Release Date: May 22, 2022

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Control hold request fulfillment based on current item availability
  - Reduce staff workload by limiting holds requests to materials that are not currently available and by suppressing currently available items from the pull list
  - Improve the turnaround time for hold fulfillment by limiting requests to items that are currently available in your collection
- 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>
</tr>
</thead>
<tbody>
<tr>
<td>Determine if your library will use the new <strong>Fulfil Holds By Item Status</strong> option in <strong>Location Policy</strong> to control when patrons are allowed to place requests in WorldCat Discovery and when library staff are asked to pull available items from the collection.</td>
</tr>
</tbody>
</table>
Before making any configuration changes, you may wish to audit your pending hold requests to determine the impact on your users. Any policy changes will immediately impact holds in the queue.

Note: User experience improvements for Location Policy configuration are coming soon! Your library may wish to delay implementing the **Fulfil Holds By Item Status** options until those improvements are available in June/July 2022.

### New features and enhancements

**Control hold request fulfillment based on current item availability**

A new configuration option now allows your library to control if item availability should be used to restrict hold requests and which items may appear on the pull list.

While the [OPAC Status Grid](#) will continue to determine when fulfillment buttons are displayed in WorldCat Discovery, the new **Fulfil Holds By Item Status** option in [Location Policy](#) will prevent your patrons from placing requests that your library cannot support.

For example, your library may not have sufficient staffing to pull items that are currently available in your accessible, open stacks. You can now configure WorldShare Circulation to prevent your users from requesting items that are available on the shelf. Likewise, available items will never appear on the pull list to fulfill title or item-level holds. Title-level holds will remain in the queue until an eligible item is returned, checked in, or an item becomes available in another part of your collection.

Alternatively, your library may want to increase your turnaround time by limiting requests to currently available items. For example, you may want to guarantee that requests will be fulfilled within a few hours or days. To accomplish this, holds must be limited to available items.

Note: By default, your library’s configuration will continue to allow WorldShare Circulation to accept hold requests regardless of item status and to allow otherwise eligible, available items to appear on the pull list. **No changes are required** to your configuration if you wish to maintain the system's original functionality.

**Configuration: Fulfil Holds By Item Status**

Use the new **Fulfil Holds By Item Status** option in [Location Policy](#) to control when items can be requested and when available items may appear on the pull list:
Your library now has three options:

<table>
<thead>
<tr>
<th>FULFIL HOLDS BY ITEM STATUS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Item Status (Default)</td>
<td>Items in any status may fulfill requests. Patrons can request any materials otherwise allowed by your policies. Any eligible item at this location may appear on the pull list to fulfill pending requests.</td>
</tr>
<tr>
<td>Available Items Only</td>
<td>Only <em>Available</em> items can fulfill requests. Patrons can only request a specific copy shelved at this location if that copy is currently <em>Available</em> and is otherwise requestable.</td>
</tr>
<tr>
<td>Not Available Items Only</td>
<td>Only items that are <em>not</em> <em>Available</em> can fulfill requests. Statuses that allow requests include: <em>Unavailable, On Loan, On Hold, In Transit, Lost, Missing</em>, etc. Patrons can only request a specific copy shelved at this location if that copy is currently <em>not</em> <em>Available</em> on the shelf and is otherwise requestable.</td>
</tr>
</tbody>
</table>
Note: User experience improvements for Location Policy configuration are coming soon! Your library may wish to delay implementing the **Fulfil Holds By Item Status** options until those improvements are available in June/July 2022.

**Item-level holds & special requests**

Based on your configuration, item-level *(Specific Copies or Volumes)* requests for barcoded materials will consider the status of the item when determining if a hold can be created. If the item's status conflicts with your policies, then no valid pickup options will be offered in WorldShare Circulation or WorldCat Discovery.

However, special requests and requests for specific, unbarcoded items will not use the **Fulfil Holds by Item Status** setting. A special request may be fulfilled with any item in the collection; the system cannot determine if an item is currently available or not. Similarly, unbarcoded items do not have a status in WMS to check against your policies. Instead, the item's holding and shelving location, material format, the requesting patron's borrower category, etc. will continue to be used to determine if the hold can be created based on the existing **Fulfil Holds For** setting in Location Policy and your library's [Hold Pickup Locations Map](#).

**Title-level holds and circulation groups**

Title-level requests will be allowed only if there is at least one eligible item in a requestable status when the request is created. Items in requestable statuses must also be allowed to fulfill holds based on the existing **Fulfil Holds For** setting in Location Policy and your library's [Hold Pickup Locations Map](#).

If you have only one copy, then that item's status will determine if a title-level *(Any Copy)* request can be created. If the item's status conflicts with your policies, then no valid pickup options will be offered in WorldShare Circulation or WorldCat Discovery.

If multiple copies are held by your library or circulation group, then a title-level hold is only allowed when at least one item is 1) in a requestable status and 2) is requestable according to Location Policy and the [Hold Pickup Locations Map](#). Valid pickup options will appear if at least one eligible item is detected.

**Pull list and hold fulfillment**

Items will only appear on the pull list if the new configuration allows fulfillment for **Any Item Status (Default)** or **Available Items Only** for items shelved at your location. However, you will still need to check the pull list if your library allows special requests or processes item-level requests for unbarcoded materials.

