

Custom Holdings Set Up in the WorldCat Services Administrative Module <https://firstsearch.oclc.org/admin>

Login using your resource sharing authorization and password.

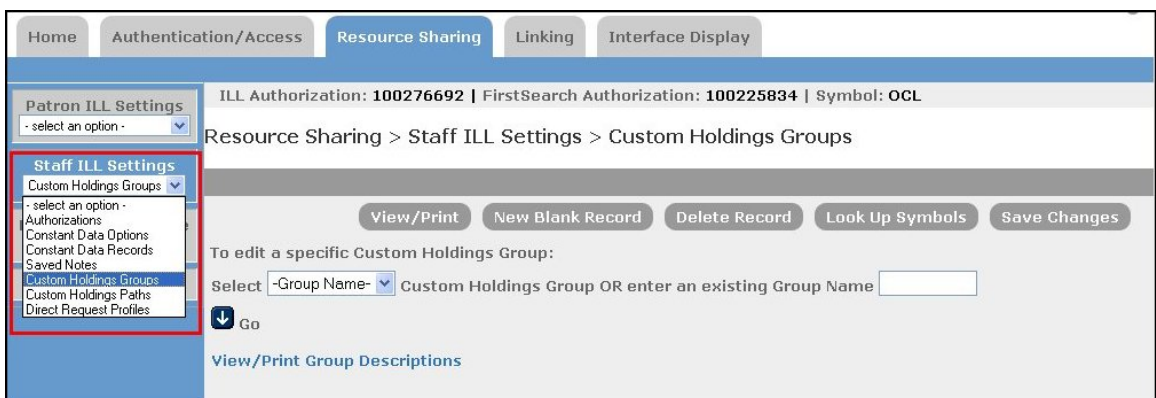
What are custom holdings groups?

Custom holdings allow you to organize and customize holdings displays to improve access to the OCLC symbols of your preferred lenders. We are recommending that SHRS participants set up custom holdings groups that refer to free lenders, \$10 lenders (all copies and domestic loans) and \$30 international loans. One possible naming convention is SHRSFREE, SHRS10 and SHRS30.



The screenshot shows the WorldCat Services Administrative Module login page. At the top left is the WorldCat Services logo. At the top right are links for WorldCat Collection Analysis, OCLC FirstSearch, and WorldCat Resource Sharing. The main heading is "Administrative Module". Below this is a login form with fields for "Authorization:" (containing 100276692) and "Password:" (masked with dots). A "Start" button is below the password field. To the right of the form are links for "Terms & Conditions", "WorldCat Services Login", "Usage Statistics", "FirstSearch News", "About OCLC FirstSearch", and "Recommended Browsers". At the bottom of the form are language options: "English | Español | Français | 日本語 | 中文(繁體) | 中文(简体)". Below the language options is a copyright notice: "FirstSearch® Copyright © 1992-2007 OCLC as to electronic presentation and platform. All Rights Reserved."

To set up custom holdings groups: Click the **Resource Sharing** section of the main menu, then choose **Custom Holdings Groups** from the drop-down list under **Staff ILL Settings** in the sidebar menu.



The screenshot shows the WorldCat Services Administrative Module Resource Sharing page. At the top are tabs for "Home", "Authentication/Access", "Resource Sharing", "Linking", and "Interface Display". Below the tabs is a navigation bar with "Patron ILL Settings" and "Staff ILL Settings". The "Staff ILL Settings" dropdown menu is open, showing options: "Custom Holdings Groups", "Authorizations", "Constant Data Options", "Constant Data Records", "Saved Notes", "Custom Holdings Groups", "Custom Holdings Paths", and "Direct Request Profiles". The "Custom Holdings Groups" option is highlighted. The main content area shows "Resource Sharing > Staff ILL Settings > Custom Holdings Groups". Below this are buttons for "View/Print", "New Blank Record", "Delete Record", "Look Up Symbols", and "Save Changes". The text "To edit a specific Custom Holdings Group:" is followed by a dropdown menu labeled "Select -Group Name-" and a text input field containing "Custom Holdings Group OR enter an existing Group Name". Below this is a "Go" button. At the bottom is a link for "View/Print Group Descriptions".

In the **Symbols to be added or removed** field, enter the OCLC symbols for the institutions to be included in the custom holdings group.

General Record Information

*Group Name:

Group Description:

Symbols to be added or removed:

* indicates a required field

Click **Add Symbols** and save your changes

Once you have established groups, these can be arranged in paths-ordered so that requests progress from least expensive to most expensive. For example, you may want to check with your free lenders first, then the \$10 lenders and finally the \$30 lenders that are your final lenders of choice.

