WorldShare Circulation release notes, June 2020

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Release Date: June 7, 2020

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Automatic creation of membership fees and integrated membership period management to help your library control access to circulation services and save staff time.
- Bug fixes and performance improvements

In mid-June 2020, OCLC is launching a new My Account interface to replace the existing portal for WMS users. More details are provided below.

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 membership management feature, review the related configuration options mentioned in these release notes.</td>
</tr>
<tr>
<td>You may wish to allocate time to proactively enter expiration dates for any existing members that you may be</td>
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New features and enhancements

Manage library memberships

Your library can now use WorldShare Circulation to manage library memberships.

Memberships are one way that your library may cover operational costs by asking some or all patrons to pay a fee to access the library's loan services. For example, alumni or guest researchers may need to pay an annual fee before being allowed to check out items. Your library may require a paid membership from all, some, or none of your patrons.

As of this release, the system will check the patron's membership status whenever staff view the account in Circulation or the patron attempts to use circulation services from WorldCat Discovery, My Account, a SIP2-enabled service like a self-service machine, etc. In a future release, membership policies will also be applied automatically when a new user account is created.

While a patron's membership if active, a message will display in Circulation at the top of the patron's account:

If a membership fee is owed, a warning will display and the patron will be blocked from checking out or renewing items, etc. until the bill is fully paid or waived. If the patron's previous WMS membership has expired, the old expiration date will display in the Account Overview accordion for reference:
Your library may already be managing memberships in a different system. If Circulation policies indicate that a membership is required for a new or existing user and no past membership is found in WMS, then the system will treat the patron's membership status as 'unknown' and ask you to update the patron's status:

Click the **Update** link to specify if this patron is an existing or new member.

In the **Update Membership Information** dialog, select **Existing** if the patron already has an active, paid membership. Specify the expiry date to unblock the patron's account without creating a new bill:
But if the patron needs to be billed again, select **New** to invoke the relevant membership policy, create a bill, and block the patron's account until the bill is resolved:

Note: All circulation and student worker roles will allow you to update an 'unknown' membership status. See [Circulation Account Roles](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2020_WorldShare_Circulation_Release_notes_and_known_issues#circulation-account-roles) to learn more.

**Patron communication**

Patrons are notified of their membership status in several ways:
• The new **Membership Bill Notification Policy** can be used to notify the patron that a membership bill is due.

• The new **Membership Confirmation Notification Policy** can be used to confirm that the patron's membership is now active and to provide the expiration date for her records.

• Patrons with an unpaid membership bill or an expired/unknown membership status will be prevented from renewing their current loans in My Account.

• Appropriate screen messages have been added for SIP2-enabled self-service kiosks.
  ◦ See [SIP2 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, including when a patron owes too much in fees. You can also use the [Blocked flag to manually block a patron](#) because of her status in another campus system or to set the user's expiration date to coincide with the end of the membership period, where appropriate. Patron Type Policy, the blocked flag, and the account expiry date will continue to be managed independently of membership.

**Membership & circulation services**

The following describes what your patrons can and cannot do while their membership status is expired or unknown:

<table>
<thead>
<tr>
<th>PATRONS WITH AN EXPIRED OR UNKNOWN MEMBERSHIP STATUS CANNOT</th>
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</tr>
</thead>
<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>• Pickup items for existing holds or item schedules</td>
<td>• Receive email notifications</td>
</tr>
<tr>
<td>• Perform proxy borrowing activities</td>
<td>• Return items already on loan</td>
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</tbody>
</table>
  ◦ All proxy accounts will share the membership status of the primary account
| • Use SIP2-enabled services that use Patron Information Request to verify if a patron is in good standing (BLN for inactive members) | • Claim items already on loan as lost, returned, etc. |
|                                                           | • Place holds, schedule items or rooms, or recall items on loan to other patrons |
|                                                           | • Create, pay, refund, etc. any bills |
|                                                           | • Proceed with some restricted activities if: |
  ◦ You decide to allow a checkout or renewal at your discretion
  ◦ The event occurred offline and is later uploaded to WMS
|                                                           | • Use SIP2-enabled services that use Patron Status Request (23) to verify if a patron is valid (BLY for inactive members) |
Getting started

By default, membership will **not** be required for any of your library patrons.

You can leverage membership policies to automatically determine if a patron owes a membership fee and the terms of the membership period.

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

1. **Create membership Notification Policies**
   - Keep your patrons informed about their membership status by enabling email notifications.
   - When configured, membership notifications will be sent hourly to any patrons that have had relevant membership activity in the previous hour.
   - There are two notification types for membership:
     - **Membership Bill Notification** notifies the patron that a membership bill has been created against her account.
       - This email includes your library's configured subject line, start text, and end text as well as the billed amount and the period of membership time this will purchase.
       - **Note:** The standard **Bill Notification** will also include the membership bill details but will not include the membership period information.
     - **Membership Confirmation Notification** notifies the patron that her membership has been activated.
       - This email includes your library's configured subject line, start text, and end text as well as the original billed amount and the expiration date of the membership.
   - You can configure one or more versions of each notification policy in **Service Configuration > WMS Circulation > Notifications and Receipts > Notification Policies**. Note that printed notifications are **not** supported at this time.