Item status restrictions will not apply when checking in an item. Therefore, you can use check in to bypass your **Fulfil Holds By Item Status** policies, when needed. For example, checking in an item that was On Loan will fulfill a pending hold even if the item's policy fulfills holds for **Available Items Only** and another, available copy hasn't been pulled yet. Likewise, an available item will not appear on the pull list if your policy fulfills holds for **Not Available Items Only** but, if you choose to pull the material, checking it in will trigger the system to check for any pending holds.
Examples of library staff and patron experiences

<table>
<thead>
<tr>
<th>FULFIL HOLDS BY ITEM STATUS SETTING</th>
<th>CURRENT STATUS OF THE ITEM IN THE COLLECTION</th>
<th>CREATE A TITLE-LEVEL OR GROUP-LEVEL REQUEST?</th>
<th>CREATE AN ITEM-LEVEL REQUEST FOR A BARCODED ITEM?</th>
<th>CREATE A SPECIAL REQUEST OR ITEM-LEVEL REQUEST FOR UNBARCODED ITEM?</th>
<th>ITEM MAY APPEAR ON THE PULL LIST?</th>
<th>CHECKING IN THE ITEM MAY FULFILL AN EXISTING HOLD?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Available Items Only</td>
<td>Available</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Any other status</td>
<td>Only if there is at least one item that could currently fulfill request.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Any Item Status (Default)</td>
<td>Available</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Any other status</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Available Items Only</td>
<td>Available</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
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</tr>
<tr>
<td></td>
<td>Any other status</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

Example 1 - Not Available Items Only

Your library wants to prevent patrons from requesting materials that are easily accessed without library staff assistance.

You have configured your General Collection and Course Reserves locations to fulfill requests for Not Available Items Only.

A patron wants to access a title with two available copies: one in the General Collection and the other in Course Reserves. The patron will not be allowed to place an item-level or title-level request in WorldCat Discovery because neither copy is requestable and, therefore, no valid pickup options will be provided.

If the patron is not sure that they have found the right title, then they are allowed to make a special request from WorldCat Discovery if your library has enabled special requests. The special request will appear on the pull list for staff to mediate the request.

If the General Collections copy is checked out, the patron will be allowed to place a title-level hold or an item-level hold on the on-loan copy. However, the hold will remain in the queue until the General Collections copy is returned. Library staff will not be asked to pull the available copy from Course Reserves.
Example 2 - Available Items Only

Your library wants to ensure speedy hold fulfillment and prevent hold queues by limiting patron requests to items that are currently available.

Your have configured your General Collection and Course Reserves locations to fulfill requests for Available Items Only.

A patron wants to access a title with two available copies: one in the General Collection and the other in Course Reserves. The patron will be allowed to place an item-level or title-level request. If the patron is not sure that they have found the right title, the patron would be allowed to make a special request from WorldCat Discovery if your library has enabled special requests. Depending on the patron's request type or desired pickup location, either copy may appear on the pull list.

If the General Collections copy is checked out, the patron will not be allowed to place an item-level hold on the on-loan copy. However, the patron will still be able to request the available Course Reserves copy or to place a title-level request. Library staff will be asked to pull the available copy from Course Reserves.

Example 3 - Request policies differ by shelving location

Your library wants to prevent patrons from requesting materials in your General Collection but always allow requests for items that are shelved in Offsite Storage and, therefore, inaccessible to your patrons.

You have configured your General Collection to fulfill requests for Not Available Items Only and Offsite Storage to fulfill requests for Any Item Status (Default).

A patron wants to access a title with two available copies: one in the General Collection and the other in Offsite Storage. The patron will not be allowed to place an item-level on the General Collection copy, but will be allowed to request the copy from Offsite Storage. The patron can also place a title-level hold. If the patron is not sure that they have found the right title, the patron would be allowed to make a special request from WorldCat Discovery if your library has enabled special requests.

If the Offsite Storage copy is in transit, the patron will be allowed to place a title-level hold or an item-level hold on the Offsite Storage copy. Library staff will not see an item on the pull list because the General Collection item is ineligible (because it's currently available) and the Offsite Storage copy is in transit.

Other considerations

Any policy changes that your library makes will impact any hold requests that are already pending fulfillment in WorldShare Circulation. You may wish to use the Pickup Location or Holds for Review reports to identify requests that may be negatively impacted by a policy change.

If your library integrates with an interlibrary loan system, be sure to configure the Any Item Status (Default) setting for the shelving location where temporary items are created for borrowing requests.
Be advised that the automatic renewal process and manual recalls from WorldCat Discovery will not recall on-loan items to fulfill a pending hold request if the item's Location Policy is configured to fulfill holds for Available Items Only.

Bug fixes

Error at check in when an item in transit can no longer fulfill its hold request

An error occurred when checking in an item that was previously in transit to fulfill a hold if, during transit, the item became ineligible to fulfill the target hold request.

As of this release, checking in the item will release the hold back to the hold queue, and library staff will be told what to do next with the item, e.g., route the item back to its holding location for reshelving, etc.

Hold dates are incorrect for holds created by library staff in some time zones

Libraries in some time zones were unable to immediately fulfill holds created by library staff in WorldShare Circulation. The needed-from date was incorrectly set to a future date, preventing immediate fulfillment of the request.

This release addresses an underlying issue with time zone handling when a hold is created by library staff.

Interlibrary loan integration fails to create borrower-side holds when patron barcodes are duplicated across a circulation groups

A user with multiple accounts across a circulation group that use the same circulation barcode were causing interlibrary loan integration to fail. The hold request for a borrowed item could not be created because the system could not determine which user account to use.

As of this release, Circulation will always create the hold for the user account associated with the borrowing library.

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