GROUP NAME:

USING A GROUP ROSTER LAST UPDATED:

START OF UPDATE:

DATE OF COMPLETION:

WHAT YOU'LL NEED:

- ☐ A list of participating libraries (organized A-Z by OCLC symbol works best)
- ☐ Access to ILLiad Client: System Tab → Groups Maintenance
- ☐ Access to ILLiad Client: System Tab → Resource Sharing Settings

1. UPDATE GROUPS IN GROUPS MAINTENANCE

- ☐ Locate your group in the ILLiad Client: System Tab → Groups Maintenance

- ☐ Scroll down your list of participating libraries and compare to the list of OCLC symbols in your group, noting any that need to be added or removed. You will need these notations later.

- ☐ For those that need to be added: enter their symbol in the lending string field and add to the group. Once added, open their Lender Address record and assign the appropriate billing category and/or shipping method based on affiliation. *Note: for new members, you may need to create address records for them before you can assign them to a group Remember to also assign the correct billing category and/or shipping method.*

- ☐ For those that need to be removed: click on their address record to open it. Change their billing category and/or shipping method if necessary. Save changes and close their address record. Remove them from the group.

2. UPDATE GROUPS IN CUSTOM HOLDINGS

- ☐ Locate your group in the ILLiad Client: System Tab → Resource Sharing Settings → Custom Holdings Groups

- ☐ Scroll down your list of participating libraries and compare to the list of OCLC symbols in your group, noting any that need to be added or removed. (You may use the notations you made in the previous step.)

- ☐ For those that need to be added: enter their symbol to add the library to the group.

- ☐ For those that need to be removed: remove the symbol from the group.
  - o Consider adding the removed symbol to another Custom Holdings group, based on your remaining affiliations with that library (this is when those overlapping agreements come in handy).