WorldShare® Interlibrary Loan Release Notes
August 3, 2014 Release

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

- Chrome Version 35.0.1916.153 m
- Firefox 30
- Internet Explorer 9 & 10
Discover Items

Improved Advanced Search screen
The Advanced Search screen has been improved. In May the WorldShare ILL team conducted some usability testing of the advanced search form. Working with our designers we were able to incorporate user suggestions to make the advanced search form easier to use:

- The layout is reorganized
- Three search indexes are open by default
- The ability to add/remove indexes is more obvious with the + / - icons on the right
- All search scope/indexes are drop downs, allowing users to only select one at a time
  - Note: the ability to search multiple formats is coming in a future release
- It no longer looks like users can enter text directly next to the search index; only in the field next to the index
- Type ahead is now available when selecting indexes

Additionally, as users type ahead in various fields what they have typed matches against what is available in the drop down.
Additional fields in Discover Items results

In response to user request we have added two new data elements to the detailed bibliographic display in WorldShare ILL Discover Items. This will help libraries more accurately select the correct WorldCat record on which to base an ILL request.

1. Serial publication date [MARC 362]:

   ![Example OCLC Number and ISSN](image)

2. Genre/form [MARC 655 Genre Headings and also 648 and 653]:

   ![Example Genre/form](image)

Default of All Holdings display increased to 100 libraries

In response to user requests, the All Holdings display from Discover Items now defaults to 100 library holdings rather than the previous default of 40 library holdings. This provides more information on a single screen and fewer clicks to find holding libraries.
Identifiers added to holdings display
Users viewing the holdings page now have the blue, “i” icon available to click and view additional bibliographic identifiers without having to navigate back to the brief or detailed bibliographic displays.

Additional bug fixes
- Users of IE 9 and IE 10 no longer receive a pop-up message asking if they want to leave this page upon clicking through to the holdings page from the bibliographic details page
**WorldCat Discovery – WorldShare ILL improvements**

If you currently subscribe to FirstSearch you are eligible to begin your migration to WorldCat Discovery. Please visit: [http://oclc.org/worldcat-discovery.en.html](http://oclc.org/worldcat-discovery.en.html) to start your migration and to learn more about the benefits of WorldCat Discovery.

**Staff requesting from WorldCat Discovery**

With the scheduled release of WorldCat Discovery on August 7, ILL staff will have the ability to submit requests from the WorldCat database in WorldCat Discovery directly into WorldShare ILL. **Staff users who have permission set for both a staff view of WorldCat Discovery and WorldShare ILL** will benefit from the improved search capabilities of WorldCat Discovery including the:

- ability to further refine search results after a search
- MARC record view of items if your library has a Cataloging subscription
- ability to connect directly to workflows in WorldShare ILL

The staff-specific features display in WorldCat Discovery once a staff member logs in with their individual OCLC Services username and password when that username has permission set for both WorldCat Discovery and WorldShare ILL.

Contact orders@oclc.org to add this functionality to your existing WorldShare account. Please include this text with your information filled in:

---

**I already use a WorldShare application. Please configure staff accounts for the WorldCat Discovery interface for:**

- Institution name:
- Library symbol or WorldShare URL:
- Personal account information
  - First and last name:
  - The existing username for the WorldShare application:
  - Email address:
- (Optional) Other staff members’ personal account information
  - First and last name:
  - The existing username for the WorldShare application:
  - Email address:

---

OCLC Order Services will send you an email confirmation letter that includes instructions for logging into WorldCat Discovery with your staff account.
The Staff ILL button appears to the right of the Patron ILL button. If a library does not have patron ILL enabled they will just see the Staff ILL button.

Clicking on the Staff ILL Request button will take users directly to the holdings display for this item in WorldShare ILL. From here users can complete their ILL workflow.
Workflow Improvements

Borrower and Lender improvements

"Close all tabs" option for request searches
When users conduct multiple searches for requests from the ILL Home Page they can now close all their search tabs in a single click rather than closing them individually.

Closed requests now display due date, received date and shipped date
Additional dates are now displayed on closed requests, including the Shipped and Received dates.

Constant data selector is now scrollable
The Constant Data selector is now scrollable. Users have requested a simpler way to navigate to and select the correct Constant Data Record. They will now see their top 19 Constant Data records. If there are more than 19 Constant Data records the right side of the drop-down will be a scroll bar.
Modifications to navigation
WorldShare ILL has modified some basic navigation. These include:

- Change in how to sort a table of requests
- Scrolling through pages of a table of requests
- Icon to refresh request queues

![Table of Requests](image)

Borrower improvements

**Manual status change for borrower: Not Reviewed ➔ Reviewed**

In response to user requests, when a borrowing library opens a Not Reviewed request the request will no longer automatically move to Reviewed. In order to move the request to Reviewed the library will have to manually action the request to Mark as Reviewed.

