

OCLC Resource Sharing Webinar • June 23, 2020

# Part 4: Curate and care for your Constant Data

**Workshop Series:** Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users

# Today's presenters



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Resource Sharing



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Customer Support  
Analyst III



# WORKSHOP SERIES

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# Series topics

Topic	Webinar Date	Office Hours Date
<i>Part 1: Policies and Deflections</i>	<i>Jan 30</i>	<i>Feb 7</i>
<i>Part 2: Custom Holdings</i>	<i>Feb 27</i>	<i>Mar 6</i>
<i>Part 3: Automation (Direct Request)</i>	<i>May 5</i>	<i>May 15</i>
 <b>Part 4: Constant Data</b>	<b>June 23</b>	June 30
Part 5: Usage Statistics	TBD	TBD

# Our continuous efforts to improve turnaround times and fill rates

Virtual Workshop  
Series



New Automation  
Request Manager



Identify fastest  
lenders ([oclc.org/rsgifts](https://oclc.org/rsgifts))



Reasons for No  
Task Force



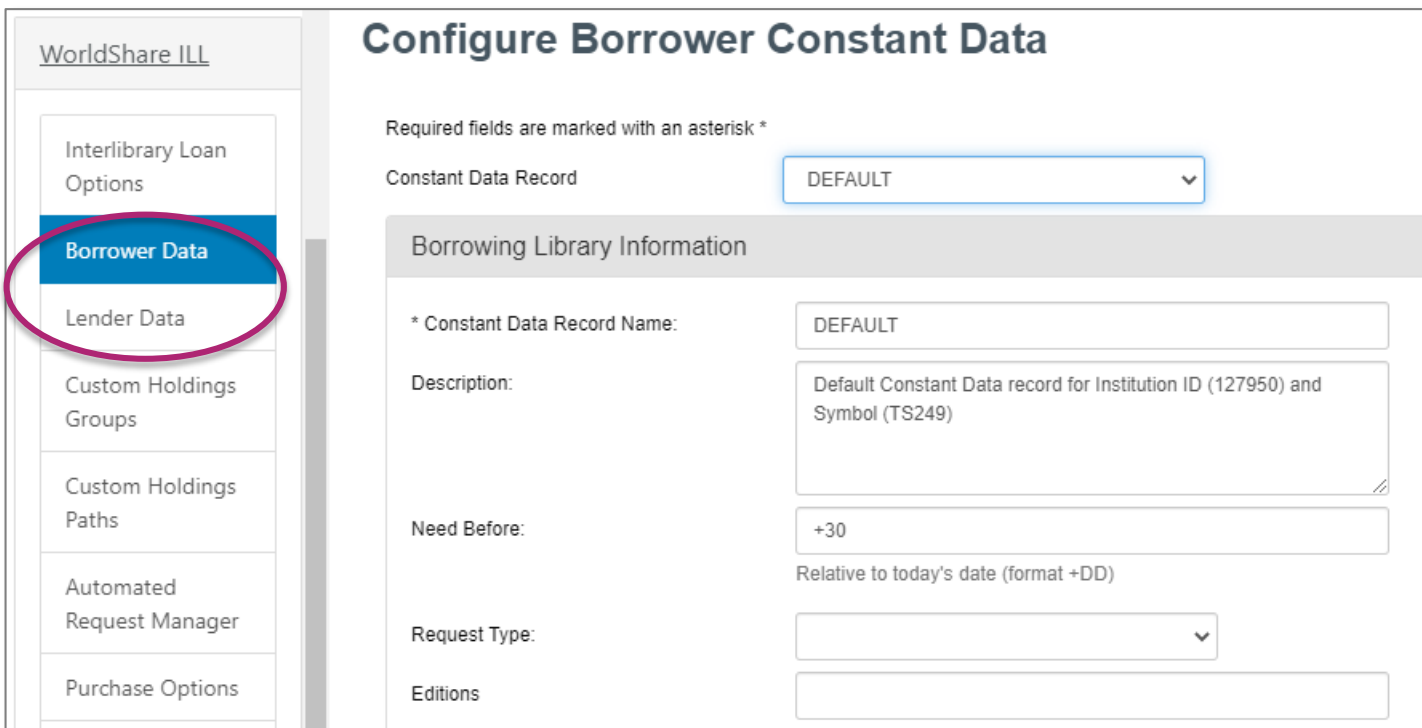
Availability/  
Requestability Pilot



Removing  
non-responsive  
suppliers



# Service Configuration – WorldShare ILL



The screenshot displays the 'WorldShare ILL' configuration page. On the left is a vertical sidebar with a menu containing the following items: 'Interlibrary Loan Options', 'Borrower Data' (highlighted with a blue background and a red circle), 'Lender Data', 'Custom Holdings Groups', 'Custom Holdings Paths', 'Automated Request Manager', and 'Purchase Options'. The main content area is titled 'Configure Borrower Constant Data'. It includes a note: 'Required fields are marked with an asterisk \*'. Below this, there is a 'Constant Data Record' dropdown menu currently set to 'DEFAULT'. A section header 'Borrowing Library Information' is followed by several input fields: '\* Constant Data Record Name:' (set to 'DEFAULT'), 'Description:' (containing the text 'Default Constant Data record for Institution ID (127950) and Symbol (TS249)'), 'Need Before:' (set to '+30' with a sub-note 'Relative to today's date (format +DD)'), 'Request Type:' (a dropdown menu), and 'Editions' (an empty text field).

WorldShare ILL

Interlibrary Loan Options

**Borrower Data**

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Purchase Options

## Configure Borrower Constant Data

Required fields are marked with an asterisk \*

Constant Data Record: DEFAULT

### Borrowing Library Information

\* Constant Data Record Name: DEFAULT

Description: Default Constant Data record for Institution ID (127950) and Symbol (TS249)

Need Before: +30  
Relative to today's date (format +DD)

Request Type:

Editions:

# Welcome to OCLC Support

How can we help you?

Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox

