WorldShare Circulation release notes, July 2020

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Release Date: July 19, 2020

Introduction

This release of WorldShare Circulation provides new features and enhancements:

• Updated user index options to make it easier to search by identifier, email address, or phone number
• Enhancements to library membership management to improve automation and patron notifications
• Bug fixes and performance improvements

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.

If your library will be using the new membership management feature, review the related configuration options mentioned in these release notes.

Monitor the OCLC Community Center for updates concerning the new My Account experience.

New features and enhancements
Updated options for searching users

The search options available in Assist Patrons have been updated to align with changes in WorldShare Admin. See the WorldShare Admin release notes for more details.

We appreciate the feedback received regarding these changes and will continue working on improvements for the search function. The following are the first phase of improvements; additional modifications will be completed for release later in 2020.

In the Assist Patron search:

- **Everything** index has been removed
- **Name** index is the new default index for the secondary user search
- **Identifier, User ID at Source, Email Address, and Phone Number** indexes have been added


The **Name** index is now used when you search for a user to link to a hold, item schedule, or room schedule to a patron or when selecting a user to act as when downloading the Offline Client.
Note: The **Everything** index will not work as expected between 17 July and the Circulation release on 19 July. During this time, **Everything** will search the **Identifier** index only.

**Enhancements to library membership management**

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. See the [WorldShare Circulation release notes, June 2020](https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2020_WorldShare_Circulation_Release_Notes_June_2020) for more details.

As of this release, the membership management feature has been enhanced with improved automation and a new expiry reminder notification.

**Automatically create membership bills for new users & expired members**

Prior to this release, the system would check the patron’s membership status only when staff viewed the account in Circulation or the patron attempted to use circulation services from WorldCat Discovery, My Account, a SIP2-enabled service like a self-service machine, etc.

This release introduces improved automation so that patrons can be notified of their membership bills as quickly as possible. No configuration changes are required to take advantage of these improvements.

As of this release, membership policies will be applied automatically when a new user account is created in WorldShare Circulation, WorldShare Admin, patron data loading, or the WorldShare Identity Management API. If the new user has a patron type that requires a paid membership, the bill will be created immediately in Circulation.

Note: Library staff will continue to be asked to manually update the membership status of any patrons with an **unknown membership status**, e.g., patrons created before the Membership Policy was configured, patrons that are updated to have a patron type that requires a membership, etc.

Similarly, when a patron’s membership expires, the system will now automatically check if his current patron type requires a paid membership. If a library membership is required, the system will create a membership bill in Circulation and block the patron from checking out or renewing items. The patron’s previous membership expiration date will display to library staff in the Account Overview accordion for reference until the new bill is fully paid or waived.

**Membership Expiry Reminder Notification**

The new **Membership Expiry Reminder Notification Policy** can be used to remind a patron that her paid library membership will be ending soon. This email reminder can be sent one or more days before the membership expires.

The expiry reminder email includes your library’s configured subject line, start text, and end text as well as the expiration date of the patron’s current 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.

You can then link an expiry reminder to one or more **Membership Policies** and specify when the notice should be sent.
Note: Membership expiry reminders will not be sent for some memberships created before 19 July 2020. Specifically, expiry reminders will not be sent to ‘existing’ memberships that were created in WMS without a membership bill, i.e. memberships for patrons that already had an active membership to your library. After this release, expiry reminders will be sent for all membership types if there is a Notification Policy selected in the Membership Policy.

**Bug fixes**

**Item withdrawn when barcode case is updated**

Changing the case of letter characters in an item barcode sometimes resulted in the item being withdrawn. For example, changing the item's barcode from ABC to abc in Record Manager would cause the item to be withdrawn in Circulation.
As of this release, the system will recognize the case change and update the item details.

Note: If your library needs to be able to search by both versions of the item barcode, you must retain the previous barcode in 876-878 $r. For example: 876 $p abc $r ABC. Updating item details using Discover Items will automatically save the previous barcode value to 876-878 $r.

**Special characters in institution name not displaying correctly**

Apostrophes and other special characters in your institution's name were not always displayed correctly when creating or editing holds, reviewing bill details, etc. in Circulation. This issue has now been resolved.

**Known issues**

See the [Known Issues](#) page.

**Important links**

**July 2020 enhancements to My Account**

A new release of the My Account interface is scheduled for 8 July. This release contains a number of enhancements and bug fixes, including:

- Display cover art to help library users easily identify items in their lists
- Provide improved display of user's profile information and communication options

For more details, please see the [WorldShare Circulation release notes for My Account, July 2020](#) and [fixed issues](#).

**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](#)