WorldShare ILL Release Notes
May 2013 Release

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WorldShare ILL

Borrower and lender improvements

DOI and PMID everywhere
The DOI and PMID fields are now included in on the workform and WorldShare ILL printouts.
Article Exchange single sign on
When users are within WorldShare ILL and click on a link to go to Article Exchange they will now be taken seamlessly into Article Exchange without having to re-enter any login credentials. Users can get to the Article Exchange feature either from the Interlibrary Loan Home page:

Or from the lender view of a New or Considering request:

Borrower improvements

Discover Items: Custom Holdings Path performance improvements and type ahead functionality
When a user wishes to limit the holdings display to libraries in their Custom Holdings Path (now the default limiter) the list is retrieved from Service Configuration. The first time this data is retrieved there may be a lag time of a few seconds, but with subsequent searching the retrieval will be much improved.
Users can also type in the name of their Custom Holdings Path.

**Discover Items: Profiled Group: Type Ahead**

When a user wishes to limit the holdings display to a Profiled Group (or GAC) there is now type ahead functionality. If a user types in a letter, for example L or LV, they are taken to that part of the list of Profiled Groups.

**Discover Items: Filter holdings by year/volume**

The Discover Items tab and the ability to limit holdings by a Custom Holdings Group or a Profiled Group has been improved to allow a library to state their desired year and/or volume.

Once a user goes to the holdings display, the libraries that are part of their Custom Holdings Path and have the desired year/volume are brought to the top of the list and the lender string is pre-populated with appropriate lenders.
Note: The algorithm that is used to select libraries with accurate holdings based on their Local Holdings Data is still being refined and search results may not entirely match what users currently see in WorldCat Resource Sharing.

Discover Items: Link to borrowing library’s OPAC
At the top of the holdings display, there is now a link to the borrowing library’s OPAC. This will allow a borrowing library to check availability of their copy of an item before requesting it from another library.

This link can also be found on the Link to borrowing library’s OPAC on request work form (described under Borrower Improvements below).

This link is maintained in the WorldCat Registry http://www.worldcat.org/registry/Institutions. In the Registry you are able to configure your OPAC to provide deep links to the specific OCLC number or other identifiers.
You can learn more about the Registry here: [https://www.oclc.org/worldcat-registry.en.html](https://www.oclc.org/worldcat-registry.en.html)

### Discover Items: Links to lending library’s OPAC

When viewing the holdings display of a bibliographic item there are now links to the lending library’s OPAC.
**New queue displayed for borrower**
The Direct Produced queue is now exposed for borrower. It appears as a subset of requests in the Produced queue.

*Please note:* there is a bug with this queue where requests that did not match a Direct Request Profile do appear in this category. This queue should only contain requests that matched a profile and were therefore unmediated. This will be remedied with our June release.

**Print return labels with Batch-Return**
Borrower can now print return labels when they are returning items using the Batch-return function.

Once the user has said Returned Items, the requests are sent to the borrowing print queue for Return Labels. The print queues can be found on the left-hand navigation.
Knowledge Base links appear for borrower
When a patron request is placed through Direct Request and their own (the borrowing) library owns the material as indicated in the KnowledgeBase, the request will be routed to New For Review and a link to the item will be included in the request details.

Patron department added to request
The Patron Department field is now included among all the patron fields on a request.
**Link to borrowing library’s OPAC on request work form**

From a request work form, users can now link out to their own OPAC in order to view their local item availability before submitting a request.

This link can also be found in the holdings display of Discover Items (described under Discover Items above).

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**Renewals:**

**Designating a desired due date**

A borrowing library can now select a desired due date when requesting a renewal. This will let the lending library apply a due date that meets the needs of the borrowing library.
Ability to request multiple renewals

Once an item has been renewed a borrowing library can now request multiple renewals from the lender.
Better handling of Constant Data records (default record and persistence)

**Default Record**
When a user pulls up a request for the first time the default Constant Data Record is now assumed to be the record of choice. Previously users had to manually click on the Default Constant Data Record in order to apply it.

**Persistence**
When a user applies a Constant Data Record to one request and then moves on to manage another request, the system now automatically applies the Constant Data Record that was being used in the previous record. This is how WorldCat Resource Sharing currently works.

If users do not wish for this to happen automatically they must remove the Persistence flag that is set in Service Configuration. The default setting is for persistence to be on.