# Constant data

Last updated: Jun 17, 2020



## Constant data description

Constant data allows you to create data records that can be saved and applied to both borrowing and lending requests. Once you have entered constant data and saved it, you can select any of your saved records and instantly populate your borrowing or lending fields with this information. This feature saves time in data entry on interlibrary loan requests and workforms.

To configure your constant data fields, see [Borrower Data](#) and [Lender data](#).

## Watch a video

Creating constant data (9:29)

This video shows how to create, edit and maintain constant data records in OCLC Service Configuration for accuracy and efficiency in ILL borrowing and lending.

### — Table of contents

1. [Constant data description](#)
  - 1.1. [Watch a video](#)
2. [Constant data records for Borrowers](#)
3. [Constant data records for Lenders](#)
4. [Edit constant data](#)



# Today's topics

- What is Constant Data and why is it important?
- Common uses and best practices:
  - Borrower Constant Data
  - Lender Constant Data
- Constant Data Persistence
- Tipasa-specific recommendations
- Assessing your Constant Data accuracy
- Takeaways and getting assistance

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# WHY CONSTANT DATA?

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# OCCLC Resource Sharing

A person with a backpack is looking at a smartphone at night. The background is a blurred city street with blue and white lights.

7,531

borrowing libraries  
worldwide

7,540

lending libraries worldwide

57

countries

12.7

requests created per minute

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# CONSTANT DATA: THE BASICS

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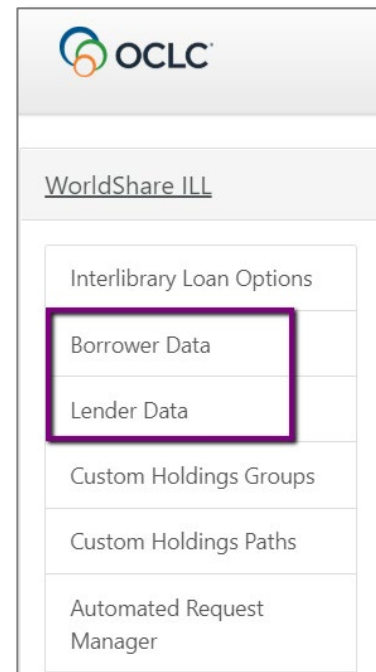
# Constant Data – What is it?

- Allows you to create and save data records you need to apply to borrowing or lending requests
- You must have at least one record, but you can have many more
- You can set up records for both borrowing and lending
- You save time by not entering common information repeatedly: shipping address, loan period, charges, shipping method, etc.

# Constant Data – Where is it created?

- Now exclusively created and maintained in OCLC Service Configuration
- Separate sections for Borrower and Lender Constant Data records

<https://worldcat.org/config>



# Constant Data – How is it applied?

- In WorldShare ILL or Tipasa: Select in staff interface
- In ILLiad: Select from the workform using the Constant Data icon
- Apply via Automated Request Manager (borrower data only at present)
- Constant Data Persistence

# Apply Constant Data – Staff interface

203176455: Anthrozoös : a multidisciplinary journal of the interactions of people and animals.

