WorldShare Circulation release notes, March 2019


Release Date: March 9, 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>Determine if your SIP2-enabled check-in devices can leverage the CV field extension.</td>
</tr>
<tr>
<td>Add an accounting code, tax code, and/or tax type description to your institution's Bill Reasons, where applicable.</td>
</tr>
</tbody>
</table>

Improvements

Enhanced alert support in SIP2 check-in response

The SIP2 check-in response message (10) has been enhanced to improve integration with your library's sorting machine or other automated materials handling system (AMH).

The SIP2 protocol includes a 1-character alert value (Y or N) to let your AMH system know that a checked-in item
requires special attention. An extension to SIP2 defined an 'alert type' field (CV) to provide specific information when the alert is set to Y, e.g., this item is needed to fulfill a patron's hold.

Prior to this release, Circulation already provided support for CV01 and CV02 field values when the item is needed to fulfill a hold. Related extended fields will continue to be supported, e.g., item shelving location / collection code (CR), item call number (CS), destination branch (CT), and hold-for patron identifier (CY).

In this release, CV support has been expanded as follows:

<table>
<thead>
<tr>
<th>CV</th>
<th>Description</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>CV01</td>
<td>Item is needed to fulfill a hold or item schedule for pickup at this branch</td>
<td>101NNY20190221 R133000AO11111</td>
</tr>
<tr>
<td>CV02</td>
<td>Item is needed to fulfill a hold or item schedule for pickup at a different branch</td>
<td>101NNY20190221 R133000AO11111</td>
</tr>
</tbody>
</table>
| CV03| Borrowed temporary item at its holding location needs to be returned to the lending library | Applies only to:  
- Temporary items created via interlibrary loan (ILL) borrowing integration with Tipasa, WorldShare ILL, etc.  
- Items needed to fulfill supplier-side holds created via ILL integration with ZFL-Server, etc.  
Note: SIP2 will only recognize borrowed ILL temporary items if the SIP2 IP Address resolution level is set to 'Whole Group'  
101NY20190221 R133000AO11111|ABItem Barcode|AQMAIN|AJTitle|CLILL Sort Bin|CK001|CRShelving Location|CV03 |
| CV04| Item needs to be routed to a different branch to be reshelved | 101NNY20190221 R133000AO11111|ABItem Barcode|AQMAIN|AJTitle |CLReshelve Sort Bin|AAPatron |
CV will not be present when the alert value is set to N, e.g., item can be reshelved at the current branch:

101NN20190221 R133000AO11111|ABItem Barcode|AQMAIN|AJTitle|CLReshelve Sort Bin|AAPatron Barcode|CK001|CRShelving Location|CSCall No

Note: Sort bin (CL) and destination branch (CT) values can also be used to determine if an item is needed for reshelving, a hold, an item schedule, ILL, etc. at the current or a different branch. Look for improvements to sort bin configuration in a future release.

**New fields added to Bill Reason**

Bill Reason configuration has been enhanced to improve current and future integration with your institution’s other financial systems such as a bursar system or online payment processor.

You can now add an accounting code, tax type code, and/or tax type description to each Bill Reason configured for Circulation. Adding these new values is currently **optional**. Values will be empty/null by default.

At this time, the new Bill Reason data will not display in the staff interface. Access to this information is planned for a future release of WorldShare Reports & Report Designer.

![Bill Reasons > Edit Policy: Lost Library Card](image)

**Payment Method added to Payment History**

You can now see the payment method used to pay a bill from the Payment History dialog.
Access Payment History by clicking the Details link from the patron Bills tab.

LHR search preferences for Shared Print & Lending Policy

You can now set preferences to control if LHR shared print and/or interlibrary loan (ILL) lending policy information display in LHR search results. You can enable or disable the display of both the related column and filter.

Student workers or other non-ILL staff may disable the Lending Policy display option to avoid confusion with circulation Loan Policy.

Disable the Shared Print display option if your library does not record shared print commitments in WorldCat.

Manage your preferences by going to Circulation > Discover Items > Preferences > Searching - Basic > LHRs > Display Information in Search Results
Pull List UI style changes

The style of the filter and actions menu on the Pull List have both been updated for consistency and improved usability.
Hold details visible to STUDENT_WORKER_RESTRICTED

The STUDENT_WORKER_RESTRICTED role now allows your student workers to view more details about a hold. From the patron Holds tab, use the View link to open a read-only dialog box that includes the hold note, preferred item locations (unfilled title-level hold only), and appropriate hold dates.

Other CIRCULATION or STUDENT_WORKER roles will continue to see the Edit link from the patron Holds tab and to save changes to the hold.

![Hold details visible to STUDENT_WORKER_RESTRICTED](image-url)
## View Existing Hold Request

- **Patron:** SWRestricted Test
- **Title:** Green Eggs and Ham
  
- **Pickup:** OCLC Library Main Branch
- **Fulfill From:** Any Location
  
- **Hold:** From 02/19/2019 until 02/26/2019
- **Suspend:** From [ ] until [ ]

- [ ] Move patron to top of queue

**Notes:**

- [ ]

[Save Changes] [Close]
Bug fixes

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

If your library uses WorldShare ILL or Tipasa integration, you will no longer be able to manually set the hold shelf expiry date for a borrowed ILL item beyond the ILL due date. An error message will be displayed instead.

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 will be calculated as configured, even if the Exclude open hours setting is disabled in the Hold Fulfillment Policy.

For example, if the pickup location is open from 08:00 - 17:00 on Monday through Friday and 'Exclude open hours' is disabled, the hold shelf expiry date will be calculated as follows:

<table>
<thead>
<tr>
<th>Hold Shelf Period in Hold</th>
<th>Item is checked in at</th>
<th>Hold Shelf Expiry will be</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_Wor...
### Fulfillment Policy

<table>
<thead>
<tr>
<th></th>
<th>Monday</th>
<th>Monday</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Minutes</td>
<td>10:55</td>
<td>11:25</td>
</tr>
<tr>
<td>30 Minutes</td>
<td>16:55</td>
<td>17:25</td>
</tr>
<tr>
<td>1 Hour</td>
<td>10:55</td>
<td>11:55</td>
</tr>
<tr>
<td>24 Hours</td>
<td>16:55</td>
<td>16:55</td>
</tr>
</tbody>
</table>

**Select All column on Checkout screen disappears intermittently**

A fix was released on 19 February 2019 to prevent this issue from occurring. Please contact OCLC Customer Support if you continue to notice this problem.

**SIP2 Patron Information response errors when all held items are in transit to the pickup location**

Your patrons will no longer experience an error viewing their account at self-service kiosks when all their holds have an item in transit to the pickup location.

### Known issues

No known issues were introduced with this release.

### 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: