Find information about steps you can take to prepare for your use of WorldShare Interlibrary Loan. There are a few things you can do to prepare for your use of WorldShare Interlibrary Loan.

Learn more in a training course: Introduction to WorldShare ILL

**Message Board**

Use the Message Board located below the Quick Links section on the WorldShare ILL home page to find information about scheduled system maintenance, training opportunities, ILL-related webinars, and other information about the ILL system.

**Browser compatibility**

Use the [browser compatibility chart](#) to ensure your systems are up to date and can support WorldShare Interlibrary Loan.

**OCLC Policies Directory**

Add or update your records in the OCLC Policies Directory. The OCLC Policies Directory allows you to:

- Communicate to other libraries your library’s schedules, contacts, and collections, as well as lending and copying policies.
- Automatically deflect some lending requests based on criteria your library specifies.

Once logged in, on the home screen under Quick Links, click **OCLC Policies Directory**.

For more information, see [OCLC Policies Directory](#). For training related to the OCLC Policies Directory, see:

- [Establishing Policies in OCLC Policies Directory](#)
- [Basics of deflections](#)
- [Fine-tune your Policies and Deflections: A workshop](#)
  - Requires Community Center login.

**OCLC Service Configuration**

Administrative settings for WorldShare Interlibrary Loan are maintained in OCLC Service Configuration. On the home screen, under Quick Links, click **OCLC Service Configuration** to go to Service Configuration. For more information on
these settings, see [OCLC Service Configuration settings](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan).

<table>
<thead>
<tr>
<th>CONFIGURATION</th>
<th>USES</th>
<th>ADDITIONAL INFORMATION</th>
<th>TRAINING</th>
</tr>
</thead>
</table>
| Constant data (borrower and lender data) | Store frequently-used data (such as address information) and apply it to requests. | • Constant data  
• Borrower data  
• Lender data | • Creating constant data  
• Curate and Care for your Constant Data: A workshop  
  ◦ Requires Community Center login |
| Custom Holdings groups and paths   | Automatically build lender strings (libraries to which your borrowing request will be sent) based on your preferred lenders. | • Custom Holdings groups  
• Custom Holdings paths | • Custom Holdings for interlibrary loan  
• Construct your Custom Holdings: A workshop  
  ◦ Requires Community Center login |
| Automated Request Manager         | Automate the processing of new borrowing requests.                   | • Automated Request Manager                          | • Automate your Request Process: A workshop  
  ◦ Requires Community Center login |

**Smart fulfillment**

Increase the speed of delivery of materials based on policy data, lending history, licensing agreements, format preferences, and more. Smart fulfillment includes the following features:

- Real-time availability for ILL
- Automated Request Manager (ARM)
- Smart lender strings
- Express program
- Turnaround Time dashboards
See Smart fulfillment for more information.

For training related to Smart fulfillment, see:

- Automate your Request Process: A workshop
  - Requires Community Center login

Print settings

Add your logo to book straps. See Print for more information.

For training related to printing, see:

- Print ILL requests
- Borrower: Print book straps and return labels
- Lender: Print book straps/stickers and shipping labels

Additional features

Find information about additional WorldShare ILL features that you and your staff may want to learn more about as you begin.

<table>
<thead>
<tr>
<th>FEATURE</th>
<th>USES</th>
<th>ADDITIONAL INFORMATION</th>
<th>TRAINING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Borrowing workflows</td>
<td>Efficiently process new requests from your library’s patrons.</td>
<td>Borrowing requests</td>
<td>• WorldShare ILL - Borrowing</td>
</tr>
<tr>
<td>Lending workflows</td>
<td>Efficiently process lending requests from other libraries.</td>
<td>Lending requests</td>
<td>• WorldShare ILL - Lending</td>
</tr>
<tr>
<td>Interlibrary Loan Fee Management (IFM)</td>
<td>Allows libraries to reconcile resource-sharing charges and payments with other libraries through their monthly OCLC invoice.</td>
<td>Interlibrary Loan Fee Management</td>
<td>• OCLC IFM: Interlibrary Loan Fee Management</td>
</tr>
<tr>
<td>Reports</td>
<td>Track metrics, spot trends, and monitor your library’s</td>
<td>OCLC Usage Statistics</td>
<td>• Make your usage statistics count</td>
</tr>
<tr>
<td>FEATURE</td>
<td>USES</td>
<td>ADDITIONAL INFORMATION</td>
<td>TRAINING</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------</td>
<td>------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>WorldShare ILL usage</td>
<td></td>
<td></td>
<td>Requires Community Center login</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan
Printed: Sun, 18 Sep 2022 16:02:56 GMT