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Introduction to WorldShare® Interlibrary Loan Prepare and plan

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OCLC Member Education

Introduction to WorldShare ILL

- Introduction to WSILL – Get Started
- Introduction to WSILL – Prepare and plan

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In this course you will learn how to...

Update OCLC Policies Directory

Configure options for WSILL

Preselect your preferred libraries

Set up automation

Documentation & Support



WSILL tutorial videos:
<https://oc.lc/WSILLvideos>

Some WSILL Terminologies

- **Borrowing Library** – requesting items in the service
- **Lending Library** – supplying items in the service
- **Lender string** – list of prospect lenders for the ILL request
- **Loan** – ILL requests for physical items (i.e., book, Dvds)
- **Copy** – ILL requests for copy of items (electronic copy)
- **OCLC Supplier** – to define if a lender or not in the system
- **Days to Respond** – how long a request stays with lender
- **Deflections** – policy for system to automatically respond No
- **OCLC Groups** – groups created by OCLC on behalf of libraries
- **Fulfillment** – item supplied by lender

[See OCLC ILL glossary of terms](#)

Prepare for ILL

Why to prepare?

Because it saves time, avoids mistakes and helps on issues resolution.

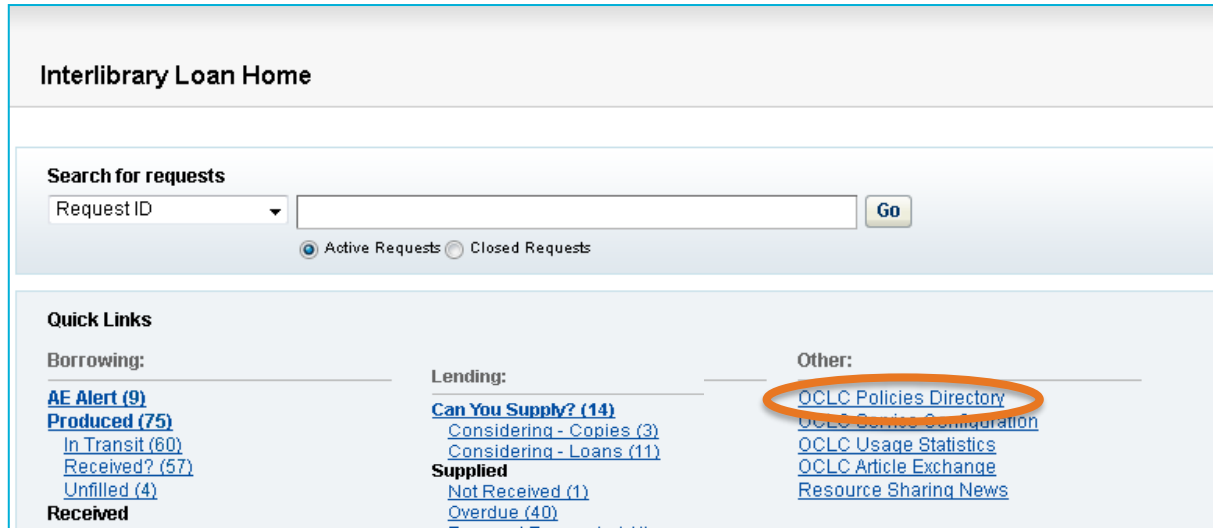
1. Set your policies
OCLC Policies Directory
2. Speed up processing of request form
Service Configuration > WorldShare ILL > Constant Data
3. Make your OPAC visible
Service Configuration > WorldCat Registry > Online Catalog

It requires admin role in your account

1- UPDATE OCLC POLICIES DIRECTORY

1. Prepare for ILL- Set your policies

Set in the OCLC Policies Directory



The screenshot displays the 'Interlibrary Loan Home' interface. At the top, the title 'Interlibrary Loan Home' is centered. Below it is a search section titled 'Search for requests' containing a dropdown menu for 'Request ID', a text input field, and a 'Go' button. Underneath the search bar are two radio buttons: 'Active Requests' (which is selected) and 'Closed Requests'. The bottom section, 'Quick Links', is organized into three columns: 'Borrowing:', 'Lending:', and 'Other:'. The 'Other:' column contains a link for 'OCLC Policies Directory' which is circled in orange. Other links in the 'Other:' column include 'OCLC Service Configuration', 'OCLC Usage Statistics', 'OCLC Article Exchange', and 'Resource Sharing News'. The 'Borrowing:' column lists 'AE Alert (9)', 'Produced (75)', 'In Transit (80)', 'Received? (57)', 'Unfilled (4)', and 'Received'. The 'Lending:' column lists 'Can You Supply? (14)', 'Considering - Copies (3)', 'Considering - Loans (11)', 'Supplied', 'Not Received (1)', and 'Overdue (40)'.