Patron ILL Settings
- select an option -

ILL Authorization: 100276692 | FirstSearch Authorization: 100225834 | Symbol: OCL

Resource Sharing > Staff ILL Settings > Custom Holdings Paths

To edit a specific Custom Holdings Path:

Select -Path Name- Custom Holdings Path OR enter an existing Path Name

[View/Print Path Descriptions](#)

General Record Information

*Path Name:

Path Description:

- We are suggesting that libraires set up four custom holdings groups for SHARES participants
 - SHRSFREE constant data (for SHARES transactions that incur no charge, mostly art libraries)
 - SHRSLN10 constant data (for all domestic loans)
 - SHRS30 constant data (for international loans)
 - SHRSCOPY (for all copies)
- As libraries join SHARES, current participants will have to add their OCLC symbol to the appropriate custom holdings group. We are looking at the possibility of automating this process.

A **custom holdings path** is the ordering of a number of groups to optimize automatic selection of lenders. Within the holdings path record are listed holdings group records in order of borrowing preference. For example, for SHARES transactions, we recommend that you have two paths—one for copies and one for loans.

The loan path will contain first list free lenders, then \$10 lenders and finally \$30 lenders. WCRS will first attempt to find five lenders from the free group. If five lenders can not be found the system will look at the lenders from the \$10 group and finally, if there are still open lenders in the lender string, the \$30 lenders will be consulted for holdings.

To create a custom holdings path click the **Resource Sharing** section of the main menu, then choose **Custom Holdings Paths** from the drop-down list under **Staff ILL Settings** in the sidebar menu.

Patron ILL Settings
- select an option -

ILL Authorization: 100276692 | FirstSearch Authorization: 100225834 | Symbol: OCL

Resource Sharing > Staff ILL Settings > Custom Holdings Paths

View/Print New Blank Record Delete Record Save Changes

To edit a specific Custom Holdings Path:

Select -Path Name- Custom Holdings Path OR enter an existing Path Name

Go

View/Print Path Descriptions

General Record Information

*Path Name:

Path Description:

Click **New Blank Record**. Enter the **Path Name** for the custom holdings path you want to create, and optionally, the **Path Description**. In the **Groups available to be included in the path** field, click the group(s) you want to include in the custom holdings path. Click the **Add** button. The group(s) you added appear under **Groups chosen to be included in the path**.

If you want to remove the group(s) you added, click the group(s) under **Groups chosen to be included in the path**, then click the **Remove** button (see the previous step for information on selecting multiple adjacent or nonadjacent groups).

To change the order of groups in the path, click a group or groups and use the **Up** or **Down** buttons. Click **Save Changes**.

General Record Information

*Path Name: SHRSLOAN

Path Description: Shares loans-free to \$10 to \$30

Groups available to be included in the path:

- SHRSCOPY.....All SHARES requests for copies (\$10)

Groups chosen to be included in the path:

- SHRSFREE.....Free SHARES loans
- SHRSLN10.....Domestic loans from SHARES participants
- SHRS30.....Shares LOANs for \$30

View/Print Group Descriptions

* indicates a required field

View/Print New Blank Record Delete Record Save Changes

Some sample group lists of SHARES Symbols:

1. All SHRS members

A7U AF# AL# ASO AUT BMF BNG BOP BP1 BRZ CASUM CGU CLART CMA CNNGC COO CUDLL DEH DLC DLH EMI EMU ERD ERL EUM EUX EYM FDA FNE FUG FXM GWL GXR HJ8 HUC HVL IPS IUJ JPG LUI LVT MBB MEAUC MLL MMX MNU MSR MZA NDL NEIGS NGA NJR NJRLL NLF NYG NYP NZ1 ONA PAU PLL PMN PSC PUL PULEA QCL RCJ RPY RULAW S2H S7Z STF SYB TEU TXKAM TXQ U3W UBY UCDLL UMM UPM UTO UTV UVN UVV VVT YLS YSM YUM YUS YYP ZCH ZCL ZCU ZVP ZYF ZYU ZZX

2. Free SHARES Members

Most SHARES participants will have only one member in this group:

DLC

But art-to-art libraries don't charge each other for SHARES transactions. Their group would look like this:

ASO BMF BP1 BRZ CLART CMA CNNGC DEH DLC DLH FNE FXM JPG MMX MSR MZA NGA NLF PMN TXKAM ZVP

3. \$10 SHARES – multiple versions

All SHARES transactions for non-returnables are worth ten dollars, as are all loans of returnables on the same continent -- unless it's the Library of Congress doing the lending, or if the transaction is between art libraries (which would make the loans free).

