CUSTOM HOLDINGS
WORKSHOP
Strategies for Better Borrowing

Alison Johnson, Assistant Library Directory
Lewis A. Jackson Library
June 9, 2016 – Great Lakes Resource Sharing Conference
GAME PLAN

✓ The Basics
✓ The Process
✓ The Next Step
What are Custom Holdings?
What are Custom Holdings?

- Part of Borrowing Workflow for ILL
- Choosing lenders to fill lending string
- Involves system settings in OCLC
- Automatically organizes libraries into groups based on your preferences
# CUSTOM HOLDINGS BASICS

<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>
<th>Holdings</th>
</tr>
</thead>
<tbody>
<tr>
<td>INDIANA STATE UNIV</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, IN</td>
<td>ISU</td>
<td>COURIER5</td>
<td>0.00 - 15.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>INDIANA UNIV, PURDUE UNIV, INDIANAPOLIS</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, IN</td>
<td>IUP</td>
<td>COURIER5</td>
<td>0.00 - 20.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>PURDUE UNIV</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, IN</td>
<td>IPL</td>
<td>COURIER5</td>
<td>0.00 - 15.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>UNIV OF NOTRE DAME, LAW SCH</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, IN</td>
<td>XND</td>
<td>COURIER5</td>
<td>1.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>ILLINOIS STATE LIBR</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, IL</td>
<td>SPI</td>
<td>PREFZ123</td>
<td>0.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>NORTHWOOD UNIV</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, MI</td>
<td>EZE</td>
<td>PREFZ123</td>
<td>0.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>UNIV OF KENTUCKY LAW LIBR</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, KY</td>
<td>KNE</td>
<td>ZONE123</td>
<td>0.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>CONCORDIA SEMINARY LIBR</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, MO</td>
<td>MR4</td>
<td>PREFZ34</td>
<td>0.00 - 3.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>JAMES MADISON UNIV LIBRS</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, VA</td>
<td>VMC</td>
<td>PREFZ34</td>
<td>0.00 USD - 35.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>MUHLENBERG COL LIBR</td>
<td>-</td>
<td>-</td>
<td>US, PA</td>
<td>EVI</td>
<td>PREFZ34</td>
<td>0.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>REGENCY UNIV</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, VA</td>
<td>VCB</td>
<td>PREFZ34</td>
<td>15.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>UNIV OF MISSOURI, ST LOUIS</td>
<td>Yes</td>
<td>Copies: 4 days</td>
<td>US, MO</td>
<td>UMS</td>
<td>PREFZ34</td>
<td>10.00 USD - 30.00 USD</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Local Holdings Available.
CUSTOM HOLDINGS BASICS
CUSTOM HOLDINGS BASICS

Benefits

✓ You don’t have to think!
✓ Allows you to optimize every request
✓ All staff/workstations can use them
✓ Easy to tweak and change
✓ Saves time!!!
CUSTOM HOLDINGS BASICS

Time Savings

“…biggest timesaver a Borrower can implement” - OCLC

When Placing the Request...
Reduces or eliminates decision-making when filling lending string

Getting the Request Filled...
Better selection of lenders = better turnaround time
CUSTOM HOLDINGS BASICS
CUSTOM HOLDINGS BASICS

GROUPS

OUT-OF-STATE FREE

OUT-OF-STATE $10

OUT-OF-STATE $15

OUT-OF-STATE $20

PATH
CUSTOM HOLDINGS BASICS

**GROUP:** A set of lending library symbols that all meet the same criteria

**PATH:** The order in which I prioritize my lending GROUPS
CUSTOM HOLDINGS BASICS

GROUPS

Indiana Libraries (I3U, IBS, IDU, IE0, IEC, IEP, IFC...)

Out-of-State Free (ZRV, ZRW, ZS#, ZS6, ZSV, ZSX...)

Out-of-State $10 (EPY, EQ$, EQQ, ERR, ESJ, EU2...)

Out-of-State $15 (ROL, ROZ, RRB, RRO, RS3, RTI...)

Out-of-State $20 (JAT, JAW, JAX, JAY, JAZ, JB4...)

PATH
CUSTOM HOLDINGS BASICS

BOOKS
- Indiana Libraries
  - Out-of-State Free
  - Out-of-State $10
  - Out-of-State $15
  - Out-of-State $20

ARTICLES
- Free & Electronic Delivery
  - Free & Fax/Mail
  - $10 & Electronic Delivery
  - $15 & Electronic Delivery
  - $10 & Fax/Mail
CUSTOM HOLDINGS BASICS

Let’s see this in action...
Step 1: Select the Path you want to use

Lenders will display in order of your Custom Holdings
Select the Path you want to use

Lenders will display in order of your Custom Holdings
THE PROCESS

#1 Create a Strategy
#2 Identify Factors to Consider
#3 Plan Your Groups and Paths
#4 Create Your Groups and Paths
#5 Populate Your Groups
THE PROCESS

#1 Create a Strategy

What are your priorities and preferences?

