WorldShare Circulation release notes, January 2020

Release Date: January 12, 2020

Introduction

This release includes new features and enhancements:

- Integrate with Relais D2D to make it easier to incorporate your consortial borrowing and lending activity into your local workflows
- Sort the Pull List by patron name or category to ensure that items are pulled efficiently
- 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.

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Libraries wishing to integrate with Relais D2D should review policies and settings in Service Configuration related to integration.

Please see Integration with Relais D2D for additional details.
New features and enhancements

Integration with Relais D2D

WorldShare Circulation now offers an enhanced integration with Relais Discovery to Delivery (D2D), an interlibrary loan service (ILL) offered by OCLC to optimize consortial borrowing.

If your library uses D2D, this integration will allow you to streamline the process of borrowing and lending materials.

For borrowing, a temporary item and patron hold can be created automatically in Circulation when the related borrowing request is received in D2D to make it easier for you to circulate that item to the patron in WMS. Circulation will honor any pickup location and/or due date provided by D2D. The D2D indicator will display on the item record, hold queue, and checkout screens for easy reference.
When you are acting as the lending library, Circulation can automatically checkout the item that you have loaned in D2D to ensure that your catalog is updated. Circulation will honor any due date provided by D2D and display the D2D indicator for easy reference. In D2D, you can specify separate WMS user accounts to represent each library that borrows from you.

For both borrowing and lending, the loaned item can be checked in automatically as soon as the loan is complete in D2D to save your staff the extra step of scanning the item in Circulation.

To learn more, see Integration with Relais D2D.
Sort the Pull List by patron name or borrower category

You can now sort the Pull List alphabetically by Patron Name or Borrower Category.

Sort by Patron Name to verify that you have pulled all of the items requested by a specific patron prior to fulfilling the holds and sending a pickup notification.

Borrower Category is a useful sort if you would like to prioritize requests from faculty, etc.
Bug fixes

Alternate Shelf Locations do not display on the Pull List
Since the October 2019 release, the Alternate Shelf Locations column has not displayed on the Pull List. Alternate shelf location(s) indicate the preferred item locations for fulfilling a title-level hold or special request. As of this release, this column has been added back to the display.

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