



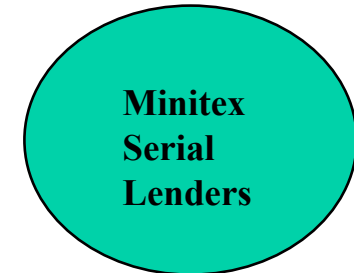
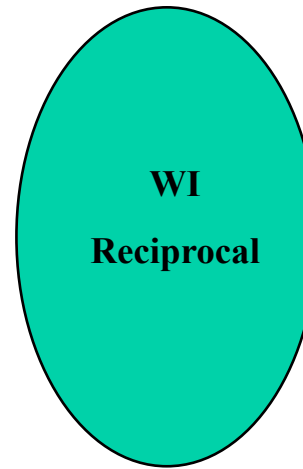
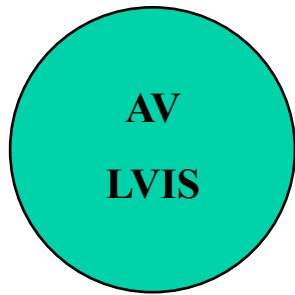
# WiLS Annual ILL Meeting

## Custom Holdings and Constant Data

**Bob Shaw**

10/1/08

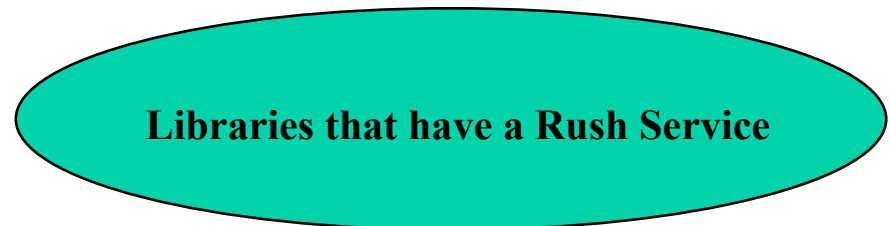
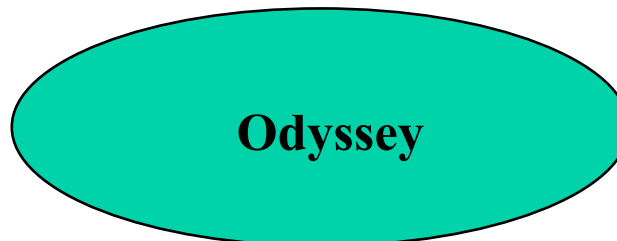
[reshaw@wils.wisc.edu](mailto:reshaw@wils.wisc.edu)



## **Custom Holdings consist of groups and paths**

**Groups consist of libraries that have a common theme**

**Paths place groups in the order that you want.**



## **What are the considerations in making groups and paths?**

### **Loans:**

- **Cost: Reciprocal partners, LVIS, IFM, \$ ranges**
- **Geography: Red Box, Postage**
- **Type of material: Book, Microfilm, AV**
- **Past Experience**

### **Serials:**

- **Cost: Reciprocal partners, LVIS, IFM, \$ ranges**
- **Delivery method: Electronic, Odyssey, Ariel, Fax**
- **Past Experience**

# Examples of groups and paths for Wisconsin libraries

	A	B
3	<b>Groups</b>	<b>Paths</b>
4		
5	<b>Private Academic Library 1</b>	
6	Free Book Lenders	Articles
7	Free Lenders in Indiana, Iowa, etc.	Books
8	Out of state free lenders	Path1
9	MN free lenders	
10	Libraries outside neighbor states	
11	UW-Madison libraries	
12		
13	<b>Private Academic Library 2</b>	
14	Ariel LVIS	Ariel LVIS
15	LVIS	Free
16	AV LVIS	LVIS
17	WI Reciprical	LVIS
18	UWs	Recips and LVIS
19		UWs, Recips, LVIS
20		
21	<b>Private Academic Library 3</b>	
22	Own library	Direct requests for journals
23	Lenders for ERIC	Free lenders from nearby states
24	Favorite IL	Paths for students to do their own ordering
25	Favorite IN	All other states
26	Favorite MO	Video lenders WI and midwest
27	Favorite MN	Wisconsin libraries
28	Favorite MI	
29	Favorite IA	
30	Loyola	
31	Free LVIS AV	
32	Free lenders Northeastern states	
33	Free Lenders Northwestern states	
34	Favorite WI libraries ouotside of SE WI	
35	Favorite libraries in SE WI	
36	Free lenders in southeast states	