A North American non-art library might have a \$10 SHARES group just for loans:

AF# AL# ASO BMF BNG BOP BP1 BRZ CASUM CGU CLART CMA CNNGC COO CUDLL DEH DLH EMI EMU EYM FDA FNE FUG FXM GWL GXR HJ8 HUC HVL IPS IUJ JPG LUI

MBB MLL MMX MNU MSR MZA NDL NGA NJR NJRLL NLF NYG NYP ONA PAU PLL PMN
PSC PUL PULEA RCJ RULAW S2H S7Z stf SYB TEU TXKAM TXQ UBY UCDLL UMM UPM
UTO UTV UVV VVT YLS YSM YUM YUS YYP ZCH ZCL ZCU ZVP ZYF ZYU ZZX

Any non-art library anywhere would have a larger group for \$10 SHARES for copies – including all symbols except DLC:

A7U AF# AL# ASO AUT BMF BNG BOP BP1 BRZ CASUM CGU CLART CMA CNNGC COO
CUDLL DEH DLH EMI EMU ERD ERL EUM EUX EYM FDA FNE FUG FXM GWL GXR HJ8
HUC HVL IPS IUF JPG LUI LVT MBB MEAUC MLL MMX MNU MSR MZA NDL NEIGS NGA
NJR NJRLL NLF NYG NYP NZ1 ONA PAU PLL PMN PSC PUL PULEA QCL RCJ RPY
RULAW S2H S7Z STF SYB TEU TXKAM TXQ U3W UBY UCDLL UMM UPM UTO UTV UVN
UVV VVT YLS YSM YUM YUS YYP ZCH ZCL ZCU ZVP ZYF ZYU ZZX

An art library (all of which are in North America) would have the same groups as above, but with the art library symbols removed.

Art \$10 for loans:

AF# AL# BNG BOP CASUM CGU COO CUDLL EMI EMU EYM FDA FUG GWL GXR HJ8
HUC HVL IPS IUF LUI MBB MLL MNU NDL NJR NJRLL NYG NYP ONA PAU PLL PSC PUL
PULEA RCJ RULAW S2H S7Z stf SYB TEU TXQ UBY UCDLL UMM UPM UTO UTV UVV
VVT YLS YSM YUM YUS YYP ZCH ZCL ZCU ZYF ZYU ZZX

Art \$10 for copies:

A7U AF# AL# AUT BNG BOP CASUM CGU COO CUDLL EMI EMU ERD ERL EUM EUX
EYM FDA FUG GWL GXR HJ8 HUC HVL IPS IUF LUI LVT MBB MEAUC MLL MNU NDL
NEIGS NJR NJRLL NYG NYP NZ1 ONA PAU PLL PSC PUL PULEA QCL RCJ RPY RULAW
S2H S7Z STF SYB TEU TXQ U3W UBY UCDLL UMM UPM UTO UTV UVN UVV VVT YLS
YSM YUM YUS YYP ZCH ZCL ZCU ZVP ZYF ZYU ZZX

4. \$30 SHARES

Returnables loaned overseas are worth \$30. The “land masses” in SHARES so far are: a) North America, b) Europe (including the UK and Ireland), c) the Middle East, and d) Australia and New Zealand. (Because currently all art-to-art libraries are in North America, an art library would have the same “\$30” group as their non-art neighbor.)

A North American library’s group for \$30 SHARES would look like this:

A7U AUT ERD ERL EUM EUX IUF JPG LUI LVT MEAUC NEIGS NZ1 QCL RPY U3W UVN

A UK library’s group for \$30 SHARES would look like this:

A7U AF# AL# ASO AUT BMF BNG BOP BP1 BRZ CASUM CGU CLART CMA CNNGC COO
CUDLL DEH DLC DLH EMI EMU EYM FDA FNE FUG FXM GWL GXR HJ8 HUC HVL IPS
IUF JPG LUI MBB MEAUC MLL MMX MNU MSR MZA NDL NGA NJR NJRLL NLF NYG NYP
NZ1 ONA PAU PLL PMN PSC PUL PULEA RCJ RULAW S2H S7Z STF SYB TEU TXKAM
TXQ UBY UCDLL UMM UPM UTO UTV UVV VVT YLS YSM YUM YUS YYP ZCH ZCL ZCU
ZVP ZYF ZYU ZZX