WorldShare® Interlibrary Loan Release Notes

Release Date: June 7, 2015

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Browser Support

This release was tested with the following browsers:

- Chrome Version 43.0.2357.81 m
- Firefox 38.0.1
- Internet Explorer 9 and 10

Recommended Actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Administrative Actions

These items require immediate actions or decisions.

<table>
<thead>
<tr>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Following the release, we recommend that you clear your browser’s cache before starting to work with WorldShare ILL.</td>
</tr>
<tr>
<td>❑ If you are using WorldShare Management Services (WMS), consider creating a calendar reminder to enable the creation of temporary WMS Circulation items by WorldShare ILL.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>❑ Have you updated all of your addresses in your borrower and lender Constant Data? If not, please do so on behalf of all your borrowing and lending partners. Address labels do not print out properly unless the addresses are formatted correctly!</td>
</tr>
<tr>
<td>❑ Share release notes with your colleagues!</td>
</tr>
</tbody>
</table>
Release Notes

Discover Items

Type-ahead in the advanced search form is improved

In Advanced Search, the type-ahead function previously identified all items that “contain” the text entered. It has now been improved to identify items that “start with” the text entered.

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="before.png" alt="Before Content" /></td>
<td><img src="after.png" alt="After Content" /></td>
</tr>
</tbody>
</table>

Workflow Improvements

Book-club features let you request and track multiple copies

When creating a request, you can now specify multiple copies by using the Quantity field.
The multiple requests are listed together on the request page.

A new Linked Requests queue is available near the bottom of the Borrowing Requests section.

Use it to monitor the status of each request.
When you open one of the linked requests, Next Request and Previous Request let you page through the other linked requests.

Patron ID is no longer passed to lender
For patron privacy, borrower data is no longer passed to the lenders who are not using WorldShare ILL (e.g., Clio).

“Can you supply?” message is clarified
When saving a “Can you supply?” request, the message is now more specific.
Validations help ensure that only desired charges are triggered

WS ILL now lets you know if your ILL or IFM charge exceeds the borrower’s maximum cost.

You are also alerted if you have specified IFM payment, but the borrower has not.

Renewal Requested queue buttons are reordered for clarity

To reduce the potential for clicking the wrong button, the order of the buttons has been changed.
WorldShare ILL will create temporary items in WMS Circulation (coming in late June 2015)

Libraries that use WorldShare Management Services (WMS) will be able to enable the automatic creation of temporary Circulation items for items borrowed from other libraries and to create a hold request for the patron.

Full instructions and requirements for setting up this process will be available on the documentation page (http://www.oclc.org/support/services/worldshare-ill/documentation.en.html).

Integration must be turned on in Service Configuration under the Interlibrary Loan Options.

![WorldShare Circulation Integration](image)

In the WorldCat Discovery patron request form, the Patron ID must be configured as a required field.

![My address and contact information](image)

When the staff librarian sends the request to lenders, a temporary item is created in WMS Circulation and a hold is placed on the item for the patron (based on the Patron ID included on the request).
The new Circulation section on the WorldShare ILL request shows the status and history for the temporary item. When the borrowing library receives the item, the lender barcode must be included.

Once the item is successfully marked as received, the patron can see the updated status in WMS Circulation under their holds. The pickup location is the patron’s default home branch.
IFM charge will be triggered upon Shipped (coming in August 2015)

In the coming weeks, several libraries will help OCLC pilot test a new workflow in which IFM payments will be triggered when the lender marks the request as Shipped. Release of this feature to all libraries is planned for August 2015, and the ability to grant IFM refunds is targeted for the following release.

IFM Pilot Libraries:

- Cornell University
- The Getty Institute
- The National Library of Australia
- Rochester Institute of Technology
- Royal Library of Denmark
- Simon Fraser University
- UCLA
- University of Edinburgh
- University of Texas

WorldCat Discovery (Patron Requesting)

Patron data is now masked

The Patron ID field is now masked as the information is being entered on the patron request form.

WorldCat Discovery release notes

Improvements to patron requesting through WorldCat Discovery can be found in the WorldCat Discovery release notes (http://www.oclc.org/support/services/discovery/release-notes.en.html). WorldCat Discovery is on a different installation schedule than WorldShare ILL, so changes will become apparent with WorldCat Discovery releases.
Bug Fixes

Discover Items: Error message for year filter added
Only a single 4-digit year can be used to filter a Custom Holdings Path or Profile Group. Previously, the search would run but an “invalid data detected” message displayed on the holdings results page. Now, the year field only allows the entry of a 4-digit year (no ranges).

Borrowing Requests / Purchase Options: Refresh fixed
Refresh buttons are now working for both vendors.

ILL Management Centers: Print queues fixed
- View As now only displays requests for the current institution.
- Remove All now only removes requests from the current institution.

ISO ILL Systems: ISO bad character scans added
In requests from libraries using ISO ILL systems to manage interlibrary loan (e.g, VDX, WorldCat Navigator), Shipped and Conditional fields are now scanned for bad characters. Previously, only the incoming requests were scanned. This helps ensure that WorldShare ILL lenders and borrowers can view ISO requests and responses in WorldShare ILL.
Known Issues

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

Important Links

Product web site
More product information can be found at: https://www.oclc.org/en-US/worldshare-ill.html

Support web sites
Support information for this product and related products can be found at:

- Documentation: http://www.oclc.org/support/services/worldshare-ill/documentation.en.html

Feature roadmap
- An updated feature roadmap can be found at: http://www.oclc.org/worldshare-ill/features.en.html

Future releases
- Integration between WorldShare ILL and WorldShare Management Services (WMS) Circulation service for creation of temporary item record
- IFM charge triggered upon Shipped
- IFM refund capability

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