WorldShare Circulation release notes, February 2019

Release Date: February 3, 2019

Introduction

This release of WorldShare Circulation provides several new features and enhancements in addition to bug fixes. 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>
</tr>
</thead>
<tbody>
<tr>
<td>Review the assignment of user roles to ensure that your staff can access the necessary functionality in Circulation.</td>
</tr>
<tr>
<td>Verify that the WorldCat Registry has accurate normal and special hours for your library and/or branches.</td>
</tr>
<tr>
<td><strong>WorldShare Report Designer customers only:</strong> Review any custom circulation reports that may include the Event Transaction Source or Event Branch Name objects.</td>
</tr>
</tbody>
</table>

New Features
New search options for Discover Items

Several collection searching improvements are now available in Circulation. Most of these features are already available in Record Manager and will help you to find items and sets of records more easily in Circulation.

New search scopes

Searches in Discover Items can now be done against three data types. Each data type is subdivided into applicable scope options. For example, searches for Bibliographic Records can be scoped to include All WorldCat or My Library Holdings.

Search local holdings records by multiple indexes via My LHRs

The list of indexes for searching local holdings records (LHRs) has been extended. Prior to this release, you could search LHRs by barcode or browse by call number. You can now search for items by note, LHR control number, shelving location, and many more.

The new indexes are available under Data Type Local Holdings Records and scope My LHRs.

Some LHR indexes offer additional dropdown options. For example, selecting the Location index will display dropdown menus for item holding branch and shelving location.
Filter copy-level search results for My LHRs

LHR search results can be filtered by location, temporary shelving location, inclusion in a shared print agreement, interlibrary loan (ILL) lending policy, and/or ILL reproduction policy. You can apply up to five filters linked with Boolean operators AND, OR, NOT.
Preferences for Discover Items

Set preferences to better control which search options are selected by default when you log into WorldShare and access the Circulation module. Most preferences can be overridden as you search, e.g., changing the search index or sorting method.

Preferences will only apply to your user account and will be available even when you log in from a different computer, browser, etc.

You can review or change your preferences by going to Circulation > Discover Items > Preferences.

Note: Search preferences you may have already set in Record Manager will not apply to Circulation. You will have the default set of preferences in Circulation until/unless you save changes in Circulation. Changes made in Circulation will not be applied to your Record Manager preferences and vice versa.

Learn more about preferences in Search Preferences.

Improvements

Checkout screen retains column display preferences

Your preferences for column display on the checkout screen will now be retained for the next time you view a patron's account.
Preferences will only apply to your user account and will be available even when you log in from a different computer, browser, etc.

Check In messages display patron name

Staff with the following Circulation roles will now see the patron’s name in messages at Check In when the item needs to be held or scheduled for a patron or when a hold has expired in transit to the pickup location:

- CIRCULATION_ADMIN
- CIRCULATION_DESK
- STUDENT_WORKER
- STUDENT_WORKER_CIRCULATION
To preserve patron privacy, staff with these roles will continue to see only the patron’s barcode:

- CIRCULATION_DESK_PRIVACY
- STUDENT_WORKER_RESTRICTED

Resizable entry fields

Resizable input fields with vertical scrolling now make it easier to enter data into Circulation. When you see the resizing indicator, click and drag the bottom-right corner of the entry box to the desired width and height.

You may notice changes to the default field size and behavior of entry fields on the following screens:

- Create/edit a temporary or container item
- Create/edit a hold request
- Create/edit an item schedule
- Create/edit/resolve a bill
Better support for closing times after midnight

Short loan periods and overdue periodic bills calculated in minutes or hours now reflect when your library closes after midnight, e.g., if the library is open on Friday from 08:00 am until 02:00 am on Saturday.

Tip: Set the Accrue bills when closed? option to No in your Loan Policies to stop assessing bills or deducting time against a grace period during the time that your library is closed.
Hold shelf period can honor open hours

Use the new setting in Hold Fulfillment Policy to control if the hold shelf period should include time that the pickup location is closed. Prior to this release, hold shelf periods did not consider your library's open hours.