	A	B
38	<b>Groups</b>	<b>Paths</b>
39	<b>UW Academic Library 1</b>	
40	CIC libraries - loans - includes CRL	Copyright paying libraries
41	Copyright paying libraries	Direct request for serials
42	Engineering 2nd lenders	Engineering 2nd lenders
43	Engineering lenders	Engineering lenders
44	Law library's recip lenders	Lenders that are "friends"
45	List of UW and Madison public libraries	Show all UW and Madison public
46	Libraries in neighboring states	Odyssey enabled libraries
47	Odyssey providers	Lenders that have rush services
48	Libraries that have a rush service	Lenders that lend videos
49	Libraries that lend videos	
50	WiLS member libraries - selective	
51		
52	<b>UW Academic Library 2</b>	
53	LVIS libraries with Ariel	Free article suppliers
54	Lenders of Videos	Free video lenders
55	Document vendors with whom we have accounts	Free book suppliers
56	Out of state non-charging libraries	Document vendors
57	Libraries in near geographic area	LVIS lenders of videos, DVDs
58	LVIS libraries	LVIS lenders of sound recordings, LPs, CDs
59	LVIS libraries with EMST	
60	Free lenders of videos and DVDs	
61	MN, IL, MN, IA, IN, WI LVIS libraries	
62	Free loans of sound recordings, music, CDs, LPs	
63	Extended region LVIS SD, ND, MO, NE, OH, AR, OK, KY, PA	
64	Madison campus, change codes to GZM	
65	Minitex libraries	
66	Libraries with which we have formal recip agreements	
67	WI libraries accepting direct requests	
68	WI libraries supplying free photocopies directly	
69	Enter my symbol twice non-charging out of state libraries	
70	UW system libraries - 4 year and 2 year	
71		

	A	B
87	<b>Groups</b>	<b>Paths</b>
88	<b>Public Library 1</b>	
89	All Minitex libraries	Free AV lenders
90	Minitex libraries that charge for lending books and AV	Free AV for direct lending
91	Minitex delivery free lenders, EMST	Free book lenders for direct request
92	Minitex on delivery that are free lenders of books only	Free book lenders
93	Minitex, free lenders of books and AV, on delivery	Free microform lenders
94	Eastern states - free AV	Minitex serial lenders
95	SOLINET, NELINET, NYLINK, PALINET, CAPCON, OHIONET	WI and MN free AV
96	EMST free lenders	WI and MN free books
97	EMST custom holdings minus those that don't lend AV	
98	FEDLINK	
99	GZM	
100	Hennepin County library	
101	IA free lenders	
102	IED -	
103	Illinois free AV lenders	
104	IL free libraries	
105	East free LVIS AV	
106	West free LVIS AV	
107	Free microform	
108	Midwest free AV	
109	BCR, MLNC, NEBASE, INCOLSA	
110	MI free libraries	
111	Milwaukee Public	
112	Minitex free AV lenders	
113	Minitex free AV lenders	
114	Non LVIS free lenders	
115	Ohio free lenders	
116	Lends AV selectively	
117	UW-Madison campus	
118	UW-Milwaukee	
119	West free AV	
120	Western states free	

	A	B
168	<b>Groups</b>	<b>Paths</b>
169	<b>Tech College 1</b>	
170	AV lenders	AV lenders
171	LVIS AV	LVIS lenders
172	WI & IL LVIS	Wispals Consortia
173	Wispals Consortia	
174		
175	<b>Tech College 2</b>	
176	All of LVIS September 2006	All LVIS libraries
177	LVIS states A-G	LVIS states A-G
178	All of LVIS 2005-09	LVIS states H-N
179	LVIS states H-N	LVIS Midwest
180	LVIS in IN, IA, and IL	LVIS WI
181	LVIS in MN and MI	
182	LVIS who lend videos	
183	LVIS Wisconsin	
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200		
201		



- Search Help ?
- Comments
- Site Map
- Print Your Settings
- Exit

Resource Sharing Search Settings

- Staff ILL Settings
  - Authorizations
  - select an option -
  - Authorizations
  - Constant Data Options
  - Constant Data Records
  - Saved Notes
  - Custom Holdings Groups
  - Custom Holdings Paths
  - Direct Request Profiles

ILL Authorization: 100017662 | FirstSearch Authorization: None | Symbol: GZY

Resource Sharing > Staff ILL Settings > Authorizations

Staff View Display Settings

Save Changes

Display link to WorldCat Services Administrative Module in WorldCat Resource Sharing  On

Staff ILL Authorizations

You are logged on as ILL authorization 100017662

**Add FirstSearch Authorization:**  
 Type an authorization in the box and click the Add button to add it to the list below.  
 Authorization formats:  
 999999999  
 999-999-999

FirstSearch Authorization  
  
 Add

**Delete FirstSearch Authorization:**  
 In the list, select an authorization that you want to delete. Then, to delete it, click the Delete button.

