WorldShare Circulation release notes, September 2018

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Release Date: September 30, 2018

Introduction

This release of WorldShare Management Services provides several new features in addition to improvements and bug fixes. The new features are the direct result of user 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 to be significant for most institutions. We encourage you to review all 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

<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Determine if your library is ready to enable integration with ZFL-Server</td>
</tr>
<tr>
<td>• For libraries in Germany, Austria, and Switzerland Only</td>
</tr>
<tr>
<td>Determine if staff and student workers have been assigned the most appropriate role</td>
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<tr>
<td>Determine best practices for your library and/or group for declining holds</td>
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<tr>
<td>Determine if your library would like to add a privacy notice</td>
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<tr>
<td>Review your Hold Request Policies to determine if the Forwarding Policy setting is correct</td>
</tr>
<tr>
<td>Determine if external request information should be added to printed receipts</td>
</tr>
<tr>
<td>• For libraries using request integration with WorldShare ILL, Tipasa, ZFL-Server, or WorldShare Acquisitions</td>
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</tbody>
</table>
New Features

Integration with ZFL-Server

WorldShare Circulation now offers an improved integration with ZFL-Server, an automated interlibrary loan service offered by OCLC to facilitate regional and national borrowing in Germany, Austria, and Switzerland.

To learn more about ZFL-Server integration, see Integration with ZFL-Server.

Two new staff roles

The privacy of your patrons and the integrity of your Circulation system are vitally important. To help you keep control of your library's data, this release includes two new user roles that can be assigned to staff and student workers who should have limited access to expert functionality and/or to patron personal data.

<table>
<thead>
<tr>
<th>CIRCULATION_DESK_PRIVACY</th>
<th>STUDENT_WORKER_RESTRICTED</th>
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<tbody>
<tr>
<td>Allows a staff user to access Circulation with approximately the same functionality as the CIRCULATION_DESK role.</td>
<td>Allows a staff user to access basic Circulation functionality such as checkout, check in, Pull List, item search, etc.</td>
</tr>
<tr>
<td>Does not grant a staff user permission to:</td>
<td>Does not grant a staff user permission to:</td>
</tr>
<tr>
<td>• Access content via the Analytics tab</td>
<td>• Access content via the Analytics tab</td>
</tr>
<tr>
<td>• Refund fully-paid bills</td>
<td>• Create, edit, or delete item records</td>
</tr>
<tr>
<td></td>
<td>• Edit or delete holds &amp; item schedules</td>
</tr>
<tr>
<td></td>
<td>• Create, pay, waive, or cancel patron bills without a supervisor</td>
</tr>
<tr>
<td></td>
<td>• Refund bills</td>
</tr>
<tr>
<td></td>
<td>• Act outside of your library's policies without a supervisor</td>
</tr>
</tbody>
</table>
Neither role can manage sensitive user data.

Does not grant a staff user permission to:

- Access the Admin module in WorldShare
- Create, edit, or delete user records
- View a patron's detailed profile or history
- View a patron's name when not assisting a specific patron, e.g., when viewing item statistics

For more details about Circulation roles, see Circulation Account Roles.

Decline a hold from the Pull List

When reviewing the pull list, you may determine that your branch cannot fulfill a hold because relevant items cannot be found, need repair, should not be shipped to the pickup location, etc.

The new 'Decline' action can be used if your branch cannot fulfill the hold. The system will keep track of the declining branches and give the last decliner the option to delete the hold.

As of this release, declining a hold will:

- Suppress the hold from appearing on your branch's pull list, even if another item shelved at your branch is or becomes available.
- Not allow an item shelved at your branch to fulfill the declined hold.
• Ask if you wish to delete the hold if your branch is the last that could fulfill. This can occur if:
  ◦ The patron requested a specific barcoded item
  ◦ Hold Request Policy prefers the pickup branch which then declines prior to forwarding
  ◦ The hold has been globally forwarded and your branch is the last with an available, barcoded item that could fulfill the hold

Note: All of the CIRCULATION and STUDENT_WORKER roles except STUDENT_WORKER_RESTRICTED allow the user to decline holds.

Add a privacy notice for staff and patrons

Institution administrators can request that an institution-defined privacy notice be displayed to staff and patrons during login for many OCLC services including WorldShare Circulation.

The privacy notice would be displayed after Circulation staff have logged in but before they are able to access WorldShare. The number of times the privacy notice is displayed can be configured for your institution.