When **Exclude closed hours** is disabled (default setting), the hold shelf period will continue to include time that your library is closed.

When enabled, the hold shelf period will only include time that the pickup location is open. The calculated hold shelf period will therefore not expire when your library is closed, and your patrons will have the configured amount of time to pickup their reserved items.

Note: The hold shelf period will continue to be limited to the unfulfilled hold's expiry date when the **Limit to hold expiry date** setting is enabled. Also, temporary items created via integration with WorldShare ILL or Tipasa will continue to have a hold shelf period limited to the ILL due date.
When **Exclude closed hours** is enabled, the following is true for a pickup location that is open 08:00 – 17:00 on Monday through Friday:

<table>
<thead>
<tr>
<th>HOLD SHELF PERIOD</th>
<th>FULFILLED AT</th>
<th>WILL EXPIRE AT</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 minutes</td>
<td>16:55 on Monday</td>
<td>08:25 on Tuesday</td>
</tr>
<tr>
<td>48 hours</td>
<td>08:32 on Monday the 1st</td>
<td>11:32 on Monday the 8th</td>
</tr>
<tr>
<td>3 days</td>
<td>10:26 on Monday the 1st</td>
<td>17:00 on Thursday the 4th</td>
</tr>
<tr>
<td></td>
<td>16:54 on Friday the 5th</td>
<td>17:00 on Wednesday the 10th</td>
</tr>
<tr>
<td>2 weeks (14 days)</td>
<td>13:35 on Wednesday, December 5th</td>
<td>17:00 on Wednesday, December 26th</td>
</tr>
<tr>
<td>*Special closure on Tuesday, 25 December</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 month</td>
<td>09:24 on Wednesday, January 30th</td>
<td>17:00 on Thursday, February 28th</td>
</tr>
<tr>
<td></td>
<td>09:24 on Tuesday, April 30th</td>
<td>17:00 on Thursday, May 30th</td>
</tr>
<tr>
<td>3 months</td>
<td>09:24 on Monday, November 5th</td>
<td>17:00 on Tuesday, March 5th</td>
</tr>
<tr>
<td></td>
<td>09:24 on Monday, November 12th</td>
<td>17:00 on Tuesday, February 12th</td>
</tr>
</tbody>
</table>

Note: The open hours of the pickup branch are used if that branch’s open hours are set to override your institution
hours. Otherwise, your general institution hours will be used. Contact OCLC Customer Support if you have questions about branch vs. institution hours.

**Edit the hold shelf expiry date**

You can now edit the date and time when an item on the hold shelf will expire and appear on the Clear Hold Shelf Report, send a hold shelf expiry notification to the patron, etc.

To change the hold shelf expiry date, navigate to the patron Holds tab and click the **Edit**... link. Adjust the **On Shelf** date and click the **Save Changes** button.

To reduce confusion, the data displayed in the Edit Existing Hold Request dialog has been updated for holds on the hold shelf. The fulfill-from location(s) hold-from/until dates, and suspend-from/until dates are no longer visible because they are no longer used by the system.

**Note:** Changes to the shelf expiry date can be made only while the hold is still active. Once the expiry date has passed, you will not be able to extend the shelf period. Consider monitoring the Holds Ready for Pickup Report for holds that will expire soon.

---

**Transaction History: Source and event branch improvements**

New transaction sources will provide your library with more accurate activity reporting. Transaction source indicates the application or service that originated an event such as a checkout, renewal, etc.
If your library retains Transaction History for display in Circulation, you will notice new values for **Source**.

For example, item renewals done by a patron from WorldCat Discovery My Account or via automatic renewal previously displayed with a source of **Other**. As of this release, these renewals will be distinguishable with sources **Patron / External Application** and **System**, respectively.

In WorldShare Report Designer, analogous Event Transaction Source values will appear in the Circulation Events universe.

