WorldShare Circulation release notes, December 2018

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Release Date: December 2, 2018

Introduction

This release of WorldShare Management Services provides several new features in addition to 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 any SIP2 clients / services should have the Whole Group resolution level.</td>
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<tr>
<td>Review default SIP2 screen messages for errors caused by a non-unique patron barcode, item barcode, or pickup location.</td>
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<td>Review Hold Fulfillment Policies to verify:</td>
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<tr>
<td>• Hold Shelf Period is correct</td>
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<tr>
<td>• 'Limit to hold expiry date' setting is correct</td>
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<tr>
<td>Review Hold Request Policy to verify that the Default Hold Request Period is correct.</td>
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<tr>
<td>Review Deleted Items retention policy.</td>
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New Features

SIP2 for WMS Groups

Your library can now enable group functionality for your self-service kiosks, sorting machines, or other applications that use SIP2 to communicate with WMS.

This will enable:

- Patrons of any member of your group to access and use your SIP2-enabled services
- Items owned by any member of your group to be viewed, checked out, checked in, etc.
- Patrons to checkout temporary items created via interlibrary loan (ILL) integration

Resolution level is configurable per IP address associated with one or more SIP2 clients. The new setting is available in OCLC Service Configuration under WMS Circulation > SIP2 IP Address.

To enable this group functionality, update the resolution level to 'Whole Group' and save the policy:

By default, the resolution level will be set to 'Local Institution Only.' This level allows only patrons, items, pickup locations, etc. associated with the SIP2 client's institution to be recognized. All other transactions will fail with an appropriate screen message (AF).

Note: SIP2 actions cannot proceed if an ambiguous value is detected at the configured resolution level. New screen messages (AF) can be customized in Service Configuration under WMS Circulation > SIP2 Custom Messages:
Improvements

Improvements to Hold Fulfillment Policy

Use the improved Hold Fulfillment Policy to better understand and control how the hold shelf period is calculated. As a reminder, the hold shelf period is calculated from the time a fulfilling item is checked in at the pickup location.

Hold Shelf Period

The 'Hold Expiration Period' label has been changed to 'Hold Shelf Period' to clarify which duration is calculated by Hold Fulfillment Policy. Hold Shelf Period is now a required field.

'Unlimited' option discontinued

To reduce confusion, the 'Unlimited' option for Hold Shelf Period is no longer visible.

In the past, the system would limit the Hold Shelf Period to the unfulfilled hold's expiry date, etc. even when the 'unlimited' setting was enabled.

If your library has a Hold Fulfillment Policy that used the 'Unlimited' setting, the value of Hold Shelf Period will now be set to 12 months in Service Configuration. *This will change how hold shelf periods are calculated moving forward.*
New 'Limit to hold expiry date' setting

The new 'limit to hold expiry date' setting in Hold Fulfillment Policy controls if an item's hold shelf period should be limited to the unfulfilled hold's expiry date.

By default, the new setting will be enabled to provide parity with previous system behavior.

You may wish to leave this setting enabled if:

• Items should remain on the hold shelf no longer than the unfulfilled hold's expiry date
• Patrons frequently specify a hold expiry date beyond which the item will not be needed
• Items are infrequently/never routed between branches to fulfill holds

Consider disabling the limit if:

• Items should always remain on the hold shelf for the Hold Shelf Period
• Patrons infrequently/never set a specific hold expiry date
• Items routed to the pickup location sometimes arrive after the hold's expiry date

Note: For libraries using integration with WorldShare ILL or Tipasa, the Hold Shelf Period will continue to be restricted to the interlibrary loan due date regardless of other settings.
Friendly message when a check-in expires a hold in transit

If a hold expires while its fulfilling item is in transit to the pickup location, the next check-in will alert you that the hold has expired.

The message will include the patron barcode to make it easier to determine which patron was expecting the item.

If the hold was created via WorldShare ILL or Tipasa integration, the expiration message will also include the ILL request ID:
Note: A hold with an item in transit to the pickup location will **not** expire if all of the following are true:

- Hold Fulfillment Policy does not limit the hold shelf period to the hold expiry date (see above)
- Any interlibrary loan due date is in the future
- The item is next checked in at the pickup location

### Delete a hold or item schedule with an item in transit

Holds and item schedules can now be deleted even when an item is already in transit for fulfillment.

You will not be told to hold/schedule the item when it arrives at the pickup location. Wherever the item is next checked in, you will be told what to do next with the item, e.g., reshelve, hold for a different patron, route to a different branch, etc.

After deletion, the relevant notification will be sent to the patron:

- Hold Request Expiry Notification
- Schedule Expiry Notification

Note: Patrons cannot delete a hold from My Account while an item is in transit.
Accurate display of Default Hold Request Period

To reduce confusion, the 'Unlimited' option for Default Hold Request Period is no longer available in Hold Request Policy. This change will **not** impact how hold expiry dates are calculated.

In the past, the system interpreted an 'unlimited' period as 20 years. If your library has a Hold Request Policy that used the 'Unlimited' setting, the value will now display accurately as 240 months (20 years) in Service Configuration.

As a reminder, the Default Hold Request Period determines the maximum duration that an unfulfilled hold will be active in the system before expiring. An unfulfilled hold's expiry date cannot exceed the Default Hold Request Period unless approved by your library staff. You or your patron can manually select an earlier date.

Note: Hold Fixed Due Date(s) can be used to limit the hold period so that unfulfilled holds will expire at the next relevant fixed date, e.g., the end of the academic semester. Hold fixed dates are not consulted again when the hold shelf period is calculated.

Note: An unfulfilled hold's expiry date can impact how long an item remains on the hold shelf. **See above for more details.**
Continue working in Circulation when ZFL-Server is unavailable

If your library has enabled ZFL-Server integration, you can now continue working in Circulation when ZFL-Server cannot be contacted due to system maintenance or other issues.

For example, if WMS cannot successfully send the 'Return' message to ZFL-Server, this feature will allow you to check in the borrowed item in Circulation so that the patron will not receive an overdue notification, overdue fee, etc.

Acknowledging the following message will complete the requested action (e.g., checkout, check in, delete hold, etc.), but you will need to update ZFL-Server manually.

You may also wish to contact your ZFL-Server administrators for assistance.

Bug fixes
Withdrawn items purged too soon

Item records for withdrawn items were deleted during the next weekly delete job if the retention period set in the Deleted Items policy would set an invalid date, e.g., beyond the year 9999.

Moving forward, the maximum retention period for withdrawn items will be 12,000 months.

Temporary items created via ILL integration display odd item location information

Temporary items created via interlibrary loan integration with WorldShare ILL, Tipasa, or ZFL-Server were attempting to display the holding and shelving locations of the lending library. In some cases, the word 'Unknown' was displayed before the item location. As of this release, ILL temporary items will display and allow editing of the borrowing library's item location.

Known issues

Backdated check in impacts hold shelf period

Backdating check in will reduce the amount of time an item is scheduled to remain on the hold shelf.

This issue is scheduled to be fixed in the next release.

SIP2 Fee Paid message without fee identifier may circumvent Group Payment Policy

If a Fee Paid message is submitted with a fee identifier (CG), Circulation may allow a fee to be paid outside of the Group Payment Policy.

To avoid this, Fee Paid messages must either:

- Provide the fee identifier (CG) or
- Include the fee assessor's institution identifier (AO) in the Fee Paid message

This issue will be fixed in the next 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
- OCLC Community Center

Next release

- To be determined.