Release Date: 15 November 2019

Introduction

This release of WorldShare Reports and Report Designer provides a number of new features and enhancements in addition to bug fixes. These features will help you manage more complex workflows, including:

- Utilize new patron data in reporting and SFTP file usage
- Utilize circulation patron suspension data in reporting
- Tipasa institutions can now utilize existing patron reports and patron universe

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.

ACTION

- If your institution currently utilizes the SFTP Circulation Patron Full or Circulation Patron Week files, you may need to modify your processes based on these files to maintain functionality. Additional columns have been added at the end of each row.
- Some OCLC standard reports have been modified, including the Overdue Items Aging Report and the Patron Information Detail report. If your institution utilizes any scripts/programs to read and process the output of these reports, those scripts/programs may need to be modified to continue functionality.
New features and enhancements

Utilize additional patron data in reporting and SFTP data extract usage

Patron Staff Notes and Patron Public Notes fields added to patron sections of all circulation universes

The patron staff and public notes are now available for your institution to utilize in existing or custom reports you may develop in Report Designer. These fields were not available prior to this release.

The new notes fields are defined as such, and are sourced from the Admin module within WorldShare:

- **Patron Public Notes**: Additional information about a patron that is supplied by library staff and can be shared with the patron.
- **Patron Staff Notes**: Additional information about a patron that is visible only to library staff.

Note: The notes fields are limited to 4,000 characters each.

Users will find these new fields in the following universes:

- Circulation Events
- Circulation Fiscal Transactions
- Circulation Hold Request
- Circulation Item Status
- Circulation Patron Information
- Circulation Scheduled Items
Report Designer users may want to utilize these fields to find subsets of patrons that have notes containing certain phrases.
Patrons with multiple notes will see all the notes for the given type (staff or public) in the one field, with values separated by the pipe character (|). The notes are ordered from newest to oldest.

<table>
<thead>
<tr>
<th>Patron Barcode</th>
<th>Patron Public Notes</th>
<th>Patron Staff Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1888800127</td>
<td>A public note</td>
<td>Another staff note</td>
</tr>
<tr>
<td>1888800176</td>
<td>N/A</td>
<td>Left card at Circulation desk</td>
</tr>
<tr>
<td>policy</td>
<td>N/A</td>
<td>Note #3</td>
</tr>
</tbody>
</table>

Patron data added to the weekly SFTP patron files

Additional patron data is now available to your institution to utilize in the weekly SFTP Circulation Patron Full or Circulation Patron Week files. These fields were not available prior to this release. The fields were added to end (right-most) of the file and include:

- Patron Custom Category 1
- Patron Custom Category 2
- Patron Custom Category 3
- Patron Custom Category 4
- Patron Country
- Patron Public Notes
- Patron Staff Notes
Note: If you have automated processing setup for these weekly files, you may need to modify your processes to maintain functionality.

**Patron ILL and Patron Country fields added to patron sections of all circulation universes**

Patron ILL fields and Patron Country field are now available to your institution to utilize in existing or custom reports you may develop in Report Designer. These fields were not available prior to this release. Report Designer users may want to utilize these fields to find subsets or counts of patrons that have certain values contained in these fields (e.g., provide a count of your patrons that are blocked from Interlibrary Loan services).

The new fields are defined as such:

- **Patron Country**: The country of the patron's primary mailing address.
- **Patron ILL Approved Flag**: Value (‘Y’, ‘N’, or ‘N/A’) indicating if the patron is explicitly approved for ILL services. If the institution has set to require approval for new ILL patron accounts in Service Configuration, then a value of ‘Y’ would indicate the patron is approved.
- **Patron ILL Blocked Flag**: Value (‘Y’, ‘N’, or ‘N/A’) indicating if the patron is blocked from ILL services. A value of ‘Y’ would indicate the patron is indeed blocked. A value of ‘N’ or ‘N/A’ would indicate the patron is not blocked.
- **Patron ILL Identifier**: The unique identifier assigned to the patron who can request ILL services.
- **Patron ILL Patron Type**: The borrower category (e.g., Undergraduate) of the patron, supplied by the institution.
- **Patron ILL Pickup Location**: The default library branch or location at which the patron can pick up their ILL request.

The patron ILL fields are sourced from the Interlibrary Loan section of the Admin module in WorldShare.
Patron ILL and Patron Country fields added to Patron Information Detail Report

Patron ILL fields and Patron Country field have been added to the OCLC standard report Patron Information Detail. These fields were not available in this report prior to this release.
Utilize circulation patron suspension data in reporting

To support [patron suspension functionality](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2019_Releas...) now offered in the WMS Circulation module, WorldShare Reports and Report Designer has added select fields associated with the action, to utilize in your reporting and analysis.

**Patron suspension details added to Circulation Events universe**

Your institution will now be able to utilize new data fields associated with circulation patron suspension actions in reporting. The event based fields will be associated to the ‘Suspend-Patron’ circulation events. You will now be able to find details about your suspension events and analyze the most common suspension reasons.