<table>
<thead>
<tr>
<th>CIRCULATION TRANSACTION HISTORY</th>
<th>EVENT TRANSACTION SOURCE</th>
<th>EVENT TRANSACTION SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NEW REPORT DESIGNER VALUE</strong></td>
<td></td>
<td><strong>OLD REPORT DESIGNER VALUE</strong></td>
</tr>
<tr>
<td>Staff</td>
<td>STAFF</td>
<td>No change</td>
</tr>
<tr>
<td>Offline Circulation</td>
<td>OFFLINE</td>
<td>No change</td>
</tr>
<tr>
<td>Self Service</td>
<td>SIP</td>
<td>No change</td>
</tr>
<tr>
<td>System*</td>
<td>POLICY*</td>
<td>N/A</td>
</tr>
<tr>
<td>Patron / External Application*</td>
<td>PLATFORM_PATRON*</td>
<td>N/A</td>
</tr>
<tr>
<td>External Application*</td>
<td>NCIP_API_LEGACY*</td>
<td>NCIP</td>
</tr>
<tr>
<td>External Application*</td>
<td>CIRC_API*</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>Acquisitions*</td>
<td>ACQUISITIONS*</td>
<td>N/A</td>
</tr>
</tbody>
</table>
CIRCULATION TRANSACTION HISTORY | EVENT TRANSACTION SOURCE | EVENT TRANSACTION SOURCE
--- | --- | ---
NEW REPORT DESIGNER VALUE | OLD REPORT DESIGNER VALUE

<table>
<thead>
<tr>
<th>Interlibrary Loan*</th>
<th>ILL*</th>
<th>NCIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorldCat Navigator*</td>
<td>NAVIGATOR*</td>
<td>NCIP</td>
</tr>
<tr>
<td>ZFL-Server*</td>
<td>ZFL*</td>
<td>N/A</td>
</tr>
</tbody>
</table>

*Indicates a new value

In addition, an event branch will no longer be assigned to renewal and other loan events that did not take place at a specified branch, e.g., an automatic renewal. In WorldShare Reports and Report Designer, Event Branch Name in the Circulation Events universe and related reports (e.g., Circulation Dashboard, Monthly Circulation Statistics Report, etc.) will record N/A for the Event Branch Name instead.

Note: Changes to transaction source and event branch assignment will be applied to events after this release. Pre-existing events will not reflect the changes in Circulation Transaction History or in Report Designer.

**Bug fixes**

**Title still held in WorldCat after last item is deleted via Discover Items**

The holding flag for the WorldCat bibliographic record was not always removed after the last item was deleted in Discover Items or the WMS Collection Management API.

A fix was released on 9 January 2019 to prevent the title-level WorldCat holding from being orphaned in the future. However, the WorldCat holding flag was not removed from records that were already impacted. Please contact OCLC Customer Support for assistance identifying the removing these holdings.

**Backdated check in impacts hold shelf period**

Backdating a check-in action will no longer cause the hold shelf period to be calculated from the backdated date and time. As of this release, the hold shelf period will always be calculated from the actual date and time when the item was checked in to fulfill the hold. Overdue fee assessment, grace periods, etc. will continue to be calculated against the backdated date and time.
SIP2 Fee Paid message without fee identifier may circumvent Group Payment Policy

If your library participates in group circulation, patron payments done via SIP2 will now honor the applicable Group Payment Policy.

Known issues

Hold shelf expiry date can be set beyond the ILL due date

If your library uses WorldShare ILL or Tipasa integration, you may notice that the hold shelf expiry date can be edited to be beyond the ILL due date. In a future release, overriding the ILL due date will no longer be allowed.

Hold shelf periods calculated in minutes or hours have an expiry time of 11:59 pm when 'Exclude open hours' is disabled

Hold shelf period calculations in minutes or hours were setting the shelf expiry timestamp to 11:59 pm even prior to this release. You may notice this issue now that the timestamp associated with the shelf period is displayed in the staff interface.

As of this release, enable the ‘Exclude open hours’ setting in Hold Fulfillment Policy to calculate hold shelf periods in minutes or hours when the pickup location is open.

In a future release, support will be added for minute/hour periods that disregard the library’s open hours.

Important links

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:

- WorldShare Circulation
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart