WorldShare Circulation release notes, December 2020

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Release Date: December 6, 2020

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Search for users by Name, ID, Email
- Manage WMS Authentication data in Circulation (for libraries with multiple IdPs)
- Include pickup location on pull list receipts
- Bug fixes and performance improvements

Many of these enhancements are the direct result of your feedback.

Recommended actions

There are no recommended actions related to this release.

We encourage you to review all of the items in the release notes to determine whether there are items that might require additional action or follow up by your institution.

New features and enhancements

Search for users by Name, ID, Email

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

In the Assist Patron search, the new Name, ID, Email index is now the default index for the secondary user search. This new index will allow you to locate user records more easily when limited or ambiguous data is available. You may continue to select specific indexes for user searches like Name, Identifier, Phone Number, etc.
The Name, ID, Email index has replaced the Name index when you search for a user to link to a hold, item schedule, or room schedule as well as when you select a user when downloading the Offline Client.

Searching the Name, ID, Email index will return results based on the following:

- **Name**: Last name, first name, middle name, preferred name
- **ID**: Barcode, User ID at Source, ILL Identifier, PPID
- **Email Address**: Email address located in the Basic User Data for the user

Note: Searches against Name, ID, Email may generate different results than the individual Name, Identifier, or Email Address indexes. Name, ID, Email functions like the existing Identifier index: your search will generate a single token ("smith", 'smithj@foo") which may find different results than searches against Name or Email Address which support multiple tokens ('smith* john*", 'smithj* foo* org").

### Manage WMS Authentication data in Circulation

Libraries that use WMS Authentication in combination with other identity providers (IdPs) can now view, create, and update the Identity Management data of your user accounts from WorldShare Circulation. For example, if your library uses WMS Authentication for guest accounts and Shibboleth for students and faculty, then your library will now be able to assign usernames, send password reset emails, and activate/deactivate your guest accounts directly from Circulation.
Library staff can continue to manage WMS Authentication data in WorldShare Admin.

This improvement will make it easier for staff working in Circulation to create and manage user accounts that require WMS Authentication data. Prior to this release, the Identity Management section of a user's record would only display in Circulation if your library prioritized WMS Authentication in your library's list of IdPs.

Include pickup location on pull list receipts

Your library can now add the Pickup Location element to your PULL_LIST_ENTRY receipts to help library staff determine where the requested item may need to be routed for fulfillment.
You can add the Pickup Location element in OCLC Service Configuration > WMS Circulation > Notifications and Receipts > Receipts > PULL_LIST_ENTRY.

Note: Always verify that the pickup location and requesting patron on the pull list receipt match the information provided at check in. This information is not confirmed until the item successfully fulfils the request at check in.

**Bug fixes**

**Pickup options not appearing in WorldCat Discovery**

Two issues related to pickup locations in WorldCat Discovery's hold form have been fixed with this release.

First, users were unable to select a pickup option in WorldCat Discovery if at least one item was held at a shelving location with a comma character. The requesting user would have seen an 'unable to retrieve pickup locations' error on the Place Hold form.

Second, users may have seen unexpected pickup options in WorldCat Discovery due to a mismatch in how characters with diacritical marks in your shelving locations were encoded in OCLC configuration compared to how shelving locations are encoded in your local holdings records (LHRs). This release includes improvements to character normalization to ensure that the correct pickup options are provided when patrons place holds.

**Item Type is incorrect on pull list receipts**

The Item Type field in the PULL_LIST_ENTRY receipt was always providing 'Other.' As of this release, Item Type will again provide the material format of the requested item.
Temporary shelving location not displayed on Checkouts tab

On the patron Checkout page, the Shelving Location column was always displaying the permanent shelving location of items on loan. As of this release, the Shelving Location column will display the item’s temporary shelving location if a temporary location has been assigned.

Please note that this issue did not impact which Loan Policies, etc. were applied at checkout or renewal; only the display of data in the Shelving Location column was impacted.

Branch Locations configuration doesn’t render apostrophes

When managing Branch Locations in Service Configuration, some characters are incorrectly displayed as HTML entities, e.g., apostrophes are replaced by ‘. This display problem was limited to the Branch Locations configuration pages and is fixed in this release.

Known issues

For a list of current and recently fixed issues for WorldShare Circulation, see the Known Issues page

For a list of current and recently fixed issues for My Account, see the Known issues page.

Important links

November 2020 enhancements to My Account

A new release of the My Account interface occurred on 11 November 2020. This release provided two bug fixes:

- Border added around search box (for WorldCat Discovery libraries)
- “Cannot retrieve your requests” errors fixed (for WorldShare Circulation libraries)

For more details, please see the My Account release notes, 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