[Previous Request](#) [Next Request](#)

[Send Request](#) [Change Fulfillment Type](#) [Cancel Request](#) **Apply constant data** [Actions:](#)

[Request](#) [Purchase](#) [Staff Notes 0](#)

[Request Details \(Request ID 203176455\)](#)

[Patron Summary](#)

[Note](#) [Mark as Reviewed](#) [Save](#) [Reset](#) [Email](#) [Print Now](#)

[COPYIFM](#)  
[COPYNOIFM](#)  
[DEFAULT](#)  
[LOANIFM](#)  
[LOANNOIFM](#)

Local ID



# Apply Constant Data – ILLiad

The screenshot displays the ILLiad system interface for a borrowing request. The top navigation bar includes tabs for 'Borrowing Processing', 'Printing', 'Copyright', 'Reprints Desk', 'OCLC Request', and 'OCLC Search'. The 'OCLC Search' tab is active, showing search criteria for 'Molecular medicine reports'. A yellow box highlights the 'Constant Data' dropdown menu, which is open and shows options: 'ARTICLE', 'BOOK', 'COKAMO', 'DEFAULT', and 'SAFESYM'. A mouse cursor is pointing at the 'SAFESYM' option. The main form area is divided into sections: 'General Information' (with fields for OCLC, Need Before, and Locations), 'Bibliographic Information' (with fields for Lenders, Author, Title, Edition, Imprint, Series, Article, Article Author, Volume, Issue Number, Issue Date, Pages, ISIN, DOI, and Verified), 'Borrowing Information' (with fields for Ship Via, Media Rate, Max Cost, Borrowing Notes, Billing Notes, E-mail, Affiliation, Patron Name, Ship To, Attention, Address, City, State/Province, Postal Code, and Country), and 'Bill To' (with fields for Attention, Address, City, State/Province, and Postal Code).

# Apply Constant Data – Automation

COPIES	Request Type: Copy Patron Status(es): Faculty, Graduate Student	If Held By Your Institution, Route to Document Delivery. (else) Send Request to Lenders if at least 1 lender(s) from Custom Holdings Path TESTINSTITUTIONS hold(s) the item	7	<a href="#">Edit</a>	<a href="#">Delete</a>
Apply Constant Data: COPYNOIFM.					

- Example of automation setup in **Service configuration > WorldShare ILL > Automated Request Manager**
- In addition to other functions, this automation will apply the **COPYNOIFM** constant data record to matching new borrowing requests

# Apply Constant Data – Persistence

## Interlibrary Loan Options

### Persistence Setting

Select whether you wish constant data records be automatically applied to each resource sharing request. If persistence is turned on, a default constant data record will automatically be applied, and if a modified constant data record is selected, that record will be applied to future requests. If persistence is turned off, users must manually select a constant data record for each resource sharing request.

☐ On

- Set up in **Service Configuration > Interlibrary Loan Options**
- Useful if you generally use the same Constant Data record or process all loan requests and then all copy requests in groups

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# BORROWER CONSTANT DATA

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# Borrower – Uses for Constant Data

- Copy vs. Loan
- Free vs. Willing to pay
- Different pickup locations/shipping addresses
- Shipping methods (mail vs. Rush)

# Borrower – Best practices

- On **copy** Constant Data records, be sure to specify a method of electronic delivery

Electronic Delivery:

[Add new Electronic Delivery methods via OCLC Policies Directory](#) (refresh this Constant Data page once you've added new options in the Policies Directory)

Optionally select your preferred choices of Electronic Delivery method in order of preference for this constant data record. You cannot select the same delivery option more than once.

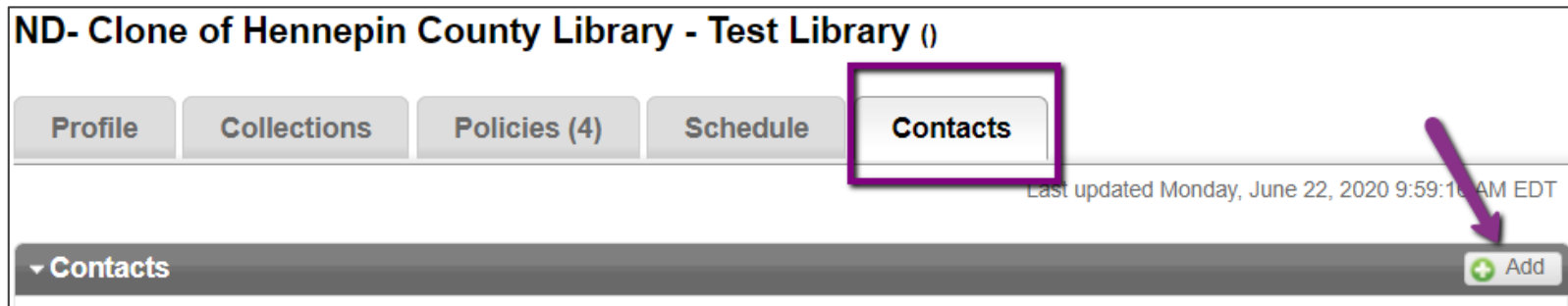
OCLC product, service and business names are trademarks and/or service marks of OCLC. Third-party product, service and business names are trademarks and/or service marks of their respective owners.


