WorldShare Circulation release notes, February 2021

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Release Date: February 21, 2021

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Enable online payment of library fees and fines from My Account
- Manage a note on hold requests that is only visible to library staff
- Bug fixes and performance improvements

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

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.

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<th>ACTION</th>
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<tr>
<td>Contact OCLC Library Services or your OCLC Library Services Consultant to learn more about enabling online payment of library fees in My Account.</td>
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New features and enhancements
Online payment options for WMS My Account

WMS libraries in Canada and the United Kingdom can now enable online payment of library fees from My Account. WMS integrates with two payment processors, Paysafe (Canada only) and WPM Education (UK only), to offer a safe and secure payment experience for library users.

Online payments are reflected in WorldShare Circulation as soon as payment is confirmed by the processor.

Some restrictions apply. A one-time implementation fee is required to enable online payments. Your library or institution will also need an active account with Paysafe or WPM Education. Contact OCLC Library Services or your OCLC Library Services Consultant to learn more.

My Account

In My Account, library users can select one, more, or all of their library fees or fines in the Fees tab and select the payment button to begin online payment. The payment button will only display to patrons whose libraries have enabled online payments:
All library users are required to consent to sending data required by the payment processor:
After the user consents, My Account will redirect the user to the appropriate payment form. WMS does not store, process, or transmit cardholder data. For example, WMS is not aware of the user’s card number, card expiry date, card verification value (CVV), etc.

Paysafe

Note: For Canadian institutions only.

Paysafe provides online payment services to institutions in Canada. Paysafe integration supports payments via Visa (credit or debit) and Mastercard.

The Paysafe.js service allows platforms like My Account to offer an integrated payment experience that simplifies PCI-DSS compliance for your library. After the user consents, the payment form opens on top of the My Account page. Sensitive payment fields (card number, CVV, and expiry date) are entered into an iframe hosted on Paysafe’s servers to ensure that the user's inputs and storage of the data is handled securely by Paysafe.

Successful online payments are reflected in WorldShare Circulation as soon as payment is confirmed by Paysafe. WMS will then send an email notification to the patron to confirm the Paysafe payment. The library user can easily return to My Account after completing or abandoning a payment attempt:
WPM Education

WPM Education provides online payment services to institutions in the United Kingdom. Your institution’s agreement with WPM will determine which payment methods are supported.

After the patron has consented to online payment, My Account redirects the user to the payment website hosted by WPM. Sensitive payment fields (card number, CVV, and expiry date) are entered on the WPM site so that the user input and storage of the data is handled securely by WPM.

Successful online payments are reflected in WorldShare Circulation as soon as payment is confirmed by WPM. WPM Education can provide email notifications for users and library staff. The library user can easily return to My Account.
after completing or abandoning a payment attempt.

**Monitoring online payments**

OCLC staff will work with you to configure and test the online payment experience.

Staff working in WorldShare Circulation will see payments reflected in the user’s account as soon as payment is confirmed by the processor. The payment method will indicate if the payment was taken by Paysafe or WPM.

To track overall usage, your library can use WorldShare Reports & Report Designer to monitor successful payments made online. You can use Report Designer to build reports that include the payment ID known to WMS and the payment processor to audit the service, the Event Pending Payment ID.

As of this release, the Event Pending Payment ID will be available in Pay-Bill-Pending events in WorldShare Report Designer to help your library report on potential online payments through Paysafe or WPM Education. Event Pending Payment ID is already supplied in Pay-Bill events for successful online payments.

**Hold note for library staff**

Staff in WorldShare Circulation can now add or edit a staff-only note on any hold. The staff hold note is optional and can be used to provide additional details about the request before and/or after the hold is ready for pickup. For example, you could use the staff hold note to help student workers locate and prepare materials or to track how often library staff have searched for a requested item.

The staff hold note will display on the Pull List, Holds for Review report, in the patron's hold queue, and when viewing or editing hold details. The staff note can also be added to the Pull List Entry receipt.

Prior to this release, a public hold note was visible and editable by library staff and the requesting patron. The public note will continue to allow the patron to communicate any special needs to library staff.
Note: To edit the public or staff hold notes, you will need the Circulation Admin, Circulation Desk, Circulation Desk Privacy, Student Worker, or Student Worker Circulation roles. Any of those roles or the Student Worker Restricted role will allow you to view hold notes in WorldShare Circulation.

Bug fixes

Title-level holds are not moved to the new OCLC number after a WorldCat bibliographic record merge

Title-level hold requests in Circulation became unfulfillable if your library's holdings were moved to a new WorldCat bibliographic record by OCLC's Duplicate Detection and Resolution (DDR) process.

This release includes an improved process that will detect bibliographic record merges and automatically move title-level holds to the new OCLC number (OCN) along with your item records. This improvement will also apply to edition-level fulfillment.

The new process will only apply to bibliographic record merges that occur after this release.

Note: Title-level holds will only move to the new OCN if your library had at least one barcoded item in your holdings when the merge occurs. Additional improvements are under consideration to support requests for on-order items and other methods of moving LHRs to a different bibliographic record.
Hold is not put back on the request queue if the recalled item is checked out to the wrong patron

If library staff check out a recalled item to a user that did not recall the item, then the recalling patron’s request was removed from the hold queue and could not be fulfilled. These failed holds could not be removed by the system and continued to appear in WorldShare Reports and Report Designer.

As of this release, the recalling request will remain in the hold queue if library staff check out the item to an unexpected patron.

Temporary item titles are sometimes limited to 100 characters

The temporary item editing form only allowed you to enter a title value up to 100 characters if the previous value was less than 100 characters.

This issue has been fixed so that the system always allows you to set a temporary item’s title up to the 4,000 character limit.

Known issues

See the Known Issues page.

Important links

January 2021 enhancements to My Account

The January release of My Account included an enhancement that makes it easier for you to identify My Account as the transaction source of circulation events in WorldShare Circulation’s transaction history and in WorldShare Reports and Report Designer.

For more details, please see the My Account release notes, January 2021.

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