

COVID-19 and OCLC Services

As the global community continues to monitor the impact of COVID-19, many libraries may be facing closures or other reductions in service. Your library may already be reviewing its plans and procedures. Many of you have reached out to your peers or to OCLC.

We are here to help. OCLC has created a list of possible actions for libraries to consider. Each library's situation is different, so please take advantage of this information to create, enhance, or revise your local plan. **You may also want to bookmark this page as we will continue to update it with additional information.**

If your library already has a plan in place, consider sharing the details in the discussion forums in the Community Center.

As always, please contact [OCLC](#) if you need any assistance or guidance.

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System settings. Who is responsible for making changes to system settings?

- Use the [Search users by role](#) feature in WorldShare Admin to identify the staff users with administrative privileges.
- Key [roles](#) include:
 - All: [USER MANAGER](#) or [USER ADMIN](#)
 - WorldCat Discovery: [WC Discovery Admin](#)
 - WorldCat Knowledge Base: [KB ADMIN](#)
 - WorldShare Acquisitions: [ACQUISITIONS ADMIN](#)
 - WorldShare Circulation: [CIRCULATION ADMIN](#)
 - WorldShare Interlibrary loan: [WORLDSHARE ILL ADMIN](#)
 - WorldShare Collection Manager: [KB ADMIN](#) and [KB SUPERVISOR](#)
 - WorldShare License Manager: [ERM ADMIN](#)
 - WorldShare Record Manager: [Cataloging INST Admin](#)
- Create a checklist of modified system settings, policies, and configurations.
 - It may be helpful to take screenshots of any settings before you make changes to make it easier to roll back to your previous configuration.

Hosted EZproxy. What is OCLC doing to ensure that Hosted EZproxy is secure and stable while we're experiencing increased usage?

We monitor EZproxy hosted 24 hours per day, 7 days per week to ensure it is functioning normally. We also monitor the network bandwidth between EZproxy hosted and our network providers.

We regularly run security queries against our EZproxy hosted environment to detect and notify institutions of potential security issues.

As your patrons' demand for remote access grows, we are ready. Our EZproxy hosted environment allows for significant usage growth for each institution's dedicated instance.

What changes should we consider for EZproxy?

If you use our hosted service, we will make any necessary appropriate changes as your usage grows. If you use EZproxy stand-alone, we recommend the following practices:

- **Server resources:** Work with your institution's IT representatives to ensure server resources (memory, disk space, and CPU capacity) are within normal values. Understanding your server resources varies with the operating system on which you run EZproxy (Windows or Linux).
 - Your log files will grow faster during this time: make sure you have a log rotation strategy and sufficient disk space for your log files.
 - The more users EZproxy has, the larger the amount of memory it needs. Our larger systems need at least 200mb of physical memory dedicated for the EZproxy program itself (Linux).

- Generally, EZproxy's usage of CPU is not a significant consumer of that resource, but if you have complex authentication or authorization rules in your user.txt file, you will use more processing capacity as your number of users scale up.
- **Network bandwidth:** since all traffic for users in a remote-only situation will go through EZproxy, it's important to work with your IT representatives to measure network consumption and verify that you have existing capacity. OCLC does not have exact numbers of network bandwidth consumed per user as this number varies widely based on the type of content being accessed.
- **EZproxy settings:** Please review the [Set limits for your institution documentation on our support website](#). Watch your MaxSessions, MaxConcurrentTransfers, and MaxVirtualHosts settings. These can be viewed in your EZproxy Administration UI, by selecting "Server Status" then clicking on "Miscellaneous". The screenshot below shows sample output:

Miscellaneous

Peak sessions active/limit: 4/500
 Peak concurrent transfers active/limit: 4/200
 Peak virtual hosts/limit: 284/10000

If your institution expects a large number of patrons using EZproxy at one time (more than 4000 sessions simultaneously), EZproxy v7.0 (scheduled for release in coming days) will provide 64-bit memory support, removing the 2GB memory limit of the current release of EZproxy. We recommend that you upgrade to this release after thoroughly reading the release notes.

What changes should we consider for FirstSearch?

- Add a custom link to any special statement about the event from the library, the university/parent organization, local government officials, etc. ([WorldCat Services Administrative Module](#) > Interface Display > Your Library Settings > Your Library > Custom web link)
- Disable the display of your ILL request button ([WorldCat Services Administrative Module](#) > Resource Sharing > Patron ILL Settings > ILL Processing)

What changes should we consider for WorldCat Discovery?

- Add a [Custom Link](#) to any special statement about the event from the library, the university/parent organization, local government officials, etc.
- Verify who, if anyone, will continue to review and fix [reports of broken links](#) to electronic resources.
- Disable any [Place Hold/Request Buttons](#) to prevent patrons from placing new requests.

What changes should we consider for WorldShare Circulation?

