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

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan
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these settings, see [OCLC Service Configuration settings](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan).

<table>
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<th><strong>CONFIGURATION</strong></th>
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| 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](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan)  
• [Curate and Care for your Constant Data: A workshop](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan)  
  ◦ 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](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan)  
• [Construct your Custom Holdings: A workshop](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan)  
  ◦ Requires Community Center login |
| Automated Request Manager | Automate the processing of new borrowing requests. | • [Automated Request Manager](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan) | • [Automate your Request Process: A workshop](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Get_started/Prepare_and_plan)  
  ◦ 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.

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<td>Borrowing workflows</td>
<td>Efficiently process new requests from your library’s patrons.</td>
<td>Borrowing requests</td>
<td>• WorldShare ILL - Borrowing</td>
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<tr>
<td>Lending workflows</td>
<td>Efficiently process lending requests from other libraries.</td>
<td>Lending requests</td>
<td>• WorldShare ILL - Lending</td>
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<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>
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<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>
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