WorldShare ILL release notes, December 2022

Release Date: December 11, 2022

Introduction

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

- Pilot feature: Allow library users to place requests via the new WorldShare ILL form
- Add off-system partner details to an off-system request
- More efficiently process overdue off-system requests with the overdue status
- See dates adjusted for your library's time zone (coming in January)

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>
<thead>
<tr>
<th>ACTION</th>
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</thead>
<tbody>
<tr>
<td>For best performance, it's very important to clear your browser's cache before starting to work with WorldShare ILL!</td>
</tr>
</tbody>
</table>

Be sure to utilize Smart fulfillment functionality, including:
ACTION

- **Real-time availability for ILL** which significantly reduces the number of times you respond “no” and “In use, on loan”.
- **Automated Request Manager** which enables you to save time by automating routine ILL workflows.
- **Smart lender strings through the Automated Request Manager** which helps you improve fill rates and turnaround times.
- **Turnaround Time dashboards** and tips to improve turnaround time

Have you updated addresses within each of your borrower and lender Constant Data records in [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...)? 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](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...).

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.

Have you signed up for email alerts for News in the [Community Center](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...)? This will ensure that WorldShare Interlibrary Loan release notes and events will come straight to your inbox.

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...
New features and enhancements

Pilot feature: Allow library users to place requests via the new WorldShare ILL form

Available on December 13

A new OpenURL-based request form for WorldShare ILL is now available for you to test and optionally provide to your library's users. Libraries that use WorldShare Management Services (WMS) can use this new form as a more fully featured and customizable alternative to the WorldCat Discovery request form. Libraries using discovery and library systems from other providers can use the form to receive requests without having to rekey the bibliographic and patron data.

We encourage you to set up the form, create test requests, and provide us with your feedback.

With the WorldShare ILL request form, you can:

- Configure and customize the elements of the form to meet your library's needs
- Utilize an authentication method already in use at your library (e.g., OCLC/WMS identity management, IP)
- Provide access to the form from any discovery service (e.g., WorldCat Discovery, EBSCO Discovery Service, ExLibris Primo)
- Receive and process requests in WorldShare ILL – without having to rekey them
- Automatically route requests submitted via the form to the automated request manager (ARM)

The new form lets your library's users:
- Place an ILL request for any item – “if you can find it, you can request it”
- Pre-populate bibliographic fields automatically
- Edit the bibliographic information to meet their needs
- Include their contact information and any notes about their request
- Receive the Request ID for their request, which they can save or print for later reference

**Example WorldShare ILL request form**

![Image of WorldShare ILL request form]

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The following sections will help you set up and use the form to generate borrowing requests. If you have questions or would like assistance, please contact OCLC Support.

**Customizing the WorldShare ILL request form**

The default WorldShare ILL request form is designed to include information for both copies and loans. It also includes the identifiers needed for staff and automation to find the right citation, and therefore holdings.

You can use the default form settings as is, but you will likely want to adjust the form to best meet your library's needs. In OCLC Service Configuration, go to WorldShare ILL > Patron Request Workforms > WorldShare ILL Request Form. You can:

- Add or remove fields
- Provide custom field labels
- Specify whether a field is required and/or editable

For a full list of fields and options, [WorldShare ILL Request Form](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...).
This single form is used for all ILL requests, but the system will preselect the Service Type (Loan or Copy) based on the type of request (e.g., book, article).

**Setting up library user authentication and OpenURL resolver**

To access the request form, the library user will be required to authenticated.

<table>
<thead>
<tr>
<th>If your library...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uses WMS</td>
<td>OCLC/WMS identity management (IDM) is already set up.</td>
</tr>
<tr>
<td></td>
<td>IP authentication (with or without EZproxy) is recommended.</td>
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<tr>
<td></td>
<td>See:</td>
</tr>
<tr>
<td></td>
<td>• Manage IP Addresses</td>
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<tr>
<td></td>
<td>• Manage_Resolvers</td>
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<td></td>
<td>• Starting_point_URLs_and_config_txt?</td>
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Note: If your library would like to use a method other than IDM or IP, please request assistance from [OCLC Support](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...).

