WorldShare Circulation release notes, September 2019

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Release Date: September 15, 2019

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Automatically suspend a patron's borrowing privileges when an overdue item is returned so that your library can punish delinquent patrons without using fees and fines
- Improvements to Discover Items to make it easier for you to search for Local Holdings Records by title or item location
- Bug fixes and performance improvements

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>
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<tbody>
<tr>
<td>If your library will be using the new patron suspension feature, review the related configuration options mentioned in these release notes.</td>
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</table>
New features and enhancements

Patron suspension

Your library can now automatically suspend a patron from using circulation services after the patron returns or renews an overdue item.

While suspended, a patron will be blocked from using most circulation services (see below for details). When the suspension period is over, the patron will automatically regain his borrowing privileges.

The threat of suspension can be used to encourage patrons to return materials on time and to penalize tardiness. You may use suspension as an alternative to or together with overdue fees.

Whenever a patron is suspended, an alert will display in Circulation at the top of the patron's account:

![Suspension Alert](image)

Patrons are notified of their suspension status:

- The new Suspension Notification Policy can be used to send email updates directly to your patrons.
  - See Notification Policies and Patron Type Policy to enable this new notification (see below for more details)
- Suspended patrons attempting to place holds or renew items in WorldCat Discovery or My Account will be notified that their accounts are blocked
- Appropriate screen messages have been made available for SIP2-enabled self-service kiosks.
  - See SIP Custom Messages to make any changes to the default message text.

Note: You may continue to use Patron Type Policy settings to automatically block patrons while their accounts are delinquent. For example, a patron can be blocked while she has more than two items are overdue. You can also use the more permanent Blocked flag to manually block a patron because of her status in another campus system, etc. Patron Type Policy limits and the blocked flag will continue to be managed independently of suspension.
Suspension & circulation services

The following describes what your patrons can and cannot do while suspended.

<table>
<thead>
<tr>
<th>WHILE SUSPENDED, A PATRON CANNOT</th>
<th>WHILE SUSPENDED, A PATRON CAN</th>
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<tbody>
<tr>
<td>• Check out items</td>
<td>• Search WorldCat Discovery and access electronic resources</td>
</tr>
<tr>
<td>• Renew items already on loan (including automatic renewals)</td>
<td>• View the My Account page</td>
</tr>
<tr>
<td>• Place holds</td>
<td>• Receive notification emails</td>
</tr>
<tr>
<td>• Recall items on loan to other patrons</td>
<td>• Return items already on loan</td>
</tr>
<tr>
<td>• Pickup items for existing holds or item schedules</td>
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<tr>
<td>◦ The Pull List will not display items needed for a suspended patron</td>
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<td>◦ Checking in an item will not fulfill a request for a suspended patron</td>
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<tr>
<td>• Perform proxy borrowing activities</td>
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<tr>
<td>◦ All proxy accounts will be suspended when the primary account is suspended.</td>
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<tr>
<td>◦ Proxy activity will contribute to the suspension status of the primary account</td>
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<tr>
<td>• Use SIP2-enabled services that use Patron Information Request to verify if a patron is in good standing (BLN for suspended patrons)</td>
<td>• Schedule items or rooms (staff mediation required)</td>
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<td></td>
<td>• Claim items already on loan as lost, returned, etc.</td>
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<tr>
<td></td>
<td>• Create, pay, refund, etc. any bills</td>
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<tr>
<td></td>
<td>• Proceed with some restricted activities if:</td>
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<tr>
<td></td>
<td>◦ You decide to allow a checkout, renewal, etc. at your discretion</td>
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<tr>
<td></td>
<td>◦ The event occurred offline and is later uploaded to WMS</td>
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<tr>
<td></td>
<td>• Use SIP2-enabled services that use Patron Status Request (23) to verify if a patron is valid (BLY for suspended patrons)</td>
</tr>
</tbody>
</table>

Note: See [Circulation account roles](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation_Release_20191106) to learn more about which staff roles are required to manage suspension.
Viewing suspension details

When you are assisting a suspended patron, you can find more details about the patron's status and history under the Suspension tab.

The Suspension History accordion includes details about suspension events, including the reason for suspension, the related item, and a summary of how much suspension was added:

![Suspension History Table](image)

Use the Details link to see more information about a suspension event or to add/edit notes:
Note: Both suspension and billing history are retained by the system until the user's account is deleted.
Automatically suspending patrons

You can leverage suspension policies to automatically add suspension time to a patron's account.

First, suspension is automatically applied when a patron returns an overdue item. Staff will be notified on the Check In screen if the returned item has resulted in a suspension:

![Check In screen](image)

Second, suspension is applied when you renew an overdue item on a patron's behalf. This suspension penalizes the patron for allowing the item to become overdue. You will be warned when attempting a renewal that could add suspension:

![Confirmation Dialogue](image)
Getting started

If your library is interested in using suspension, you can begin by configuring the following policies and settings.

1. Set a Maximum suspension period in Patron Type Policy
   ◦ The maximum suspension period indicates how long a patron can be suspended at any given time.
   ◦ By default, all patrons will have a maximum suspension period set to No Limit.
   ◦ If a patron type should never be suspended, you can set the maximum suspension period to 0 Minutes.
   ◦ You can configure maximum suspension periods in Service Configuration > WMS Circulation > Patron Type Policy
2. Create **Suspension Notification Policies**
   - Keep your patrons informed about suspension activity by enabling email notifications.
   - When configured, suspension notifications will be sent hourly to any patrons that have had suspension time added in the previous hour.
   - Suspension notifications include:
     - Your library's configured subject line, start text, and end text
     - The patron's suspended-until date (as-of sending the email)
     - Details about suspension-related events
   - You can configure one or more suspension notification templates in **Service Configuration > WMS Circulation > Notifications and Receipts > Notification Policies**. Note that printed notifications are **not** supported at this time; this feature will be added in the next release.
   - You can then select the appropriate **Suspension Notification Policy** from the Billing and Suspension section of **Patron Type Policy**.

