WorldShare Circulation release notes, April 2019

Release Date: April 7, 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 library will use the new Holds for Review report. See configuration options detailed below.</td>
</tr>
<tr>
<td>Determine if your SIP2-enabled check-in devices can leverage the expanded CL mapping options.</td>
</tr>
</tbody>
</table>

New features

Holds for Review

You can now view a report of unfulfilled hold requests that need to be reviewed. The report contains live (current) data so that you can better monitor your fulfillment services and, if needed, edit or delete holds immediately.

Holds will gain In Review status and be added to the report according to your library’s policy. See below for configuration details.
Holds will no longer be in review if they are deleted, expire, or if a fulfilling item is in transit to the pickup location or on the hold shelf.

Note: If your library is a member of a WMS group and participates in group circulation, the Holds for Review report and its associated policies will apply to requests for your library's patrons.

**Accessing the report**

To view the Holds for Review report, navigate to the Circulation tab and open the **Reports** accordion in the left menu. **Holds for Review** is listed above the Pull List.

Holds for Review has two filters:

- **Patron Branch**
  - By default, this is set to the branch currently selected in WorldShare.

- **Hold Type**
  - By default, this is set to All hold types
  - Hold Types are defined as:
    - **Item Level**: Patron requested a specific, barcoded item.
    - **Title Level**: Patron requested any copy of a title.
    - **Special Requests**: Patron placed a special request or an item-specific request for an unbarcoded item via WorldCat Discovery.
- Supplier (External): An external system has requested your library supply an item. WorldShare Acquisitions, WorldCat Navigator, and ZFL-Server may create supplier-side external holds.
- Requester (External): An external system has requested an item on your patron's behalf. WorldShare Interlibrary Loan, Tipasa, WorldCat Navigator, and ZFL-Server may create requester-side external holds.

**Holds for Review**

Filter by: Patron Branch: Selected (1) ▼ Hold Type: All ▼

Note: At this time, column display cannot be changed. Filters will return to the default setting during your next session.

**Action holds from the report**

As you review the report, you may want to view more details, update the hold, or delete the hold. Use the Actions menu to access the View/Edit option to open the Edit Existing Hold Request dialog box. Use the Delete option to delete the
patron’s hold and send an expiry notice to the patron (if configured).

The STUDENT_WORKER_RESTRICTED role does not have permission to edit or delete holds. Instead, the student worker will see a View action that opens the read-only View Existing Hold Request dialog.

Review status visible from hold queues

If a hold qualifies for review, an In Review status indicator will display in both the patron and title hold queues.
Configuration

For a hold to qualify for review, there must be a corresponding Holds To Review policy in place when the hold is created. Whenever a hold already linked to a policy is edited, the system will recalculate its review parameters based on the current rules in the policy.

Administrators can manage this new policy in OCLC Service Configuration under WMS Circulation > Holds To Review Policy.

By hold type, you can determine if a hold should be reviewed when it is:

- X days, weeks, or months before it will expire at the Needed Before Date and/or
- X days, weeks, or months after it was created

Leaving a period blank will not cause the hold to be placed in review based on that parameter.

The configured periods can be adjusted by hold type:

- Circulation Requests include item-level, title-level, or special requests that are not related to an interlibrary loan or other external system.
- External Borrowing Requests include holds created by an external system on your patron's behalf. You may only need to review these close to the expiry date.
- External Lending Requests include holds created by an external system that need to be supplied by your library.

In the following example, an unfulfilled hold would be eligible for review if any of the following are true:

- Hold is a Circulation Request that was created more than 2 days ago OR
- Hold is a WorldShare ILL borrowing request that will expire in less than 1 week ago OR
- Hold is a WorldShare ILL borrowing request that was created more than 1 month ago
Holds To Review Policies can then be mapped by patron type and material format via the Hold Request Policy Map. A single Review policy can be applied to multiple entries in the map.

If holds do not require review, you do not need to select a Holds To Review Policy in the map.
### Improvements

**Data added to Existing Hold Request dialog**

An unfulfilled hold's created date and any declining branches can be viewed in the Edit Existing Hold Request dialog.

STUDENT_WORKER_RESTRICTED will be able to see these new fields in the View Existing Hold Request dialog.

Neither field can be updated at this time.
Enhanced SIP2 sort bin mapping

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).

Sort bin values (CL) provided by Circulation can be used by your AMH system to move a checked-in item to a particular bin. For example, an AMH could sort items needed for holds into Bin 1, items to be routed to another branch into Bin 2, etc.

Prior to this release, Circulation already provided support for CL mapping based on routing reasons such as Reshelve or Hold.

In this release, CL mapping options have been expanded to include the item’s holding location, shelving location, and/or its destination branch.
To utilize the new mapping options, go to OCLC Service Configuration under WMS Circulation > SIP2 Configuration. Select the appropriate branch and update the Sort Bins map.

At check in, the Sort Bins table will be read from top to bottom, left to right. If no bin value is found, CL will not be sent in the response.

Note: The Use SortBin (CL) field in Checkin response option must be enabled for a CL value to be provided by WMS.

<table>
<thead>
<tr>
<th>Routing Reason</th>
<th>Item Holding Location</th>
<th>Item Shelving Location</th>
<th>Item Destination Branch</th>
<th>Sort Bin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reshelve</td>
<td>NDOSU Main Library</td>
<td>Book Stacks</td>
<td>NDOSU Main Library</td>
<td>01 Reshelve Floor 1</td>
</tr>
<tr>
<td>Reshelve</td>
<td>NDOSU Main Library</td>
<td>Reference</td>
<td>NDOSU Main Library</td>
<td>02 Reshelve Floor 2</td>
</tr>
<tr>
<td>Reshelve</td>
<td>NDOSU Main Library</td>
<td>Reserves</td>
<td>NDOSU Main Library</td>
<td>03 Reshelve Floor 3</td>
</tr>
<tr>
<td>Reshelve</td>
<td>All</td>
<td>All</td>
<td>NDOSU West Branch</td>
<td>10 Route Reshelve</td>
</tr>
<tr>
<td>Hold</td>
<td>All</td>
<td>All</td>
<td>NDOSU Main Library</td>
<td>04 Local Hold</td>
</tr>
<tr>
<td>Hold</td>
<td>All</td>
<td>All</td>
<td>NDOSU West Branch</td>
<td>11 Route Hold</td>
</tr>
<tr>
<td>Scheduled</td>
<td>All</td>
<td>All</td>
<td>NDOSU Main Library</td>
<td>06 Local Hold</td>
</tr>
<tr>
<td>Scheduled</td>
<td>All</td>
<td>All</td>
<td>NDOSU West Branch</td>
<td>11 Route Hold</td>
</tr>
<tr>
<td>ILL</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>12 ILL</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>00 Exception</td>
</tr>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>00 Exception</td>
</tr>
</tbody>
</table>

Note: The following routing reasons were never implemented in WMS and are therefore no longer supported for Sort Bins configuration: Cataloguing, Manual, Repair, and Stack Retrieval.

Admin: Search users by role

As of 13 March 2019, you can easily retrieve a list of users who have a specific authorization role. For example, you can search for staff members at your library who have the STUDENT_WORKER role.

Under the Admin tab in WorldShare, use the new Search by Role feature to select a role. From the search results, you can select specific users and make appropriate changes.
Bug fixes

'Acknowledge' button sometimes inactive

The Acknowledgements dialog displayed an inactive Acknowledge button if you had been asked for and did not provide override credentials earlier in your session. The button will now be active whenever appropriate.

Known issues

No known issues were introduced with this release.

Important links

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