OCLC WorldShare® Interlibrary Loan
Custom Holdings – Knowledge Check

Questions:

1. Describe one or two purposes of using Custom Holdings.

2. List one or two examples of Custom Holdings Groups a library might create.

3. List one or two examples of Custom Holdings Paths a library might create.

4. Where do you create and maintain your Custom Holdings Groups and Paths?

5. True or False:
   a. ___ You create Custom Holdings Groups and then put them in Custom Holdings Paths
   b. ___ You are limited in the number of Custom Holdings Paths you can create
   c. ___ There is no limit to the number of OCLC symbols you can put into your Custom Holdings Groups
   d. ___ You can edit your Custom Holdings at any time
   e. ___ You should use your Custom Holdings on every single request you create

6. What happens if you apply Custom Holdings to a bibliographic record?

7. List some examples of tools you might use to build Custom Holdings.

Answers:

1. Possible purposes for using Custom Holdings are to reduce staff time in request creation or to reduce errors in the requests themselves. Custom Holdings can save time and money.

2. Some examples of possible Custom Holdings Groups might be:
   a. Libraries in my geographic area that lend DVDs
   b. Libraries outside my geographic area that lend DVDs
   c. Libraries in my area that do not charge
   d. Libraries outside my geographic area that do not charge

3. Some example of possible Custom Holdings Paths might be:
a. Libraries that do not charge  
b. Libraries that lend genealogy material  
c. Libraries that lend audio-visual material  

4. You create and maintain your Custom Holdings Groups and Paths in Service Configuration, linked from the WorldShare ILL home page. 

5. True or False: 
   a. _T_ You create Custom Holdings Groups and then put them in Custom Holdings Paths  
   b. _F_ You are limited in the number of Custom Holdings Paths you can create  
   c. _F_ There is no limit to the number of OCLC symbols you can put into your Custom Holdings Groups  
      *(You should limit to a maximum of 2500 symbols in each Custom Holdings Group you create)*  
   d. _T_ You can edit your Custom Holdings at any time  
   e. _F_ You should use your Custom Holdings on every single request you create  
      *(Custom Holdings are normally created to be used in specific circumstances. For example, there would be no point in applying a Custom Holdings Path about DVDs to a request for a book. There may also be times when requests are specific in nature and you need to do additional research, carefully selecting lenders for the specific case.)*  

6. The OCLC WorldShare ILL system will compare your Custom Holdings Path with the actual holdings on an item, looking at the Groups contained in that path, in order. The system will choose 15 lenders randomly from the first Group in your path. If there are not 15 lenders in that group, it continues to pull lenders from the second Group and so on.  

7. You can use the Policies Directory, reports from the Statistics Portal, or you can ask other libraries to share their Custom Holdings settings. You may also have a list of your favorites already in another format which you can copy into Custom Holdings Groups. 

**Related Videos:**  
- Creating and Editing Custom Holdings Groups and Paths