![Billing and Suspension](image)

3. Create **Suspension Reasons**
   - Suspension reasons describe why a patron was suspended.
   - You can configure suspension reasons in **Service Configuration > WMS Circulation > Billing and Suspension > Suspension Reasons**

![Billing and Suspension > Suspension Reasons > Create New Policy](image)
4. Create Suspension Structures
   ◦ A suspension structure is used to define how long a patron should be suspended after returning an overdue item.
   ◦ You can configure suspension structures in Service Configuration > WMS Circulation > Billing and Suspension > Suspension Structures
   ◦ There are two types of structures:
     1. **Fixed Suspension** will suspend a patron for a set period of time per item returned.
2. **Periodic Suspension** can be used to change the rate of suspension penalties to reflect how long the item has been overdue.

The following periodic structure is read as: 'Suspend the patron for 15 minutes for every 1 minute overdue for the first 4 hours after the due date. Then suspend the patron for 1 hour for every 1 hour overdue for the next 8 hours after the due date.' etc.
5. Select a **Suspension Structure** in **Loan Policy**
   - Activate suspension penalties by selecting a Suspension Structure in a relevant Loan Policy
   - You can select a Suspension Structure from **Service Configuration > WMS Circulation > Loans > Loan Policy**

Caution: Patrons will be suspended according to the overdue suspension structure that is selected in the Loan Policy *when the overdue item is returned or renewed*. Therefore, suspension will be applied to overdue items already on loan under this Loan Policy.

Note: If your library participates in group circulation, suspension policies are set by the library that owns the overdue item. The suspending library is visible in the **Suspension Details** dialog (see above). To limit suspension penalties levied against your patrons, use the maximum suspension period in **Patron Type Policy**.
Other considerations

Suspension is cumulative. If the patron is not already suspended, the suspension period will begin at the time of the check-in or renewal. If the patron is suspended, suspension time will be added to the end of the current suspension period.

The patron's suspension period will not be extended if the patron is currently suspended for the maximum period allowed by Patron Type Policy (see above). Patrons can continue to return overdue items, but no suspension time will be added.

All automatic suspension calculations will honor any backdating done at check in.

The automatic suspension calculator will honor the following policy settings:

- **Overdue Grace Period** ([Loan Policy](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation)): If an item is returned during the grace period, then no suspension time will be added.

- **Recall Due Date & Grace Period** ([Loan Policy](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation)): If a recalled item is returned during the grace period, then no suspension time will be added. If returned outside of the grace period, the recalled due date will be used to calculate how long the item has been overdue.

- **Accrue bills and/or suspension when closed?** ([Loan Policy](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation/Release_notes_and_known_issues/2019_WorldShare_Circulation)): Your library's open hours will be used to calculate the overdue duration for periodic suspension structures only if this setting is set to **No**.

At this time, your library's open hours will **not** be considered when calculating the suspension period. For example, a suspension period of seven days will include Saturday and Sunday even if your library is closed on weekends.

Patrons will **not** be automatically suspended when:

1. An item becomes long overdue
2. Claiming an overdue item as lost, returned, or never had
3. Returning a long overdue or claimed item
4. Staff checkout an overdue item to a different patron without checking in the item first (i.e. bad checkout)

Note: The ability to manually update a patron's suspension status will be added in the next release of WorldShare Circulation.
Improvements to Discover Items

Several improvements have been made to item searching and management in WorldShare Circulation.

New LHR index for OCLC number of the bibliographic record

A new index (bn:) has been added to list of indexes for searching local holdings records. You can use this index to find all of the LHRs associated with a specific OCLC number.

Updated labels for item locations

In order to use consistent terminology across all WorldShare applications, the following field labels have been updated:

- In the list of LHR search indexes, the 'Location' index was renamed 'Branch/Shelving Location'
- In LHR result lists, the 'Location' filter was renamed 'Branch/Shelving Location'
- In Item Details, the 'Holding Location' field was renamed 'Branch'
Bug fixes

Item barcode searching not working as expected when creating bills for ILL items

Prior to this release, an item barcode search would not retrieve temporary items created via interlibrary loan (ILL) integration when you attempted to manually link the item to a new bill. This issue has been resolved.

SIP2 Item Information Response sends null fee type value when item not found

The WMS SIP2 Service provided an Item Information Response (18) message that would cause an error in some SIP2 clients.

When requesting Item Information (17) for an unknown item barcode, the response from WMS would include an empty fee type value. As of this release, the fee type for ‘Unknown/Other’ (01) will be provided instead.

Example response: 1800010120190722 Q043514AFTThis item is unknown.

Completing a lending request in Tipasa automatically fulfills a local hold

Tipasa integration for lending libraries will no longer fulfill holds or item schedules when a request is updated to Checked-in/Complete. Instead, the item will always be updated to Available/Unavailable status per your Location Policy. The item may then appear on the Pull List at its holding location, if applicable. This change will give your library time to process recently-returned items before the system notifies your patron that the item is ready for pickup.

Known issues

See the Known Issues page.

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