✓ Write down your decision-making process as you choose lenders for your lending string
#1 Create a Strategy

My Strategy:
- FREE and FAST and EASY to process

Other Examples
- Just FREE … don’t have time to setup for FAST
- Just FAST … cost isn’t as important… maybe for faculty
- RELATIONSHIPS …use consortia first
- LENGTH OF LOAN
- Creating groups that are easy to update
THE PROCESS

#2 Identify Factors You Want to Consider

- Consortium
- Reciprocal State or Regional Group
- Lending Charges
- Fee Payment Method (IFM vs. Invoice)
- LVIS – Libraries Very Interested in Sharing
- Loan Delivery Method (Courier, USPS, UPS)
- Article Delivery Method (Mail!, Fax!, Email, Odyssey, Article Exchange)
- Lending Policies (Do they lend e-serials, DVD, new items)
- Length of Loan
- Days to Respond
- Actual Turn Around Time
- Time Zone
- Others?
#3 Plan Your Groups and Paths

What **PATHS** do you need?

- Public libraries: Start with one for Books, one for AV
- Academic libraries: Start with one for Books, one for Articles
- Other paths: E-Serials, Serial Volume, Video, Audio, Microfilm
#3  Plan Your Groups and Paths

What **GROUPS** do you need for each **PATH**?

- Turn the “Factors You Want to Consider” into **GROUPS**
  
  
  Examples for Articles: Free Odyssey Libraries, Under $10
  
- Some **GROUPS** can be used for multiple **PATHS**
  (Consortium Libraries, In-State Libraries, LVIS)

In what order do you need the **GROUPS** within each **PATH**?
#3 Plan Your Groups and Paths

What **GROUPS** do you need for each **PATH**?

- Turn the “Factors You Want to Consider” into **GROUPS**
  - Examples for Articles: Free Odyssey Libraries, Under $10
- Some **GROUPS** can be used for multiple **PATHS**
  - (Consortium Libraries, In-State Libraries, LVIS)

In what order do you need the **GROUPS** within each **PATH**?
Simple Example:

BOOKS
- Indiana Libraries
- Out-of-State Free
- Out-of-State $10
- Out-of-State $15
- Out-of-State $20

ARTICLES
- Free & Electronic Delivery
- Free & Fax/Mail
- $10 & Electronic Delivery
- $15 & Electronic Delivery
- $10 & Fax/Mail
Not So Simple Example:

**PATH: ARTICLES**

- Preferred libraries (free) who send via Odyssey
- Other libraries (free) who send via Odyssey
- Preferred libraries (free) who send AE or email
- Other libraries (free) who send AE or email
- LVIS libraries (free) who send by fax/mail/etc./unknown
- Preferred libraries (excluding LVIS) who send via fax/mail/etc./unknown
- Other libraries (free) who send fax/mail/etc./unknown

Libraries that we have special written reciprocal agreements with:

- Libraries who charge $11 or under and send via Odyssey
- Libraries who charge $11 or under and send via AE or Email
- Libraries who charge $11 or under and send via fax/mail/etc./unknown

Libraries who charge $12 or over and send via Odyssey:

- Libraries who charge $12 or over and send via AE or Email
- Libraries who charge $12 or over and send via fax/mail/etc./unknown

Preferred libraries = ALI, Indiana, ATLA, CL@N, LVIS (do not charge us)
Not So Simple Example:

**PATH: BOOKS**
Free Indiana libraries with 5 day courier pickup
Free Indiana libraries with 4 day courier pickup
Free Indiana libraries with 3 day courier pickup
Free Indiana libraries with 2 day courier pickup
Free Indiana libraries with 1 day courier pickup
Free Indiana libraries that do not use courier
**Preferred** free, out-of-state libraries in postal zones 1-3
Free, out-of-state libraries in postal zones 1-3
**Preferred** free, out-of-state libraries in postal zones 3-4
Free, out-of-state libraries in postal zones 3-4
**Preferred** free, out-of-state libraries in postal zones 4-5
Free, out-of-state libraries in postal zones 4-5
**Preferred** free, out-of-state libraries in postal zones 6-7
Free, out-of-state libraries in postal zones 6-7
**Preferred** free, out-of-state libraries in postal zones 7-8
Free, out-of-state libraries in postal zones 7-8
Libraries with written reciprocal agreements
Libraries that charge $11 or less
Libraries that charge $12 or more

Preferred libraries = ATLA, CL@N, LVIS (do not charge us)
THE PROCESS

#3 Plan Your Groups and Paths

Simple is good!
THE PROCESS

#4 Create Your Groups and Paths

Where do I edit my Custom Holdings?