Electronic Delivery Service choice 1:

Electronic Delivery Service choice 2:

Electronic Delivery Service choice 3:

# Setting method of electronic delivery



- Access the Policies Directory for your site and go to the Contacts tab
- Click the  Add button to add your Article Exchange info
- OCLC Policies Directory is accessible via links in staff interface of WorldShare ILL, Tipasa, or ILLiad

# Setting method of electronic delivery

- Select **Article Exchange** as the Contact Type
- In the **URL** field, enter your library ILL department's email address
- If delivery via Article Exchange is not successful, this is the email that should receive the PDF of the item

The screenshot shows a web form titled "Add Contact" with a "Required Fields" indicator. The "Contact Type" dropdown menu is highlighted with a red box and set to "Article Exchange". Below this, a note states: "For **Electronic** contact types use the Attention: field to note the type of electronic contact (Skype, Yahoo messenger, etc.) and the URL: field to define the specific address (if one is needed)". The form includes fields for "Attention:", "Phone:", "Fax:", "Email:", and "URL:". The "URL:" field is highlighted with a red box and contains the text "ill@mylibrary.org".

**Add Contact** \* Required Fields

\*Contact Type:  
Article Exchange

For **Electronic** contact types use the Attention: field to note the type of electronic contact (Skype, Yahoo messenger, etc.) and the URL: field to define the specific address (if one is needed)

Attention:  
[Text Field]

Phone:  
[Text Field]

Fax:  
[Text Field]

Email:  
[Text Field]

URL:  
ill@mylibrary.org



# Setting method of electronic delivery



Contact added: Article Exchange -



You may need to update your Constant Data records in the OCLC Service Configuration module, if you plan to use this information as part of your constant data. Log in to the Service config module to update your Constant data  
<http://worldcat.org/config/SignIn.do>

- Scroll to the bottom of the pop-up window and click Save
- OCLC Policies Directory reminds you to update your Constant Data

# Setting method of electronic delivery

Electronic Delivery:

[Add new Electronic Delivery methods via OCLC Policies Directory](#) (refresh this Constant Data page once you've added new options in the Policies Directory)

Optionally select your preferred choices of Electronic Delivery method in order of preference for this constant data record. You cannot select the same delivery option more than once.

OCLC product, service and business names are trademarks and/or service marks of OCLC. Third-party product, service and business names are trademarks and/or service marks of their respective owners.

Electronic Delivery Service choice 1:

Electronic Delivery Service choice 2:

Electronic Delivery Service choice 3:

- The options you configured in OCLC Policies Directory will now display
- Select the Article Exchange entry you just created and click Save
- Repeat for all Constant Data records you use for copy requests


# Borrower – Best practices: Addresses

- Addresses should **not** be formatted all in one line
- These will not print correctly and will cause problems for the lender
- Do not write “same” for billing address/information. Instead, use the “copy from shipping address” button

# Address formatting – DO NOT DO THIS

Shipping and Contact Info	
Attention:	<input type="text"/>
Address Line 1:	6565 KILGOUR PLACE / DUBLIN / OHIO / 43017 / USA
Address Line 2:	<input type="text"/>
City:	<input type="text"/>
Country:	<input type="text" value="v"/>
State/ Province/ Region:	<input type="text" value="v"/>
Postal Code:	<input type="text"/>
Fax / Phone Number:	<input type="text"/>
E-mail:	rosenfej@oclc.org
Copy From Shipping Info.	
Attention:	SAME
Address Line 1:	<input type="text"/>

# Address formatting – DO THIS

Shipping and Contact Info	
Attention:	ILL Department
Address Line 1:	6565 KILGOUR PLACE
Address Line 2:	
City:	DUBLIN
Country:	United States ▼
State/ Province/ Region:	Ohio ▼
Postal Code:	43017
Fax / Phone Number:	
E-mail:	rosenfej@oclc.org
Bill to:	 Copy From Shipping Info.
Attention:	ILL Department - Billing
Address Line 1:	6565 KILGOUR PLACE

