WorldShare® Interlibrary Loan Release Notes

Release Date: August 22, 2015

Contents

Browser Support ........................................................................................................................................... 1
Recommended Actions ....................................................................................................................................... 2
Release Notes .................................................................................................................................................. 2
       Service Configuration ................................................................................................................................. 3
       Workflow Improvements ............................................................................................................................. 4
       User interface improvements make navigating easier .................................................................................... 4
       Custom Holdings Paths can be used in book-club lender strings ................................................................. 4
       Link added between original and new (cloned) requests ............................................................................. 5
       WorldShare ILL-Circulation integration improved ..................................................................................... 6
       Local Holdings information now includes summary data ............................................................................. 7
       Purchasing Requests Details improved ..................................................................................................... 8
WorldCat Discovery (Patron Requesting) ......................................................................................................... 9
       Patron request form now allows up to 400 Pickup Locations .................................................................... 9
Bug Fixes ............................................................................................................................................................ 10
       Discover Items: Search results now display in correct application ............................................................... 10
       Book Club: Character limit added for names of Linked Requests ................................................................ 10
       Language display improved in translated interfaces ................................................................................... 10
       Preferred edition now available for all formats ........................................................................................... 11
       Request History now displays Supplier ...................................................................................................... 12
       Knowledge Base (KB) ................................................................................................................................. 12
       ILL Management Centers ......................................................................................................................... 12
Known Issues ..................................................................................................................................................... 13
Important Links .................................................................................................................................................. 13

Browser Support
This release was tested with the following browsers:

- Chrome Version 44.0.2403.125 m
- Firefox 39.0
- Internet Explorer 9, 10, and 11

Adobe Reader and JavaScript need to be enabled.

**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.

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 enabling the creation of temporary WMS Circulation items by WorldShare ILL.</td>
</tr>
<tr>
<td>This feature became available in June 2015, and full documentation and instructions are available on the documentation web page.</td>
</tr>
<tr>
<td><a href="http://www.oclc.org/support/services/worldshare-ill/documentation.en.html">http://www.oclc.org/support/services/worldshare-ill/documentation.en.html</a></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>❑ Have you reviewed the new Terms of Service for Article Exchange?</td>
</tr>
<tr>
<td><a href="https://share.worldcat.org/ILL/articleexchange/terms/Terms%20of%20Service.pdf">https://share.worldcat.org/ILL/articleexchange/terms/Terms%20of%20Service.pdf</a></td>
</tr>
<tr>
<td>❑ Share release notes with your colleagues!</td>
</tr>
</tbody>
</table>

**Release Notes**
Service Configuration

When you access Service Configuration by using the quick link in WorldShare ILL, you may notice one or more additional product modules in Service Configuration.

Some of the modules are not yet active, or you may not have access to all of the modules. If you need access to or have trouble accessing a particular module, please contact OCLC Support.

In the coming months, you will be able to access all your product modules by using your OCLC Services account.
Workflow Improvements

User interface improvements make navigating easier

- Persistent headers: When you scroll through the details of a request, the heading now remains viewable at the top of the page.
- Up/down navigation: New floating up/down buttons have been added for easier scrolling.

![Diagram of user interface improvements](image_url)
Custom Holdings Paths can be used in book-club lender strings

When the Linked Requests (book club) functionality was added in June 2015, lender strings needed to be created one-at-a-time. Now, Custom Holdings Paths can be applied to multiple lender strings.

Libraries in a Custom Holdings Path are automatically distributed among the lender strings. The library symbols are “dealt” among the lender strings similarly to dealing a deck of cards. The symbols in the first Custom Holdings Group are dealt among the lender strings, then symbols in the second Custom Holdings Group are dealt, and so on. This continues until all the symbols in the Custom Holdings Path have been assigned to a lender string or all of the lender strings have hit the maximum of 15 symbols.

For example, this request includes four copies and a custom holdings path has been applied. Notice that each string includes 13-14 symbols.