Two Options:

- OCLC Service Configuration Module
- ILLiad software
Configure Custom Holdings Groups

Required fields are marked with an asterisk *

Display groups:
by group name | by symbol

Custom Holdings Groups
ATTNBOOK

* Custom Holdings Groups Name: ATTNBOOK
Description:

OCLC Symbol(s)
Symbols currently in the group: 2
Select All Clear All
OCLC Service Configuration – How to Get There...
Follow link from within WorldShare ILL
OCLC Service Configuration – How to Get There...
Another option: Go to www.worldcat.org/config
Login using your OCLC Services Account
ILLiad Client – Resource Sharing Settings
Special Feature!

Select “Display Groups by symbol”…

You can search across all your Custom Holdings Groups to find when a particular symbol occurs.
THE PROCESS

#4 Create Your Groups and Paths

First create your GROUPS…
Configure Custom Holdings GROUPS
www.worldcat.org/config
To CREATE A NEW Custom Holdings Group:

Step 1: Click...

Step 2: Enter Group Name and Description

Step 3: Click... and add just your library’s symbol for now (b/c groups can’t be saved w/o at least one symbol)

Step 4: Click...
Note: Naming Custom Holdings Groups...

ATTNLOAN
INDFAST
INDSLOW
COURIER5
COURIER4
COURIER3
COURIER2
COURIER1
INDFREE
PREFZ123
PREFZ45
PREFZ678
ZONE123
ZONE45
ZONE678
UNDER 11
OVER 12

The Custom Holdings Group name can only contain letters and numbers
Repeat until all your GROUPS are created
To CREATE A NEW Custom Holdings Path:

Configure Custom Holdings Paths

Required fields are marked with an asterisk *

Custom Holdings Path

* Custom Holdings Path Name

Description:

all no cost serial lenders

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

Choose from available groups (58)

Groups chosen for this path (20)

+ ATTNBOOK
+ AV
+ LVARIEL
+ FREEARIE
To CREATE A NEW Custom Holdings Path:

1. Click...

2. Enter Path Name and Description

3. Drag desired groups into the path and arrange in desired order

4. Click...

5. Save As New

Delete Custom Holdings Path
Repeat until all your PATHS are created
THE PROCESS

#5 Populate Your Groups

- Find libraries that meet the criteria of each of your groups
- Enter their OCLC symbols into the groups
THE PROCESS

#5 Populate Your Groups

Basic Tools
- Policies Directory (Create queries by limiting many factors)
- OCLC Group Access Codes (for consortia or special groups)
- Other consortia membership lists
- ShareILL Lists including Sue’s AV Lender List

Advanced Tools
- Borrowing History in OCLC Stats
- USPS Shipping Zone Map (determine shipping costs and time)
- Time Zone Map
- Excel (Removing duplicates values)
- Notepad or Other Text Editor Software
- Other libraries’ Custom Holdings
Step 1: Search Policies Directory

Step 2: Display symbols

Step 3: Select symbols and copy
To EDIT a Custom Holdings Group:

Step 1: Select a group to edit

Step 2: Remove symbols by clicking the red X

Step 3: To add symbols, click...
To EDIT a Custom Holdings Group:

Step 4: Type or paste symbols. Either add symbols to current list or overwrite current list.

Step 5: Click...

Step 6: Click “Save” on the next screen.
THE PROCESS

#5 Populate Your Groups

✓ Repeat to populate all groups.
✓ Done!
THE NEXT STEP

Quick Fixes
THE NEXT STEP

Quick Fixes

✓ If you don’t have time for any of this…
Use Profiled Groups…. LVIS, MIGC, ILSU, IALI
THE NEXT STEP

Quick Fixes

80/20 Rule

✓ 80% of your borrowing will come from 20% of your lenders.
✓ Focus on creating GROUPS of the 20%
✓ Examples: Consortia libraries, In-State libraries
THE NEXT STEP

Quick Fixes
Make only GROUPS that are easy to create
✓ LVIS
THE NEXT STEP

Quick Fixes

Make only GROUPS that are easy to create

LVIS
THE NEXT STEP

Quick Fixes

Make only GROUPS that are easy to create

- LVIS
- Consortia
- State or Region
- Create a group of fastest lenders using OCLC Stats Borrowing reports
THE NEXT STEP

Other Tips

- Create an E-Serials path using KBIL libraries
- Create an “Attention” group at the top to alert you if it’s held by your Library, Google Books, Hathi Trust, or affiliated institution
- Create a “Do Not Use” or “Last Resort”
- Look for aged to next lender in borrowing report
- Use help for repetitive tasks! - Circulation Workers, Volunteers, Student Workers
- Document your steps when updating your groups
COMMENTS AND QUESTIONS