FirstSearch Authorization List  
  
 Delete

ILL and FirstSearch Authorization Associations

Done



Resource Sharing Search Settings

Staff ILL Settings Custom Holdings Groups

- Group Name-
- BRI
- CISTI
- COPY10
- COPY15
- CRL
- GZD
- GZN
- GZQ
- GZR
- MAILLOCS
- MIICOPY
- MINITEX
- PUBLIB
- TWICE15
- TWICE00S
- UWCENTER
- UWFOUR
- WISCISO
- WISCPRIV

Search Help ?

Comments

Site Map

Print Your Settings

Exit

7662 | FirstSearch Authorization: None | Symbol: GZY

Staff ILL Settings > Custom Holdings Groups

View/Print New Blank Record Delete Record Look Up Symbols Save Changes

To edit: [Symbol]

Select: -Group Name- Custom Holdings Group OR enter an existing Group Name

Go View/Print Group Descriptions

General Record Information

\*Group Name:

Group Description:

General Record Information

\*Group Name: WISCPRIV Last Modified Date:20050328

Group Description: Wisconsin private academic and special libraries

Symbols to be added or removed:

Add Symbols

Remove Symbols

\* indicates a required field

Symbols currently in your group (26)

GHB ?	GZA ?	GZB ?	GZC ?				
SHT ?							
WCD ?	WCT ?	WEC ?	WEZ ?	WIB ?	WII ?	WIL ?	WIP ?
WJF ?	WKG ?	WKI ?	WLD ?	WLE ?	WLF ?	WMO ?	WN3 ?
WNL ?	WOP ?	WRO ?	WZQ ?				
ZR1 ?							

View/Print New Blank Record Delete Record Look Up Symbols Save Changes



- Search Help ?
- Comments
- Site Map
- Print Your Settings
- Exit

Resource Sharing Search Settings

Staff ILL Settings  
Custom Holdings Paths

ILL Authorization: 100017662 | FirstSearch Authorization: None | Symbol: GZY

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

- Path Name-
- BOOKS
- COPIES

General Record Information

\*Path Name:

Path Description:

Groups available to be included in the path: Groups chosen to be included in the path:

To edit a specific Custom Holdings Path:

Select  Custom Holdings Path OR enter an existing Path Name



[View/Print Path Descriptions](#)

General Record Information

\*Path Name:  Last Modified Date: 20060823

Path Description:

Path for book loans for WILS members

Groups available to be included in the path:

- BRI.....British Lending
- CISTI.....CISTI
- COPY10.....Out of system locations charging <= \$10 for phot
- COPY15.....OUT-OF-STATE THAT CHARGES \$10-\$15
- MIICOPY.....Non-circulating Minitex Collections
- TWICE15.....enter my symbol twice and costs at least \$15
- TWICE00S.....ENTER MY SYMBOL TWICE - OOS - LESS



Groups chosen to be included in the path:

- WISCPRIV.....Wisconsin private academic and specie
- UWCENTER.....UW Center Campuses
- UWFOUR.....UW Four Year Campuses
- GZQ.....Marquette University
- GZN.....UW-Milwaukee
- PUBLIB.....Public Library Systems
- GZR.....Reference and Loan
- GZD.....Milwaukee County Library System
- MINITEX.....minitex locations
- MAILLOCS.....Locations accessed by mail only
- WISCISO.....In-state/Out of System Locations
- CRL.....CRL



[View/Print Group Descriptions](#)

\* indicates a required field


View/Print

New Blank Record

Delete Record

Save Changes

Accession No: OCLC: 114704 National Library Cataloging: Library of Congress (DLC)  
More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)  
[See more details for locating this item](#)

8.  [Copyright in cyberspace 2 : questions and answers for librarians /](#)  
Author: Hoffmann, Gretchen McCord.  
Publication: New York : Neal-Schuman Publishers, 2005  
Document: English : Book  
[Libraries Worldwide](#): 793 | [Regional Holdings](#) | [State Holdings](#)


Group Holdings	Custom Holdings Path
<input type="text"/>	<input type="text"/>
<input type="button" value="Select"/>	<input type="button" value="Select"/>

Accession No: OCLC: 56128 National Library Cataloging: Library of Congress (DLC)  
More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)  
[See more details for locating this item](#)

