WorldShare ILL Release Notes
September 2013 Release

Contents

WorldShare ILL .................................................................................................................. 2
Browser Support.................................................................................................................. 2
Bug fixes .............................................................................................................................. 2
Interlibrary Loan Home page .............................................................................................. 2
Bug fixes .............................................................................................................................. 2
Discover Items .................................................................................................................... 2
Search for version with the same title and author .............................................................. 2
Improved display of bibliographic details (part 1) .............................................................. 3
Additional bug fixes ......................................................................................................... 4
Workflow Improvements ................................................................................................... 5
Request searching-changes to results display ................................................................. 5
Transferring Bibliographic Data/Holdings into a request from VIEW HOLDINGS page .... 5
Display different data elements as columns in request lists ........................................... 7
Improved OPAC linking ..................................................................................................... 8
Lender ability to edit a request details once they have responded ‘yes’ ......................... 9
Additional bug fixes ......................................................................................................... 9
Printing improvements ................................................................................................... 10
Ability to print directly from a request ............................................................................. 10
Improved 1 request per page printouts ........................................................................... 10
Modifications to two requests per page printouts .......................................................... 11
Additional bugs ............................................................................................................... 11
Service Configuration ...................................................................................................... 12
Custom Holdings Symbol Search: ability to add/remove symbols from a group .......... 12
Additional bug fixes ......................................................................................................... 12
Known Issues ................................................................................................................... 13
Looking ahead .................................................................................................................... 13
November release (tentative) ......................................................................................... 13
Feature roadmap ................................................................................................................. 13
WorldShare ILL

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

- Mozilla FireFox 23.0.1
- Chrome 29.0.1547.62 m
- IE 8.0
- IE 9.0
- IE 10.0

Bug fixes
- IE8 - Side queue counts are now being updated
- IE8 – Users no longer getting page error after clicking 'Create Request' from Holdings page
- Intermittent authorization error when system has been idle for several hours has been fixed
- IE 8 There is no longer an error with the validation message that is displayed after sending request

Interlibrary Loan Home page

Bug fixes
- The link to Article Exchange from the ILL home page now links correctly.
- Certain libraries were unable to search for requests from the ILL homepage, this has been fixed.
- The timeout interval for searching the archive of closed requests has been increased to result in fewer failed searches.

Discover Items

Search for version with the same title and author
Users now have a link to search for versions with the same title and author from a brief record display.
Improved display of bibliographic details (part 1)

This change represents the first step in improving the detailed display of bibliographic data. Additional changes will be coming with our November release.

This initial change will include layout modifications. Various data elements have been broken out into four tabs. The description tab will be open by default when navigating to the detailed bibliographic display.

The Holdings tab allows users to go directly from a detailed bibliographic display to the holdings display without having to navigate back to the search results/brief bibliographic details.

The Find Related tab:
The Subject tab will include descriptors and genre/form information, but not until our November release.

![Table Example](image)

**Call numbers not yet searchable**

**Additional bug fixes**
- Improved linking to ILL Policies Directory from holdings screen
Workflow Improvements

Request searching-changes to results display
When searching for requests by title or author the search results are now divided into borrower and lender result sets. The default is to display borrowing requests with a click for lender requests. If there are no borrowing requests the lender request will be viewable.

Transferring Bibliographic Data/Holdings into a request from VIEW HOLDINGS page
In August we introduced the ability to apply bibliographic data, an OCLC Number and holdings to a new request. In particular this impacts libraries that submit their requests via a third-party system (e.g. Clio, Polaris, III).

We have improved this workflow to support applying bibliographic data and holdings in one step. If a request has a title or an author (or a standard number) users can click on the magnifying glass to launch a search.
From the brief search results users can now navigate directly to holdings either by clicking on a link to holdings, either state/regional/all holdings or use a Custom Holdings Path or Profiled group.

Users can click on the button to Update request """".

The request will update updated with complete information.
Display different data elements as columns in request lists
When users navigate through the various request queues as a borrower and lender different data elements are now displayed that provide a quick view of more contextual information—based on the queue users are viewing. Below are some sample request queues.

Borrower New For Review queue:

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Date Requested</th>
<th>Needed By</th>
</tr>
</thead>
<tbody>
<tr>
<td>08521940</td>
<td>Reviewed</td>
<td></td>
<td>Figga &amp; phantoms</td>
<td></td>
<td>09/10/13</td>
<td></td>
</tr>
</tbody>
</table>

Borrower In Transit queue:

<table>
<thead>
<tr>
<th>ID</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Date Requested</th>
<th>Shipped Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>68919640</td>
<td></td>
<td>Harry Potter and the Half-Blood Prince</td>
<td>NDT7P</td>
<td>09/09/13</td>
<td>09/10/13</td>
</tr>
</tbody>
</table>

Borrower Received queue:

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Patron</th>
<th>Lender</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>68920240</td>
<td>Received/In Use</td>
<td></td>
<td>Don’t be afraid to travel the road less traveled : I did it and so can you / in: Vital speeches of the day. Vol. 72 (2008)</td>
<td>ISOMM</td>
<td></td>
<td>10/09/13</td>
</tr>
</tbody>
</table>
Lender Can You Supply queue [Note: Referral date is the last date the request was auctioned. If a lender has a referral date of 09/10/13 they have four system days until the request automatically ages to the next lender.]

