WorldShare Interlibrary Loan release notes, February 2019

Last updated: Mon, 04 Mar 2019 14:38:27 GMT

Release Date: February 24, 2019

Introduction

This release of WorldShare Interlibrary Loan provides new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

• Resubmitting unfilled requests
• Use branches defined in WorldCat Registry as pickup locations

Many of these enhancements are the direct result of your feedback.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Administrative actions

These items require immediate action or decisions.

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<th>ACTION</th>
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<tr>
<td>We recommend that you clear your browser's cache before starting to work with WorldShare ILL.</td>
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If this link to your library’s catalog has not been set up:

Search my library’s online catalog

Or if the link needs to be updated, follow the instructions below. When you have enabled your online catalog links, you can search your catalog for requested items as a borrower or lender.
Have you updated addresses within each of your borrower and lender Constant Data records in OCLC Service Configuration? If not, please do so on behalf of all your borrowing and lending partners. Address labels do not print properly unless the addresses are formatted correctly.

Have there been any changes in your contact information or lending policies? If so, please make the appropriate updates in OCLC Policies Directory.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

New features and enhancements

Resend unfilled requests

A new Resend Request option is now available for resubmitting requests that were not filled with the initial lender string. You also have the option of changing the fulfillment type to a purchase, for example.
In an unfilled request, a new section lets you see previously tried lenders, view holdings, and build a new lender string. You can also edit fields like Need Before Date, Borrowing Notes, and Max Cost amount and currency before resending the request.
Once the request is resent and awaiting response, it’s much like any other borrowing request. The patron sees a status of Submitted, and you can view which lender currently has the request.

If you wish to change bibliographic data for the request, you should use the New option that was previously available, rather than this new Resend Request option. Please also note that using Resend Request will affect statistics, since the request will be active longer before it is filled or exhausted.

See Unfilled requests for more information.

Use branches defined in WorldCat Registry as pickup locations

You now have a new option for defining ILL pickup locations on the patron request form.

Previously, ILL pickup locations could only be entered in Service Configuration as free text. New options added with this release allow you to specify ILL pickup locations as free text, WorldCat Registry locations, or both.
This may be particularly useful for libraries using WorldShare Management Services (WMS) because, if a location name is changed in the registry, the change will be automatically reflected in the pickup location drop-down menu in the patron request form.

**Bug fixes**

The following bug fixes were included in this release:

- Article Exchange links are now retained in borrowing requests. Previously, there were some instances where the link was not retained.
- Open Access links are now showing in the request in the staff interface.
- The Staff ILL Request button in WorldCat Discovery now opens the request in the Staff interface. Previously, the Staff ILL Request button opened a blank page.
- Deflection policies based on E-License terms are now deflecting requests for e-books.
- After taking an action that moves a request to a different queue, it is once again possible to use next/previous links to view other requests in the original queue.
- Request screen no longer jumps to the previously open accordion.
- Language and Publication Date will be included in interlibrary loan statistics going forward. Previously, these were missing from interlibrary loan statistics.

Current and fixed issues can be found at:

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/
Known issues

Current known issues can be found at:

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/

Important links

Post-release session

To help you become familiar with the new features, enhancements, and improvements included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, April 17, 2019, 2:00pm, Eastern Daylight Time (New York, GMT-05:00)


Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.

Support website(s)

Support information for this product and related products can be found at:

- WorldShare ILL product website
- OCLC Community Center
- OCLC Support
- Browser compatibility chart