WorldShare Circulation release notes, April 2021

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Release Date: April 24, 2021

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Track the location of items at check in to make it easier to locate materials that are temporarily away from their shelving or pickup location
- Manage branch locations that are not pickup locations but, instead, identify places where items may be managed or checked in by library staff
- Review patron information for hold fulfillment events in WorldShare Reports and Report Designer to improve the quality of request reporting
- 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.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verify and update the service status of any Branch Locations that you may have previously configured. Then review the Hold Pickup Locations Map (if configured) to ensure that pickup options are selected correctly at the branch and/or sublocation levels.</td>
</tr>
</tbody>
</table>
ACTION

Decide if your library will use Branch Locations to configure a set of non-pickup locations for use in last-seen item statistics set manually or at check in.

New features and enhancements

Track the location of items at check in

Staff in WorldShare Circulation can now automatically update an item's last-seen statistics to specify a location inside a branch while checking the item into the system. If a valuable, unique, or highly-demanded item cannot be found, accurate last-seen statistics can be crucial to the search effort.

This enhancement expands on the manual update of last-seen item statistics introduced in the March 2021 release. Setting a branch location at check-in is also optional and will allow you to monitor exactly where and when a barcoded item was checked in at a library location.

The system will continue to fulfil holds and item schedules if the item is checked in at the pickup branch. However, if your library has more than one pickup location per branch, you may want to check in items at the specified pickup location to ensure that the Clear Hold Shelf report can list items at each location. The Clear Hold Shelf report includes items that are still reserved for expired or cancelled requests and provides each item's last-seen location.

Note: As of this release, checking in an item from any other interface will set the item's last-seen statistics at the branch level only. Any previously recorded branch location or free text value will be removed. This includes check-ins and pulling items using Digby, RFID-enabled book returns, sorting machines, etc.

Staff experience

Any user with a Circulation or Student Worker role can set a Branch Location from the Check In screen. By default, your current branch will display. If you wish to specify a more exact location for the check in, click the Edit button to open the new editing options:
Select any **Branch Location** currently configured for your branch:

Or enter a one-time, custom location value up to fifty characters in length:
You may also need to set the last-seen location to your current branch only / in general. For example, once an item has been reshelved, you may wish to update the last-seen statistics to specify only the item's holding location. To set only a last-seen branch, use the Edit button to open the editing options, leave the entry box blank, and click the Update button. Any items checked in will record only the branch and date/time in item last-seen statistics, and any branch-specific location previously recorded will be removed.

Manage branch locations that are not pickup locations

Your library can now create and manage branch locations that are not pickup locations. These branch locations can still be used as a controlled list of locations when setting an item's last-seen location at Check In or manually from the item's Statistics screen.

The Branch Location configuration now allows you to choose from three service status options:

<table>
<thead>
<tr>
<th>SERVICE STATUS</th>
<th>PICKUP OPTION IN CIRCULATION AND HOLD PICKUP LOCATIONS MAP?</th>
<th>PICKUP OPTION IN WORLDCAT DISCOVERY AND MY ACCOUNT?</th>
<th>ITEM LOCATION OPTION AT CHECK IN AND ITEM STATISTICS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Pickup Location</td>
<td>Yes - Override required if not allowed by library policy</td>
<td>Yes - If otherwise allowed by library policy</td>
<td>Yes</td>
</tr>
<tr>
<td>Inactive Pickup Location</td>
<td>Yes - Override required</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Not a Pickup Location</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Prior to this release, branch locations could be enabled or disabled only. By default, the system will update the status of all existing branch locations as follows:
• **Enabled** locations will become **Active Pickup Locations**
• **Disabled** locations will become **Inactive Pickup Locations**

**Configuration**

When creating or updating a Branch Location, you will find the **Service Status** dropdown under the new **Request Fulfillment** section:

![Admin/General > Branch Locations > Edit Location: Staging Area - 2nd Floor](image)

For libraries using the Hold Pickup Locations Map:

• Review and update the Map whenever your library:
  1. Adds a new branch location **or**
  2. Updates the status of existing locations such that a branch location becomes a pickup location (active or inactive) **or** is no longer a pickup location.
• No changes to the Hold Pickup Locations Map are needed if you modify a location’s service status from active to inactive (and vice versa).
• Invalid entries in the Map are now highlighted in red. You will be prevented from saving changes to the Map until all issues are resolved. Invalid entries include:
  ◦ A branch alone cannot be selected in the Map if that branch has at least one branch location that is a pickup...
location (active or inactive).
◦ A branch location that is no longer a pickup location cannot be selected in the Map. An 'invalid location' message will appear.
◦ All branch locations for a specified branch are no longer pickup locations and cannot be selected in the Map. An 'invalid location' message will appear. If you want the branch alone to be a pickup option, be sure to select the branch in the Map.

Patron information added to Fulfil-Hold events in WorldShare Reports & Report Designer

Circulation events with an Event Type of 'Fulfil-Hold' will now include patron information including name, barcode, borrower category, home institution, etc. You will see this change reflected in the Circulation Events Detail Report and/or Group Circulation Events Detail Report as well as in any custom reports with queries from the Circulation Events universe.

This information can be used to assist with troubleshooting, monitoring trends in your library's request fulfillment services, or to identify when a hold has been fulfilled via group circulation (i.e. where the patron's home institution is not equal to the item's holding institution).

This change is not retroactive. All other hold-related circulation events already include information about the requesting patron.

Note: Personally Identifiable Information (PII) will not be retained if your library has chosen to disassociate patron data from circulation events.

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