Custom Holdings Paths

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Use this screen to configure custom holdings paths that contain the names of holdings groups appropriate to a set of requests.

Use this screen to configure custom holdings paths that contain the names of holdings groups appropriate to a set of requests. Within the holdings path record are listed holdings group records in order of borrowing preference. To create groups for your custom holdings paths, see Custom Holdings Groups.

Use Custom Holdings Paths to:

• Build lender strings using the OCLC symbols contained in the Custom Holdings Group within the Custom Holdings Paths
  - Custom Holdings Paths contain the names of the Custom Holdings Groups and apply them to a set of requests in the order set under Groups chosen for this path.
  - The OCLC symbols contained within a group are randomized with each request.
  - When building a lender string, Tipasa looks to the holdings of the libraries within the first listed Custom Holdings Group. If fewer than 15 potential lending libraries are returned, the system will then look to the libraries in the next listed Custom Holdings Group and continue through this list until there are at least 15 lending libraries or the Custom Holdings Path is complete.

• Automatically build lender strings
  - See Automated Request Manager

• Deflect requests

Configure Custom Holdings Paths

Notes:

• A custom holding path can contain up to 5,000 holding codes.
• Groups are applied to the request in the order set under Groups chosen for this path. To alter the order of the selected groups, click and drag each group to the preferred placement.
• The OCLC symbols contained within a group are randomized with each request.

To add a custom holdings path:

1. Click Create New Custom Holdings Path.
2. Enter the Custom Holdings Path Name, and optionally, a Description.
3. Select the groups you want to include from the available Custom Holdings Groups or the available Profiled Groups and click Add.
   - Custom Holdings Groups: Locally configured groups that contain the OCLC symbols of preferred lenders for a particular category of borrowing activities. See Custom Holdings Groups for more information.
   - Profiled Groups: Members of Profiled Groups are automatically updated by OCLC. See the OCLC Policies.
Directory, Resource sharing groups for information on the available Profiled Groups.

- Custom Holdings Paths that contain Profiled Groups can only be completely applied via automations configured in the Automated Request Manager. Lenders in a Profiled Group will only be added to a lender string if it is built through automation. To build a lender string that includes a Profiled Group in a Custom Holdings Path, configure an automation in Automated Request Manager.

- If you manually limit holdings to a Custom Holdings Path in the Tipasa staff interface that contains a Profiled Group, lenders from the Profiled Group will not be added to the lender string.
  - To build a partial lender string from the current Custom Holdings Path that does not include symbols from the Profiled Group, click OK on the warning message.
  - Or, click Cancel to close this window and either manually route this request to automation or select a different Custom Holdings Path.
  - Adding more than 5 Profiled Groups to one Custom Holdings Path may produce a page time out in Service Configuration. The groups will be added to the Custom Holdings Path, but you may see an error when saving.

4. Click and drag the selected groups in the Groups chosen for this path section to alter the order of the selected groups. Groups are applied to the request in the order set.

5. Click Save as New.

To edit a custom holdings path:

1. From the Custom Holdings Path drop-down, select the custom holdings path you want to edit.
2. Select the groups you want to include from the available Custom Holdings Groups or the available Profiled Groups and click Add.
3. Click and drag the selected groups in the Groups chosen for this path section to alter the order of the selected groups. Groups are applied to the request in the order set.
4. To remove a group from the Custom Holdings Path list, highlight the group and select Remove.
5. Click Save.

To delete a custom holdings path:

1. From the Custom Holdings Path drop-down, select the custom holdings path you want to edit.
2. On the bottom of the screen, click Delete Custom Holdings Path.
3. On the confirmation window, click OK.

Custom Holdings Paths fields

Note: Required fields are marked with an asterisk (*).

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Holdings Path Name</td>
<td>The name of the custom holdings path (20-character limit, with no special characters).</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Example:</td>
<td>DOTLIBS</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>A brief description of the path.</td>
</tr>
<tr>
<td><strong>Example:</strong></td>
<td>Dept of Transportation libraries and other partners.</td>
</tr>
<tr>
<td><strong>Choose from available Custom Holdings Groups</strong></td>
<td>Locally configured groups that contain the OCLC symbols of preferred lenders for a particular category of borrowing activities. See <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/050Custom_Holdings_Paths">Custom Holdings Groups</a> for more information.</td>
</tr>
<tr>
<td><strong>Choose from available Profiled Groups</strong></td>
<td>Members of Profiled Groups are automatically updated by OCLC. See <a href="https://help.oclc.org/Resource_Sharing/Tipasa/Configuration/050Custom_Holdings_Paths">OCLC Policies Directory, Resource sharing groups</a> for information on the available Profiled Groups.</td>
</tr>
<tr>
<td>• Custom Holdings Paths which contain Profiled Groups can only be completely applied via automations configured in the Automated Request Manager. Lenders in a Profiled Group will only be added to a lender string if it is built through automation. To build a lender string that includes a Profiled Group in a Custom Holdings Path, configure an automation in Automated Request Manager.</td>
<td></td>
</tr>
<tr>
<td>• If you manually limit holdings in the Tipasa staff interface to a Custom Holdings Path that contains a Profiled Group, lenders from the Profiled Group will not be added to the lender string.</td>
<td>To build a partial lender string from the current Custom Holdings Path that does not include symbols from the Profiled Group, click <strong>OK</strong> on the warning message.</td>
</tr>
<tr>
<td></td>
<td>Or, click <strong>Cancel</strong> to close this window and either manually route this request to automation or select a different Custom Holdings Path.</td>
</tr>
<tr>
<td><strong>Groups chosen for this path</strong></td>
<td>The names of custom holdings groups that are currently included in the group holdings path or that will be included when changes are saved.</td>
</tr>
</tbody>
</table>