WorldShare Circulation release notes, October 2020

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Release Date: October 24, 2020

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Configure multiple pickup locations per branch to help your users understand exactly where their requested items will be delivered.
- Use the new Hold Pickup Locations Map to control where your library materials are allowed to be picked up to prevent your patrons from requesting unsupported fulfillment options and to direct your patrons to the most appropriate pickup options.
- Fulfill a title-level hold request using any item cataloged for the requested edition to simplify fulfillment when local holdings have been cataloged on different bibliographic records.
- 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.

<table>
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<th>ACTION</th>
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<tr>
<td>Attend or review the community webinar for additional details about this release and recommended actions.</td>
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<tr>
<td>Review your branch name(s) in the WorldCat Registry.</td>
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<tr>
<td>Review your library’s Location Policy to ensure that the Fulfils Holds For setting is accurate.</td>
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Decide if / when your library will create Branch Locations and/or use the new Hold Pickup Locations Map. See the October 2020 release notes for WorldCat Discovery for more information about the updated place hold experience.

If your library will use Branch Locations, ensure that all mobile devices are updated to Digby 3.1.1 for full support.

New features and enhancements

Configure multiple pickup locations per branch

The new Branch Locations configuration will allow your library to help patrons understand exactly where a requested item will be delivered for pickup. For example, a single WMS branch location may make requested items available at a circulation desk, smart lockers, a reading room for in-house use of special collections, and offer a campus delivery service. This new feature is optional and will allow you to display more specific pickup locations in WorldCat Discovery and My Account, to library staff in WorldShare Circulation and Digby, and in your library's email notifications and receipts.

Staff experience

In Circulation, you will be able to view and/or manage the pickup location for a hold request from the create/edit hold dialog boxes, the patron's hold queue, pull list, clear hold shelf report, and the check-in screen.
Checking in an item that needs to be held for a patron at the current branch will direct you to hold the item at the relevant branch location:

You can sort or filter the Clear Hold Shelf report by branch location to make it easier to find items reserved at different locations at your branch:

Any email notifications or receipts that include pickup location details will automatically include the branch location as well.
Configuration

Branch locations can be configured in OCLC Service Configuration > WMS Circulation > Admin/General > Branch Locations:

By default, the list of Branch Locations will be empty. Use the Create New option to open the create form.

Location names may be up to 50 characters in length. The name may be changed at any time without impacting any existing holds or policies.

You may disable a pickup location at any time if a location is discontinued or is temporarily inaccessible to your patrons. Disabled branch locations will not appear as valid pickup options in WorldCat Discovery, My Account, or WorldShare Circulation. Before disabling a location, you may wish to review the Open Holds report to ensure that existing holds are appropriately canceled or updated to a new pickup location.
Configure the new Hold Pickup Locations Map to control where materials may be picked up

The new Hold Pickup Locations Map can be used to guide your patrons to the most appropriate pickup option and to prevent them from requesting pickup options that your library does not support. For example, your library may require its special collections to be ‘picked up’ in a reading room, or you may limit a delivery service to faculty members. Your library can also use the new map to prevent items from appearing on your pull list, triggering a hold or routing message at check in, etc. if those items cannot be picked up at the location currently selected in the hold request.

Caution: As of this release, the WorldCat Registry branches associated with your library and any enabled branch locations will be the default set of pickup locations used by the system. If your library does not configure any content in the Hold Pickup Locations Map, then the system will allow your materials to be picked up at any branch and at any enabled branch locations. Therefore, your library must use the new map if you wish to suppress any library branches as valid pickup options for your library's materials, e.g., an offsite storage location.

The new map can be configured in OCLC Service Configuration > WMS Circulation > Holds and Schedules > Hold Pickup Locations Map:
Use the five parameter columns (Patron Type, Patron Home Branch, Material Format, Holding Location, and Shelving Location) to determine the Default Pickup Location and any Alternative Pickup Locations that your library may also allow.

- **Default Pickup Location**: The best pickup option available to patrons. The default is used to preselect a pickup location when users create new hold requests in WorldCat Discovery and WorldShare Circulation. A default will be preselected by the system for title-level (Any Copy) or special requests if all items related to the requested title share the same default pickup location.

- **Alternative Pickup Locations**: Other pickup options that are supported by your library. Alternatives can be selected when users create or edit hold requests in WorldCat Discovery, My Account, or WorldShare Circulation.