Interlibrary Loan Home

Search for requests

Request ID

Active Requests Closed Requests

Quick Links

Borrowing:

- [AE Alert \(9\)](#)
- [Produced \(75\)](#)
- [In Transit \(80\)](#)
- [Received? \(57\)](#)
- [Unfilled \(4\)](#)
- [Received](#)

Lending:

- [Can You Supply? \(14\)](#)
- [Considering - Copies \(3\)](#)
- [Considering - Loans \(11\)](#)
- Supplied**
- [Not Received \(1\)](#)
- [Overdue \(40\)](#)

Other:

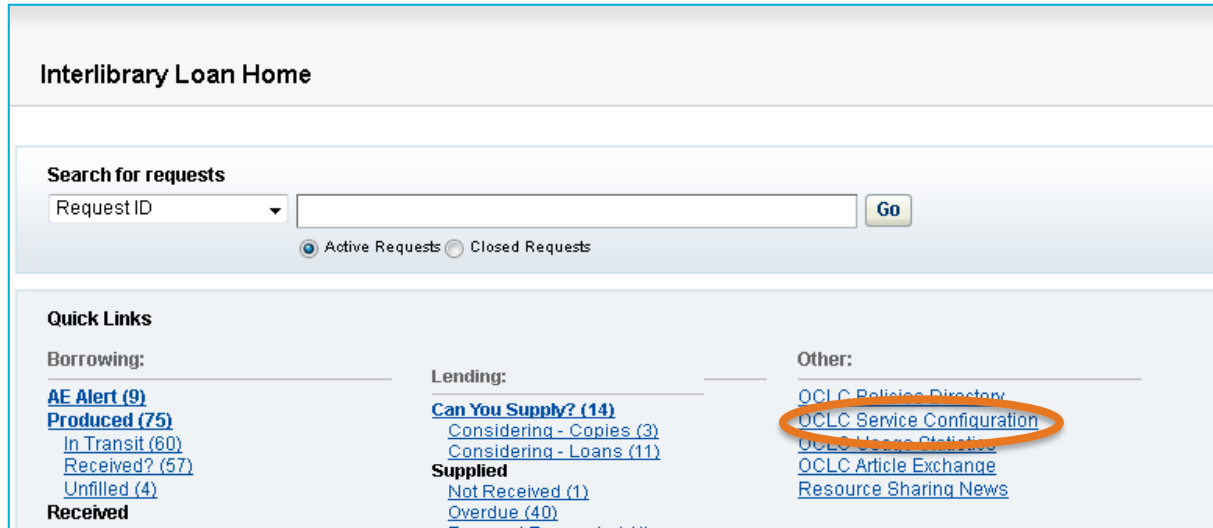
- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)

2- CONFIGURE OPTIONS FOR WSILL

Create Constant Data

Created in OCLC Service Configuration

[How to create Constant Data](#)



The screenshot displays the 'Interlibrary Loan Home' interface. At the top, there is a search section titled 'Search for requests' with a dropdown menu set to 'Request ID', an input field, and a 'Go' button. Below this are radio buttons for 'Active Requests' (selected) and 'Closed Requests'. The 'Quick Links' section is divided into three columns: 'Borrowing:', 'Lending:', and 'Other:'. The 'Other:' column contains a link for 'OCLC Service Configuration' which is circled in red.

