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.

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
  - WMS
    - ACQUISITIONS_ADMIN
    - CIRCULATION_ADMIN
  - 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.

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 in 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?

- 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 ILL?

- Review the ‘In Transit’ queues for borrowing & lending. Contact partner libraries to ask for more information about tracking or redirecting shipments.
- **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**.
    - 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.
- **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 Tipasa?

- **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.
    - 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.
What changes should we consider for ILLiad?

Please also see Atlas Systems’ Managing ILLiad Workflow During COVID-19 for updates as new ILLiad addon options and tips become available.

- **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](#).