Exception Processing

Last updated: Thu, 28 Jun 2018 15:08:08 GMT

Find information about reasons an exception may have occurred causing a halt in the integration process. There will be times when exceptions in the process may occur. If an exception occurs, it will be noted in the Circulation History section in the Circulation accordion of the ILL Request. An exception halts the integration process and must be remedied in order for the integration to occur.

There are four statuses you will see in the Circulation History section if an exception has interrupted the workflow:

1. No status (Circulation History appears empty)
2. Temporary item record failed to create (invalid patron id). Correct the patron id and retry.
3. Temporary item record failed to create (exception)
4. Temporary item record failed to update (exception)

There are several reasons exceptions may occur (and the status you will see):

1. Setup and configuration steps have not been completed (status 1)
2. Patron barcode is missing/empty (error message appears when trying to send the ILL request)
3. Patron barcode does not match an existing barcode (status 2)

**Note:** These errors will NOT stop the ILL request from being sent and processed between borrower and lender. As your staff work to correct any errors, your patron’s request has not been delayed.

## Setup and configuration steps have not been completed

### No Status in Circulation History

If you do not see anything in the Circulation History section of the ILL Request, this indicates an activation error. Verify all setup and configuration steps have been completed correctly.

![Circulation History](https://help.oclc.org/Library_Management/WorldShare_Circulation/Configuration/Tipasa_integration/040ExceptionProcessing/)

Review the documentation and view the video that outlines the process:
• **Set up and Integration**

**Patron barcode is missing/empty**

Error message appears when trying to send the ILL request

The patron barcode is the matching data point between WorldShare Circulation and WorldShare Interlibrary Loan. This field must be populated in order to send the ILL request to lenders.

When the integration is activated, it requires the patron barcode to be included in the Patron information section of the ILL Request. If your patrons are submitting requests directly through WorldCat Discovery, the patron barcode is required to submit the Patron Request Form.

When the ILL request is generated from within WorldShare, staff entering requests on behalf of their patrons also need to include the patron barcode. If the barcode is missing, the request cannot be sent to lenders and you will receive an error message.

If you find that you need to place ILL requests for special programs or situations where a patron account does not exist in the Circulation module, it is recommended that you create a patron account before submitting the ILL request.

**Workaround (in WorldShare)**

1. Search for the patron in the Circulation module.
2. In the ILL Request, in the Patron accordion, enter the barcode in the ID field.
3. Save the ILL Request.
4. Resend the request.

**Patron barcode does not match an existing barcode**

Circulation History Status: Temporary item record failed to create (invalid patron id). Correct the patron id and retry.

If the patron enters their barcode incorrectly and no matching barcode is found in the Circulation module, the integration will fail.

If the patron incorrectly enters their barcode and the mistyped barcode matches another patron barcode, the request will be placed for the wrong patron. Some libraries may wish to add a patron barcode verification step within ILL where staff check the Circulation module for the barcode and correct patron name. If the correct barcode is found and updated before the request is sent, no remediation will be needed.

**Workaround (in WorldShare)**

1. Search for the patron in the Circulation module and find the correct barcode.
2. In the ILL Request, in the Patron accordion, update the barcode in the ID field.
3. Save the ILL Request.
4. In the Circulation accordion, click Retry.
5. The Circulation Status will update if the barcode was entered correctly.