# WorldShare ILL Release Notes

## November 2013 Release

### Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorldShare ILL</td>
<td>2</td>
</tr>
<tr>
<td>Browser Support</td>
<td>2</td>
</tr>
<tr>
<td>Interlibrary Loan Home Page</td>
<td>2</td>
</tr>
<tr>
<td>Discover Items</td>
<td>3</td>
</tr>
<tr>
<td>Links to materials that are freely available from Open Access resources</td>
<td>3</td>
</tr>
<tr>
<td>Improved display of bibliographic details (part 2)</td>
<td>4</td>
</tr>
<tr>
<td>Display Days to Respond on the Holdings Display screen</td>
<td>5</td>
</tr>
<tr>
<td>Display of aggregate lender cost information in the Holdings Display screen</td>
<td>5</td>
</tr>
<tr>
<td>Workflow Improvements</td>
<td>6</td>
</tr>
<tr>
<td>Support for the “Days to Respond” field in the ILL Policies Directory</td>
<td>6</td>
</tr>
<tr>
<td>Copy to Loan to Copy</td>
<td>9</td>
</tr>
<tr>
<td>Integration of Article Exchange into WorldShare ILL</td>
<td>11</td>
</tr>
<tr>
<td>Saving Local ID field before saying yes (lender workflow)</td>
<td>14</td>
</tr>
<tr>
<td>Borrowing Notes &amp; IFM highlighted at top of Lender’s request</td>
<td>15</td>
</tr>
<tr>
<td>Links to freely available Open Access resources</td>
<td>15</td>
</tr>
<tr>
<td>Borrower can cancel a request at Considering and Conditions Accepted statuses</td>
<td>16</td>
</tr>
<tr>
<td>Email confirmation will be sent to sender’s email address</td>
<td>17</td>
</tr>
<tr>
<td>Additional bug fixes</td>
<td>17</td>
</tr>
<tr>
<td>Printing improvements</td>
<td>18</td>
</tr>
<tr>
<td>Book stickers for lender</td>
<td>18</td>
</tr>
<tr>
<td>Additional bug fixes</td>
<td>19</td>
</tr>
<tr>
<td>Borrowing on behalf of others workflows for “referral groups”</td>
<td>20</td>
</tr>
<tr>
<td>Known Issues</td>
<td>20</td>
</tr>
<tr>
<td>Looking ahead</td>
<td>20</td>
</tr>
<tr>
<td>February release (tentative)</td>
<td>20</td>
</tr>
<tr>
<td>Feature roadmap</td>
<td>20</td>
</tr>
</tbody>
</table>
WorldShare ILL

Browser Support
Our November release was tested with the following browsers:

- Mozilla FireFox 25.0
- Chrome 30.0.1599.101 m
- IE 8.0
- IE 9.0
- IE 10.0

Note: Beginning with our February 2014 release, OCLC will not test WorldShare ILL against Internet Explorer 8. This change is in line with Microsoft’s plan to end support for Windows XP on April 8, 2014. The service will continue to work with IE 8; however, over time users will likely experience degradation in functionality. This decision is being made for several reasons:

- Microsoft has been forcing users to update from IE8 to IE9 through Windows Update (although users are able to opt-out).
- Modern browsers provide better security and performance.
- IE8 does not support HTML 5, some modern JavaScript constructs, and also has a slow, inefficient JavaScript engine. This hampers our ability to provide a modern, rich, user experience.
- Supporting deprecated browser versions adds to development and support time. This has an impact on how quickly features can be delivered.

If your institution will continue to use Windows XP unsupported after April 8, 2014 we highly recommend that you install either Mozilla FireFox or Google Chrome for an improved experience.

If you are currently limited to using IE 8, now is the time to begin working with your technical staff to upgrade your browsers to Internet Explorer 9 or 10, Firefox or Chrome.

Interlibrary Loan Home Page
The Alert queue has been renamed AE Alert, more accurately representing the intention of the field.
Discover Items

Links to materials that are freely available from Open Access resources

WorldShare ILL now displays links to materials that may be available for free from Open Access resources as they are recorded in the WorldCat Knowledge Base. Links are available in two places related to Discover Items:

1. Bibliographic record: brief display

   ![Scientific American](image)

   Clicking on the links will open a new browser tab or window. The links go to resources such as JStor. There is no guarantee that the links will resolve successfully, but they provide a shortcut to filling an ILL request internally, before it’s sent to potential lenders. This will help libraries get materials to their patrons in a timely manner. Links are also available in the borrower and lender workflows (see below).