**Lending Requests: Can You Supply? (6)**

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Borrower</th>
<th>Referral Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>6892142</td>
<td>Submitted</td>
<td></td>
<td><em>I can read with my eyes shut</em></td>
<td>NDT7P</td>
<td>09/10/13</td>
</tr>
</tbody>
</table>

Lender Supplied queue:

**Lending Requests: Supplied (45)**

<table>
<thead>
<tr>
<th>ID</th>
<th>Status</th>
<th>Media Type</th>
<th>Title</th>
<th>Borrower</th>
<th>Due Date</th>
<th>Referral Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>68921541</td>
<td>In Transit</td>
<td></td>
<td><em>The Cat in the Hat</em></td>
<td>NDT7P</td>
<td>10/01/13</td>
<td>09/10/13</td>
</tr>
<tr>
<td>68918842</td>
<td>In Transit</td>
<td></td>
<td><em>A light in the attic</em></td>
<td>NDT7P</td>
<td>10/09/13</td>
<td>09/09/13</td>
</tr>
</tbody>
</table>

**Improved OPAC linking**

Links to library OPACs are being improved to take into account prefixing of the OCLC number that may be included in a library’s local system. This may be an ocn or ocm prefix or a custom prefix as designated in the WorldCat Registry.
Lender ability to edit a request details once they have responded ‘yes’
After a lender says yes to a request the lending library is now able to edit the following fields:

- Due Date
- Alert
- Call Number
- IFM
- Lending charges
- Shipped date
- Ship insurance
- Lending note
- Lending restrictions
- Return address
- Return via

Other fields are editable at different statuses as necessary to support the lending workflows. As users edit a field the Save button becomes active.

Additional bug fixes

- The cancel button now appears on all Unfilled and Expired requests. The button no longer disappears when navigating between requests.
- When trying to batch Yes the system now puts cursor focus into first box.
- Received/InUse (also Received/Overdue and others) the "Renew Item" button now displays.
- Request searching by lender or borrower symbol now accepts both lowercase and upper case symbols.
- When lenders use batch functionality to respond YES or NO the batched requests are now removed from the list of request IDs if entered manually or via a barcode scanner.
- Constant data rules have been modified so that patron data fields that include data are not overwritten by blank fields.

Bug fixes that apply to libraries outside of the United States:

- Non-US libraries received error trying to receive or return items when time zones impact the DATE relative to Dublin, Ohio
Printing improvements

Ability to print directly from a request
Libraries can now print a request directly from within the request, bypassing the request queue. The Print button is now a drop-down button and users can choose if they want to Print Now or Add to Print Queue. The default is to Print Now.

After the button is pushed a .pdf print preview of the 1 request per page printout appears and users can print directly from there.

Improved 1 request per page printouts
The 1 request per page printout has been re-designed for improved readability.
**Modifications to two requests per page printouts**
A few changes have been made to the two requests per page. The barcode is now in the upper right corner of the request and several missing fields are now included.

**Additional bug fixes**
- Printing 6 shipping labels per page is aligned correctly.
- Clicking "Print" button on request details now updates queue counts.
- The paper used to print 2-requests per-page on 8 ½” x 11” US paper size are now better aligned, and can be folded in half without folding the content of either request on the page.
- Misspellings in field labels are now spelled correctly.
- Lending Restrictions now included in one and two requests per page printouts.
- Lending notes field now displays to borrower and lender on one and two page printouts.
- Borrower printout now includes lender string when status = unfilled.
- Select All/ Clear All buttons only display once on print queues.
- Format has been added to print request.
- A more complete Borrower’s note is now included on lender printouts.
- Locations field has been removed from request printouts. With 15 lenders in a lender string the locations field is no longer necessary.
Service Configuration

Custom Holdings Symbol Search: ability to add/remove symbols from a group
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 as well as Move and Delete a symbol from a group.

From the Custom Holdings Groups tab a user selects to display groups by symbol. Users that have no custom holdings groups configured will not see this link.

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.

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

Looking ahead

November release (tentative)
• Improved display of bibliographic details (part 2)
• Links to materials that are freely available from Open Access resources.
• Integration of Article Exchange into WorldShare ILL
• Support for the “Days to Respond” field in the ILL Policies Directory, eliminating the need for enter my symbol twice (EMST)
  o This includes display of this data from the Holdings Display screen and in the lender string of the request.
• Display of aggregate lender cost information in the Holdings Display screen
• Borrowing on behalf of others workflows for “referral groups”

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.