

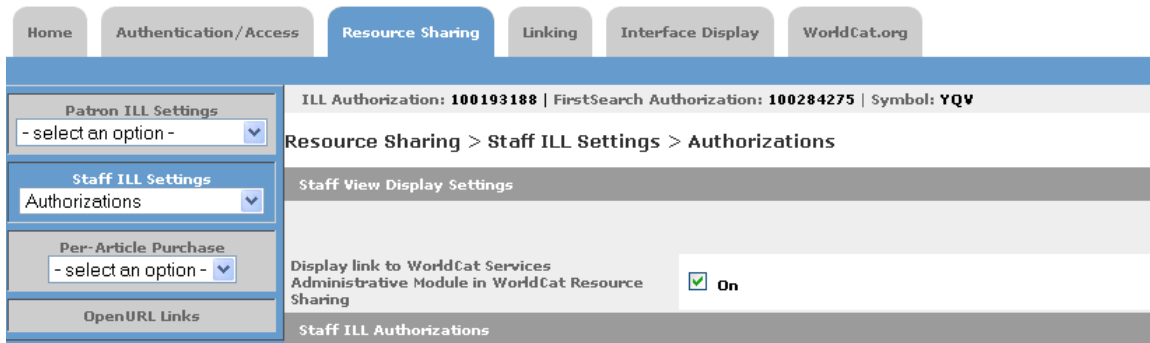
How to Create an Interlibrary Loan Path for Libraries in the Courier Project

LOG-IN:

1. Go to <http://firstsearch.oclc.org/admin>
2. Enter your ILL authorization and password

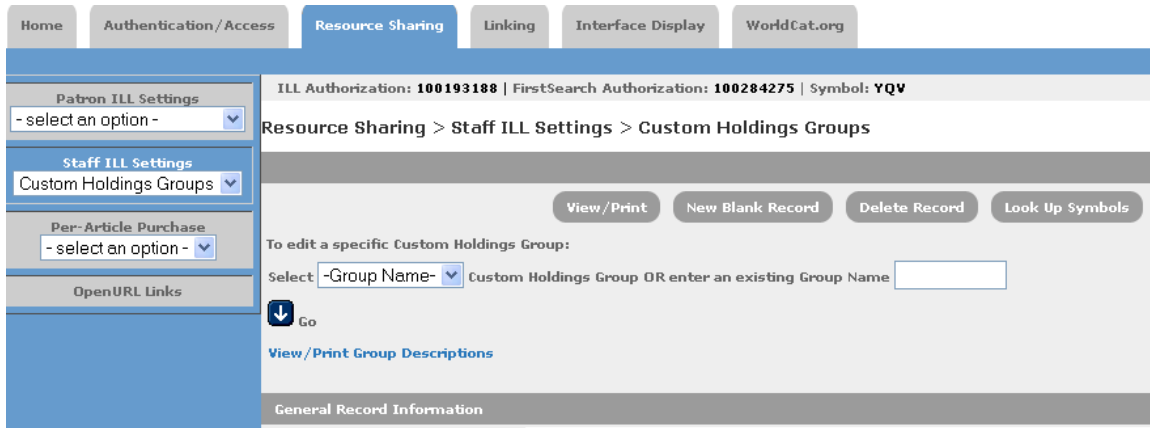
CREATE A CUSTOM HOLDINGS GROUP:

1. Click on the Resource Sharing tab. You should see something similar to the following:



The screenshot shows the 'Resource Sharing' tab selected in the navigation menu. The left sidebar contains several settings sections: 'Patron ILL Settings' with a dropdown menu, 'Staff ILL Settings' with a dropdown menu set to 'Authorizations', 'Per-Article Purchase' with a dropdown menu, and 'OpenURL Links'. The main content area displays the user's authorization information: 'ILL Authorization: 100193188 | FirstSearch Authorization: 100284275 | Symbol: YQV'. Below this, the breadcrumb path is 'Resource Sharing > Staff ILL Settings > Authorizations'. There is a section for 'Staff View Display Settings' and a checkbox labeled 'Display link to WorldCat Services Administrative Module in WorldCat Resource Sharing' which is checked and labeled 'On'. At the bottom, there is a section for 'Staff ILL Authorizations'.