The new fields are defined as such:

- **Event Patron Suspension Reason**: The reason that a suspension event occurred. Reason values are defined by the institution.
- **Event Patron Suspended Until Date**: The date and time when the user's suspension period was scheduled to end as-of the event.
• **Event Suspension Institution Name**: The institution whose policies or staff initiated a suspension event.

• **Event Suspension Institution Symbol**: The three or five-character code assigned by OCLC to identify the institution whose policies or staff initiated a suspension event.

• **Patron Suspended Until Date**: The date and time when the user's suspension period will end and access to circulation services will be restored. The patron is not suspended when this date is in the past.

  Note: This is the current state of patron's suspended until date. This field is also added to the following universes: Circulation Fiscal Transactions, Circulation Hold Request, Circulation Item Status, Circulation Patron Information, Circulation Scheduled Items.

**Patron Suspended Until Date added to the Patron Information Detail Report**

The new Patron Suspended Until Date field has also been added to the Patron InformationDetail Report. The patron is not suspended when this date is in the past. Report Designer users at your institution may wish to develop custom queries to filter subsets of your patrons based on this date (e.g., provide a list of current suspended patrons).
Patron reporting available for Tipasa institutions

OCLC standard patron reports available to Tipasa institutions

The following OCLC standard reports are now available to Tipasa institutions:

- **Circulation Data Last Refreshed**: This report shows the latest date that the Circulation data was last updated.
- **Patron Counts Summary Report**: Counts of patrons by branch.
- **Patron Information Detail Report**: Detailed Patron Information.

Tipasa institutions can utilize the Patron Counts Summary Report to analyze how many patrons they have by branch, by zip code, and by the patron custom categories. The Patron Information Detail Report has multiple prompt filters to allow you to get details about specific subsets of your patrons, e.g., your patrons that have newly registered within the last 6 months, or your patrons that have had (or haven't had) activity in the last year.

Circulation Patron Information universe available to Tipasa institutions

The Circulation Patron Information universe is now available to Tipasa institutions. With Report Designer, you will be able to create custom reports on vast amount of patron data made available in this universe.
Other enhancements

Acquisitions Statistics Value added to the Acquisitions universe

To support the Statistics Value feature in Acquisitions, WorldShare Report Designer has made this value available for your custom reporting. You can now track the number of volumes associated with an order item using the Statistics Value field. This field will allow you to report the summed totals of these volumes.

Statistics Value: Value representing the number of volumes being received for a specific order item. This value is used for generating statistics for the total number of volumes for the library. It must be enabled by Customer Support to display in Acquisitions. The default value is 1.
Publication Date and Edition added to the Circulation Item Status universe

The Item Publication Date and Item Edition have been added to the Circulation Item Status universe. WorldShare Report Designer users will be able to utilize these fields in queries against this universe. Prior to this release, to get these fields into your results, you were required to build a multi-universe query against the LHR Item Detail universe (or Institution Title Holdings). Now they are directly available for your use.

Note: The Item Publication Date is a string field, so math operations against it may produce unexpected results, as values include typical cataloging examples such as 19uu, uuuu, and 2010.
Title level holds now contain bibliographic data in Circulation Events

Place-Hold circulation events that are title-level holds will now contain the relevant bibliographic data associated to the title, including Title, Material Format, etc. Prior to this release, only item-level holds contained this bibliographic data, and title-level holds did not. Therefore, you could not count hold history by title.

Note: Historical circulation events data from 1 January 2018 to the present will now reflect this bibliographic content. With WorldShare Report Designer, you can now report historical counts of all hold events (both item-level and title-level holds) by title.
Enhancements to the High Use Circulation Titles Summary Report

The High Use Circulation Titles Summary Report has been updated in a few ways. It will now only report titles that have at least a count of 1 for one of the measures in the report: Items Checked Out, Items Renewed, Holds Fulfilled, Items Soft Checked Out. Prior to this release, some titles would appear on this report even when all four of these measures were 0.

Also, the prompts for this report have changed. New optional prompts have been added for:

- Circulation Event Branch Name
- Item Material Format
- Item Permanent Shelving Location

These new prompts will allow you to pinpoint your report to clearer, more concise results.
Enumeration and Chronology added to the Overdue Items Aging Report

The Overdue Items Aging Report has been updated to include the Item Enumeration and Chronology in the results. It will appear next to the Item Call Number column. Prior to this release, this column wasn't there and required WorldShare Report Designer users to customize the report in order to display the specific enumeration/chronology of the item.
Totals added to the Circulation Add-Delete Report

The Circulation Add-Delete Report has been enhanced to include total counts at the bottom of the report, to reflect adds and deletes. The total adds will appear under the LHR Date Entered on File column, while the total deletes will appear under the Item Deleted Date column. Previously, you would have to manually count your rows, or customize this report, or export the details to Excel and sum them.

![Circulation Add-Delete Report Example]

Bug fixes

Acquisitions Copy Cancellation Date now populated correctly

The Copy Cancellation Date in the Acquisitions universe now contains the correct values as recorded by the Acquisitions module. Prior to this release, the date always contained the equivalent of no value: 01-01-0001.
Known issues

A list of all current known issues is available here.

Support website(s)

Support information for this product and related products can be found at:

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