9.  [Circulation, interlibrary loan, patron use, and collection maintenance : a handbook for library management /](#)  
Author: Kohl, David F., 1942-  
Publication: Santa Barbara, Calif. : ABC-CLIO, 1986  
Document: English : Book  
[Libraries Worldwide](#): 775 | [Regional Holdings](#) | [State Holdings](#)

Group Holdings	Custom Holdings Path
<input type="text"/>	<input type="text"/>
<input type="button" value="Select"/>	<input type="button" value="Select"/>

Accession No: OCLC: 12314535 National Library Cataloging: Library of Congress (DLC)  
More Like This: [Search for versions with same title and author](#) | [Advanced options ...](#)  
[See more details for locating this item](#)

10.  [Library disaster planning and recovery handbook /](#)  
Author: Aire, Camila A.  
Publication: New York : Neal-Schuman, 2000  
Document: English : Book  
[Libraries Worldwide](#): 758 | [Regional Holdings](#) | [State Holdings](#)

Group Holdings	Custom Holdings Path
<input type="text"/>	<input type="text"/>
<input type="button" value="Select"/>	<input type="button" value="Select"/>

Accession No: OCLC: 43296521 National Library Cataloging: Library of Congress (DLC)

\* Lenders

WEC WKI WIS GZV GZS

Transfer to ILL Staff workflow Clear

[Display All Libraries](#) | [Regional Holdings](#) | [State Holdings](#)

Group Holdings Custom Holdings Path

Select Select

Custom Holdings Path BOOKS for: "Copyright in cyberspace 2..." ( [Record for Item](#) | [Get This Item](#) )

Group	Library	Supplier	Code
WISCPRIV	<a href="#">CHIPPEWA VAL TECH COL LIBR</a>	yes	<a href="#">WEC ?</a>
WISCPRIV	<a href="#">CONCORDIA UNIV, RINCKER LIBR</a>	yes	<a href="#">WKI ?</a>
UWFOUR	<a href="#">UNIV OF WISCONSIN, OSHKOSH</a>	yes	<a href="#">GZO ?</a>
UWFOUR	<a href="#">UNIV OF WISCONSIN, STOUT</a>	yes	<a href="#">GZS ?</a>
UWFOUR	<a href="#">UNIV OF WISCONSIN, PLATTEVILLE</a>	yes	<a href="#">GZV ?</a>
UWFOUR	<a href="#">UNIV OF WISCONSIN, STEVENS POINT</a>	yes	<a href="#">WIS ?</a>
GZQ	<a href="#">MARQUETTE UNIV RAYNOR MEMORIAL LIBR</a>	yes	<a href="#">GZQ ?</a>
GZN	<a href="#">UNIV OF WISCONSIN, MILWAUKEE</a>	yes	<a href="#">GZN ?</a>
PUBLIB	<a href="#">LINK (SOUTH CENT LIBR SYS)</a>		<a href="#">WIM ?</a>
PUBLIB	<a href="#">EASTERN SHORES LIBR SYST</a>		<a href="#">WSD ?</a>
GZR	<b>WISCONSIN DEPT OF PUB INSTRUCTION</b>	yes	<a href="#">GZR ?</a>
GZD	<a href="#">MILWAUKEE CNTY FEDERATED LIBR SYST</a>	yes	<a href="#">GZD ?</a>
MINITEX	<a href="#">CONCORDIA COL LIBR</a>	yes	<a href="#">CKK ?</a>
MINITEX	<a href="#">HAMLINE UNIV, SCH OF LAW</a>	yes	<a href="#">MHL ?</a>
MINITEX	<a href="#">COLLEGE OF ST CATHERINE</a>	yes	<a href="#">MNE ?</a>

Go

[View/Print Group Descriptions](#)

General Record Information

\*Group Name: WLS Last Modified Date: 20080930

Group Description: UW-Madison Libraries - Use GZM in lending string for all of them - 10/1/08

Symbols to be added or removed:

Add Symbols

Remove Symbols

\* indicates a required field

Symbols currently in your group (7)

GZH ?	gzi ?	GZL ?	GZM ?
WID ?	WIH ?	WIY ?	

