WorldShare Interlibrary Loan Release notes, March 2020

Release Date: March 8, 2020

Introduction

This release of WorldShare Interlibrary Loan provides new features, enhancements, and bug fixes that will help you manage more complex workflows, including:

- Use Automated Request Manager to set up and manage automations
- Deliver Get It Now articles via Article Exchange

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.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>It’s very important to clear your browser’s cache before starting to work with WorldShare ILL!</td>
</tr>
</tbody>
</table>

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.

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Reference/Search_my_library’s_online_catalog

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.

Share these release notes with your colleagues.

Gather your team for the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, GMT-04:00)
Registration: https://www.oclc.org/community/interlibrary_loan/events/apr20.en.html

Start 2020 off right by attending the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users. Topics include:

- Fine-tune your Policies and Deflections - view recording
- Construct your Custom Holdings - view recording
- Automate your request process - coming in May (register here)
- Curate and care for your Constant Data - coming in June
- Make your usage statistics count - coming in July

Have you signed up for email alerts for News in the Community Center? This will ensure that WorldShare Interlibrary Loan release notes and events will come straight to your inbox.
Include Request ID with problem reports

When reporting an issue with WorldShare ILL, it's very helpful to include the Request ID. Including this information allows us to directly trace what happened on the request we are troubleshooting.

New features and enhancements

Use Automated Request Manager to set up and manage automations

In this release, we’re excited to introduce the new Automated Request Manager, which replaces Direct Request profiles. The Automated Request Manager provides a new, user-friendly interface to make it easier for you to configure automations. Note that your existing Direct Request profiles will be automatically transferred into the Automated Request Manager. Although no immediate action is needed, we encourage you to use the friendlier interface to review your existing automations and add new ones. You can access the Automated Request Manager in OCLC Service Configuration.

See Automated Request Manager for more information.
<table>
<thead>
<tr>
<th>WorldShare ILL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interlibrary Loan Options</td>
</tr>
<tr>
<td>Borrower Data</td>
</tr>
<tr>
<td>Lender Data</td>
</tr>
<tr>
<td>Custom Holdings Groups</td>
</tr>
<tr>
<td>Custom Holdings Paths</td>
</tr>
<tr>
<td><strong>Automated Request Manager</strong></td>
</tr>
<tr>
<td>Direct Request Profiles</td>
</tr>
<tr>
<td>Purchase Options</td>
</tr>
<tr>
<td>Patron Request Workforms</td>
</tr>
</tbody>
</table>

At the top of the Automated Request Manager screen, you can now see clearly what standard actions are done for all new borrowing requests, regardless of other automations.
Adding and reviewing automations

To create a new automation, click Add New to open the form for specifying your criteria. These fields are required:

- **Name**: Use something descriptive of what the automation is intended to do
- **Priority**: Give the most specific automations the highest Priority (lowest score)
- **At least one of the following**: Match, Action, or Exception. The same match criteria cannot be used more than once in a given automation.

To help ensure your automations will do what you’re expecting, new validation and error messages will display as needed when you save your automation, listing any errors that need to be addressed before the automation can be saved.

All of your automations will display in Priority order with descriptions that make it much easier to understand the actions of your automations.

**Matches**

In the Matches section, the drop-down menu includes all match criteria that were available from Direct Request profiles. They are used in the same way as before.
Match based on Patron Note

In addition to the previously available match criteria, you can now also match requests based on the presence of a Patron Note or on specific content within a Patron Note (words, phrases, etc.). You can enter multiple search terms (words or phrases) separated by commas. There is an implied Boolean OR between search terms. For example: rush, urgent, exact edition would match a patron note that had either the words rush or fast or the exact phrase “exact edition.”

Actions

Actions let you tell the system specifically what to do with requests that match your match criteria. If you do not select any match criteria, the action will apply to all requests.
Exceptions

Exceptions allow you to specify certain scenarios where different actions should be taken. For instance, you can decide that if an item is held by your library the request should be routed to review instead of having the other actions applied.