2. Click on the downward pointing arrow beside Authorizations (appears under Staff ILL Settings on the left of the screen).
3. Click Custom Holdings Groups You should see something similar to the following:



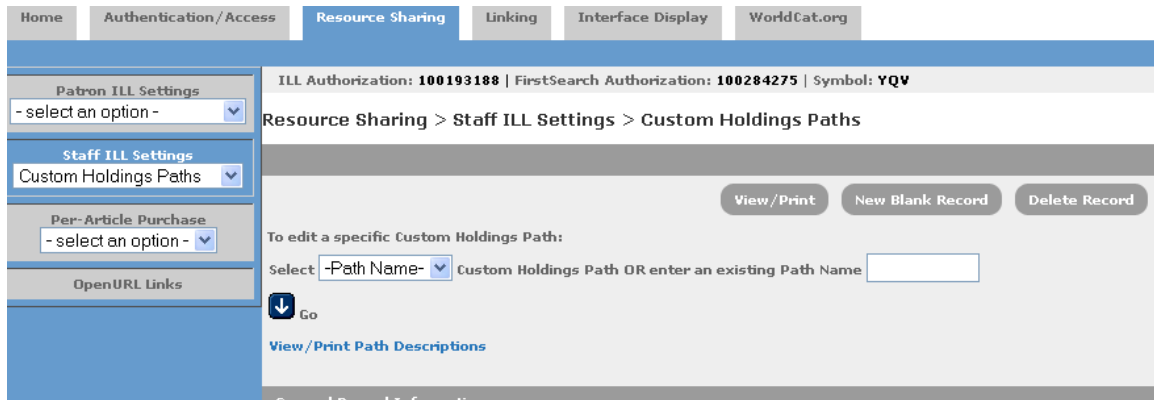
The screenshot shows the 'Custom Holdings Groups' page. The left sidebar is the same as in the previous screenshot, but the 'Staff ILL Settings' dropdown is now set to 'Custom Holdings Groups'. The main content area shows the breadcrumb path 'Resource Sharing > Staff ILL Settings > Custom Holdings Groups'. There are four buttons: 'View/Print', 'New Blank Record', 'Delete Record', and 'Look Up Symbols'. Below these buttons, there is a section for editing a specific group: 'To edit a specific Custom Holdings Group:'. This section includes a dropdown menu labeled '-Group Name-' and a text input field for 'Custom Holdings Group OR enter an existing Group Name'. A 'Go' button with a downward arrow is below the input field. At the bottom, there is a link for 'View/Print Group Descriptions' and a section for 'General Record Information'.

4. Scroll down the page and under the General Record Information type in a name for the Group (for example courier)
5. Enter the symbols for each of the participating libraries in the large box beside Symbols to be added or removed. For example, YQV is the symbol for Great Falls Public Library. See the Statewide Projects webpage http://msl.state.mt.us/For_Librarians/Statewide_Projects/default.asp for the current list of participating libraries and their symbols.

6. Click Add Symbols
7. Click Save Changes

**ADD COURIER GROUP TO AN EXISTING CUSTOM HOLDINGS PATH:
(see next set of directions to create a new custom holdings path)**

1. Click on downward pointing arrow beside Custom Holdings Groups
2. Click Custom Holdings Path. You should see something similar to this:



3. Click the downward pointing arrow beside Path Name in the middle of the screen.
4. Click on the Path that you would like to add the courier libraries to and click GO.
5. Click on the Courier Group that you created previously. It should appear under Groups Available to be included in the path.
6. Click on the add arrow to the right of this box
7. Click the up or down arrow to move the courier group to first place in the list.
8. Click Save Changes

You should now be able to see this path when using FirstSearch for Interlibrary Loan.

**CREATING A NEW PATH:
(if you haven't used holding paths before)**

1. Click on downward pointing arrow beside Custom Holdings Groups
2. Click Custom Holdings Path. You should see something similar to this:

Home | Authentication / Access | **Resource Sharing** | Linking | Interface Display | WorldCat.org

ILL Authorization: 100193188 | FirstSearch Authorization: 100284275 | Symbol: YQV

Resource Sharing > Staff ILL Settings > Custom Holdings Paths

Patron ILL Settings
-select an option-

Staff ILL Settings
Custom Holdings Paths

Per-Article Purchase
-select an option-

OpenURL Links

View / Print | New Blank Record | Delete Record

To edit a specific Custom Holdings Path:

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

Go

[View / Print Path Descriptions](#)

3. Type a name for you path. (For example type in books for a path you would use when borrowing books from other libraries. Some libraries also have a different path for A/V, etc.)
4. Type in a path description (optional)
5. Click on the Courier group that you created in the first part of this process. It should appear under Groups available to be included in the path.
6. Click on the add arrow beside the box.
7. If you have other groups you can add them to this path. The key is to make sure that the courier group is listed first. You can use the up and down arrow keys to move it to the correct position.
8. Click Save Changes

You should now be able to see this path when using FirstSearch for Interlibrary Loan.

**CUSTOM HOLDINGS GROUP FOR COURIER PARTICIPANTS LENDING AV MATERIALS
12/20/2010**

**MZE,YQV,MZI,YVT, MZG,YNZ,Y38,Y36,
MZC,Y64,Y59,Y44,Y83,CLNCY,BLZ,YPQ,
Y65,YZQ,YZS,FKK,YZK**