View/Print New Blank Record Delete Record Look Up Symbols Save Changes

General Record Information

\*Group Name: MINITEX Last Modified Date:20080930

Group Description: Minitex locations for books - Use MII - 9/30/08

Symbols to be added or removed:

Add Symbols  
Remove Symbols

\* indicates a required field

Symbols currently in your group (714)

a\$8 ?	a3g ?	a6k ?	ablhs ?	acadc ?	ACC ?	achla ?	ACO ?
afsah ?	agc ?	agfsa ?	aleas ?	alls ?	alv ?	anh ?	ank ?
anr ?	ant ?	apple ?	aps ?	apsjl ?	ar6m8 ?	aroja ?	arrbl ?
ashps ?	at1 ?	atn ?	auahc ?	avlcs ?			
bbeps ?	bc0 ?	becis ?	bekjl ?	bethe ?	bhhs1 ?	BHS ?	BIODX ?
birch ?	bkmen ?	bkmjl ?	bmjps ?	bnc ?	boldh ?	bom ?	bongs ?
BPL ?	bqp ?	brccp ?	brojl ?	bsajl ?	BTA ?	bvm ?	bvr ?
bxtjl ?	bxtre ?	bypsc ?	bzc ?				
c#f ?	c2# ?	cad ?	calla ?	calpl ?	caths ?	cce ?	cchsa ?
cclae ?	ccsch ?	cdvj1 ?	cenms ?	centp ?	cfbml ?	cgbes ?	cgpjl ?
chall ?	chejl ?	chh ?	cjb ?	CKK ?	cl0 ?	cleve ?	clqms ?
clvre ?	cmnjl ?	cmtes ?	cn0 ?	cntle ?	cpxjl ?	CQUJL ?	cr# ?
crish ?	CRM ?	crmsl ?	ctrys ?	cwmsl ?	cwpsl ?		
d3w ?	d5d ?	d5g ?	d5q ?	d5z ?	d6x ?	d7b ?	DCB ?
des ?	defsd ?	DIP ?	DML ?	DST ?	dts ?	dud ?	dx1 ?

Done

# Creating Custom Groups

**Make your own through the Admin Module and the  
Advanced Search Feature of the Policy directory**

**or**

**Copy**

Policies Directory - Advanced Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://illpolicies.oclc.org/ipd/NewAdvancedSearch.do;jsessionid=6D07EAF5987567E9A48378CBF3D6EFA

Most Visited Customize Links WLL Membership Database

POLICIES DIRECTORY MY UNITS | SEARCH | HELP | EXIT

Search the Policies Directory!

Basic Search **Advanced Search**

SEARCH RESET

**Advanced Search**

**Institution/Unit Information**

Name

Group Affiliation

Regional Service Provider

City

State/Region Wisconsin

Country

Library Type

OCLC Supplier

International Lender

**Policy Information**

Format

Delivery Method ILLiad - Odyssey

Billing Method

Request Method

Rush Supported

**QUICK TIP**

Combine search terms on this screen to limit retrieval of policies matching specific conditions. For example, to search for public libraries in Indiana that loan Visual Materials, choose:

- State/Region of **Indiana**
- Library Type of **Public Library**
- Format of **Visual Materials**

**QUICK TIP**

For more accurate searching, refer to the list of [abbreviations commonly used in institution names](#) (Univ, Coll, Pub).

Done illpolicies.oclc.org

start University of W... WiscMail Plus - ... Microsoft Powe... Custom Holding... Policies Director... 12:06 PM

Policies Directory - Unit Summary - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://illpolicies.oclc.org/ipd/

Most Visited Customize Links WLS Membership Database

Policies Directory - Unit Summary

**POLICIES DIRECTORY**

**Search Results Summary**

You searched for: State/Region:Wisconsin & Delivery Method:ILLiad - O

**29 Unit Records found**

DISPLAY SYMBOLS

Unit Summary	Unit Name	Location
1.	<a href="#">CARDINAL STRITCH UNIV LIBR - default (WKG)</a>	
2.	<a href="#">MARQUETTE UNIV RAYNOR MEMORIAL LIBR - Interlibrary Loan (GZQ)</a>	Milwaukee
3.	<a href="#">RIPON COL LIBR - Lane Library - Ripon College (WIP)</a>	Ripon /
4.	<a href="#">SAINT NORBERT COL LIBR - default (WCD)</a>	De Pere
5.	<a href="#">UNIV OF WISCONSIN, BARABOO/SAUK CNTY - default (WUZ)</a>	BARABOO
6.	<a href="#">UNIV OF WISCONSIN, BARRON CNTY LIBR - default (WUN)</a>	Rice Lake
7.	<a href="#">UNIV OF WISCONSIN, EAU CLAIRE - UNIV OF WISCONSIN, EAU CLAIRE - Wm. McIntyre Library (GZE)</a>	Eau Claire
8.	<a href="#">UNIV OF WISCONSIN, FOND DU LAC - UW-Fond du Lac Library (WUO)</a>	Fond du Lac
9.	<a href="#">UNIV OF WISCONSIN, FOX VAL LIBR - default (WCZ)</a>	Menasha
10.	<a href="#">UNIV OF WISCONSIN, GREEN BAY - Cofrin Library (GZW)</a>	Green Bay

DISPLAY SYMBOLS

Policies Directory - Institution Symbols Display - Mozilla Firefox

https://illpolicies.oclc.org/ipd/DisplaySymbols.do;jsessionid=6D07EAF5987567E9A48378CBF3D6EFA3?institutionid=...

