WorldShare® Interlibrary Loan Release Notes

Release Date:  October 11, 2016*

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* In-country IFM transactions became available on these dates:
  • Australia: Saturday, October 15
  • Canada: Friday, October 14
  • Eurozone: Thursday, October 13
  • South Africa: Thursday, October 13
  • UK: Thursday, October 13
Browser support

This release was tested with the following browsers:

- Chrome (latest version)
- Firefox (latest version)
- Internet Explorer 11

Adobe Reader and JavaScript need to be enabled.

Recommended actions

For this release, we recommend that you review the following checklist and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. This checklist identifies 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 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>
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</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>❑ Review the release notes (below) and documentation for issuing refunds with ILL Fee Management (IFM).</td>
</tr>
<tr>
<td><a href="http://www.oclc.org/support/help/ill/">http://www.oclc.org/support/help/ill/</a></td>
</tr>
<tr>
<td>❑ For Australia, Canada, Eurozone, South Africa, and U.K., review the release notes (below) and documentation for using In-Currency IFM.</td>
</tr>
<tr>
<td><a href="http://www.oclc.org/support/help/ill/">http://www.oclc.org/support/help/ill/</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>❑ Share release notes with your colleagues.</td>
</tr>
</tbody>
</table>
Release notes

Workflow improvements

Issue an Interlibrary Loan Fee Management (IFM) refund

The lending library can now issue a refund for an IFM charge. Only the full amount of the IFM charge can be refunded, and once a refund has been given on a request, no further charges or refunds can be made on that request.

You may want to issue a refund if:

- You responded Yes to a request, but then discovered you could not supply the item.
- You inadvertently applied the wrong Constant Data record to a request.
- You accidentally charged the borrower (for example, you did not realize that they were part of your reciprocal lending group).

Refunds can be issued only within the WorldShare ILL interface.

- ILLiad libraries: You can continue to use Undo Shipped. However, if you have inadvertently charged a library outside of the Undo Shipped scenario, you need to sign in to WorldShare ILL to issue a refund.
- ISO ILL lending libraries (e.g., those using Auto-Graphics SHAREit™, Relais ILL, VDX®, WorldCat Navigator®): You will need to "de-ISO" the request to issue a refund. Note that if you "de-ISO" an ILL transaction, you no longer will be able to use your ISO ILL system to update that request.

The Refund button is located at the top right corner of the request:
You will be asked to confirm the refund because it cannot be undone.

The borrowing library may request a refund by using the Email button within the request.

The request history will show both a payment and a refund. In OCLC statistics, the refund will appear immediately below the charge.

Full documentation for IFM refunds can be found at: http://www.oclc.org/support/help/ill/
Conduct “in-country” IFM transactions in your own currency

Until now, all IFM transactions have been done in US Dollars (USD). If you are in Australia, Canada, the Eurozone, South Africa, or the UK, you can now conduct IFM transactions with other libraries in your country/region in your local currency.

When borrowing with IFM, you’ll want to use a two-phased approach.

- First create an “in-country” request. Include only libraries within your country/region in the lending string, and specify your local currency for IFM payment.
- If the request goes unfilled, then create an “out-of-country” request. Include libraries outside your country in the lending string, and specify USD for IFM payment.

To specify the currency, select it from the drop-down. This screenshot is from a Canadian borrowing library, so the options are Canadian Dollars (CAD) or US Dollars (USD).

Reminder: If you leave the Maximum Cost field blank, the lender can charge any amount, regardless of the currency selected.

Tip: To speed processing of borrowing requests, you may want to set up Custom Holdings Groups for in-country and out-of-country requests. You might also want to create two sets of Constant Data records (one with your local currency and one with USD).
When lending, be sure to select the same currency that the borrower specified. An error message will display if the lender and borrower do not specify the same currency.

Tip: To speed processing of lending requests, you may want to create two sets of Constant Data records (one with your local currency and one with USD).

ILLiad libraries: When you get a request from a library in another country, you’ll want to verify that the borrowing library specified USD. The IFM transaction cannot occur if the lender and borrower do not specify the same currency. The exception to this is when the borrowing library did not enter a Maximum Cost.

The Request History (for both borrower and lender) shows the currency for the IFM transaction along with the amount.

<table>
<thead>
<tr>
<th>ILL Fee Management (IFM) History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>2016-05-25</td>
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</tbody>
</table>

You will now get two IFM reports: one for transactions done in your currency and one for transactions done in USD.

Full documentation for in-currency IFM, including how to change your default currency or set up Constant Data, can be found at: [http://www.oclc.org/support/help/ill/](http://www.oclc.org/support/help/ill/)
Service Configuration

Admin role now required to update Service Configuration

Accounts with the User role (WORLDSHARE_ILL_USER) can no longer be used to make updates within Service Configuration. If someone with the User role needs access to make changes in Service Configuration, their role can be changed to Admin (WORLDSHARE_ILL_ADMIN).

Anyone with an account with the Admin role for your library can change another account’s role from User to Admin. To do this, click the Admin tab and open the User account.

Then, edit the Roles to give Admin access.

Assistance with making this change is available from OCLC Support:
http://www.oclc.org/support/contact-support.en.html
**WorldCat® Discovery Services (patron requesting)**

**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.


**Bug fixes**

**For requests in Submitted status, hitting enter no longer updates status**

If lending staff hit a carriage return while viewing a request in Submitted (Can You Supply?) status, the request was inadvertently updated to Shipped (In Transit) status. Hitting enter no longer changes the status of the request.

**When using Print All, requests now update to Considering**

When lending staff select the option to “Auto-update to Considering” for Print All, the status failed to update from New - Copies or New - Loans to Considering. The status now correctly updates to Considering.
Known issues

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

Future releases

- Confirm proper address formatting so shipping labels are accurate – October 2016
- Select which accordions stay open (or closed) when viewing requests – October 2016

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

OCLC Community Center
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