Introduction to
OCLC WorldShare® Interlibrary Loan

Objectives

The objectives of the *Introduction to WorldShare ILL* course are to provide an overview of the functionalities available in the service and guide you through the preparation options that speed fulfillment of interlibrary loan requests to save time for your staff and users.

Prepare and Plan

There are a few things you can do to prepare for your use of WorldShare Interlibrary Loan.

For further information, see [Get started](#) where you can find documentation and short video tutorials on this topic and **browser compatibility**.

OCLC® Policies Directory

Add or update your library's information in the OCLC Policies Directory. Some key areas to review include Contacts and Policies for copies, loans, and deflections.

Once logged in to WorldShare Interlibrary Loan, click the link from the WorldShare Interlibrary Loan Home screen to go to the **OCLC Policies Directory**. See [Prepare and plan](#) for more information.

Constant Data

Maintain administrative settings for WorldShare Interlibrary Loan, such as constant data, in *OCLC Service Configuration*. Click the link from the WorldShare Interlibrary Loan Home screen to go to *OCLC Service Configuration*.

Constant data allows you to create data records, including your library's information, that can be saved and applied to both borrowing and lending requests. See [Constant Data](#) to find documentation and a short video tutorial on this topic.

OCLC® Interlibrary Loan Fee Management (IFM)

The OCLC® Interlibrary Loan Fee Management (IFM) allows libraries to reconcile resource sharing charges and payments through their OCLC monthly invoice. See how to configure and manage [IFM](#).

Custom Holdings

Custom Holdings feature allows you to pre-select the lending libraries of your preference to be applied to your requests. Custom Holdings uses your criteria to automatically populate the lender string on your requests. First you create your Custom Holdings Group(s) to select the libraries, then you define your Custom Holdings Path for the group(s).

OCLC® Community Center

Take advantage of the OCLC Community Center where you can interact with staff at other libraries using WorldShare Interlibrary Loan, learn about updates and training opportunities, and suggest enhancements to the service.

Create an account

If you already use WorldShare Management Services, WorldShare Collection Manager, or WorldShare License Manager, you have an existing OCLC Services account that gives you access to several services in the WorldShare platform. Before you log on for the first time, you will need to work with someone at your institution who has administrative rights to add permissions to your account. Refer to Create a WorldShare ILL account for further information.

Statistics reports, OCLC Support and documentation

You can learn more on how to generate statistics reports here. See OCLC WorldShare Interlibrary Loan for OCLC Support, other valuable documentation, and training resources.

Test your knowledge

Try this quiz: Intro WSILL quiz