For both IDM and IP authentication, you will need to set up an OpenURL resolver. In [OCLC Service Configuration](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...), go to OpenURL Resolvers > Manage Resolvers and click Create Resolver.
For...

Enter...

Notes

Base URL

https://<yourregistryid>.account.worldcat.org/account/route/wsill/openurl?

Note: If your library uses EZproxy, prepend the EZproxy information:


Replace <yourregistryid> with your library's Registry ID.

Replace <yourezproxyprefix> with your library's EZproxy prefix.

Resolver Name

A description that indicates this resolver is for use with the WorldShare ILL request form

Once your authentication and OpenURL resolver are set up, you can do some internal testing to review the form setup and submit test requests.

Providing ILL buttons in discovery services

When you are ready to give your library users access to the WorldShare ILL request form, you can configure ILL buttons
in your discovery services. You'll use the OpenURL resolver you created above to configure an OpenURL 1.0 button.

For information on setup, see Configure OpenURL.

Note: If your library has been using the WorldCat Discovery request form, you'll want to remove buttons with the type WCRS/WS ILL and replace them with OpenURL 1.0 buttons.

Example ILL button

Receiving requests in WorldShare ILL

Requests submitted with the WorldShare ILL form will be acted on by automations (if set up) and/or sent to staff review. The Source for these requests will be WSILLFORM. You will see the form values submitted with the request in the corresponding fields in the staff interface. No more rekeying! Process the requests as you normally would.

For more information, see Process Requests.

Using key automations

By enabling the new WorldShare ILL request form for your library's users, you can more fully take advantage of the automations. Requests placed with the form will automatically route to the automated request manager (ARM). You no longer need to manually send requests to automation!

For example, ARM can do one or more of these actions for you:

- Create the lender string
- Send request to lenders
- Apply constant data

For more information and examples of basic automations, see Automated Request Manager.
Add off-system partner details to an off-system request

On October 25, a new Address Book option in OCLC Service Configuration was released to allow you to create and maintain details about off-system institutions that you borrow from and lend to.

You can now use these records to populate the partner details in your off-system borrowing and lending requests, removing the need to enter all the information individually into each off-system request.

Note: Off-system requesting functionality was first introduced in April 2022. Learn more in the WorldShare ILL release notes, April 2022.

Moving a borrowing request to off-system request

![Image of off-system request details](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...)

Creating an off-system lending request

https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_r...
For more information, see [Off-system requesting](https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan/Release_notes_and_known_issues/2022_release/).

**More efficiently process overdue off-system requests with the overdue status**

Off-system lending and borrowing requests that are 14 days overdue will automatically have the overdue status applied.
For more information, see Off-system requesting.

See dates adjusted for your library’s time zone

Coming in January 2023

In your WorldShare ILL interface and the OCLC Policies Directory, you’ll see accurate dates regardless of your global location.

Bug fixes

You can now send a French-translated email from the Article Exchange interface without errors. Previously, typos existed in the email.

Known issues

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

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, February 2, 2:00pm, Eastern Daylight Time (Eastern Standard Time, UTC -05:00)
Registration: https://www.oclc.org/content/community/en_us/interlibrary_loan/events/rspi-feb-2023.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 (RSC22) web series

OCLC invites you to view the recordings from past presentations in the 2022 OCLC Resource Sharing Conference web series. This year’s series of free, virtual sessions featured ILL 101 sessions, automation, controlled digital lending, and moving resource sharing forward during this challenging time. Recordings and slides are available in the community center.

RSC22 included these sessions:

- Working smarter not harder: How to automate your holdings and configure policies to expedite fulfillment | Recording
- Lightning sessions: Resource sharing at the Internet Archive and E-book lending/borrowing demystified | Recording
- The persistence of CONTU: The results of two surveys | Recording
- Controlled digital lending for resource sharing: Law and policy since 2018 | Recording
- A look into the future of ILL services | Recording
- Controlled digital lending during global COVID-19 and beyond | Recording

In partnership with IDS Project, recordings of pre-conference ILL 101 sessions are also available at the Online Learning Institute.

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 website(s)

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

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