GZE GZM GZN GZO GZP GZQ GZT GZU GZV GZW TQY WCD WCZ WDB WIE WIH WIP WIS WJT WKG WKU WRF WRO WUN WUO WUT WUV WUX WUZ

Done illpolicies.oclc.org

Done illpolicies.oclc.org

start University ... WiscMail Pl... Microsoft P... Custom Ho... Policies Dir... Policies Dir... 12:07 PM

View/Print New Blank Record Delete Record Look Up Symbols Save Changes

To edit a specific Custom Holdings Group:

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

Go

View/Print Group Descriptions

General Record Information

\*Group Name: WODYSSY

Group Description: WI Odyssey Libraries 10/1/08

Symbols to be added or removed:  
GZE GZM GZN GZO GZP GZQ GZT GZU GZV GZW TQY  
WCD WCZ WDB WIE WIH WIP WIS WJT WKG WКУ WRF  
WRO WUN WUO WUT WUW WUX WUZ

Add Symbols

Remove Symbols

\* indicates a required field

View/Print New Blank Record Delete Record Look Up Symbols Save Changes

View/Print New Blank Record Delete Record Look Up Symbols Save Changes

To edit a specific Custom Holdings Group:

Select  Custom Holdings Group OR enter an existing Group Name

[View/Print Group Descriptions](#)

General Record Information

\*Group Name:  Last Modified Date: 20080930

Group Description:

Symbols to be added or removed:

\* indicates a required field

Symbols currently in your group (29)

GZE ? GZM ? gzn ? GZO ? GZP ? GZQ ? GZT ? GZU ?  
GZV ? GZW ?  
TQY ?

Done

Resource Sharing

Search Settings

Staff ILL Settings

Custom Holdings Paths

ILL Authorization: 100017662 | FirstSearch Authorization: None | Symbol: GZY

Resource Sharing > Staff ILL Settings > Custom Holdings Paths

Custom Holdings Path has been updated

View/Print New Blank Record Delete Record Save Changes

To edit a specific Custom Holdings Path:

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

Go

View/Print Path Descriptions

General Record Information

\*Path Name: SERODYS Last Modified Date: 20080930

Path Description: Libraries that deliver via Odyssey - 10/1/08

Groups available to be included in the path:

- BRI.....British Lending
- CISTI.....CISTI
- COPY10.....Out of system locations charging <= \$10 for photocopie
- COPY15.....OUT-OF-STATE THAT CHARGES \$10-\$15
- CRL.....CRL
- GZD.....Milwaukee County Library System

Add

Groups chosen to be included in the path:

- ODYSTRUS.....Odyssey Trusted Sender Librari
- WIODYSSY.....Wisconsin Odyssey libraries 10/
- MIIDY.....Mil Odyssey libraries 10/1/08
- LVISODYS.....LVIS Odyssey libraries 10/1/08

Up

Done

# Copy:

Reference & Loan Custom Holdings: <http://dpi.wi.gov/rll/wiscat/custhold.html>

ShareILL Custom Holdings: [http://www.shareill.org/index.php/Custom\\_Holdings](http://www.shareill.org/index.php/Custom_Holdings)



NEW WISCONSIN PROMISE:  
A QUALITY EDUCATION  
FOR EVERY CHILD

## Create Custom Holdings in WorldCat

### DPI Menu

- Superintendent's Page
- Divisions & Teams
- Directories
- Ask?Away

### WISCAT Resources

- Listserv Info
- Order Info
- Press Kit
- Staff Contact Info
- Statistics

Here is placeholder text to provide an introduction to the contents of this page

Click [here](#) for an overview on how custom holdings groups are used.

### CUSTOM HOLDINGS FOR LIBRARIES OUTSIDE OF WISCONSIN (REFERENCE & LOAN LIBRARY)

Click the links below to look at templates to create custom holdings using different media formats.

