEXP20ORMORE2X</td>
</tr>
<tr>
<td>IFMEXP20ORMOREUPS</td>
</tr>
</tbody>
</table>
Where is YUS? (FirstSearch Admin Module view)
Lending Charges: $15 or Less
Paths and Groups

- **Copymax**
  - Freecopy
  - Copymax1
  - Copymax2

- **Loanmax**
  - Freeloan
  - Loanmax1
  - Loanmax2
### Resource: IFM Reports

#### ILL Fee Management Program Borrower Report

<table>
<thead>
<tr>
<th>Lender Symbol</th>
<th>Institution Name</th>
<th>ILL Record</th>
<th>Title</th>
<th>Request Date</th>
<th>Date Shipped</th>
<th>ILL Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UNIV OF ARKANSAS MULLINS</td>
<td>171095234</td>
<td>The world.</td>
<td>2016-09-16</td>
<td>2016-09-16</td>
<td>$15.00</td>
</tr>
<tr>
<td></td>
<td>UNIV OF ARKANSAS MULLINS</td>
<td>171095234</td>
<td>Lost towns of Navarro County</td>
<td>2016-09-23</td>
<td>2016-09-23</td>
<td>$15.00</td>
</tr>
</tbody>
</table>
Display Symbols Button

Symbols

A3E AAM ABB ABC ABF ABH ACM ADA AFU AHS AJH AJO AJR AJS AKD AKE AKK AKM AKO AKU AL5CM AL5GD AL7VL ALAMR ALDEM ALDPL ALJVP ALLUV ALM ALOPP ALPEL ALPLG ALR ALRCP AMK AMP ANO AS4 ASA ASB ASG ASK ASU ASZ ATA ATB ATMRE AUBRN AUF AVR AZC AZL AZN AZP AZS AZT AZU AZY BMQ CHINO DECTR EC2 ERU FAYTV FY9 FY2 FY6 FY7 GC0 GRANC HRY LC2 MMS MVQ MWR MXD NCENT PISOL PMD Q2L RC8 RED RF6 RG4 RG6 RP8 SVZ TUS TYD TZE UAA UC2 WN6 X#7 X$4 X@4 X@6 X@8 XF8 XPQ XY9 XZX Y4Z YCC ZF3 ZPT
Maintain Custom Holdings

On-the-fly

Scheduled
Assessing Usage: ILLiad Groups
Assessing Usage: Who We Borrow From

[Diagram showing bar chart and table related to assessment of usage and borrowing sources]
Resource: OCLC reports

**OCLC Lender String Report**: identify libraries that consistently provide excellent service and those who do not.

<table>
<thead>
<tr>
<th>Lender Symbol</th>
<th>Lender name</th>
<th># times in Lender String</th>
<th># times supplied</th>
<th># times Not supplied</th>
<th>Time to Respond</th>
<th>% Filled</th>
<th>% Unfilled</th>
<th># times in Lender String</th>
<th># times Supplied</th>
<th># times Not supplied</th>
<th>Time to Respond</th>
<th>% Filled</th>
<th>% Unfilled</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST</td>
<td>TEST one</td>
<td>1856</td>
<td>1572</td>
<td>284</td>
<td>0.68</td>
<td>84.69</td>
<td>15.3</td>
<td>382</td>
<td>275</td>
<td>107</td>
<td>0.64</td>
<td>71.98</td>
<td>28.01</td>
</tr>
<tr>
<td>TEST2</td>
<td>TEST two</td>
<td>188</td>
<td>88</td>
<td>100</td>
<td>1.69</td>
<td>46.8</td>
<td>53.19</td>
<td>90</td>
<td>57</td>
<td>33</td>
<td>0.74</td>
<td>63.33</td>
<td>36.66</td>
</tr>
<tr>
<td>TEST3</td>
<td>TEST three</td>
<td>64</td>
<td>24</td>
<td>40</td>
<td>1.17</td>
<td>37.5</td>
<td>62.5</td>
<td>44</td>
<td>18</td>
<td>26</td>
<td>0.97</td>
<td>40.9</td>
<td>59.09</td>
</tr>
</tbody>
</table>

**Reason for No Report**: cost, deflection, aged to next lender

**OCLC Borrower Resource Sharing Stats Report**
Time-Saving Uses for Custom Holdings
Custom Holdings and Direct Request

Direct Request Profiles
- Profile: CAMBR
- *Profile Name*: CAMBR
- Description: Direct request books for Cambridge
- Request Sources: (fields empty)
- Request Type: LOAN

Constant Data Record:
- DIRCAM

Minimum Number in Lender Strings:
- 5

*Custom Holdings Path*:
- DIRBOOKS

Produce the Request:
- Yes
- No
Routing Rules, D2D and Direct Request

Awaiting Request Processing

...a few of my favorite matchstrings...

u.NYTGC = 'VPL' and t.ISSN > " and t.RequestType = 'Loan' and (t.LendingString = " or t.LendingString is NULL) and ((t.CitedIn like '%E23%') or (t.CitedIn like '%EED%') or (t.CitedIn like '%E-ZBorrow%') or (t.CitedIn like '%I-Voyager%'))

Awaiting Direct Request Sending

It’s a matter of balance
Custom Holdings and Deflection

Create custom holdings group
Do NOT put group into custom paths
Create deflection policy in Policies Directory

<table>
<thead>
<tr>
<th>Libraries who have $0 max cost</th>
<th>FEES</th>
<th>BORROWERS</th>
<th>ITEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requests: Copy or Loan</td>
<td>Max Cost:</td>
<td>Custom Holding Groups:</td>
<td></td>
</tr>
<tr>
<td>Deflection Type: Enable Real Time Deflection - except when I am last in the lender string</td>
<td>&lt; 15.00</td>
<td>![NOPAY]</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Deflecting libraries that have $0 max cost
Wish List

- Policies Directory
  - More precise searching
  - Ability to exclude groups from searches
- ILLiad & Service Configuration
  - Export Custom Holdings lists to a spreadsheet
- IFM Reports
  - Restore the Copy/Loan column to the reports
Searching for Lenders of Formats?
Therefore, there is ShareILL

Custom holdings lists

- AV Lenders
- Color copies
- ERIC Suppliers
- Kate's Mid-America List
- New materials lenders
- CDandDVDcustomholdingbystate2
Panelists: Lapis David Cohen, University of Pennsylvania, lapis@pobox.upenn.edu

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Sue Kaler, Massachusetts Library System, sue@masslibsystem.org

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