To request a privacy notice, please contact OCLC support in your region.
Improvements

Clear Hold Shelf improvements

To make it easier to find expired holds on the hold shelf, we've improved the Clear Hold Shelf report with:

- A new column for Patron Barcode
- The ability to sort by Patron Name, Patron Barcode, or Borrower Category
Pull List improvements

In addition to declining holds, we've improved the Pull List so that you can:

- Filter by Request Type
  - All (default)
  - External Requests (including holds placed by WorldShare Acquisition or lending requests for ZFL-Server)
  - Schedules
- Sort by Request Type
- Forward from the new Actions column alongside declining

Management of temporary or container items

As of this release, STUDENT_WORKER_CIRCULATION will no longer be able to create, edit, or delete temporary or container items. In the past, this role already did not allow users to create, edit, or delete WorldCat local holdings records (LHRs) via Discover Items.

The following roles allow a staff user to search and view item records:

- STUDENT_WORKER_CIRCULATION
- STUDENT_WORKER_RESTRICTED

The following roles allow a staff user to search, view, create, edit, or delete item records via Discover Items:

- CIRCULATION_ADMIN
- CIRCULATION_DESK
- CIRCULATION_DESK_PRIVACY
- STUDENT_WORKER
Hold forwarding status honored at check in

In February 2018, we made improvements to how the Forwarding Policy set in the Hold Request Policy is honored when fulfilling title-level holds. This release adds more complexity to how a hold’s forwarding status is honored to help your library avoid routing items unnecessarily to fulfill holds.

When the Forwarding Policy prefers items at the pickup location and there is an item available at the pickup location, then only items checked in at the pickup branch can fulfill the hold. If staff at the pickup location forward the hold or there are no items available at the pickup location, then relevant items checked in at any branch could be routed to fulfill the hold.

Depending on your library's configuration and the state of the hold queue, this enhancement will decrease the likelihood that the system will route an item to fulfill a hold when there is an item available at the pickup branch.

Note: Using a Forwarding Policy that prefers pickup location may cause a patron's place in the hold queue not to be honored. If your library wants all holds to be fulfilled in queue order, then all Forwarding Policies should be set to 'Globally Forwarded by default.'

External request information added to printed receipts

If your library is using the integrations with WorldShare ILL, Tipasa, ZFL-Server, or WorldShare Acquisitions (to place holds for requesting patrons), you can add related request data to your printed receipts in Circulation. At this time, this data is not available in the automatic email receipts.

External Request ID represents the:

- Request ID from WorldShare ILL or Tipasa
- PFL or AFL number assigned to a ZFL request
- Order Item Number or reference ID from Acquisitions

Send To Library Name represents the name of the partner library in an interlibrary loan request.

You can customize the field labels and add these new objects to the following printed receipts:

- PULL_LIST_ENTRY (relevant for ZFL lending & Acquisitions only)
- HOLD
- CHECK_IN
- DUE_DATE

Note: When configured, the new fields will only appear in the receipt when data is available.

Offline Client uses Java proxy settings

The Offline Client now honors the Java proxy server settings of your workstation when uploading transactions to Circulation. This feature will allow workstations that connect to the internet via a local proxy server to use the Offline
Client. Be sure to download the latest version of the Offline Client to take advantage of this feature.

**WMS Circulation API update**

WMS Circulation API can now supply patron identifiers in the Pull List that you can use to get full patron details via the WorldShare Identity Management API. This improvement will allow you to get patron contact or other details for a custom application, a high-density storage or ASR system, etc.

**Bug fixes**

**Patron Name column does not display**

Some libraries experienced an intermittent problem where the Patron Name column on the Pull List, holds queue, etc. did not display. This issue is now resolved.

**ILL holds fulfilled at the wrong branch**

Libraries using the borrowing integration between Circulation and WorldShare ILL or Tipasa may have noticed that ILL holds are immediately updated to 'On Shelf' status when a loaned item is received in ILL.

As of this release, ILL holds will be fulfilled as if the item was checked in at the item's holding location.

- For WorldShare ILL, the item will be In Transit from the WSIL branch to the pickup location.
- For Tipasa, the item will be:
  - 'In Transit' if the configured temporary item holding location differs from the pickup branch, or
  - 'On Shelf' if the configured temporary item holding location is the same as the pickup branch.

**Known issues**

No new issues were introduced in this release.

**Post release sessions**

No post release session is scheduled at this time.

**Support website(s)**

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

- Browser compatibility chart
- WorldShare Circulation support site
Next release

- November 2018.