

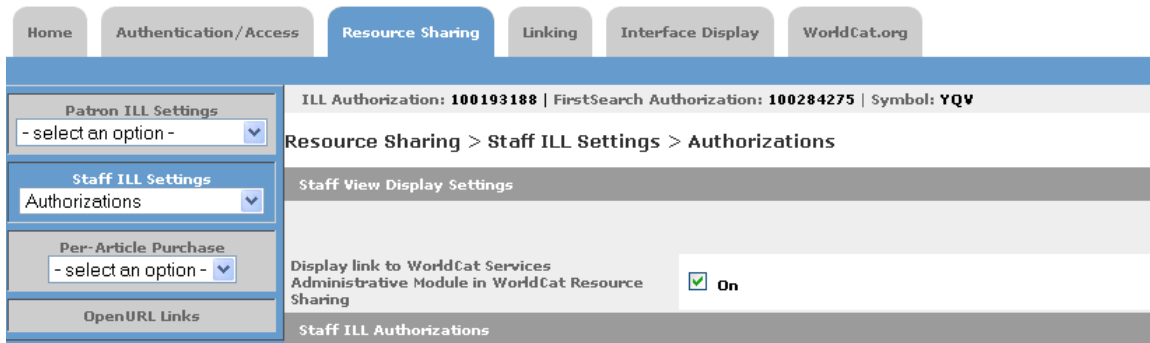
## How to Create an Interlibrary Loan Path for Libraries in the Courier Project

### LOG-IN:

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

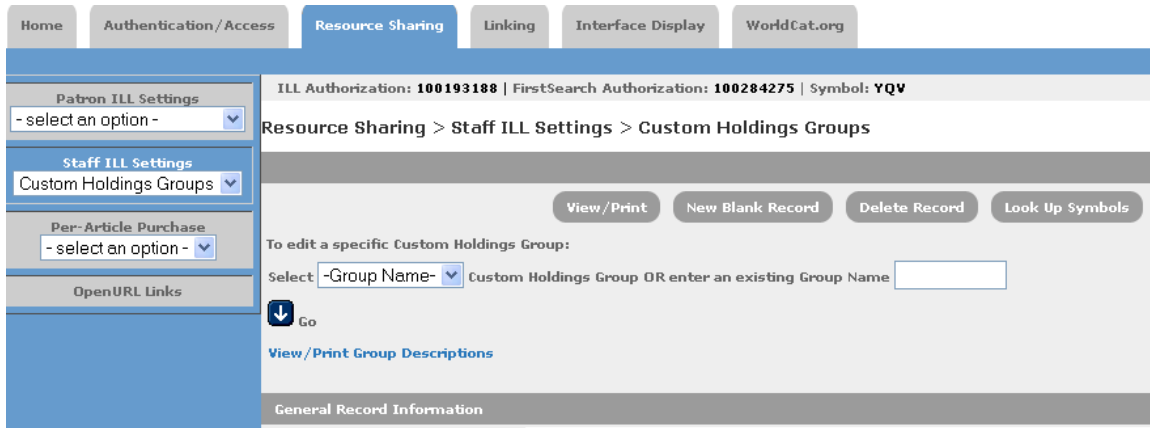
### CREATE A CUSTOM HOLDINGS GROUP:

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 'Patron ILL Settings', 'Staff ILL Settings' (with 'Authorizations' selected), 'Per-Article Purchase', and 'OpenURL Links'. The main content area displays the user's authorization information (ILL: 100193188, FirstSearch: 100284275, Symbol: YQV) and the breadcrumb 'Resource Sharing > Staff ILL Settings > Authorizations'. Below this is a 'Staff View Display Settings' section with a checkbox for '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 now has 'Custom Holdings Groups' selected under 'Staff ILL Settings'. The main content area shows the breadcrumb 'Resource Sharing > Staff ILL Settings > Custom Holdings Groups'. There are buttons for 'View/Print', 'New Blank Record', 'Delete Record', and 'Look Up Symbols'. Below these is a section 'To edit a specific Custom Holdings Group:' with a dropdown menu for '-Group Name-' and a text input field for 'Custom Holdings Group OR enter an existing Group Name'. A 'Go' button 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](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:

The screenshot shows a web interface for managing Custom Holdings Paths. At the top, there are navigation tabs: Home, Authentication / Access, Resource Sharing (selected), Linking, Interface Display, and WorldCat.org. Below the tabs, the page displays the following information: ILL Authorization: 100193188 | FirstSearch Authorization: 100284275 | Symbol: YQV. The breadcrumb trail is Resource Sharing > Staff ILL Settings > Custom Holdings Paths. On the left side, there are three dropdown menus: Patron ILL Settings (set to -select an option-), Staff ILL Settings (set to Custom Holdings Paths), and Per-Article Purchase (set to -select an option-). Below these is an OpenURL Links section. On the right side, there are three buttons: View / Print, New Blank Record, and Delete Record. The main content area contains the text 'To edit a specific Custom Holdings Path:' followed by a 'Select' dropdown menu (set to -Path Name-), the text 'Custom Holdings Path OR enter an existing Path Name', and an empty text input field. Below this is a 'Go' button with a downward arrow icon. At the bottom, there is a link for 'View / Print Path Descriptions'.

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

View / Print | New Blank Record | Delete Record

To edit a specific Custom Holdings Path:

Select:  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**