# WorldShare ILL Release Notes

August 2013 Release

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WorldShare ILL

Browser Support
Our August release was tested with the following browsers:

- Mozilla FireFox 22.0
- Chrome 28.0.1500.72 m
- IE 8.0
- IE 9.0
- IE 10.0

Interlibrary Loan Home page
New look and feel for WorldShare ILL (and other WorldShare services)

The user interface of WorldShare ILL has been refreshed and some navigational elements have been redesigned.

The link to WorldShare ILL is now on the left

In the upper right hand corner you can now

1. Change the language of the interface. This control used to reside within your browser.
2. Logout of WorldShare ILL
Discover Items

Lender strings populated by Custom Holdings path
WorldShare ILL no longer includes a lender multiple times when automatically creating a lender string from a custom holdings path view of the holdings display.

WS ILL is now de-duplicating holding symbols when automatically applying lenders to a lender string using custom holdings paths. Previously, if a borrower had placed a library in three different custom holdings groups and those groups were in the same path WorldShare ILL could include the library multiple times in the randomly generated lender string (potentially once for each custom holdings group in which the symbol appeared). Now, when generating the lender string from Custom Holdings a symbol appears in the lender string once. Duplication of symbols is not allowed. If a symbol appears in more than one group in a custom holdings path, it will no longer appear in the lender string multiple times.

Lender string can be built from more than one Custom Holdings Path
If a user of WorldShare ILL selects a custom holdings path which results in fewer than 15 lenders being applied to the lender string, and they then select a different custom holdings path to round out the full lender string the lenders selected from the first Custom Holdings Path now remain in the lender string.
Additional bug fixes

- Polices Directory links from holdings screen sometimes failed to bring up the correct institution profile and instead bring up the profile of the borrowing library.
- WorldCat Local or WorldCat Navigator institutions that had the 3rd level relevancy group configured are now able to search WorldCat in WorldShare ILL.
- Advanced search, if there is no search term in an advanced search box (or a search term is entered in an incorrect box) the system now provides an error message.
Workflow Improvements

New Purchase workflows
Once a request has been created and is in the New for Review category, WorldShare ILL now offers a workflow to support a library’s decision to purchase an item rather than borrow it. Clicking on the Purchase Request button converts the ILL request to purchase “On Order”.

Immediately after clicking on the Purchase Request the user sees a pop-up screen where they may manually enter information relating to the request:

When they hit the Save button they receive a confirmation message:
The request is added to the On Order queue, which can be found in the new requests queues under Purchasing Requests:

When a request is subsequently called up it can be either cancelled or received.

The purchase information entered previously will be saved as part of the request.

Note: there are two outstanding bugs:

- The order number and the price do *not* appear in the request.
- In some statuses none of these four fields is displayed. However, the data is saved in the request.
Materials that are purchased will be tracked through statistical reports. The Borrower Overview report will include:

- Purchases Ordered
- Orders Received
- Orders Cancelled

There will also be a new report, the Purchase Statistics report, which will include additional details about items purchased.

When a purchased item is added to the print queues they currently appear on the Borrowing/Print Requests and Borrowing/Book Strap print queues. They will be moved to their own print queues in a future release.

Transferring Bibliographic Data/Holdings into a request

WorldShare ILL now supports the workflow for when a request is in the New for Review queue and the library needs to add more complete bibliographic data to the request via WorldCat or needs to add lenders to the lender string based on holdings for that item. This is a workflow that is useful to all libraries but in particular to libraries that use a third-party system (e.g. Innovative Interfaces or Polaris OPACs) to place patron-initiated requests into WorldShare ILL.

When a request is in the New For Review request queue and there is any data in the Title/Author/Standard Number fields use the magnifying glass icon to search WorldCat via Discover Items.

Clicking on the icon will launch a contextual search of the entered terms. In the example above the icons will execute a title search or an author search.
After navigating to the detailed bibliographic record (by clicking the title link) the library is able to apply *this* bibliographic record to the request ID number from which you launched the search.

After clicking on the button to apply this data to the request, users will receive a confirmation message, the bibliographic data in the request will be updated and new icons will appear allowing users to launch new searches based on available data.

In order to create a lender string and apply it to this request, users should click on the VIEW HOLDINGS link, not the magnifying glass.
After selecting lenders, users can click on the button to update their request.

Note: We are looking to refine this process allowing users to both apply bibliographic data and add lenders as an optional 1-step process from the holdings display. This will happen in a future release.

Borrower ability to edit produced request

A borrowing library can now edit a request that has been produced, but not yet shipped by a lender. This includes the following request queues:

- Awaiting response
- Direct produced
- Conditional

Note: The ability for a lender to edit a request once they have responded yes is scheduled for our September release.

Hot linked request ID in confirmation

In the confirmation message that appears after an action has been taken on a request the request ID number is now hot linked. If a user clicks on that hot link it will execute a search on that request ID number and re-display the request.

Hot linked request ID:

Re-displayed request
New rules for applying Constant Data

Previous rules for applying Constant Data say that if a field is already populated, the value in a Constant Data record will not replace it.