Please note:
- The Persistence flag in Service Configuration was initially set to the same value as in the WorldCat Services Administrative Module.
- Changes to the Persistence flag for WorldShare ILL must be managed through Service Configuration.
- Changes to the Persistence flag for WorldCat Resource Sharing must be managed through the WorldCat Services Administrative Module.
Lender improvements

Splitting New requests to Copy/Loan
As with WorldCat Resource Sharing, Can You Supply lending requests will now be split into New-Copies and New-Loans and Considering-Copies and Considering-Loans.

LHR summaries to lender
Lenders that have Local Holdings Records (LHRs) will see a display of their own LHR in the Request Details accordion with the bibliographic information about the request.
Conditional notes
Lenders now have the ability to edit the conditional message or add a free-text note when responding to a request with a conditional response.

The conditional notes field appears:

Enter your free-text response and then Send Response.
At the same time, a bug was fixed where Conditional Notes overwritten by Lending Notes.

**Lending: Batch NO**

Lending libraries are now able to say NO to incoming requests using batch processing.

From the Can You Supply queue you can select Batch respond to “Can You Supply” items NO.

Users can select your records to respond No to. Users can either type request ID numbers in manually, wand them with a barcode reader or select the green checkmarks.
Once users have a list of requests they can select the Reason for No for that group of materials:

Finally, selecting the No button will result in batch processing of these items.

**Display of Group Affiliations**
Lending libraries will now see a list of the profiled groups (also known as GACs) to which both they (the lender) and the borrower have in common.
Renewals:
A lender responding to a borrower’s renewal request now sees the borrower’s desired due date.

The request details portion of a request now lets the library know if a renewal has been granted or denied.

Article Date of Publication
Article date of publication is now appearing on the lender side of an article request.
Improved workflow with article exchange
When a lending library chooses to supply a copy request using Article Exchange the email capability in Article Exchange has been improved. When a user clicks on the Email a Notification button Article Exchange pulls up the locally configured email server.

The contents of the email message are pre-populated with information relevant to the transaction and instructions for using Article Exchange.
Printing
All requests in a queue

In the Print Queue accordion there is a new option to Print All.

When a user selects Print All a listing of all their categories and the number of requests in each category is displayed with check boxes to select the appropriate categories.
Print bookstraps and shipping labels from batch

When a user responds yes using batch functionality, they can now send relevant requests to the print queues in order to print book straps and/or shipping labels.

Once the user has said Yes, the requests are sent to their relevant print queues. The print queues can be found on the left-hand navigation.
Bug fixes
IE8 user searches resource discovery and user sees confusing error message every time they log in to use the system anew (reply YES their searches fail until they log out/in again and select NO)

Patron department missing from request

User receives an error message when cancelling new for review request (but request really does cancel)

Conditional notes overwritten by lending notes

Known Issues
A known issues web site can be found here:

http://www.oclc.org/support/services/worldshare-ill/known-issues.en.html

New known issue:
For serial records with a large number of holdings, if a user enters a Custom Holdings Path with a year and/or volume the holdings display will return no results. If user re-executes the search from the holdings page (hit Go button), the holdings display may work. This is due to a timeout in the holdings retrieval and we are pursuing a fix for our June release.

No fix date yet:
Deleting unfilled requests

Patron name field appears when a lender batch processes YES/NO/COMPLETE

Transfer bib data into the request automatically when OCLC# is added to a request

Looking ahead

Release Schedule for 2013
16 June 2013 (bug fixes and user requested enhancements)
11 August 2013 (major feature release plus bug fixes and user requested enhancements)
22 September 2013 (bug fixes and user requested enhancements)
10 November 2013 (major feature release plus bug fixes and user requested enhancements)
15 December 2013 (bug fixes and user requested enhancements)

June 16 (tentative)
Discover items search results sort in descending order of number of holdings (libraries with the most holdings appear first).

Completing a recalled request
If borrower specifies pages on a loan request, should be displayed to lender and included in printouts
Ability to print requests in 2-per page format
Ability to print book straps in 2-per page format

August 12 (tentative)
PD links from holdings screen sometimes fail to bring up the correct institution profile and instead bring up the profile of the borrowing library.

Request history

Feature roadmap
An updated feature roadmap can be found at the link below. OCLC product staff review this list regularly and update the features and timing information.