WorldShare Circulation release notes, October 2019

Last updated: Fri, 31 Jul 2020 19:35:57 GMT

Release Date: October 13, 2019

Introduction

This release includes new features and enhancements:

- Manually update a patron's suspension status to penalize or forgive patron behavior without using fees and fines
- Identify Digby check-in events in Transaction History to better monitor activity that happened in the mobile app
- 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 patron suspension feature, review the related configuration options mentioned in these release notes.</td>
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</table>
New features and enhancements

Manually update patron suspension

Your library can now manually update a patron's suspension status.

Manual updates to the patron's suspension period can be used to penalize patrons for bad behavior. For example, a patron may lose his circulation privileges after losing too many items, damaging library property, bringing food into a reading room, etc. At your discretion, you may also reduce a patron's penalty by subtracting time from the suspension period.

This capability adds to the automatic suspension feature that was introduced last month. You may manually suspend patrons even if your library does not utilize automatic suspension.

When you are assisting a patron, use the Update Suspension option at the top of the Suspension tab.

From the Update Suspension dialog box, you can:

- Select the relevant suspension reason.
- Change when the suspension period will end.
  - If the patron is already suspended, then the current suspended-until date will be pre-populated in the update form for easy reference.
  - If the patron is not suspended, then the suspend-until date will default to the current date at 11:59 PM.
- Link the suspension update to a specific item, where relevant.
- Add a note.

Changes to the patron's suspension status will take effect immediately after your update.

https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_Worl...
Note: Because of the potentially serious consequences of restricting a user's access to circulation services, you will need the CIRCULATION_ADMIN role to make manual suspension updates. If you have only have one of the other circulation or student worker roles, you will be required to provide override credentials. The examples below show the Update Suspension dialog for CIRCULATION_ADMIN vs. STUDENT_WORKER_RESTRICTED:

![Update Suspension Dialog](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2019_Worl...)

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
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<tbody>
<tr>
<td>Patron</td>
<td>Student, Stijn</td>
</tr>
<tr>
<td>Suspending Library (Branch)</td>
<td>WMS University (Main Campus)</td>
</tr>
<tr>
<td>Suspension Reason *</td>
<td>Damaged Item</td>
</tr>
<tr>
<td>Suspend Until *</td>
<td>10/18/2019 11:59:59 PM</td>
</tr>
<tr>
<td>Item</td>
<td>Bib/OCLC #</td>
</tr>
<tr>
<td></td>
<td>or</td>
</tr>
<tr>
<td></td>
<td>211186000056716</td>
</tr>
<tr>
<td>Notes</td>
<td>Disc is cracked</td>
</tr>
</tbody>
</table>
A supervisor override will be required to complete this action

**Suspending Library (Branch)**
WMS University (Main Campus)

**Suspension Reason**
Damaged Item

**Suspend Until**
10/18/2019 11:59:59 PM

**Item**
Bib/OCLC #
or
211186000056716

**Notes**
Disc is cracked

[Update Suspension] [Cancel]
The system will warn you if the suspension period you have selected exceeds the maximum suspension period. You will be allowed to proceed after acknowledging the limit.

The patron's suspension history will include an entry for every successful update to keep a record for helping the patron, troubleshooting problems, etc. Suspension history will indicate if time was added to or subtracted from the patron's suspension period.

Details about your update will also be included in any Suspension Notification email configured to be sent to the patron.

Note: If your library participates in group circulation, any library in the group can manually update a patron's suspension status. 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.

Getting started

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

- **Suspension Reasons**
  - You may need at least value that can be used when you are reducing a patron's suspension period.
- **Maximum suspension period** set in Patron Type Policy
- **Suspension Notification Policy** linked to Patron Type Policy

See the September 2019 release notes for more details about using and configuring automatic suspension.
Identify Digby check-in events in Transaction History

As of this release, you will be able to identify Digby as the transaction source of circulation events.

If your library retains transaction history, Digby will be identified as the source of check-in events in Transaction History for a patron or item.

This change is not retroactive. For events that occurred prior to this release, the source for Digby activity will continue to display as 'External Application.'

Note: Activity done via the WMS Circulation API or WMS NCIP Service will continue to display the 'External Application' source.

Learn more about Digby by reviewing the Digby app FAQ.

![Transaction History Table](image-url)
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