



How to Create, View and Modify Global Policies

Introduction

WorldCat Registry users around the world can now access global resource sharing policy information in the Registry. Policy information about global resource sharing previously available only in the subscriber-only Policies Directory is now included in institution profiles within the WorldCat Registry for display by any Registry user.

Access to global resource sharing policies will help Registry users determine whether a library will loan a resource identified through the WorldCat database to libraries within the same country or in other countries. Consulting the Registry for this type of policy information will save time for library staff trying to obtain needed items for their users.

All institutions in the WorldCat Registry can define global resource sharing policies. A user authorized to modify an institution's settings can create or modify that institution's policy information. OCLC will pre-populate the WorldCat Registry with global resource sharing policies of WorldCat Resource Sharing subscribers that exist in the Policies Directory.

The following policy information will display to WorldCat Registry users:

Copy policy

- My institution sends copies within my home country for free or for a fee
- My institution sends copies outside my home country for free or for a fee

Loan policy

- My institution loans within my home country for free or for a fee
- My institution loans outside my home country for free or for a fee

Creating a Global Policy

All institutions in the WorldCat Registry can define global policies. A user authorized to modify an institution's settings can create or modify that institution's global policies using the following steps:

1. After login and selection of the institution you are authorized to edit, select the **Global Policies** link on the Profile Summary screen.

Profile Summary

Global Policy Museum

Global

Profile Summary Share this Profile Download this Profile as XML	Institution Name: Global Policy Museum Also Called: Global Institution Type: Museum
Name and Location	Street Address: 1234 Any Street Dublin, Ohio 43017 United States
Identifiers	Business Address: 1234 Any Street Dublin, Ohio 43017 United States
Relationships: Branches Affiliations	Phone: 614 555-1234 Fax: 614 555-0000 E-mail Address: global@globalmuseum.org Home Page: www.globalmuseum-notreally.org Information Page: www.globalmuseum-notreally.org/info
Services: IP Addresses Online Catalog OpenURL Resolvers Virtual Reference	Services: IP Addresses: Online Catalog: OpenURL Resolvers: Virtual Reference:
Administrative Information	
Contacts	
Global Policies	
Profile History Last updated on 2008-05-27	

2. On the Global Policies page, select the **Edit this page** button to create or modify the global policies.

The screenshot shows the 'Global Policy Museum' page. On the left is a navigation menu with links for Profile Summary, Name and Location, Identifiers, Relationships, Services, Administrative Information, Contacts, and Global Policies. The main content area is titled 'Global Policies' and includes a note about inter-lending. A red box highlights the 'Edit this page' button. Below the button is a 'Last Updated:' section and a 'Global Policies' header. Under 'Copy Policy', it states 'No domestic copy policy defined.' and 'No international copy policy defined.' Under 'Loan Policy', it states 'No domestic loan policy defined.' and 'No international loan policy defined.'

3. Select the checkbox for each policy that applies. You may select only one button for fees; the default is **A fee** is charged.

The form is titled 'Last Updated:' and 'Global Policies'. It contains two sections: 'Copy Policy' and 'Loan Policy'. Each section has two rows of options. For 'Copy Policy', the first row is 'My institution sends copies within my home country for' with radio buttons for 'Free' and 'A fee'. The second row is 'My institution sends copies outside my home country for' with radio buttons for 'Free' and 'A fee'. For 'Loan Policy', the first row is 'My institution loans within my home country for' with radio buttons for 'Free' and 'A fee'. The second row is 'My institution loans outside my home country for' with radio buttons for 'Free' and 'A fee'. At the bottom, there are two buttons: 'Save Changes' (orange) and 'Cancel Changes' (blue).

4. Click the **Save Changes** button to save the settings.

The screenshot shows a configuration form for 'Global Policy Museum'. At the top, it says 'Last Updated:'. Below that is a section header 'Global Policies'. Under 'Copy Policy', there are two rows: 'My institution sends copies within my home country for' and 'My institution sends copies outside my home country for'. Each row has a checked checkbox, a radio button for 'Free', and a selected radio button for 'A fee'. Under 'Loan Policy', there are two rows: 'My institution loans within my home country for' and 'My institution loans outside my home country for'. Each row has a checked checkbox, a radio button for 'Free', and a selected radio button for 'A fee'. At the bottom, there is an orange 'Save Changes' button and a blue 'Cancel Changes' link. The 'Save Changes' button is highlighted with a red box.

5. The policy is saved.

The screenshot shows the 'Global Policy Museum' profile page. On the left is a navigation menu with links: 'Profile Summary' (with a sub-link 'Download this Profile as XML'), 'Name and Location', 'Identifiers', 'Relationships' (with sub-links 'Branches' and 'Affiliations'), 'Services' (with sub-links 'IP Addresses', 'Online Catalog', 'OpenURL Resolvers', and 'Virtual Reference'), 'Administrative Information', 'Contacts', and 'Global Policies'. The main content area is titled 'Global Policies' and contains the text: 'Below are the current resource sharing settings for Global Policy Museum. NOTE: These global policies may not apply for all inter-lending and are subject to change.' Below this text is an orange 'Edit this page' button. Underneath is a 'Last Updated:' field with the value '2008-05-30'. Below that is another 'Global Policies' section header. Under 'Copy Policy', there are two rows: 'My institution sends copies within my home country for a fee' and 'My institution sends copies outside my home country for a fee'. Under 'Loan Policy', there are two rows: 'My institution loans within my home country for a fee' and 'My institution loans outside my home country for a fee'.

Display an Institution's Global Policies

Anonymous users may display any institution's global policies by clicking the **Global Policies** link.

Profile Summary
Global Policy Museum
Global

[Profile Summary](#)
[Download this Profile as XML](#)

[Name and Location](#)
[Identifiers](#)
Relationships:
[Branches](#)
[Affiliations](#)
Services:
[IP Addresses](#)
[Online Catalog](#)
[OpenURL Resolvers](#)
[Virtual Reference](#)
[Administrative Information](#)
[Contacts](#)
Global Policies

Institution Name: Global Policy Museum
Also Called: Global
Institution Type: Museum

Street Address:
1234 Any Street
Dublin, Ohio 43017
United States

Business Address:
1234 Any Street
Dublin, Ohio 43017
United States

Phone: 614 555-1234
Fax: 614 555-0000
E-mail Address: global@globalmuseum.org
Home Page: www.globalmuseum-notreally.org
Information Page: www.globalmuseum-notreally.org/info

Services:
IP Address

And the resulting screen is displayed.

Global Policy Museum

[Profile Summary](#)
[Download this Profile as XML](#)

[Name and Location](#)
[Identifiers](#)
Relationships:
[Branches](#)
[Affiliations](#)
Services:
[IP Addresses](#)
[Online Catalog](#)
[OpenURL Resolvers](#)
[Virtual Reference](#)
[Administrative Information](#)
[Contacts](#)
Global Policies

Global Policies

Below are the current resource sharing settings for Global Policy Museum.
NOTE: These global policies may not apply for all inter-lending and are subject to change.

[Edit this page](#)

Last Updated: 2008-05-30

Global Policies

Copy Policy
My institution sends copies within my home country for **a fee**
My institution sends copies outside my home country for **a fee**

Loan Policy
My institution loans within my home country for **a fee**
My institution loans outside my home country for **a fee**

Remember: A user must be authorized with an institution and logged in to change the institution's global policies.