Creating Custom Holding Group Instructions in OCLC

Libraries participating with their own OCLC subscription will want to create new custom holdings groups in OCLC WorldShare to identify and favor libraries on delivery for borrowing purposes. Custom holdings are the group(s) of your preferred lending libraries that you can apply to your ILL requests. The system will automatically add them to the lender string on your ILL requests, thus saving time when processing those requests. Consider making several groups based on format. Refer to the [OCLC Policies Directory](#).

Configure Custom Holdings Groups

[Go to the [OCLC Service Configuration module](#) and click WorldShareILL and choose Custom Holdings Groups]

To create a custom holdings group:

1. Click **Create New Custom Holdings Group**.
2. Enter the **Custom Holdings Groups Name**, and optionally, a **Description**.
3. Click **Add/Edit symbol(s)**.
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
    - If you need to look up OCLC symbols, click the link to access the [OCLC Policies Directory](#)
5. Click **Update Symbols**.
6. Click **Save as New**.

Note: Saving a Custom Holdings Group with no OCLC symbols will result in an error. Be sure to add at least one OCLC symbol before saving your new Custom Holdings Group.

To add an institution to a custom holdings group (on the by group name screen):

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to edit.
2. Enter the **Custom Holdings Groups Name**, and optionally, a **Description**.
3. Click **Add/Edit symbol(s)**.
4. In the Add/Edit OCLC symbols window, add the symbols in the box provided. Separate multiple symbols with a space.
    - If you need to look up OCLC symbols, click the link to access the [OCLC Policies Directory](#)
5. Click **Update Symbols**.

6. Click **Save as New**.

To delete an institution from a custom holdings group (on the by group name screen):

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to edit.
2. You have two options:
    1. Select the **check box** next to the symbol you want to delete and click **Clear selected symbols**, or
    2. Click the **delete button** () next to the symbol you want to delete.
3. Click **Save**.

To add or remove an institution to a custom holding group (on the by symbol screen):

1. Under Display groups, click **by symbol**.
2. On the Custom Holdings Groups Symbol Search screen, enter the **symbol** you want to add or delete from one or more custom holdings groups.
3. Click **Search**.
    o   A list of all of your custom holdings groups appears, along with an indication of whether or not that symbol is contained in each group that contain that symbols appears, including an indicator of whether that symbol appears in the group.
    o   **Note:** If no results are found, a message will appear the symbol does not exist in any groups, the groups are all displayed with a **No** indication.
4. Select **Yes** to add a symbol to the group, or **No** to remove a symbol from the group.
5. Click **Save**.

To delete a custom holdings group:

1. From the Custom Holdings Groups lists, select the **custom holdings group** you want to delete.
2. On the bottom of the screen, click **Delete Custom Holdings Record**.
3. On the confirmation window, click **OK**.

    Note: The Custom Holdings Group must be removed from any Custom Holdings Path before it can be deleted.

For more information, please see [Custom Holdings Groups, OCLC](#)

Using Custom Holdings Groups

1. Stay in the OCLC Service Configuration module under Worldshare ILL.

2. Click on Custom Holdings Paths.

3. Select the appropriate path.

4. Drag the new Custom Holdings Group into the proper place in the path, moving it from the left box to the correct position in the right box.

5. Save your work so changes will activate at your next login.

For more information, please see [Custom Holdings Paths, OCLC](#)