### Providing feedback

A link is available at the top of the Automated Request Manager screen in [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r… for letting us know what you think about this new functionality. We'd appreciate hearing about your experiences, and please feel free to use this form multiple times to submit your feedback.

For more information, see [Automated Request Manager](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r…

### Deliver Get It Now articles via Article Exchange

If your library uses Get It Now, you'll soon be able to deliver Get It Now articles via Article Exchange. This functionality will be in a separate release in April 2020. Please watch for an announcement in the [OCLC Community Center](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r…) when this option becomes available.

For more information, see [Get It Now](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r…) and [Article Exchange](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r…

---

**Main Automations**

Configure automations that will be applied to new borrowing requests. Only the best matching automation will be applied to a request.

<table>
<thead>
<tr>
<th>Name</th>
<th>Matches</th>
<th>Actions</th>
<th>Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOAN</td>
<td></td>
<td></td>
<td>15</td>
</tr>
</tbody>
</table>

**Exceptions**

- If Duplicate Request, Route to Review
- If Held By My Institution, Route to Review

---

**Automated Request Manager**

We want to hear your thoughts on the new Automated Request Manager.

For more information, see [Automated Request Manager](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r…

---


Printed: Wed, 15 Apr 2020 09:49:53 GMT
Notes

FirstSearch administration module discontinued

As of Thursday, February 6, you can no longer use the FirstSearch administrative module to change ILL configurations. No action is required. All data and settings configured in FirstSearch are maintained and available for editing in OCLC Service Configuration.

The following FirstSearch administration pages no longer allow editing, but you can instead make changes in OCLC Service Configuration:

- Resource Sharing > Staff ILL Settings > Resource Sharing Options
- Resource Sharing > Staff ILL Settings > Constant Data Records
- Resource Sharing > Staff ILL Settings > Saved Notes
- Resource Sharing > Staff ILL Settings > Custom Holdings Groups
- Resource Sharing > Staff ILL Settings > Custom Holdings Paths
- Resource Sharing > Staff ILL Settings > Custom Holdings Symbols Search
- Resource Sharing > Staff ILL Settings > Direct Request Profiles

Note that the following pages remain, so you can still configure them in the FirstSearch administration module:

- Resource Sharing > Patron ILL Settings > Patron ILL Request Form
- Resource Sharing > Patron ILL Settings > ILL via E-mail

If you have questions or need help with logging in to OCLC Service Configuration, please contact OCLC Support.

Support for Transport Layer Security (TLS) versions 1.0 and 1.1 discontinued

To continue providing best-in-class security and to align with evolving industry standards, OCLC discontinued support for Transport Layer Security (TLS) versions 1.0 and 1.1 on February 3, 2020.

OCLC systems accessed through the internet use the TLS encryption protocol for data protection. Your internet browser used to access OCLC systems will need to be updated to TLS version 1.2 or higher. Current versions of most browsers such as Chrome, Internet Explorer, Edge, Firefox, and Safari already accept TLS 1.2 or higher. Therefore, you likely will not be impacted and can continue to access OCLC systems as you do today.

For a list of impacted products and information about testing your browser, see TLS security enhancements or contact OCLC Support.

Bug fixes and known issues

For a list of current and recently fixed issues, see Known issues.
Future releases

Roadmap information is available in the OCLC Community Center.

Important links

Product Insights: Resource Sharing

To help you become familiar with the enhancement and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Wednesday, April 22, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)
Registration: https://www.oclc.org/community/interlibrary_loan/events/apr20.en.html

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.

Workshop Series on Policies and Configurations

Start 2020 off right by attending the Workshop Series: Learn how to fine-tune your ILL setup to save you time and speed turnaround for your library's users. Topics include:

- Fine-tune your Policies and Deflections - view recording
- Construct your Custom Holdings - view recording
- Automate your request process - coming in May (register here)
- Curate and care for your Constant Data - coming in June
- Make your usage statistics count - coming in July

Support websites

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

- WorldShare Interlibrary Loan product website
- OCLC Community Center
- OCLC Support
- Browser compatibility chart