2. **Create Membership Policies**
   - A membership policy is used to define the terms of the membership, including cost and duration.
   - You can configure membership policies in **Service Configuration > WMS Circulation > Billing and Suspension > Membership Policies**.
   - Set the appropriate fee amount, bill reason, and membership period, i.e. how long the membership should be active after the bill is fully paid or waived.
   - Select any membership notifications created in the previous step.
3. Select a Membership Policy in Patron Type Policy
   ◦ Activate membership requirements by selecting a Membership Policy in a relevant Patron Type Policy.
   ◦ You can select a Membership Policy from Service Configuration > WMS Circulation > Patron Type Policy.
   ◦ By default, no Membership Policy will be selected.
   ◦ You can remove a Membership Policy at any time:
     ▪ Active memberships will continue to display in the patron's account in WorldShare Circulation
     ▪ Patrons with an expired or unknown membership status will be no longer be blocked by the system
     ▪ Caution: Any pending membership bills will need to be manually canceled by library staff. Use the Outstanding Fees and Bills Report to identify orphaned bills.
Note: You will be able to set membership policies only for your own, local patrons. If your library participates in group circulation, the patron's membership status will control what she is allowed to do across the entire group. For example, Library A may require membership for its alumni but cannot require membership for alumni of Library B. If the membership of an alumnus of Library A expires, then he will not be able to checkout items owned by any library in the group.

**Other considerations**

A membership is activated when the associated bill is fully paid or waived OR when library staff set an expiration date in the future when updating the membership status of an existing member.

All memberships will end after 11:59:59 PM in your local institution time on the specified expiration date. The minimum membership period is 1 day; this will expire at 11:59:59 PM on the day after the membership bill is resolved.

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

Membership expiration dates **cannot** be edited or cleared once set by the system.

You may cancel a membership bill to indicate that a paid membership is no longer required. However, you may need to update either the user's Patron Type or the Patron Type Policy to ensure that the system will not block the patron or recreate the bill later. For example, a bill was created while a user was assigned to a Patron Type requiring membership. The patron has since enrolled at your institution and no longer needs to pay the bill. You should update the...
patron record to reflect the user's enrollment status and then cancel the bill.

Continue to monitor the release notes for WorldShare Circulation and WorldShare Reports & Report Designer for enhancements to membership management.

Updated My Account portal coming in June 2020

OCLC is launching a new My Account interface to replace the existing portal for WMS users. By combining expert user interface design with input from the community, the new interface will offer a refreshed look and improved accessibility.

The new My Account’s initial release will be in mid-June and additional features will be added in the future. Access to the My Account features will depend on the OCLC services your library uses.

- If your library uses WorldCat Discovery, along with WMS, your users will enjoy a refreshed, WCAG 2.1-compliant user interface, access to WMS circulation information (checked-out items, holds, and fees), and saved searches. Your users will continue to manage their lists in the same My Account interface they currently use.

- If your library uses Tipasa and WorldCat Discovery, along with WMS, your users will see their circulation activity (checked-out items, holds, and fees), Tipasa ILL requests, and saved searches all in one unified interface. The new My Account will provide library users with a single easy-to-use interface for managing all their interlibrary loan and circulation activities. It also will eliminate the need for users to move back and forth between the existing Tipasa user portal and WorldCat Discovery’s My Account pages.

- If your library also uses Course Reserves as part of WorldCat Discovery, your users will access Course Reserves information in My Account as well.

- If your library uses WMS only, the new My Account will provide your library users with a refreshed look and improved accessibility to review their circulation activities.

Library users will not need to take any action to begin using the new My Account. Everything in their current profiles/accounts will transfer automatically. However, OCLC has identified a few things you may want to do to help prepare for this change. We will provide more details as we get closer to the June launch.

Documentation for WMS, WorldCat Discovery, and Tipasa is currently being updated with information about the new My Account and will be available when the refreshed interface is released in June.

Please contact OCLC Support in your region with questions about using the new My Account feature.

Bug fixes

LHR Receipt Status value of '| - No attempt to code' causes errors when managing items

LHRs with an unexpected Receipt Status (008/06) value would result in errors when library staff viewed the Copies screen, tried to receive new serial issues, etc. As of this release, unexpected Receipt Status values will be treated like '0 - Unknown.'

Item updates do not honor the currency of the item cost

When editing an item in Discover Items, all item costs were saved using your library's currency from the WorldCat
Registry even if the LHR originally included a cost in a different currency. The item editing form has been updated to allow you to select and save a cost in any currency already included in the LHR.

This change was released on 30 May 2020.

Note: Use WorldShare Record Manager to manage costs with a new currency.

Known issues

See the Known Issues page.

Important links
WorldShare Record Manager release notes

The May 2020 release of WorldShare Record Manager includes new bulk update capabilities to help your library update a set of LHRs.

Your library can now define bulk scripts to:

- Add or delete any LHR field or subfield
- Replace a string found in any LHR subfield

This release also includes several enhancements to label printing and the sorting of LHR search results.

See the [WorldShare Record Manager release notes](https://help.oclc.org/Library_Management/WorldShare_Record_Manager/Release_notes_and_known_issues/2020_WorldShare_Record_Manager_release_notes) for more details.

Support website(s)

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

- [WorldShare Circulation](https://help.oclc.org/Library_Management/WorldShare_Circulation)
- [Contact OCLC Support](https://help.oclc.org/Library_Management/Contact_OCLC_Support)
- [OCLC Community Center](https://help.oclc.org/Library_Management/OCLC_Community_Center)
- [Browser compatibility chart](https://help.oclc.org/Library_Management/Browser_compatibility_chart)