Interlibrary Loan Home

Search for requests

Request ID

Active Requests Closed Requests

Quick Links

Borrowing:

- [AE Alert \(9\)](#)
- [Produced \(75\)](#)
- [In Transit \(80\)](#)
- [Received? \(57\)](#)
- [Unfilled \(4\)](#)
- Received**

Lending:

- [Can You Supply? \(14\)](#)
- [Considering - Copies \(3\)](#)
- [Considering - Loans \(11\)](#)
- Supplied**
- [Not Received \(1\)](#)
- [Overdue \(40\)](#)

Other:

- [OCLC Policies Directory](#)
- [OCLC Service Configuration](#)
- [OCLC Usage Statistics](#)
- [OCLC Article Exchange](#)
- [Resource Sharing News](#)

4. Make OPAC visible – Update WorldCat Registry

Service Configuration: *WorldCat Registry* > *Online Catalog*

WorldCat Registry

OCLC Training: WSTPU (OCLC WorldShare ILL Beta) (128802) [Change](#)

Online Catalog [Help on this screen](#)

Last Updated: 6/7/13

Do you have a Web-accessible catalog? Here you can list information about its vendor and the various URL syntaxes used to access records. It may take up to 24 hours for any changes to your institution's Online Catalog links to be reflected in other OCLC services.

Online Catalog Availability

Available Online Available on Intranet Only Not Available

Online Catalog

Library System Used:

Base URL: [Test](#)

Online Catalog Direct to ISBN: [Test](#)

Use 10 Digits Use 13 Digits

Online Catalog Direct to ISSN: [Test](#)

e-Serial ISSN Search: [Test](#)

Online Catalog Direct to OCLC Number: [Test](#)

Add Leading Zeroes to the OCLC search Term: Yes

OCLC Number Prefix: Do not add prefix to the OCLC Number
 Add ocn/ocm/on prefix to the OCLC Number
 Add the following custom prefix to the OCLC

[Save Changes](#) [Cancel](#)

4. Make OPAC visible – Update WorldCat Registry

List of lenders, some with links back to their OPACs

The screenshot shows the OCLC WorldShare Interlibrary Loan interface. The search results for 'Gone with the wind (290058)' are displayed. A callout box highlights the link 'Search my library's online catalog' with the text 'Link to your library's OPAC'. Below the search results, a table lists lenders with their respective OPAC links highlighted in an orange box.

Search Results:

- Title:** gone with the wind
- Author:** Mitchell, Margaret; Herman Finkelstein Collection (Library of Congress); Alfred Whital Stern Collection of Lincolniana (Library of Congress); Rouben Mamoulian Collection (Library of Congress)
- Type:** [Blank]
- Publisher:** New York : The Macmillan Company, 1936.
- OCLC Number:** 290058

Search my library's online catalog (Link to your library's OPAC)

Lender String: [Blank] **Quantity:** 1

Filter by: Custom Holdings Path [Select] Year: [] Volume: []