2. Bibliographic record: detailed display

   ![Scientific American](image)

   Note: In order to maintain accurate statistics of ILL requests placed/filled by your institution, we do recommend that you create a request and then fill it using Open Access as the fulfillment method.
Improved display of bibliographic details (part 2)
Additional bibliographic details have been added including the Summary on the Description tab:

The Named Corporation heading is now displaying in the subject tab, as well as the named person and or genre where applicable:
Display Days to Respond on the Holdings Display screen
(additional details in the Workflow Improvements section of Release Notes)

In the WorldShare ILL holdings screen users will see a visual indicator in the Days to Respond column on the holdings screen letting them know how long a request will remain with a lender before aging to the subsequent lender.

Display of aggregate lender cost information in the Holdings Display screen

Also new to the holdings page is the inclusion of potential lenders’ cost information. This data is the aggregated cost information in the Polices Directory. Up until now, this cost information has been visible in the Lending library accordion on the request form.
Workflow Improvements

Support for the "Days to Respond" field in the ILL Policies Directory, [Eliminating the need for enter my symbol twice (EMST)]

With the November release, WorldShare ILL will start using the Days to Respond setting in the ILL Policies Directory to manage request aging. WorldShare ILL has, up to now, used a standard of four system days to age a request from one lender to another. In order for a lender to have additional time to respond to a request, the borrower had to enter their OCLC symbol twice in the lender string, thus giving them eight system days to respond to a request (often referred to as “enter my symbol twice” or EMST).

In May 2012 a new setting was added to the ILL Policies Directory which allows a lending library to broadcast their preferred aging period to the ILL community. From your library’s main page in the Policies Directory you can see the number of days you have set for request aging. The default is four days unless a library makes a change.

To change the Days to Respond click on the Edit link and a pop-up will open. Here a library can change the default four days to any increment of four up to 20.
Libraries can also search for the Days to Respond as set by potential lenders:

A borrowing library will see a visual indicator of potential lenders’ Days to Respond in two places.

1. The Holdings screen in WorldShare ILL
2. The Lending Libraries section of the request form

![Lending Libraries section of the request form]

Requests will begin to age at 4/8/12/16/20 days on November 8.

Examples from screen capture above:

**Lender string #1:** NDT7P, NDOLP, NDTBF will take 24 days to age to unfilled.

**Lender string #2:** NDIUI, NDIUI will take 40 days to age to unfilled.

If a library enters a lender symbol multiple times they will receive a warning message. This warning message does not prevent a borrowing library from entering a symbol in their lender string multiple times, but serves as a reminder that they may not need to do so.
Copy to Loan to Copy
WorldShare ILL now supports the ability for a lender to change a loan request to a copy or a copy request to a loan. This works differently than it does in WorldCat Resource Sharing and it will require a new workflow.

When a lender opens a LOAN request there is a drop-down box allowing them to change the fulfillment type to a copy.

Loan request

If the lender changes the loan to a copy the Due Date field disappears.
When a lender opens a COPY request the same drop-down box is on the screen allowing them to change the fulfillment type to a LOAN.

**Copy Request**

If the lender changes the fulfillment type to a Loan the due date field appears:

This change in workflow will result in more accurate statistics that count requests as copies or loans, depending on how the request was filled by the lending library:

- Loan requested—fulfilled with a loan = LOAN
- Loan requested—fulfilled with a copy = COPY
- Copy requested—fulfilled with a copy = COPY
- Copy requested—fulfilled with a loan = LOAN
Integration of Article Exchange into WorldShare ILL

Users of Article Exchange will have a more streamlined workflow, no longer having to leave WorldShare ILL to upload documents in a separate browser tab or window. This reduces the number of actions (clicks) from seven down to four. Lenders can click on the OCLC Article Exchange link.

Their computer’s file navigation will open up where they can select an appropriate document to upload.

Users will then click on the Drop File button:
Users then receive a confirmation message that their file has been uploaded and the AE Alert field is automatically populated with the URL and password for the document.

This eliminates email messages to borrowers because document links are clearly visible in the AE Alert field.

The Borrowing library’s workflow has also changed. On the Interlibrary Loan Home page in WorldShare ILL, the AE Alert category will display the number of Requests have data in the AE Alert field.

Borrowing libraries will no longer receive emails because links are delivered through the AE Alert field.
When a borrower opens a request in the AE Alert request queue WS ILL will recognize the pattern of Article Exchange URL and password and display the “Email to patron” action button. This button will appear if the request comes from another WS ILL library, an ILLiad library or a VDX library.

If the borrowing library email address and the patron email address are in the appropriate fields they will be automatically mapped to the “To” and “From” address boxes in the email template. Citation data will also transfer to the email along with information about how long the file will be maintained in Article Exchange.
Saving Local ID field before saying yes (lender workflow)

A lending library can enter a number (e.g. call number, barcode number) in the Local ID field and save data in the request.

