WorldShare Circulation release notes, February 2022

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Release Date: February 20, 2022

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Forward holds for fulfillment by other branches of your institutions before requesting fulfillment from your circulation group (circulation groups only)
- View Talis Aspire reading list information when viewing bibliographic search results and when managing items in the LHR text editor
- 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.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Review your Hold Request Policies to verify if the system should prefer items at the pickup location to fulfill title-level or edition-level holds.</td>
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<tr>
<td>If you are a member of a circulation group and your Hold Request Policies already prefer available items at the pickup location, then you do not need to take any action to see the new library and group forwarding levels.</td>
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New features and enhancements

Enhanced hold forwarding for circulation groups

WorldShare Circulation allows your library to reduce the time and money spend routing items between your locations by first attempting to fulfill title-level or edition-level holds with eligible items that are already available at the pickup location. If you have difficulty fulfilling the request with an item at the pickup location (e.g., the item cannot be found or is damaged), you can forward the hold so that items appear on the pull list of other locations. Today, your library can use Hold Request Policy to choose if pull lists should prefer items at the pickup location.

This release introduces improvements to hold forwarding to help circulation groups. You may now forward a hold to the other branches of the pickup institution prior to forwarding to the entire circulation group. This change will help your library to save time and money by allowing you to attempt fulfillment at another branch of the pickup location before asking the group to pull and route an item.

Note: If you are not a member of a circulation group, you will continue to see the Forward option on the pull list if your Hold Request Policies prefer items at the pickup location and the hold has not yet been forwarded manually by library staff working at the pickup branch. The system will continue to automatically forward the hold so that items can appear on all eligible branches’ pull lists when there are no eligible, available items at the pickup branch.

Library staff experience

If your library is a member of a circulation group, you can now use the Pull List in WorldShare Circulation to forward a hold to other branches of the pickup institution or to your group for fulfillment.

For example, you will now see two forwarding options if you are working at the hold’s pickup location and no one has manually forwarded the hold yet:

- Forward to Library
- Forward to Group

You will see the Forward to Group option alone if the hold has already been forwarded to the pickup institution or if no eligible items are available at the pickup institution.
You will only need to forward a hold manually from the Pull List if library staff cannot locate the requested item or cannot use the item to fulfill the hold because of item condition, damage, etc. The system will continue to automatically forward the hold when no eligible items are available at the pickup branch or institution. For example, if a patron requests a title that is only held by a member of the group that is not the patron’s chosen pickup institution, then the hold will appear on that holding library’s pull list automatically.

At this time, there is no way to revert hold forwarding. Once a member of library staff has a forwarded, the hold cannot be limited to appear on the pull list at the pickup branch or institution again.

Forwarding a hold will not stop items from appearing on your pull list. You may continue to Decline a hold from the Pull List to stop the hold from appearing on your branch’s pull list. When declining a hold, the system will warn you if your branch is the last location at the current fulfillment layer with an eligible, available item. If the forwarding option is also available and you are the last eligible branch at the current fulfillment layer, you may wish to forward the hold prior to declining.

To prevent unnecessary item routing, the system will continue to prevent hold fulfillment when checking in an item at a location that is not yet eligible to fulfill the hold. For example, an item checked in at Branch 1 will not fulfill a title-level
hold for pickup at Branch 2 unless 1) library staff at Branch 2 have forwarded the hold to Branch 1 or 2) Branch 2 has no eligible, available items to fulfill the hold.

See Circulation account roles for more information about the staff roles required to forward and decline hold requests.

Note: In a future release, hold forwarding levels will be incorporated into the Pull List function in the Digby mobile app. As of this release, forwarding a hold in Digby will continue to forward the request to your entire group.

Configuration

Hold forwarding is already configurable in your Hold Request Policies. If your library is a member of a circulation group and your configuration already prefers available items at the pickup location, then you do not need to take any action to see the new library and group forwarding levels.

The display of the forwarding setting in Hold Request Policy has been updated for clarity. Your existing selections will continue to be honored.

<table>
<thead>
<tr>
<th>NEW: PREFER AVAILABLE ITEMS AT THE PICKUP LOCATION</th>
<th>OLD: FORWARDING POLICY</th>
</tr>
</thead>
<tbody>
<tr>
<td>No</td>
<td>Globally Forwarded by Default</td>
</tr>
<tr>
<td>Yes</td>
<td>Prefers Pickup Location if any items are available</td>
</tr>
</tbody>
</table>
Note: Hold Request Policies are controlled by the requesting institution which is usually the patron's home library. Your library staff may see forwarding options on your pull list even if your local policies do not prefer items at the pickup location.

View Talis Aspire reading list information

If your library is currently using the Talis Aspire reading list service, you can now easily see if a title is currently included in one or more Talis reading lists.

When Talis integration is enabled, reading list information will display when you hover over the info icon on search results for Bibliographic Records for Local Holdings Records. Clicking either reading list link (this item or related editions) will open a dialog box with Talis reading list details and links to each list on the Talis platform:
You can also use the **Reading Lists** tab to see the detailed list of Talis reading lists with hyperlinks to view the list on the Talis platform:
A warning message will appear if you attempt to delete an item when the title is currently on a Talis reading list:
Bug fixes

Create New Hold Request dialog fails to close after ad-hoc creation of a temporary item

The Create New Hold Request dialog failed to close automatically after attempting to checkout a new/unknown barcode to user and selecting the Automatically place hold on item option. Some libraries use this workflow to quickly create a temporary item and hold request.

As of this release, clicking on the Save Changes button will close the hold request dialog as long as there are no hold policy conflicts.

Membership status cannot be updated manually by library staff

Library staff were unable to manually set the membership status of a patron's account, and an incorrect message displayed on the patron's account: "Membership status unknown. Membership information will need to be updated by the patron's home institution."

As of this release, library staff of the patron's home library will be able to manually update the patron's membership status. Previously impacted patron accounts will correctly display the membership status update option.
The message above will only display to circulation groups when viewing the membership status of a patron from another library in the group.

**Check-in alerts for missing or claimed items not displayed**

Alerts were not appearing on the Check In screen for items that was previously in missing, lost, claimed never had, or claimed returned status.

As of this release, these alerts will appear if configured in your library's UI Preferences. You may wish to use the Circulation Events Detail Report to check for any recent Find-Item events.

**Cannot retrieve items with a barcode ending with a plus character**

Library staff could not retrieve item information if the item's barcode ended with a plus character (+). These items could still be checked out, etc. but library staff could not view the item's status, statistics, or history and would incorrectly see the temporary item creation dialog box when searching for the item barcode in the Enter barcode field.

**Automatic renewal fails for items scheduled far in the future**

Scheduled items failed to automatically renew regardless of how far in the future the schedule would begin.

As of this release, automatic renewals will process successfully if the user with the item on loan is in good standing, the renewal complies with your loan policies and limits, and any future schedules are not yet within the automatic recall period.

**Clear Hold Shelf fails with a 500 for invalid holding location**

The Clear Hold Shelf report would sometimes not load for branches in a circulation group if the list included an item belonging to another institution in the group.

As of this release, an item will appear on the Clear Hold Shelf report regardless of which institution provided the item.

**Problems searching for temporary items**

Several issues around temporary item searches have been resolved in this release including:

- The 'please relogin' message appeared and activities became inactive in Circulation after some temporary item searches with special characters
- No results are returned when searching by title or author when the search term included an apostrophe character (').
- Server communications error sometimes displayed to library staff working in the French version of WorldShare Circulation

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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