Te Puna Interloan on WorldShare ILL

Service Configuration
Part 3. Setting up Custom Holdings Groups in Service Configuration
To get to Service Configuration

<table>
<thead>
<tr>
<th>To do</th>
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<tbody>
<tr>
<td>1. Login to your library’s WorldShare instance</td>
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<td>2. Select the Interlibrary Loan tab</td>
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<td>3. Select the OCLC Service Configuration link</td>
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<td>4. You will now be in Service Configuration</td>
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The settings within OCLC Service Configuration are institution wide. Do not change settings outside the WorldShare ILL area without consulting your colleagues.
To do

5. Select WorldShare ILL
6. Select Custom Holdings Groups
To do

Custom holdings groups are the way of managing the groups you wish to request from.
See the Preparing your custom holdings groups guide for advice on which groups to create and a template you can cut and paste from.

For each Custom Group:

7. Select Create New Custom Holdings Group
8. The blank Configure Custom Holdings Groups appears
9. Fill in the form as below. This example shows creating a custom holdings group for First Choice libraries (e.g. National Library libraries)
10. Custom Holdings Groups Name: FIRSTCHOICE (Note Custom Holdings Group Names cannot contain numbers, characters or spaces)
11. Select Add/Edit symbol(s)
12. Type or copy and paste the relevant symbols into the Add/Edit OCLC symbols pop up window e.g. NZ1, NZASL, NZCSL from the FIRSTCHOICE group.
13. Select Update Symbols
To do

14. The symbols now display as being part of the FIRSTCHOICE group.
15. Select **Save As New**
16. Repeat the process for any other groups you need.

17. You will be able to see the Custom Holding Groups you have created by selecting the **Custom Holding Groups** dropdown.
To do

18. When making requests you will now be able to see the holdings groups that your request will be going to.

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**Top Tip**

You can search by symbol
Select **by symbol**

Enter the OCLC symbol you wish to search at the next screen (not shown.)
To do

You can see the group you have put the library in. You can add or delete from a group by using the Yes /No radio buttons at any stage.
To do

Now that you have created your Custom Holdings Groups – you deserve a cuppa.

Any questions contact tepuna@dia.govt.nz

More information about Custom Holdings Groups can be found on the OCLC website.