Note: If you have Constant Data persistence turned off and do not enter a due date prior to saving, you will be prompted to do so. The way to work around this problem is to enter a due date before saving. You will be able to edit the due date either manually or using constant data when responding yes to the request. This is a known bug and will be addressed in a future release.

Once the data is saved the request can be printed and the Local ID field will appear in the printout. Printing can be done through the Print Now feature as a 1-request per-page format:

Through the Print Queue lenders can choose to print out 2-requests per-page:
**Borrowing Notes & IFM highlighted at top of Lender’s request**

Lender libraries now see important details about a request at the top of the Request Details section. These details include the borrowing libraries Max Cost and whether they have agreed to use IFM and their Borrowing Notes.

The Borrowing Notes section is truncated and lending libraries can click on the link to show more to see the entire Note.

**Links to freely available Open Access resources**

A borrowing library now sees links to Open Access materials in the Request Details section of a request. This will allow a library to link to materials available (as defined in the WorldCat Knowledge Base) before sending it to potential lenders.

Creating a request rather than filling from Discover Items allows the library to record that they were able to fill their own request using and Open Access resource and track it through statistical reporting.
Additionally, if a request that might be available through Open Access resources makes it to a lending library the lending library will see links to Open Access materials.

Borrower can cancel a request at Considering and Conditions Accepted statuses
Borrowing libraries now have the ability to Cancel a request when it is at the Considering status and the Conditions Accepted status.
Email confirmation will be sent to sender's email address
When a library sends an email through the WorldShare ILL interface the email address in the From: address will now receive a copy of the sent email.

Additional bug fixes
- Lender details in the request are now displayed with the lender string contains a non-US institution
- Lender string now appears on its own, wrapping lines rather than bleeding into other data elements
- Email function in the US has been updated to work with all valid email addresses
- Dollar amounts in display (and printouts) now show two decimal points (example: 12.00 vs. 12.0)
- When a user navigates from a request via the "View Holdings" link, then filters the list by CHP or Profiled group, the "Update Request" button now works
- The confirmation message at the top of the screen now displays for 20 seconds, an increase from 15 seconds
- When a user navigates away from a request in the Unfilled queue and then returns to the request still see the Cancel request button, previously the button disappeared when user navigated away and then returned
- After a borrower responds Not Received to a request, they are now able to return to that request and Receive it
- The Request history for the final lender who loans the material now shows as “supplied” rather than “in-transit”
- Patron status is now maintained when submitting a request to a lender or saving the request
- Libraries that are profiled to work with OCLC ILL using ISO ILL (e.g. VDX, Navigator, AutoGraphics, etc.) should manage their requests in their ISO ILL system. If they attempt to work in WorldShare ILL they will see an error message specific to their situation.
Printing improvements

Book stickers for lender
WorldShare ILL now supports the ability for a lending library to print a book sticker in addition to a book strap. In the Print Queue a lender selects the Book Straps/Stickers button.

The lender selects the requests they want to print and selects either 2 per page or the 6 per page label stock option.
The print preview will show the book sticker.

Note: 2 known issues with printing book stickers:

- Barcodes are not yet included in the book stickers. We will be adding them with our February release.
- We’re still cleaning up references to book strap vs. book sticker in the interface.

Additional bug fixes

- The labels when printing 30 shipping or return labels per page are now aligned correctly
- Publisher (imprint) data is now included on 1 & 2 per page printouts
- Diacritics are now displayed on request printouts
- Lender string now appears when printing unfilled requests. “Reasons for no” do not
- Print queues are now refreshing in a more timely manner
- Patron status is now maintained when printing requests (previously the patron status would revert to OTHER upon printing a request)
- Lending restrictions now appear on request printouts
- Request ID number now appears under the request barcode
Borrowing on behalf of others workflows for “referral groups”
With our November release OCLC will begin a pilot of new functionality in WS ILL will provide a centralized service for an ILL Borrowing Management Center to manage borrowing on behalf of other libraries. If you are a library that has a workflow that supports working on behalf of other libraries (e.g. a referral center or a library network) please take a few minutes to fill out an online form at http://oc.lc/referral and someone from our implementation team will contact you with additional details so you can plan your migration off of WorldCat Resource Sharing.

Known Issues
A list of known issues can be found here:
http://www.oclc.org/support/services/worldshare-ill/known-issues.en.html

Looking ahead
February release (tentative)
- Library ability to customize book straps
- Borrowing library will have one free preview of Article Exchange link before sending to patron
- Improved shipping labels
- Additional fields included in request (e.g. dissertation note, series title, uniform title)

Feature roadmap
An updated feature roadmap can be found at the link below. OCLC product staff review this list regularly and update the features and timing information.