WorldShare Circulation release notes, August 2020

Introduction

WorldShare Circulation will have three releases in August 2020. These updates include enhancements and bug fixes:

5 August 2020

- Alert suspended and blocked users in My Account

13 August 2020

- Update a local holdings record's Date of Report when the LHR is saved in the text-view editor
- Send automatic email receipts using the configuration of the patron’s home library (groups only)

27 August 2020

- Generate notifications and receipts with material format values translated into the appropriate language

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.
Review any documentation you have created for My Account and add information about the new messages displayed to blocked and/or suspended patrons.

If your library is a member of a circulation group, review your configuration for automatic email receipts to ensure that your patrons receive the appropriate email receipts:

1. Notification Policies
2. Receipts
3. Additional Patron Notifications

Verify if your institution's language setting in OCLC Service Configuration is the correct language for providing material format values in patron notifications and receipts:

WorldCat Registry > Currency and Locale > Locale Language

Contact OCLC Customer Support for assistance changing your library's default language, updating notification field labels, etc.

New features and enhancements

Alert suspended and blocked users in My Account (8 August)

Patrons who are blocked and/or suspended from using circulation services will now see a message near the top of the My Account page.

Any user that has been manually blocked from using circulation services will be told that they are blocked from performing checkouts or holds:

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Suspended users will see the date and time when their suspension is scheduled to end:

2020-08-04_12-41-57.png

Note: Messages for interlibrary loan blocks will also be displayed in My Account for Tipasa users. For details about changes related to interlibrary loan in My Account, see the Tipasa release notes.

LHR Date of Report updated when items are edited using text view (13 August)

The LHR's Date of Report value (008/26-31) is set by the system when a new local holdings record is added to WorldCat. This date is then updated each time an existing LHR is saved in the MARC 21 editor in WorldShare Record Manager.

As of this release, the Date of Report value will also be updated when an existing LHR is saved using the LHR text-view editor available in Record Manager, WorldShare Acquisitions, or WorldShare Circulation. The WMS Collection Management API will also update the Date of Report when it is used to update an LHR.
This improvement will make it easier to identify recently-updated local holdings for MARC record delivery or holdings synchronization with other systems, e.g., synchronizing holdings information using Syndeo, building a query collection in WorldShare Collection Manager, etc.

This change will be released on 13 August 2020.

**Automatic email receipts sent by the patron's home library (13 August)**

WorldShare Circulation can be configured to automatically deliver due date and/or check-in receipts to library patrons via email. For more information, see the documentation for Additional Patron Notifications.

Prior to this release, the institution that owns the item controlled if automatic receipts were enabled as well as the content of those emails. This behavior was problematic for circulation groups because patrons and library staff could not predict if an automatic receipt email would be sent, patrons were confused by receiving receipts from multiple libraries/libraries that were not their home institution, etc.

As of this release, the patron's home institution (i.e. the institution that loaded or created the patron record) will control the configuration of these automatic email receipts. This change will impact only libraries that participate in group circulation and provide the following benefits:

- Patrons can predict if an automatic receipt will be emailed, regardless of which library owns the item, where the checkout/return event took place, etc.
- Patrons with items on loan from multiple libraries will receive consolidated receipts
- Patrons will receive all automatic receipts with consistent branding and content as determined by their home library

Note: The following notifications will continue to be controlled by the policies of the library that owns the item:

- Hold Fulfillment Policy
  - Hold Pickup Notification
  - Hold Shelf Expiry Notification
- Loan Policy
  - Loan Overdue Notification
  - Recall Notification
- Scheduling Policy
  - Schedule Placed Notification
  - Schedule Pickup Notification
  - Schedule Expiry Notification

This change will go into effect on 13 August 2020.

**Material formats translated in notifications and receipts (27 August)**

The description of an item's material format in circulation notifications and receipts will now be provided in your institution's language.

You can find your institution's language setting in OCLC Service Configuration > WorldCat Registry >
Currency and Locale > Locale Language.

If your library participates in a multilingual circulation group, the material format values will match the language of the notification. For more information, see Notification translations for multilingual WMS groups.

Prior to this release, material format values were always provided in English. The following languages are now supported:

- Chinese
- Dutch
- English
- German
- French
- Italian
- Japanese
- Korean
- Spanish

This change will be go into effect on 27 August 2020.

Note: Please contact OCLC Customer Support for assistance updating notification field labels, changing your library's default language, etc.

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Known issues

See the Known Issues page for WorldShare Circulation.

For a full list of current and recently fixed issues for My Account, 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