WorldShare Interlibrary Loan Release Notes, December 2020

Last updated: Thu, 02 Sep 2021 13:38:33 GMT

Release Date: December 13, 2020

Introduction

This release of WorldShare Interlibrary Loan provides a new feature in addition to some bug fixes, including:

- Save time by including Profiled Groups in Custom Holdings Paths

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><strong>It's very important to clear your browser's cache before starting to work with WorldShare ILL!</strong></td>
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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: Tuesday, January 26, 2020, 2:00pm, Eastern Standard Time (New York, UTC -05:00)

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 feature

Save time by including Profiled Groups in Custom Holdings Paths

You can now add OCLC Profiled Groups to Custom Holdings Paths. Because the members of these groups are automatically updated at OCLC, you will no longer need to create and maintain your own separate Custom Holdings Groups in OCLC Service Configuration to mirror these groups, which will result in time savings.

To include Profiled Groups in a Custom Holdings Path, go to the WorldShare ILL section within OCLC Service Configuration and create or edit a path.
Custom Holdings Paths with Profiled Groups can only be completely applied via automations configured in Automated Request Manager.

When you manually limit holdings to a Custom Holdings Path that contains a Profiled Group, by using the filters on the Holdings page, lenders from the Profiled Group will not be added to the lender string. In this case, a warning message will appear.

Click OK to build a partial lender string from the current Custom Holdings Path that does not include symbols from the Profiled Group. Or, click Cancel to close this window and either manually route this request to automation or select a different Custom Holdings Path.

For more information, see Custom Holdings Paths.
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 enhancements and fixes included in this release, please attend the upcoming webinar Product Insights: Resource Sharing.

Date: Tuesday, January 26, 2020, 2:00pm, Eastern Standard Time (New York, UTC -05:00)
Registration: https://www.oclc.org/community/interlibrary_loan/events/january-2021.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

Virtual Workshops. Were you able to join us for all of our Virtual Workshops where we showed how you can optimize your library’s ILL setup and workflows, and save time?

The recordings, slides, and checklists are now available:

Part 2: Construct your custom holdings. Recording, Slides, and Custom Holdings Checklist
Part 3: Automate your request process. Recording, Slides, and Automation Checklist
Part 4: Curate and care for your constant data. Recording, Slides, and Constant Data Checklist
Part 5: Make your usage statistics count. Recording, Slides, and Usage Stats Checklist

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