# Borrower – Best practices: Naming

- Use intuitive and descriptive names for your Constant Data records. Examples:
  - FREECOPY
  - FREELOAN
  - IFMCOPY
  - IFMLOAN
  - RUSH
- In the staff interface, only the record name appears

# Borrower – Best practices: Max Cost

- On your free Constant Data records, do NOT check IFM
- On your free Constant Data records, enter 0.00
- Lenders cannot charge you if your Max Cost is 0
- Make sure you consistently apply free Constant Data records when you expect to obtain something for free

☐ ILL Fee Management (IFM):

Maximum Cost:

Currency:

If you only want items that are free, enter 0.00

If you do not enter an amount, you will be responsible for whatever the lender charges.

# Borrower – Best practices: Cleanup

- Revisit your Constant Data records and delete any you no longer use
- You can view a list of all your records by using the drop-down list near the top of the page

**Configure Borrower Constant Data**

Required fields are marked with an asterisk \*

Constant Data Record

DEFAULT

ALLBORROWERFIELDS  
BADADDRESS  
BILLTEST  
CCDIRECTREQUESTS  
CINDYCD  
COPY  
COPYRIGHTTEST  
COPYWITHPATRON  
**DEFAULT**  
DOCDEL  
DON  
ELIZABETHCOPY  
ELIZABETHLOAN  
LOAN  
LOANWITHPATRON  
PIITEST  
RAPIDBORROWERFIELDS  
SHAUNNOTYPE  
SHAUNSCOPY  
SHAUNSCOPYCCG

ymbol (NDOSU)



# Borrower – Best practices: Cleanup

- Delete button is at the bottom of each Constant Data record
- The only record you cannot delete is the Default



A screenshot of a web interface for a Constant Data record. The interface is a horizontal bar with a light gray background. On the left side, there is a button labeled "Delete Record" with a red rectangular border around it. On the right side, there are three buttons: "Save As New", "Save", and "Cancel".

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# LENDER CONSTANT DATA

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# Lender – Uses for Constant Data

- Specify due dates
- Indicate lending charges
  - Specify different types of lending charges (non-IFM)
- Add a return address

# Lending – Due Date

Lending Library Information

\* Constant Data Record Name: BOOKS [Create New CD record](#)

Description:

Due Date: +120  
Relative to today's date (format: +DDD)

Shipped Date:  
Relative to today's date (format: -DD)

Add ILL Management Fee (IFM): ☐

Lending Charges: Currency:

Insurance Amount: USD

Lending Notes:

Lending Restrictions:

Return To:

Attention:

Address Line 1:

- Use Constant Data to specify due dates in requests
- Multiple profiles can be created for different due dates

# Lending – Shipped Date

Lending Library Information

\* Constant Data Record Name:

DEFAULT

Description:

Due Date:

+30

Relative to today's date (format: +DDD)

Shipped Date:

-0

Relative to today's date (format: -DD)

- Do not set this field too many days back
- How is your library using this field?

# Lending – IFM charges

Lending Library Information

\* Constant Data Record Name:

CHARGE

Create New CD record

Description:

Due Date:

120

Relative to today's date (format: +DDD)

Shipped Date:

Relative to today's date (format: -DD)

Add ILL Management Fee (IFM):

☒

Lending Charges:

20

Currency:

USD

Insurance Amount:

USD

Lending Notes:

Lending Restrictions:

Return To:

Attention:

# Lending – Other charges

Add ILL Management Fee (IFM):	<input type="checkbox"/>		
Lending Charges:	<input type="text" value="10"/>	Currency:	<input type="text" value="USD"/>
Insurance Amount:	<input type="text"/>	<input type="text" value="USD"/>	
Lending Notes:	<div>We do not use IFM. We will send an invoice which can be paid via credit card or check.</div>		
Lending Restrictions:	<input type="text"/>		