- Quickly adjust the due dates of items already on loan
 - The new WorldShare Circulation Bulk Renewal Client accepts a CSV file of loans that your library wishes to renew. To ensure that the new due dates you specify are applied, the new client will bypass your library's normal circulation policies.
 - See the [documentation to learn how to download and use the bulk renewal client](#).
 - Please contact [OCLC Customer Support](#) if you need any assistance or guidance.
- Disable any [Place Hold/Request Buttons](#) to prevent patrons from placing new requests from WorldCat Discovery.
- Review [Notification Policies](#)
 - Add start or end text to critical notifications to provide information about the event, policy changes, etc.
- Run the [Items in Transit Report](#) to identify items already in transit. Make any arrangements to redirect or receive these items during the event.
- Create a special closure in the WorldCat Registry to ensure due dates are adjusted appropriately, penalties are not calculated during the closure (per policy), etc.
- Identify impacted patrons
 - Run the [All Checked Out Items Report](#) & contact patrons or update due dates as needed.
 - Run the [Recalled Items Report](#) to identify items that a patron has been told to return with urgency. Contact patrons or update due dates as needed.
 - Run the [Holds Ready for Pickup Report](#) to identify items on the hold shelf. Contact patrons, update hold-until dates, and/or cancel holds as needed.
 - Run the [Open Holds Report](#) to identify holds that have not been fulfilled yet. Contact patrons, update hold expiry dates, and/or cancel holds as needed.
- Update due dates of items already on loan
 - Use the [Offline Client](#) to force due date changes that would otherwise conflict with library policy. Libraries may need [assistance with their WSKey](#).
 - Use the staff interface to renew or for due date changes. Staff can email due date receipts to inform patrons of the changes.
 - Use the NCIP API, a SIP2 machine, or other library-controlled client to renew items.
 - If your library has a very large set of impacted loans, please contact OCLC support staff to discuss additional options.
- Review [Loan Policies](#)
 - Do not include closures when calculating periodic bills or suspension and/or remove fixed overdue bills.
 - Add or extend grace periods for overdue or recalled items.
 - Remove billing/suspension policies to avoid penalties when an overdue item is returned.
 - Allow patrons to renew items, increase the number of renewals or the renewal period, etc.
 - Note: Automatic renewal must be enabled before an item is checked out. This feature cannot be enabled retroactively.
- Extend the retention of [transaction history and/or notification history](#) to assist with troubleshooting.

What changes should we consider for WorldShare License Manager and electronic resources?

- **Free e-resources.** Many publishing vendors are making their resources freely available for a limited time. Use License Manager's automation utilities to take full advantage of these e-resources. License Manager will automatically enable and disable these collections according to the window of time you've recorded.
 - Create a new "Free Temporarily" license and record the start and end dates to match the courtesy period when these resources are available.
 - (Optional) If the collection will be available at a future date, check the "Automatically select collection when activated" option.
 - Under the "Collections" section of the new license, mark the "Deselect collection(s) when license expires."
- **Public notes.** Use the "Public Notes Display" utility to globally update your collection public notes, in both WorldCat Discovery and the A-Z list, according to your library's messaging needs

What changes should we consider for WorldShare Collection Manager and the WorldCat knowledge base?

- View this 31 March session of the WorldShare Collection Manager Office Hours when the team reviewed key settings that you can use during the COVID-19 crisis. This includes modifying Deflection, Institution settings, and more.
 - [Recording and slides.](#) (Note: You will need to login to the OCLC Community Center to access these materials. If you are not sure of your login credentials, [click here.](#))

What changes should we consider for WorldShare ILL?

- View this webinar recording, "Managing your library's ILL services during the COVID-19 crisis," where we offer useful information to help you make changes to your WorldShare ILL service and navigate your library's ILL department through these challenging times.
 - [WebEx recording](#) (90 minutes) (Q&A starts at 60 minutes)
 - Notes for [Slides 70-81](#): the audio breaks up from (timestamp) 00:38 – 00:48, so we provided notes for the content covered during that time
 - [Full slide deck](#)
- Returns and 'In Transit' queues
 - Review the 'In Transit' queues for borrowing & lending. Contact partner libraries to ask for more information about tracking or redirecting shipments.
 - For returns, before mailing returns please call or email the lending library to ensure that they are open to receive the shipment.
- Take advantage of the new Profiled Groups (ACOV & BCOV) & Days-To-Respond indicators
 - We recently implemented two new Profiled Groups to help you to identify those libraries that can supply electronic documents (Profiled Group: ACOV) and e-books (Profiled Group: BCOV) during this COVID-19 crisis. [Learn more.](#)

- If you have questions about using the new groups and ensuring your policies and deflections are set appropriately, please watch this [video tutorial](#) (40 minutes) and [review the slides](#).
- Borrowing
 - Disable any [Place Hold/Request Buttons](#) to prevent patrons from placing new requests from WorldCat Discovery.
 - Update the [Automated Request Manager](#) to route new requests to the review queue instead of automatically submitting to lenders, etc.
 - Cancel loan requests that have already been submitted to lenders. Alternately, plan for any items that may arrive from a lender during the event.
 - Notify lending libraries with items in transit / on loan to the library. Proactively submit renewal requests where appropriate.
- Lending
 - Use the [ILL Policies Directory](#) to:
 - Make the library a [non-supplier](#) for the duration of its closure, or
 - Create [deflection policies](#) to automatically deflect loan requests, etc.
 - Use this Reason For No (RFN) for the COVID-19 crisis (*Preferred Delivery Time Not Possible*). [Click here for more details](#).
 - Continue to review and supply copy requests for online articles and other electronic resources.
 - Actively say 'No' to loan requests that have already been assigned.
- For libraries that have loaned an item to an impacted library:
 - Approve renewal requests from impacted libraries whenever possible.
 - Relax any overdue penalties.
 - Use the [ILL Policies Directory](#) to formalize any policy exceptions for impacted borrowers.