- [Audiocassettes - Music](#)
- [Audiocasettes - Spoken Word](#)
- [Books](#)
- [Books - New](#)
- [CDs - Music](#)

- ASK?Away
- WISCAT Resources**
- Listserv Info
- Order Info
- Press Kit
- Staff Contact Info
- Statistics
- Training
- WISCAT Home
- WISCAT Documentation**
- Interlibrary Loan
- Resource Sharing Standards
- Union/Virtual Catalog
- WISCAT Background
- Other Destinations**
- BadgerLink
- Reference & Loan Library**

## CUSTOM HOLDINGS FOR LIBRARIES OUTSIDE OF WISCONSIN (REFERENCE & LOAN LIBRARY)

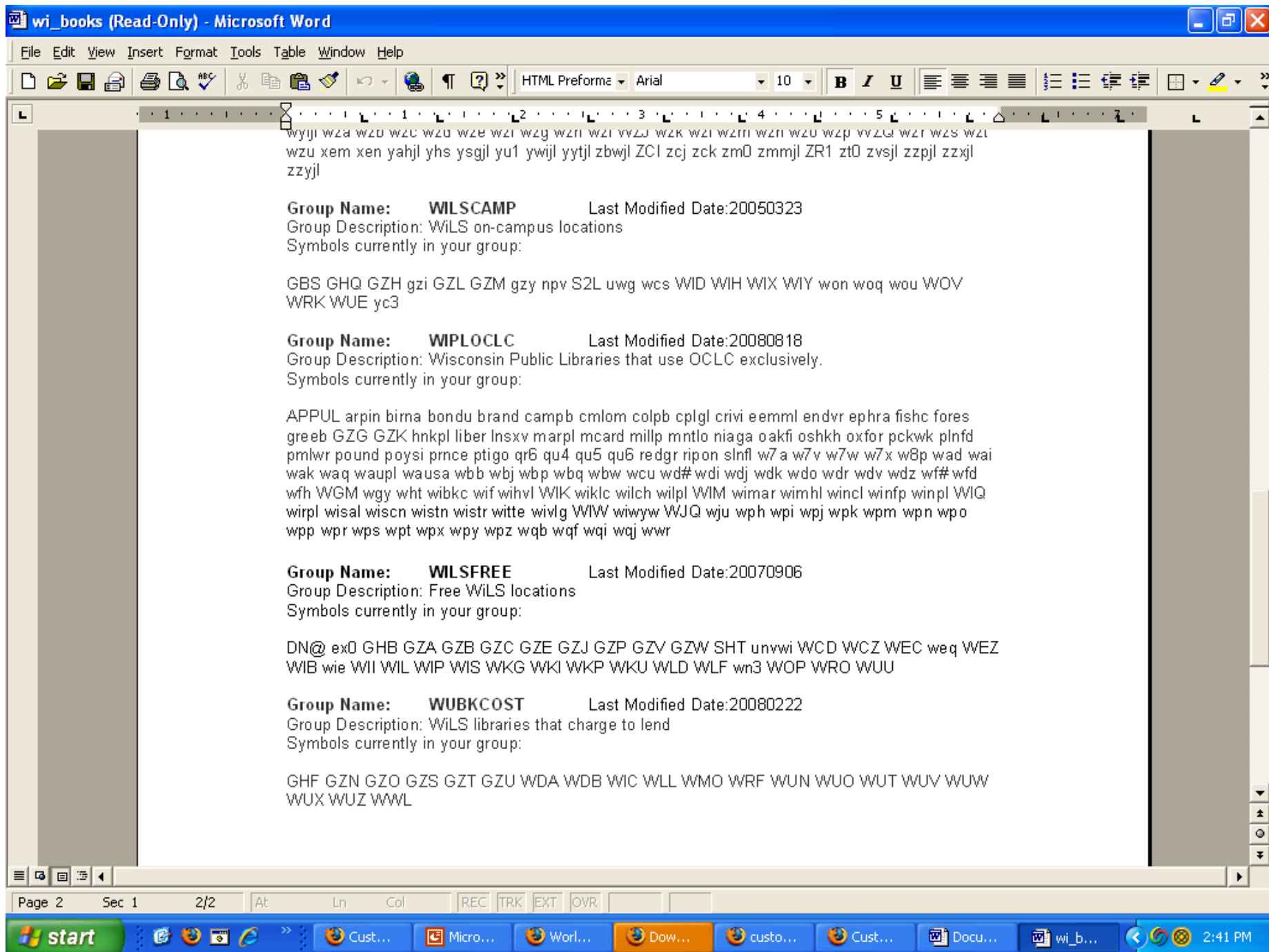
Click the links below to look at templates to create custom holdings using different media formats.

- [Audiocassettes - Music](#)
- [Audiocasesettes - Spoken Word](#)
- [Books](#)
- [Books - New](#)
- [CDs - Music](#)
- [CDs - Spoken Word](#)
- [DVDs](#)
- [VHS - Video Recordings](#)

## WISCONSIN CUSTOM HOLDINGS (REFERENCE & LOAN LIBRARY)

Click the links below to look at templates to create custom holdings using different media formats.