![Mark as Reviewed Button](image)

**Note:** This is only applicable when reviewing individual requests. If a user batch prints all Not Reviewed requests they will automatically update to Reviewed. The option to not auto-update is scheduled for an upcoming release.
**Borrower has direct links to lender’s Policies Directory entry**

Borrowers will now have a quick link into the Policies Directory from the Lending Information accordion once a lender says Yes or replies with a Conditional. This will allow borrower’s easy access to all the information contained in the ending library’s Policies Directory entry.

![Lending Information (Supplier: NDCLV) Screen](image)

**Auto-complete applies to email forms**

When using the Email feature of WorldShare ILL all of the header information now takes advantage of auto-complete. This means that if users are sending multiple emails to the same email address the system will remember the most recent 10 email addresses used per session and as they type matching options will appear as a drop down. This is applicable to the following fields:

- To
- From
- CC
- Subject

![Email Request Screen](image)
**Received but missing requests can't be returned**
Requests that a borrowing library has reported as Lost (status Received but Missing) now allow the borrower to return the item if it is found by their patron.

![Image of a request form with options to return or renew the item, and a red box highlighting the status 'Received but Missing'.]

**Lender improvements**

**Manual status change for lender: New → Considering**
In response to user requests, when a lending library opens a New request the request will no longer automatically move from New to Considering. In order to move the request to Considering the library will have to manually action the request using the Mark as Considering button.

![Image of a request form with options to mark the request as Considering.]

**Note**: This is only applicable when reviewing individual requests. If a lender batch prints all New requests they will automatically update to Considering. The option to not auto-update is scheduled for an upcoming release.
Lenders able to update Article Exchange after saying Yes to a request

Libraries that mistakenly say Yes to a copy request filled using Article Exchange, but forget to drop their local file with Article Exchange, can now open their In Transit request and upload the article to Article Exchange.

In order to do so, lenders open a request that is Considering, In Transit or Received? Click on the Article Exchange link and drop their file. They will receive confirmation that the file has been uploaded. Save the request and the link to Article Exchange and the password will be available to the borrowing library.

Lender link to borrower’s Policies Directory entry

In the lender’s view of a request the Borrowing Information accordion header now includes a link to the borrowing library’s entry in the ILL Policies Directory. This allows a lender easy access to the ILL policies of the borrowing library.

Improvements to date displays in Lender’s view of a request

Several dates have been added to the lender’s display of a request.

- The lender’s shipped date has been added to the lender’s view of a request at the following statuses:
  - Not received
  - Received?
  - Received but Missing
- Return Date now displays to lender when status is Returned But Missing
- Received Date now displays to lender when status is Recalled
**Improvements to lender view of article request fields**

The following bibliographic fields do not display in the lender’s view of a request if there is no data in them. This condenses the useful data at the top of the screen.

- title / book title / journal title
- uniform title
- issn
- isbn
- doi
- pmid
- author
- publisher (place / publisher / date)
- dissertation
- series
- format
- language
- edition (= bib edition)
- article title
- article author
- volume
- issue
- issue date
- pages

Screen shot of Lender’s Request Details pre-July release:

![Screen shot of Lender’s Request Details pre-July release](image)

Screen shot of Lender’s Request Details post-July release:

![Screen shot of Lender’s Request Details post-July release](image)
Fields have been slightly re-ordered for better readability. The author field now displays after the Uniform Title (if present, or else the Title) and before the standard identifier fields.

Screen shot of Lender’s Request Details pre-July release:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Cowgirl Kate and Cocoa</td>
</tr>
<tr>
<td>Uniform Title</td>
<td>Cowgirl Kate and Cocoa</td>
</tr>
<tr>
<td>ISBN</td>
<td>9780152021045 (hardcover)</td>
</tr>
<tr>
<td>DOID</td>
<td></td>
</tr>
<tr>
<td>PMID</td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td>Silverman, Erica; Lewin, Betsy</td>
</tr>
<tr>
<td>Publisher</td>
<td>Orlando : Harcourt, c2005</td>
</tr>
<tr>
<td>Series</td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>Book</td>
</tr>
<tr>
<td>Language</td>
<td>English</td>
</tr>
<tr>
<td>Edition</td>
<td>Any edition</td>
</tr>
<tr>
<td>Preferred Ed</td>
<td></td>
</tr>
<tr>
<td>Verification</td>
<td>WORLDCAT Physical Description: 1 v. (unpaged) : col. ill. : 23 cm.</td>
</tr>
</tbody>
</table>