Once you have successfully saved the map with at least one valid policy row, WMS will use the map to control where items can be picked up. The map is processed from top to bottom, left to right; the first relevant row is honored per item that could fulfill the request. For example, a title-level hold will allow any of the pickup location policies associated with any item cataloged on the requested title.

If the map is configured but no relevant row is found, then no pickup locations are allowed and new holds will be prevented. Items that cannot be routed to the pickup location selected in the hold will not appear on the pull list or fulfill the request at check in.
Note: Hold requests with branch-level pickup locations will continue to be valid and fulfillable in the system when the Hold Pickup Locations Map is empty, allows the branch, or allows at least one of the branch's branch locations. A new branch location is **not** automatically valid if its branch was previously selected in the map; you must update the Hold Pickup Locations Map when you add new branch locations.

All existing circulation policies will continue to be honored. For example, if a valid pickup location exists but the requested item(s) cannot fulfill holds per your Location Policy, then the system will reject the request.

**Circulation groups**

Participants in a circulation group can use the Hold Pickup Locations Map to control where your institution's items are allowed to be picked up. The **Holding Location** and **Shelving Location** parameters will be limited to your library's locations.

However, the **Patron Type**, **Patron Home Branch**, **Default Pickup Location**, and **Alternative Pickup Locations** will be group aware so that you can specify what options are available for patrons of other institutions and/or which pickup locations at other institutions are supported for your materials.

**Fulfill hold requests at the edition level**

Use the new **Fulfil using variant records** option to fulfill title-level hold requests using any item cataloged for the requested edition. This option will simplify fulfillment if your local holdings are cataloged on multiple bibliographic records, e.g., when members of a circulation group have chosen different bibliographic records that represent the same edition of a work.

By default, the **Fulfil using variant records** option will be disabled. You can enable the setting in **OCLC Service Configuration > WMS Circulation > Holds and Schedules > Settings**:

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https://help.oclc.org/Library_Management/WorldShare_Circulation/Release_notes_and_known_issues/2020_World...
When the **Fulfil using variant records** setting is enabled, the system will store all OCLC numbers held by the library (or its circulation group) in the same edition cluster as the bibliographic record selected/discovered by the user. This process will be invisible to the patron, but the list of OCLC numbers will be visible to library staff in WorldShare Circulation. The hold will appear in the hold queues of all variant records and in the patron's hold queue.

Note: Queue position is an estimation of the order in which holds may be fulfilled. Queue position may vary when the request is viewed in different queues, e.g., a title-level hold may be first in the queue for OCN 1 but third in the queue behind two item-level holds for OCN 2. When viewing the patron's holds, the queue position will reflect the OCLC number that the user selected/discovered when the hold was created.
The pull list will provide any relevant item in the variant record set that is otherwise allowed to fulfill the hold by Location Policy, etc. Likewise, checking in a relevant item will fulfill the hold request. No preference will be given to any of the OCLC numbers in the variant record set.

Note: The set of variant records is only calculated when a new hold is created. Variant records cannot be removed or added to the set. Please report any inaccurate edition clusters to OCLC Customer Support.

**Add item library to the due date and check-in receipts**

If your library uses group circulation, you can now add the new Item Library element to your DUE_DATE and CHECK_IN receipts to help your patrons keep track of which library owns the loaned item(s). Item Library will appear in the receipt only if the item and patron belong to different institutions in your circulation group.

**Bug fixes**

**BILL receipt does not translate the payment method for waived bills**

When a bill is waived by library staff, the BILL receipt displayed the Method value of 'WAIVE_BILLS.' As of this release, the value has been changed to 'Waived' and will translate to the appropriate receipt language.

**Receive-Item events are not found in WorldShare Reports and Report Designer**

Receive-Item events indicate when an in-transit of dispatched item was checked in at its destination branch. These events failed to be created after the June 2019 release of WorldShare Circulation. After this release, new Receive-Item events will appear in WorldShare Reports and Report Designer.

**Large policy maps and matrices do not behave as expected in Service Configuration**

Large policy maps and matrices were slow to load with no indication that the full data set was not yet displayed. This could cause problems if the user attempted to save the map before it was fully loaded. As of this release, a clear loading indicator will appear for all pages in the WMS Circulation section of Service Configuration. You will not be allowed to make changes to a policy or map until the page has fully loaded.
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