# Lending – Return To address

Return To:	<table><tr><td>Attention:</td><td><input type="text" value="OCLC ILL Department"/></td></tr><tr><td>Address Line 1:</td><td><input type="text" value="6565 Kilgore Place"/></td></tr><tr><td>Address Line 2:</td><td><input type="text"/></td></tr><tr><td>City:</td><td><input type="text" value="Dublin"/></td></tr><tr><td>Country:</td><td><input type="text" value="United States"/></td></tr><tr><td>State/ Province/ Region:</td><td><input type="text" value="Ohio"/></td></tr><tr><td>Postal Code:</td><td><input type="text" value="43017"/></td></tr></table>	Attention:	<input type="text" value="OCLC ILL Department"/>	Address Line 1:	<input type="text" value="6565 Kilgore Place"/>	Address Line 2:	<input type="text"/>	City:	<input type="text" value="Dublin"/>	Country:	<input type="text" value="United States"/>	State/ Province/ Region:	<input type="text" value="Ohio"/>	Postal Code:	<input type="text" value="43017"/>
Attention:	<input type="text" value="OCLC ILL Department"/>														
Address Line 1:	<input type="text" value="6565 Kilgore Place"/>														
Address Line 2:	<input type="text"/>														
City:	<input type="text" value="Dublin"/>														
Country:	<input type="text" value="United States"/>														
State/ Province/ Region:	<input type="text" value="Ohio"/>														
Postal Code:	<input type="text" value="43017"/>														
Return Via:	<input type="text" value="Library Rate"/>														

- Specify a return address
- Multiple profiles can be created for separate branches



# Align with OCLC Policies Directory

**Lending**

EditDelete

SERVICE	FEEs	BORROWERS	ITEMS	DETAILS
<b>Loan Item Max:</b> None <b>Loan Period:</b> 4 Month(s) <b>Renewal Max:</b> None <b>Renewal Period:</b> 3 Week(s)	<b>Per Request:</b> <ul style="list-style-type: none"><li>20.00</li></ul> <b>Currency:</b> United States Dollar <b>Tax Included:</b> No	<b>Groups:</b> ✔ Any <b>Libraries:</b> ✔ Any <b>Locations:</b> ✔ United States	<b>Collections:</b> ✔ Any <b>Formats:</b> ✖ E-Audio Book ✖ E-Text ✖ Microform ✖ Newspaper ✖ Serial - Bound ✖ Serial - Unbound ✖ Sound Recording - LP ✖ Visual Material - DVD ✖ Visual Material - VHS	<b>Requests:</b> <ol style="list-style-type: none"><li>Email</li><li>OCLC ILL</li><li>Phone</li><li>Mail</li></ol> <b>Delivery:</b> <ol style="list-style-type: none"><li>Mail /</li></ol> <b>Billing:</b> <ol style="list-style-type: none"><li>OCLC IFM</li></ol>
<b>Note:</b>				

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# CONSTANT DATA PERSISTENCE

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# What is Constant Data Persistence?

- Automatically applies Default record as soon as you open a request (and every time you open a request)
- If you have manually applied a different record to a previous request, persistence applies that record to all subsequent requests you open
- Resets when you sign out or end your session

# Who should use Persistence?

- You only use the Default record (each for borrowing and lending)
- You have a few records but you process all requests of one type first before moving onto the next

## Interlibrary Loan Options

[Help on this screen](#)

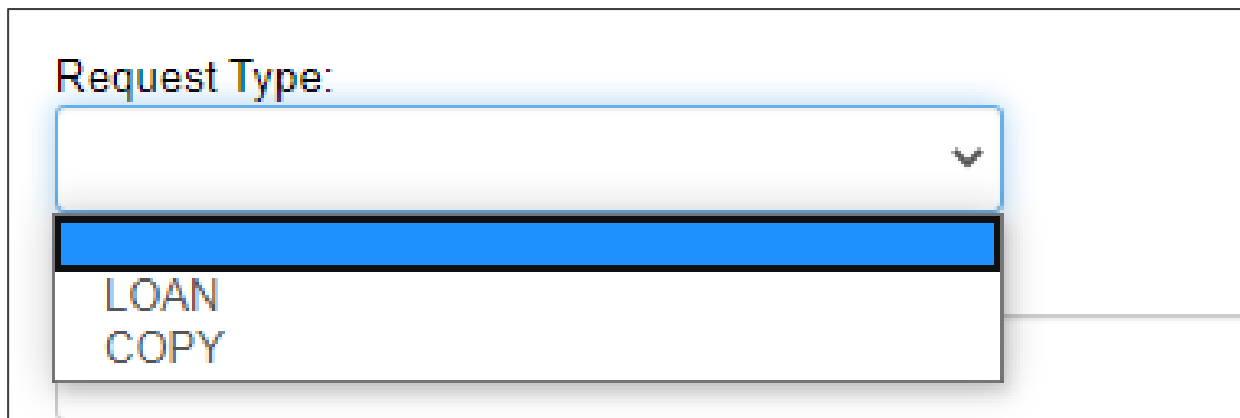
### Persistence Setting

Select whether you wish constant data records be automatically applied to each resource sharing request. If persistence is turned on, a default constant data record will automatically be applied, and if a modified constant data record is selected, that record will be applied to future requests. If persistence is turned off, users must manually select a constant data record for each resource sharing request.