Screen shot of Lender’s Request Details post-July release:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Cowgirl Kate and Cocoa : rain or shine</td>
</tr>
<tr>
<td>Author</td>
<td>Silverman, Erica; Lewin, Betsy</td>
</tr>
<tr>
<td>ISBN</td>
<td>9780152023849 (bc) 97802053849</td>
</tr>
<tr>
<td>Publisher</td>
<td>Orlando, Fla. : Harcourt, c2006.</td>
</tr>
<tr>
<td>Format</td>
<td>BOOK</td>
</tr>
<tr>
<td>Language</td>
<td>ENGLISH</td>
</tr>
<tr>
<td>Edition</td>
<td>First</td>
</tr>
<tr>
<td>Verification</td>
<td>WORLDCAT Physical Description: 1 v. (unpaged) : col. ill. : 23 cm.</td>
</tr>
</tbody>
</table>

**Direct Request and 15 lenders**

Patron-initiated requests that are submitted to OCLC ILL via ILL Direct Request now have 15 lenders automatically applied to their lender strings.

**Additional bug fixes**

- Users of WorldShare ILL who click on the hyperlink on the ILL home page to view and edit their own Policies Directory entry now have full 'edit' capabilities.
- When users of IE 9 and IE 10 use batch processing and hit the enter key it no longer triggers an action. Instead the cursor is moved to the next request ID entry box.
- The logic used to apply a lender string when viewing holdings with a Custom Holdings Path and a year for the publication has been modified to create a more accurate lender string, better reflecting library ownership.
- Diacritics included in a constant data record now display correctly in WorldShare ILL.
- Deflection criteria have been improved resulting in a higher level of success.
- The ISSN is now displayed in the lender’s view of a request.
- Lenders who open a request, make no changes and navigate away from the request are no longer prompted to save or abandon changes.
Service Configuration

Patron Request Workform
On August 8, the day following the WorldCat Discovery release, WorldShare ILL will introduce the ability for a library to customize their patron request form as it displays in WorldCat Discovery. This can be found in the WorldShare ILL section of Service Configuration. This patron request form will only work with WorldCat Discovery. The patron request form that can be edited in WorldCat Services Administrative Module will continue to be used with FirstSearch, WorldCat Local

Almost all aspects of the Patron Request Form can be customized by libraries.

Libraries can divide their customized patron request form into multiple sections and those sections can be re-ordered or removed:
Users select field names from a drop down selector, controlling the order in which the fields appear on the request form:

Users can make a data field required or optional:

Users can provide multiple notes to their patrons that can be used for instructions, copyright notices, etc.:

**Bug fixes**

- Modifying the Copyright Compliance setting in Service Configuration’s Borrower Constant Data now stays in sync with WorldCat Services Administrative Module
- Modifying the patron names, states and country setting in Service Configuration’s Borrower Constant Data now stays in sync with WorldCat Services Administrative Module
Printing improvements

Borrower can reprint book straps and return shipping labels
Borrowing libraries now have the ability to reprint book straps and return shipping labels if they forget to do so when taking an action on a request. This is a new feature that was not available in WorldCat Resource Sharing and has been long-requested by users of OCLC’s ILL system.

After a borrowing library has received an item the Print Now drop down button has a new option to Reprint Book Strap. Selecting this option sends this request to the Book Strap print queue.

After a borrowing library returns an item the Print Now drop down button has another new option to Reprint Return Label. Selecting this option sends this request to the Return Labels print queue.

Users can then navigate to the Print Queue and print out their book straps or return labels.

Lender ability to re-print book straps/stickers and shipping labels
Lending libraries now have the ability to reprint shipping labels, book straps and book stickers after they have said Yes and before the request is Received by the borrower. This feature is available at the following statuses: In Transit, Received? and Not Received

The ability to re-print is handled through the Print Now drop down button that now has options to Reprint Book Strap/Sticker or Reprint Shipping Label. Selecting this option sends this request to appropriate print queue.
**Lender book strap includes Due Date**
The lender’s book strap now includes the lender’s due date. The borrowing library’s book strap does not include a due date which allows the borrowing library to add their local library’s due date.

![Due Date Example](image1)

**Lender print outs include Referral Date**
When lenders print out requests in the New or Considering queues the referral date is now included. The referral date is the last date a request was actioned. In the example below the request moved from New/Submitted to Considering on the date in the screenshot below.

![Referral Date Example](image2)

**Additional bug fixes**
- Two per page printouts are now split evenly across the page. If users fold and tear them in half all relevant data will appear on each equal half.
- The user interface indicates that there is a printing limit of 500 requests at once at the same time. The ability to print up to 500 requests was implemented in May but the text on the screen was not updated at that time.

**Known issues**
A list of known issues can be found here:


**September release (tentative)**
- Dynamically updated Message Board on the WS ILL homepage
- Optional updates when batch printing for Borrower: Not Reviewed ➔ Reviewed and Lender: New ➔ Considering
- Ability to clear all print queues at once
- Support for A4 printing
- Performance improvements for batch processing

**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.