- [Audiocassettes - Music](#)
- [Audiocasesettes - Spoken Word](#)
- [Books](#)
- [CDs - Music](#)
- [CDs - Spoken Word](#)
- [DVDs](#)
- [VHS - Video Recordings](#)



Custom Holdings - ShareILL - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://www.shareill.org/index.php/Custom\_Holdings

Most Visited Customize Links Membership Database

Custom Holdings - ShareILL

Log in / create account

article discussion edit history

# Custom Holdings

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- 2 Ariel Custom Holdings
- 3 AV/Media
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- 5 EMST (Enter My Symbol Twice)
- 6 ERIC Documents
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- 8 Loans
- 9 Microforms
- 10 New Material Lenders

finding aids and tools

- National libraries and archives
- Gateways and union catalogs
- Online directories
- Verification tools
- Document suppliers

managing your ill operatio

- Codes and guidelines
- Library networks and consortia
- Systems, software and standards
- Copyright and licensing
- Training tools
- Marketing

keeping current

- Conferences
- Discussion lists and blogs
- Projects and current

Done

Spreadsheets and Databases [edit]

- Linda and Nick's Spreadsheet

Ariel Custom Holdings [edit]

- Ariel
- ArielLVIS
- Ariel Reciprocal
- Free Ariel (Loans & Copies)

start University of W... WiscMail Plus - ... Microsoft Powe... Custom Holding... Custom Holding... 12:12 PM

Links:

OCLC Custom Holdings Overview:

[http://www.oclc.org/support/documentation/firstsearch/managing/adminref/admin\\_ref\\_custom\\_gen/admin\\_ref\\_custom\\_gen.htm](http://www.oclc.org/support/documentation/firstsearch/managing/adminref/admin_ref_custom_gen/admin_ref_custom_gen.htm)

OCLC Custom Holdings Tutorial:

<http://www5.oclc.org/downloads/tutorials/firstsearch/rs/customholdings.html>

Mark Beatty's Lesson 3: Custom Holdings:

<http://lepton.wils.wisc.edu/illtoc/illd2ltricks3/illtrk3.html>

Reference & Loan Custom Holdings: <http://dpi.wi.gov/rll/wiscat/custhold.html>

ShareILL Custom Holdings: [http://www.shareill.org/index.php/Custom\\_Holdings](http://www.shareill.org/index.php/Custom_Holdings)

Creating Custom Holdings in OCLC (Minitex): <http://www.minitex.umn.edu/events/webinars/handouts/custom-holdings.pdf>

# Constant Data

Examples of when you would have different constant data:

- Different ship to addresses
- Charges are different
- Loans vs. copies
- High volume customers

Per-Article Purchase

- select an option -

OpenURL Links

To edit a specific Constant Data Record:

Select  Constant Data Record OR enter an existing CD Name

- DEFAULT
- CHRGCOPY
- CHRGLOAN
- DEFAULT
- FREECOPY

Borrowing Information

\*CD Name:  Last Modified Date: 20080403

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

Request Type:

Edition:

Ship To:

Bill To:

Ship Via:

Electronic Delivery: [Define Electronic Delivery addresses.](#)

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:



- Search Help ?
- Comments
- Site Map
- Print Your Settings
- Exit

Resource Sharing Search Settings

Staff ILL Settings  
Constant Data Records

- WALD
- WCD
- WCT
- WCZ
- WD8
- WDA
- WDB
- WEAT
- WEC
- WEZ
- WGK
- WIB
- WIE
- WII
- WIL
- WIP
- WIS
- WJF
- WJT
- WKG
- WKL
- DEFAULT

17662 | FirstSearch Authorization: None | Symbol: GZY

### Staff ILL Settings > Constant Data Records

View/Print New Blank Record Delete Record Save Changes

To edit:  Constant Data Record:  
 Select:  Constant Data Record OR enter an existing CD Name

Go

#### Borrowing Library Information

\*CD Name:  Last Modified Date: 20071005

Need Before:  relative to today's date (format: +DD) ?

Request Type:  ?

Edition:

Ship To:

Done

OCLC constant data

<http://www.oclc.org/resourcesharing/features/constantdata/default.htm>

OCLC constant data tutorial:

<http://www5.oclc.org/downloads/tutorials/firstsearch/rs/constantdata.html>

Mark Beatty's constant data tutorial:

<http://lepton.wils.wisc.edu/illtoc/illd2lbasics1/illbas1.html>



**Questions?**