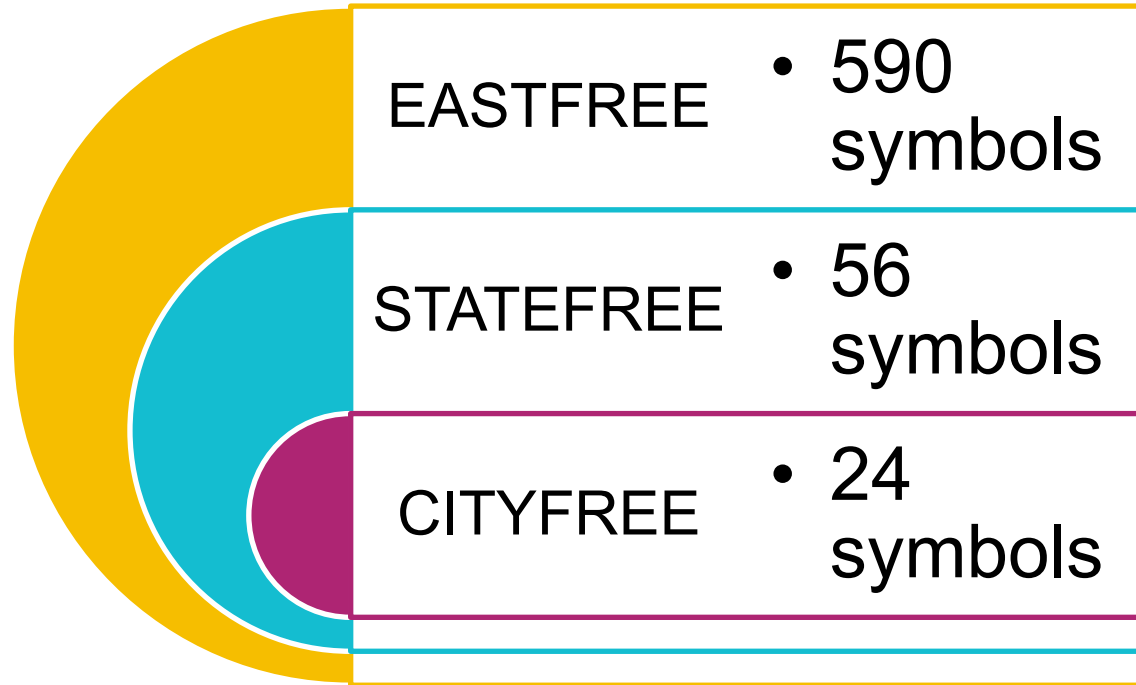
Results 1 - 100 of 2527

| Library | Supplier | Days To Respond | Location | Symbol | Group | Cost | IFM | Holdings |
|--|----------|---------------------------------|----------|--------|-------|---|-----|----------|
| AMERICAN UNIV | Yes | Copies: 4 days Loans: 4 days | US, DC | EAU | | Copies: 10.00 - 25.00 USD Loans: 10.00 - 25.00 USD | Yes | |
| CATHOLIC UNIV OF AMERICA | Yes | Copies: 4 days Loans: 4 days | US, DC | DCU | | Copies: 7.50 - 10.00 USD Loans: 10.00 USD | Yes | |
| DISTRICT OF COLUMBIA PUB LIBR | - | - | US, DC | DWP | | - | | |
| GEORGE WASHINGTON UNIV | Yes | Copies: 4 days Loans: 4 days | US, DC | DGW | | Copies: 0.10 - 15.00 USD Loans: 15.00 USD | Yes | |

4. PRESELECT YOUR PREFERRED LIBRARIES

Create Custom Holdings

Provides a way to organize and prioritize lenders based on reciprocal arrangements, geographic location, and special services.



How to create Custom Holdings

Custom Holdings are created in **OCLC Service Configuration**

[See how to create Custom holdings](#)

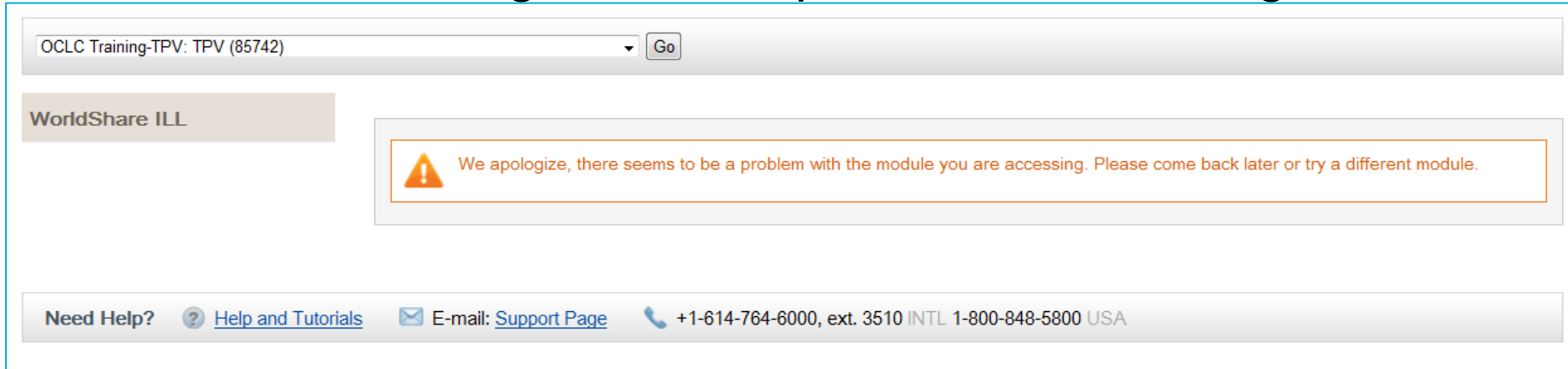
They consist of two components- Groups and Paths

- First Create a Group
- Then Create a Path



Deleting Custom Holdings Groups

Attempting to delete a Custom Holdings Group that is used in a Custom Holdings Path will produce the following error:



The screenshot shows a web application interface. At the top, there is a search bar with the text "OCLC Training-TPV: TPV (85742)" and a "Go" button. Below the search bar, there is a navigation menu with the item "WorldShare ILL" highlighted. In the center of the page, there is a large orange-bordered box containing an error message: "We apologize, there seems to be a problem with the module you are accessing. Please come back later or try a different module." At the bottom of the page, there is a footer with the text "Need Help?" followed by links for "Help and Tutorials", "E-mail: Support Page", and a phone number "+1-614-764-6000, ext. 3510 INTL 1-800-848-5800 USA".

