WorldShare Interlibrary Loan release notes, October 2021

Last updated: Wed, 03 Nov 2021 15:23:28 GMT

Release Date: October 17, 2021

Introduction

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

- Customize Article Exchange settings to better reflect your library's policies and the copyright policies in your country
- Utilize Time To Respond improvements to better prioritize request processing

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.

<table>
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<tr>
<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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Be sure to utilize Smart fulfillment functionality, including:

- Real-time availability for ILL
- Automated Request Manager
ACTION

• Smart lender strings through the Automated Request Manager

If the 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 your contact information or lending policies changed? 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.

Register for upcoming presentations included in the OCLC Resource Sharing Conference 2021 Web Series.

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:
• A new ILL community-sourced map: Learn lending status and when to return ILL items
• Setting your Days To Respond for loan requests to 16 or 20 as a visual cue to borrowers
• New profiled group CCOV joins ACOV and BCOV
• Reopening your ILL operation: workflow and configuration suggestions

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.

New features and enhancements

Customize Article Exchange settings to better reflect your library's policies and the copyright policies in your country

You can now customize the number of views allowed and the number of days after the first view that a patron can access the document. This should be adjusted to reflect your library's policies and the copyright policies within your country. Please note that:

• The default will continue to be five views with access for thirty days, and this setting only needs to be customized if your needs differ from this default.
• The default purge time period is thirty days after the last time a patron accessed the copy document. This can be adjusted based on your library's policies and needs.
You can also now provide text for a copyright declaration to be displayed to patrons when they access their copy document via Article Exchange.

- When turned on, your patrons will first be directed to an Article Exchange page to acknowledge that they have read the copyright compliance statement.
- Once they click proceed, the document download will be processed.

For more information, see Configuration.

**Utilize Time To Respond improvements to better prioritize request processing**

**Quickly see how much time you have left to respond to a request with additional time to respond values**

In April 2021, the Time To Respond column replaced the referral date column in the lending Can You Supply? and related queues. As a result of user feedback, we've expanded the values to help you know how much time you have to respond to a request.

The existing calculations will remain and include:

- <12 hours (less than twelve hours)
- <24 hours (less than twenty-four hours)
- >1 day (more than one day)
• >2 days (more than two days)

The following times to respond have been added to aid in request processing:

• >3 days (more than three days)
• >4 days (more than four days)
• >5 days (more than five days)
• >6 days (more than six days)
• >7 days (more than seven days)

**Know which requests have been waiting the longest with a new secondary sort**

Within each category of time to respond (<24 hours, >1 day etc.) the system now sorts (from top to bottom) in order by the referral date and time. This enables you to work from top to bottom in the queue. The top requests are the ones that will age or expire first, and, when multiple requests have the same time to respond value, the requests with that value will be sorted by which request were assigned to your library as the lender first.

For more information, see [Time To Respond](#).

**Coming Soon**

**Discover items more efficiently using new search customization options**

You can now customize search option preferences, both for basic and advanced searching. These settings are remembered from session to session and are based on username, so each staff member can customize this based on their own preferences.
Searching - Basic

You can now customize the default scope and sorting method when doing a basic search.

You can also choose which search indexes will be displayed in the menu, and in what order. In order to change the default sorting method and search index, click on the hyperlinked search scope name. When done making customizations, remember to save.
Searching - Advanced

You can also customize the advanced search function the same way as the basic search, with more indexes to choose from. The advanced search customization also allows you to set an optional language of cataloging and source of cataloging preference.

For more information, see Discover Items.

Bug fixes

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: Thursday, October 21, 2:00pm, Eastern Daylight Time (New York, UTC -04:00)
Registration: https://www.oclc.org/content/community/en_us/interlibrary_loan/events/october-2021.html

Please note the session time zone 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.

OCLC Resource Sharing Conference (RSC21) web series

OCLC invites you to view the recordings of the presentations from the OCLC Resource Sharing Conference web series. This year’s series of six free, virtual sessions featured electronic document delivery, controlled digital lending, and moving resource sharing forward during this challenging time.

RSC21 included these sessions:

- **Tuesday, March 30, 1:00-2:30 pm** | “Page, scan, send, reshelve: A mobile scanning station for ILL electronic document delivery service”
- **Wednesday, April 28, 11:00 am-12:30 pm** | “ILL and the pandemic: Learning from the unexpected”
- **Wednesday, May 12, 1:00-2:30 pm** | “Renewing resource sharing in challenging times: Collaborating to meet library user needs and demonstrating the value of ILL services”
- **Tuesday, May 25, 1:00-2:30 pm** | “Managing resource sharing during COVID-19 pandemic: Experiences and impacts—three perspectives”
- **Thursday, June 10, 1:00-2:30 pm** | “Controlled digital lending in two private academic libraries: Same services with diverse tools”
- **Tuesday, June 15, 11:00 am-12:30 pm** | “A look at ILL into the future: An update on your ILL services”

Recordings of these 60 minute presentations are available here.

Virtual Workshop Series: Learn how to fine-tune your ILL setup

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 series included the following topics:

- Part 1: Fine-tune your policies and deflections (recording, slides, and checklist available)
- Part 2: Construct your custom holdings (recording, slides, and checklist available)
- Part 3: Automate your request process (recording, slides, and checklist available)
- Part 4: Curate and care for your constant data (recording, slides, and checklist available)
• Part 5: Make your usage statistics count (recording, slides, and checklist available)

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