These are the new rules that WS ILL uses when applying constant data:

- **Data in a field of the constant data record will always overwrite the value already in the request.**
  - This will happen regardless of whether that existing value in the request was
    - manually edited by the user or
    - applied by an earlier Constant Data Record
- **Blank data in a field of the constant data record will overwrite the value in the request, with two exceptions:**
  - Patron Note – if the Patron Note in a Constant Data Record is blank, and the request comes into the system with a Patron Note that contains data, the request’s Patron Note will *not* be replaced with the blank data
  - Request Type— if the Request Type in a Constant Data Record is blank, and request comes into the system with a value in the Request Type field, the requests’s Request Type field will *not* be replaced with the blank data

**Constant Data: green highlighting**

When a different Constant Data is applied to a record, the fields are briefly highlighted in green as a visual indicator of the change.
Request record display improvements
The four top accordions of a request record are now defaulted to open, lessening the number of clicks a user must take to navigate through a request. These fields include:

- Request Details
- Lending Libraries
- Borrowing Library
- Patron (borrower only)

Batch processing icons
Request queues where batch processing is available now include an icon in the sidebar, making it easier for users to identify.

OPAC link on lender’s view of request
When a lender views a lending request a link to their local OPAC is now presented in the user interface.
Local ID field in lender’s view of a request
(NOTE: replaces Call Number field in WorldCat Resource Sharing)

A new field is present in the lender’s view of a request allowing a lender to include a local ID in the request. This could represent the library’s call number, the item barcode or another piece of information the library would like attached to a particular request.

It also appears on the two-request per page printout.

Conditional note now visible to Lender
When a borrower accepts the lending library’s conditions, the condition is now visible to the lending library.
New languages for staff interface
WS ILL is now available in Dutch and Spanish, in addition to English, French, German and Japanese.

Additional bug fixes
- Email now includes borrower IFM information
- Email message is no longer omitting several fields if data was only 1-character long
- Borrower IFM is now more clearly displayed to lender in the staff interface
- All patron fields have been removed from the lending library’s view, this now includes when a lender searches for requests
- Patron name not displayed as “null” when no name has been entered.
- Request search by title no longer fails when title contains special characters or punctuation (e.g. a colon :)
- Request search by symbol no longer fails when symbol contains special characters (e.g. #, @)
- Request searching with a search that returns a large set of results no longer fail, the timeout for this action has been increased.
- When non-numeric data is entered in the Insurance field the error message that is returned is more accurate so libraries can correct the error.
- If there is an error among a group of requests that a lender is batch processing yes, the error message now provides the relevant request ID number and what the error is.

- The Verification field in the request has been expanded.

Bug fixes that apply to libraries outside of the United States:
- Non-US libraries are now able to follow the link to Article Exchange
- Non US lenders are now able to apply constant data to requests that originated with a US library
Printing improvements

Bookstraps
The pick-up location has been added to the borrower bookstraps

Two-request per page printouts
Two requests per page printouts now include the following data:

- Borrower’s use of IFM added
- Lender’s use of IFM added
- Lending Charges added
- Return Via field added
- Status field now includes all values, spelled out
- The e-periodical format type is now supported
- Previously an ampersand (&) in publisher name caused an error resulting in the title looking like HTML making it difficult to read.

Full Request
- Bill-to address added
Service Configuration

Custom Holdings Symbol Search
In the Service Configuration module, users can now search for a single symbol and retrieve a list of the Custom Holdings Groups that contain that symbol. Note: The ability to Move and Delete a symbol from a group is not yet active.

From the Custom Holdings Groups tab a user selects to display groups by symbol:

A user can then enter a library symbol, hit search, and a list of all the library’s Custom Holdings Groups appears with an indicator of whether that symbol appears in each group. Note: The ability to add a library to a group(s) or remove a library from a group(s) is not yet in place. We are targeting our September release for this more complete functionality.

Additional bug fixes
- Custom Holdings Path names and Custom Holdings Group names are now limited to 20 characters.
- Borrower Data description field is limited to 140 characters and a new error message appears when the description exceeds this field limit.
Other

WorldCat Resource Sharing banner
The banner text in WorldCat Resource Sharing has been changed to highlight the migration to WorldShare ILL and point users to resources that will assist them.

Join the libraries using WorldShare Interlibrary Loan! Getting started is easy, and Training resources provide the information you need to learn about the new service. Be sure to Register for the upcoming updates on new features in the service.

November 25
As of November 25, users of WorldCat Resource Sharing will no longer be able to submit new requests. All new requests will need to be entered in WorldShare ILL.

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

New known issue:
- Availability accordion is not displayed in request details (no fix date yet determined)

Looking ahead

Upcoming Release Schedule for 2013
- 22 September 2013 (see highlights below)
- November 2013 (major feature release plus bug fixes and user requested enhancements)
- 25 November 2013 New Requesting turned off in WorldCat Resource Sharing
- December 2013 (bug fixes and user requested enhancements)
- 3 January 2014 WorldCat Resource Sharing retired

September 22 release (tentative)
- Improved readability of 1 request per page printout
- Improved brief display of bibliographic information
- Custom Holdings Symbol Search: the ability to add symbol to groups/delete symbol from groups
- Additional data elements as column headings on borrower queues
- Additional printing improvements

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.