WorldShare Interlibrary Loan release notes, August 2020

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Release Date: August 16, 2020

Introduction

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

• Process requests more quickly using real-time availability and the new auto-no feature (for libraries that subscribe to WorldCat Discovery with availability)
• Get more time to process requests in problem statuses
• More easily find lenders now filling requests for physical materials by using the new CCOV profiled group

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.

ACTION

It’s very important to clear your browser’s cache before starting to work with WorldShare ILL!

If this link to your library’s catalog has not been set up:
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.

**ACTION**

Share these release notes with your colleagues.

During the COVID-19 crisis, review the information summarized in this [News post]:

- Managing your library’s ILL services during the COVID-19 crisis ([Recording](#) - 90 min, [slides](#), notes for [slides](#) 70-81)
- Reason for No (RFN) = Preferred Delivery Time Not Possible ([News post](#))
- Profiled Groups ACOV and BCOV and Days-To-Respond indicators ([Video tutorial](#) - 40 min, [slides](#); office hour, [slides](#))
- ILL professional development: Recorded webinars and on-demand training ([News post](#))
- [COVID-19 and OCLC Services](#) Service Configuration cheat sheet

See also the News posts about crowd sourcing the safe return of ILL physical items and the ILL community-sourced map.

Gather your team for the upcoming webinar [Product Insights: Resource Sharing](#).
Date: Wednesday, October 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/community/interlibrary_loan/events/pi-october-2020.en.html

Attend 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 - view recording
- Curate and care for your Constant Data - view recording
- Make your usage statistics count - coming in October

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 Interlibrary Loan, 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
Process requests more quickly using real-time availability and the new auto-no feature

If your library subscribes to WorldCat Discovery with availability, you'll no longer see lending requests for items that aren't available. Based on real-time availability configured in WorldCat Discovery, the system will now automatically say No to requests that have an OPAC status of unavailable and requests will move through the lender string faster. (If the OPAC status of the item is anything other than unavailable, or if the OPAC status cannot be returned, the automatic Reason for No will not be applied.)

This also results in a new reason for saying no: **No - System checked availability.** (Note: This Reason for No is not available for manual selection, but it will appear in the OCLC Usage Statistics, Report Designer, and Request History.)

As a borrower, you may see this Reason for No if the request is sent to a WorldShare ILL or Tipasa library that is utilizing availability and the item status is unavailable. This will help the request move through the lender string faster because these lenders won't have to manually process the request.

Utilize more time to process requests in problem statuses

Because many libraries remain closed or library users have not returned to campus, some ILL staff have been unable to send back borrowed items or process returned materials. So, you and your ILL team are likely seeing increases in requests that are in "problem statuses":

- **RECEIVED?** – Borrowing library has not yet indicated that a shipped item has been received
- **NOT RECEIVED** – Borrowing library has indicated that a shipped item was not received
- **RECEIVED BUT MISSING** – Borrowing library received the item but the patron indicates it's been lost
- **OVERDUE** – Borrowing library has not returned an item that is 14 or more days beyond the lender’s due date
- **RETURNED/COMPLETE?** – Lending library has not yet indicated that a returned item has been completed
- **RETURNED BUT MISSING** – Lending library has indicated that a returned item was not received (is missing)

Prior to August 5, requests in problem statuses were moved ("aged") to CLOSED after 180 days. This aging period has now been extended to 365 days. This extra time will allow you to update requests without the worry that some requests will be moved to CLOSED before they can be updated correctly. The extended aging period will apply to all requests that were in problem statuses on August 5 as well as any requests in those statuses in the future.

To ensure the ILL system is updated properly, you may want to check your problem-status queues for items that are indeed back on the shelf but perhaps did not get checked in through ILL for some reason.

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

Use the CCOV profiled group to find lenders that are filling requests for physical materials

You can now also use the new CCOV group to build lender strings of libraries that are able to ship and receive materials...
from their physical collections during the COVID-19 crisis.

- ACOV: Libraries supplying **electronic documents** during the COVID-19 crisis
- BCOV: Libraries supplying **e-books** during the COVID-19 crisis
- CCOV: Libraries supplying **physical collection** during COVID-19 crisis

The groups are updated weekly, and a PDF that lists the OCLC symbols for each group (as well as the libraries that also participate in LVIS) is posted [here](#). The new CCOV group was built from the Physical ILL Return and Lending Status map based on libraries that have reported being open to receive and ship physical items.

- To check the status of your library and other libraries, go to the [map](#).
- To update the status of your library, go to [oc.lc/mailform](#).

The ACOV and BCOV lists are based on the status submitted for your library with this [form](#), and you can use this same form to update your status.

As a reminder, you can use the profiled groups to build lender strings.

- When viewing a list of holding libraries in WorldShare ILL, Tipasa, or ILLiad, filter by Profiled Group (e.g., CCOV).
- In the OCLC Policies Directory, search by Group Symbol (e.g., CCOV) to identify a list of symbols in the group and copy/paste them into a Custom Holdings Group that you maintain.

For more information on how to make best use of these profiled groups, [view this video tutorial](#).

### Important links

#### Product Insights: Resource Sharing

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

**Date:** Thursday, October 15, 2020, 2:00pm, Eastern Daylight Time (New York, UTC-04:00)

**Registration:** [https://www.oclc.org/community/interlibrary_loan/events/pi-october-2020.en.html](https://www.oclc.org/community/interlibrary_loan/events/pi-october-2020.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

Join us for 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 - [view recording]
• Curate and care for your Constant Data - [view recording]
• Make your usage statistics count - Coming in October

Support websites

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

- [WorldShare Interlibrary Loan product website](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r...)
- [OCLC Community Center](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r...)
- [OCLC Support](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r...)
- [Browser compatibility chart](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2020_r...)

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