Here, two additional copies have been added and another custom holdings path has been applied. Notice that all the strings now include the maximum of 15 symbols.

Note: Information about creating and using Custom Holdings Groups and Paths is available in the Service Configuration help files and in the WorldShare ILL training and documentation.
Link added between original and new (cloned) requests

When a new request is created using the New button (to clone an existing request), a link has been added to the Request History. This allows you to easily access the original request, for example, to view the lender string and supplier history.

WorldShare ILL-Circulation integration improved

A few ease-of-use enhancements have been made to the Circulation accordion.

For institutions that have set up the ILL-Circulation integration, the Circulation accordion is now open by default. This is helpful when you are receiving the item and are required to enter the item barcode.

Also, when you click Refresh, the screen stays at the Circulation section, rather than jumping to the top of the page.

If the item barcode is not entered, an alert now appears at the top of the page and within the Circulation section.
Local Holdings information now includes summary data

In the lender view of Request Details, the Local Holdings section now includes additional information:

- Holdings summary (summarizes holdings at all locations for the institution)
- Shelving location
- Call number
- Holdings at each location
Purchasing Requests Details improved

The Ordered Date has been added to the Request Details for purchases.
WorldCat Discovery (Patron Requesting)

Patron request form now allows up to 400 Pickup Locations

Service Configuration has been updated to allow up to 400 branches as pickup locations, and the patron request form now can display up to 400 branches.

Service Configuration:

Patron Request Workform:

WorldCat Discovery release notes

WorldCat Discovery is on a different installation schedule than WorldShare ILL, so additional enhancements to patron requesting will become available with WorldCat Discovery releases. These are described in the WorldCat Discovery release notes.

http://www.oclc.org/support/services/discovery/release-notes.en.html
Bug Fixes

Discover Items: Search results now display in correct application

For institutions with WMS Circulation, Acquisitions, or Metadata, bibliographic searches entered in Interlibrary Loan sometimes displayed results in a different application. This has been corrected so that results appear within Interlibrary Loan.

Book Club: Character limit added for names of Linked Requests

To improve displays and performance, the names of Linked Requests have been limited to 95 characters.

Language display improved in translated interfaces

For translated interfaces, the borrower view previously displayed the language as a three-letter abbreviation. It now displays in the language of the interface.
Edition information now included for all formats

Previously, edition and preferred edition were passed from WorldCat Discovery to the WorldShare ILL lender view only for books. Now, the edition and preferred edition are passed for all formats.

Patron request for DVD:

![Patron view of DVD request]

Borrower view of DVD request:

![Borrower view of DVD request]

Lender view of DVD request:

![Lender view of DVD request]
Request History now displays Supplier

In the Request History for copies, loans, and purchases, the Lender column has been renamed as Supplier.

<table>
<thead>
<tr>
<th>Data</th>
<th>Supplier</th>
<th>Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-08-07</td>
<td>NDOSU</td>
<td>No - Aged to next lender</td>
</tr>
<tr>
<td>2015-08-07</td>
<td>NDOSU</td>
<td>No - No reason given</td>
</tr>
</tbody>
</table>

Knowledge Base (KB)
To fix occasional unexpected system issues, the number of KB collections returned is now limited to 10.

ILL Management Centers
- Member institutions now see their Borrowing AE Alert queue.
- Member institutions now see their Borrowing Request print queue.
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
- IFM charge triggered upon Shipped
- IFM in-currency (transactions in common non-U.S. currency – Australian Dollar, British Pound, Canadian Dollar, Euro)
- IFM refund capability

© 2015 OCLC Online Computer Library Center, Inc. All rights reserved. The following OCLC product and service names are trademarks or service marks of OCLC Online Computer Library Center, Inc.: WorldShare Interlibrary Loan and “The world’s libraries. Connected.” The OCLC, WorldCat and WorldShare symbols are service marks of OCLC. Third-party product service names are trademarks or service marks of their respective companies. OCLC grants permission to photocopy this publication as needed.