☐ On

# Persistence – Best Practices: Request Type

- Make sure your Default borrower record does **not** have a Request Type selected



A screenshot of a web form element labeled "Request Type:". Below the label is a dropdown menu. The dropdown is currently open, showing two options: "LOAN" and "COPY". The "LOAN" option is highlighted with a blue background. The dropdown menu has a small downward arrow icon on its right side.

## Persistence – Best Practices: Need Before date

- Be aware that Persistence will overwrite your patron's Need Before date with whatever is in the Default record
- For this reason, select a Need Before value that works for most requests (+30 is a good suggestion)
- Requests that are unfilled past their Need Before dates will move to Expired status and will not progress

Need Before:
+30
Relative to today's date (format +DD)

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# TIPASA-SPECIFIC RECOMMENDATIONS

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# Tipasa-specific recommendations


- Don't use patron-specific information in a Borrower Data record
- Set Copyright Compliance to "None"



# Don't use patron-specific information

Patron

Patron Name:	<input type="text" value="Joe Patron"/>
Patron ID:	<input type="text" value="jpatron"/>
Patron Department:	<input type="text" value="Faculty"/>
Status:	<input type="text"/>
Email:	<input type="text" value="jpatron@library.org"/>
Address:	<div><div>Address Line 1: Address Line 2: City: Country: State/ Province/ Region: Postal Code: Phone Number: Fax Number:</div><div><input type="text" value="123 OCLC Ave."/> <input type="text"/> <input type="text" value="Dublin"/> <input type="text" value="United States"/> <input type="text" value="Ohio"/> <input type="text" value="43017"/> <input type="text" value="614-555-5555"/> <input type="text"/></div></div>



Including patron information in Constant Data will overwrite patron matching in Tipasa

# Copyright considerations

Copyright Compliance

☐ CCG: Conforms to CONTU Guidelines

☐ CCL: Conforms to U.S. Copyright Law

☒ None

- If you are managing copyright in Tipasa, select None for Copyright Compliance
- The Tipasa copyright module will manage this separately

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# ASSESSING CONSTANT DATA

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# ILL Fee Management (IFM) Reports

- In OCLC Usage Statistics (<http://www.stats.oclc.org>)
- Monthly data available
- Separate reports for borrowing and lending



[ILL Fee Management Program Borrower Report](#)



[ILL Fee Management Program Lender Report](#)

# IFM Borrower Report

## ILL Fee Management Program Borrower Report

REPORTING PERIOD:  
April 2020

INSTITUTION:  
OCLC DEMO LIBR

SYMBOL:  
NDWTL

Lender Symbol	Institution Name	Request Count	ILL Fee
<a href="#">Show All Requests</a>	Total	1	\$5.55
<a href="#">NDOSU</a>	ND OHIO STATE UNIV TEST	1	\$5.55

# IFM Lender Report

## ILL Fee Management Program Lender Report

REPORTING PERIOD:

March 2020

INSTITUTION:

ND OHIO STATE UNIV TEST

SYMBOL:

NDOSU

Borrower Symbol

Institution Name

Request Count

ILL Fee

[Show All Requests](#)

Total

4

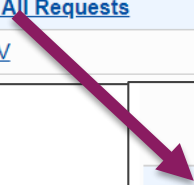
\$22.20

[NDCLV](#)

ND CLIVE PUB LIBR 123 TEST

4

\$22.20



						Total Count	4
NDCLV	ND CLIVE PUB LIBR 123 TEST	202575505	The world is flat : a brief history of the twenty-first century	2020-03-24	2020-03-24	\$5.55	
NDCLV	ND CLIVE PUB LIBR 123 TEST	202575881	Foolproof planting : how to successfully start and propagate more than 250 vegetables, flowers, trees, and shrubs	2020-03-24	2020-03-24	\$5.55	
NDCLV	ND CLIVE PUB LIBR 123 TEST	202575885	Unselfie : why empathetic kids succeed in our all-about-me world	2020-03-24	2020-03-24	\$5.55	
NDCLV	ND CLIVE PUB LIBR 123 TEST	202576113	Virgil Wander	2020-03-24	2020-03-24	\$5.55	

# Using the IFM reports to assess Constant Data

- Who is charging you?
- Would you have expected to receive materials at no charge from those institutions?
- Who are you charging?
- Would you have expected to charge those institutions?
- If you see charges you would not have expected, investigate further