What changes should we consider for ILLiad?

Please also see Atlas Systems' [Managing ILLiad Workflow During COVID-19](#) for updates as new ILLiad add-on options and tips become available.

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 - We recently implemented two new Profiled Groups to help you to identify those libraries that can supply electronic documents (Profiled Group: ACOV) and e-books (Profiled Group: BCOV) during this COVID-19 crisis. [Learn more](#).
 - If you have questions about using the new groups and ensuring your policies and deflections are set appropriately, please watch this [video tutorial](#) (40 minutes) and [review the slides](#).
 - To use the new Profiled Groups ACOV and BCOV you must add them to the GAC table in Customization Manager. For details, see [New OCLC Profiled Groups Available in Response to COVID-19 Conditions](#).

- Borrowing
 - Disable your patrons' ability to place new requests by [Editing Web Pages](#).
 - Limit your patrons' ability to request an entire book by [Editing OpenURLMapping](#).
 - Provide information to patrons regarding service availability by [Editing Status Lines](#) and [Creating Web Alerts](#).
 - Explore the [ILLiad Addon Directory and new version 9.1 Decision Support Pipeline](#) options to further streamline and automate staff workflows.
- Lending
 - Re-route your existing ILL requests with [Bulk Email for Requests](#).
 - You can create your own local Reason for No (RFN). However, we ask you to map your local RFN to our recommendation (*Preferred Delivery Time Not Possible*). If you have created a local RFN for these circumstances, you would need to map the local RFN to RFN number 24 in the ILLiad Customization manager. Please see this [RFN documentation](#). [Also see these specific instructions under the Options for Disabling Lending section](#).
- Please also view this webinar recording, "Managing your library's ILL services during the COVID-19 crisis," where we offer useful information to help you make changes to your WorldShare ILL service and navigate your library's ILL department through these challenging times.
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What changes should we consider for Tipasa?

- View this webinar recording, "Managing your library's ILL services during the COVID-19 crisis," where we offer useful information to help you make changes to your WorldShare ILL service and navigate your library's ILL department through these challenging times.
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- Returns and 'In Transit' queues
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 - For returns, before mailing returns please call or email the lending library to ensure that they are open to receive the shipment.
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 - We recently implemented two new Profiled Groups to help you to identify those libraries that can supply electronic documents (Profiled Group: ACOV) and e-books (Profiled Group: BCOV) during this COVID-19 crisis. [Learn more](#).

- If you have questions about using the new groups and ensuring your policies and deflections are set appropriately, please watch this [video tutorial](#) (40 minutes) and [review the slides](#).
- Borrowing
 - Disable any [Place Hold/Request Buttons](#) to prevent patrons from placing new requests from WorldCat Discovery.
 - Update the [Automated Request Manager](#) to route new requests to the review queue instead of automatically submitting to lenders, etc.
 - Cancel loan requests that have already been submitted to lenders. Alternately, plan for any items that may arrive from a lender during the event.
 - Notify lending libraries with items in transit / on loan to the library. Proactively submit renewal requests where appropriate.
- Lending
 - Use the [ILL Policies Directory](#) to:
 - Make the library a [non-supplier](#) for the duration of its closure, or
 - Create [deflection policies](#) to automatically deflect loan requests, etc.
 - Continue to review and supply copy requests for online articles and other electronic resources.
 - Actively say 'No' to loan requests that have already been assigned.
- Borrowing and Lending
 - Review the 'In Transit' queues for borrowing & lending. Contact partner libraries to ask for more information about tracking or redirecting shipments.
 - Review [Notifications](#)
 - Disable overdue notifications or updating the content to provide extra information about the event, policy changes, etc.
- For libraries that have loaned an item to an impacted library:
 - Approve renewal requests from impacted libraries whenever possible.
 - Relax any overdue penalties.
 - Use the [ILL Policies Directory](#) to formalize any policy exceptions for impacted borrowers.
- User Portal
 - Add a [Custom Link](#) to any special statement about the event from the library, the university/parent organization, local government officials, etc.
 - Disable [Place Hold/Request Buttons](#) to prevent patrons from placing new requests for returnable items via WorldCat Discovery.
 - Disable any [Patron Request Workforms](#) to prevent patrons from placing new requests.
 - [Hide patron due dates](#) in the user portal
 - Allow patrons to [renew or cancel their own requests](#) from the user portal.
- Other systems
 - Remove direct links to request forms from the library's website
 - Disable [openURL links](#) that allow a user to autofill request forms with metadata from a 3rd party website.
 - Note: This will usually require access to the partner platform's configuration module.