1. Remove Group from Path(s) OR Delete Path(s) where referenced
2. Then, delete the Group

OCLC Profiled Groups

Recommended profiled groups

Express Program – Libraries supplying digital items within 18 hours

EBOOK - Libraries with licenses/rights for lending whole e-books

FILM - Libraries supplying audio-visual materials free of charge

LONG - Libraries with loan periods of 12+ weeks

LVIS - Libraries Very interested in Sharing resources free of charge

To join one or more groups, email oclcresourcesharing@oclc.org.

[See full list of profiled groups](#)

SET UP AUTOMATION

Automated Request Manager

- OCLC Service Configuration

WorldShare ILL

Interlibrary Loan Options

Borrower Data

Lender Data

Custom Holdings Groups

Custom Holdings Paths

Automated Request Manager

Purchase Options

Patron Request Workforms

[See automation self-paced training](#)

Automated Request Manager

We want to hear your thoughts on the new Automated Request Manager.

Borrowing New Request

These standard actions are done for all Borrowing New Requests, regardless of profile:

- Bibliographic record**
Best matching bibliographic record applied to request
- WorldCat holdings check**
Available when holdings set in WorldCat
- Knowledge base holdings check**
Available when OCLC knowledge base holdings set in WorldCat
- Custom Holdings Group check**
Available when Custom Holdings Group holdings set in WorldCat

Main Automations

Configure automations that will be applied to new borrowing requests. Only the best matching automations will be applied.

[See ILL Sources](#)

- Automate ILL workflows based on matched criteria you define along with actions you want the system to perform on matched requests.

- Automations allow you to determine how requests are processed either as Borrowing or Lending.

If I want to reuse my library's information and access my online catalog in WSILL I need to configure

1. Constant data and IFM
2. Constant data and WorldCat Registry
3. WorldCat Registry and Policies Directory
4. Policies Directory and WorldCat Registry

Select the **correct** statement below

1. Custom holdings can't be edited or deleted after creation
2. Online catalog in WSILL can be configured for lenders only
3. Custom holding is the option to pre-select and save a group of lenders and borrows
4. Automation is configured for borrowers only

The **four** topics...

Update OCLC Policies Directory



Configure options for WSILL



Preselect your preferred libraries



Set up automation



Support, Documentation & Tutorials

OCLC <https://help.oclc.org>

System Status Dashboard **Contact OCLC Support**



Select a category



Discovery and Reference



Library Management



Metadata Services



Resource Sharing

OCLC support regions

| Region | Location | Contact information |
|---------------------------|--|--|
| Asia Pacific | OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US | Or: +1-614-764-6009 Send an email Submit/View requests |
| Australia and New Zealand | OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU | T: 1300 260 795 (local call w Or: +61 (0) 3 9929 0800 Send an email Submit/View requests |
| United States | OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US | T: 1-800-848-5800 (toll free in USA and Canada) Or: +1-614-793-8682 Send an email Submit/View requests |

Subscribe to [OCLC-SHARING-L](#) listserv.

Next steps

After completing Introduction WSILL courses

- **WSILL Borrowing**
 - Borrowing requests
 - Manage ILL requests as Borrower
- **WSILL Lending**
 - Configuration for Lenders
 - Manage and respond requests

Upcoming sessions - [Register](#)

Test your knowledge

Introduction to WorldShare ILL online quiz

[Access the quiz](#)



Thank You!

Please remember to fill out the evaluation for this class

Your input will help shape our future training sessions.

<https://www.surveymonkey.com/r/IntroILLPreparePlan>

- Date: 04/22/26
- Instructor: Sarah Robledo
- Class name: Introduction to WorldShare ILL – Prepare and plan

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)