# What could unexpected charges mean?

- As a **borrower**
  - You may have a Constant Data record with IFM checked and no Max Cost
  - You may be using a Constant Data record with a Max Cost above 0.00
- As a **lender**
  - You may be applying the wrong Constant Data record to borrowers you should not charge (LVIS, reciprocal arrangements)



# Using the Resource Sharing Stats Reports

- If you do not use IFM, the Resource Sharing Stats Reports will have information about charges
- One report each for borrowing and lending activities
- Available monthly
- Can export and filter to requests with charges only
- Also contains the borrower's stated Max Cost



# Looking at Max Cost – Borrower

- Blank fields in Maximum Cost field indicate your Borrower Data record used had a blank Max Cost
- Review your Borrower Data records to make sure all have a value in the Max Cost field

Borrower Resource Sharing Stats Report							
REPORTING PERIOD:		INSTITUTION:			SYMBOL:		
March 2020		ND HENNEPIN CNTY LIBR			NDHCO		
Call Number Medicine	Language	ISBN	ISSN	Maximum Cost	Lending Charges	Patron Department	Patron Status
	ENG	9781560771227			0.00		FACULTY
	ENG	9781601196309			0.00		FACULTY

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# TAKEAWAYS AND GETTING ASSISTANCE

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# Suggested to-do list

- **Review the checklist**
  - Best practices for Borrower Data
  - Best practices for Lender Data
  - Assessing Constant Data
- **Attend next week's Office Hour (June 30)**

## Checklist: Construct your Custom Holdings

### Part 2 of the OCLC Resource Sharing Workshop Series

#### Review basic uses of Custom Holdings

- Set up deflections – applying policies to a single group of libraries or to all libraries **except** a group of libraries. Create a Custom Holdings Group for that!
- Set up automations (Direct Request today) to route requests to Custom Holdings Paths
- Use Custom Holdings Paths to auto-populate lender strings in WorldShare ILL and Tipasa

#### Building Custom Holdings Groups and Paths

##### OCLC Policies Directory

- Search to build Custom Holdings Groups based on your needs:
  - Libraries by geography
  - Libraries by profiled group (e.g., LVIS, [OhioLINK](#), PASCAL)
  - Libraries by days to respond
  - Libraries by current supplier status
  - Libraries by library type (e.g., academic, public, federal)
  - Combinations of these criteria that are meaningful to you

##### Combine Custom Holdings Groups into Custom Holdings Paths with OCLC Service Configuration

- Order matters – put your highest prioritized groups first in the paths
- Prioritize different paths for reasons that matter most for those requests (e.g., nearby geography and low cost for loan requests, fast time to respond and high fill rates for copies)

#### Assessing Custom Holdings – a basic routine

##### OCLC Usage Statistics ([www.stats.oclc.org](http://www.stats.oclc.org))

- Review the **Lender String Report** (under **Assessment Tools**) at least yearly
- Export to Excel and sort or filter by fill rate or time to respond – or combine both
- Review data separately for copy and loan requests (Loans are indicated as **Originals** in the report)
- Place your highest performing lenders (for each copy and loan requests) into their own Custom Holdings Groups. Make those groups first in the Custom Holdings Paths you use to request copies and loans, respectively.
- Identify lenders that have fallen below a threshold you define of acceptable lending performance (less than x% fill rate and more than y days to respond). Consider removing those lenders from your existing Custom Holdings Groups.
- Review the **Resource Sharing Borrower Reasons For No Report** monthly
- If you want, retrieve data from that report separately from the last few months and combine into one spreadsheet
- Sort by potential lender symbol and look for lenders that habitually let your requests age
- Remove those lenders from existing Custom Holdings Groups

# Office Hour: Tuesday, June 30

## 1:00-2:00 pm Eastern Time



### Register for Office Hour for Curate and Care for your Constant Data

Please provide the following information to register for this training session. You will receive an email confirmation of your registration.

#### Session Information

<b>Topic:</b>	Office Hour for Curate and Care for your Constant Data
<b>Session status:</b>	Not Started
<b>Session dates:</b>	Tuesday, June 30, 2020
<b>Starting time:</b>	1:00 pm, Eastern Daylight Time (New York, GMT-04:00)
<b>Duration:</b>	1 hour
<b>Presenters:</b>	Alena Miller,Audrey Heisel,Jenny Rosenfeld,Laura Kreis,Heather Black

# Welcome to OCLC Support

How can we help you?

Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing



Librarians' Toolbox

# OCLC Resource Sharing team





# Q&A

Your OCLC Resource Sharing Team

[support@oclc.org](mailto:support@oclc.org)  
[oclc.org/support](https://oclc.org/support)

**Because  
what is  
known must  
be shared.®**