WorldCat Discovery release notes for WMS libraries, February 2018

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Release Date: February 14, 2018

Introduction

The following release notes are for the February 14, 2018 special release of WorldCat Discovery. Please note that the new features and enhancements in this release are for WMS Discovery users only.

WorldCat Discovery February special release highlights

This release adds features that will help your users more easily request and pick up holds for items in your library’s collections.

• Library staff can create custom shelving location messages to help users understand the shelving locations available to them and additional custom shelving notes to help users make more informed hold requests.
• Users can now place multiple and specific copies on hold in a single request, request items from a preferred location, and add custom notes to each request.

Recommended actions

Please refer to WorldShare Circulation February 2018 release notes for additional information.

Include a Request ID with problem reports

When reporting an issue with WorldCat Discovery, it is extremely helpful to include the Request ID. The Request ID is found at the bottom of the screen on which the issue occurred. Including this information allows us to directly trace what happened on the request we are troubleshooting.
New features and enhancements

Create custom shelving location messages

Library staff can create messages specific to shelving locations for their library users. The shelving location messages can help users make more informed decisions when placing hold requests.

Custom shelving location messages can be configured to display on the “Availability Table” and the “Place Hold Request Page” as well as on the “Place Hold Confirmation Page.”

To create custom shelving location messages, log in to Service Configuration and go to Holding Codes & Shelving Location page under My WorldCat.org:

Clicking the “Shelving Location Messages (WMS Only)” tab will expand the page and will display the “Create Message” button:
Holding Codes & Shelving Location Messages

Required fields are marked with an asterisk (*).

Holding Codes Translation Table

When OCLC retrieves Local Holding Records (LHRs) for an item, we will display the “Location” of the item in the availability area in your worldcat.org. If you would like to display a user friendly location name instead of a Holding Code from the LHR, you can customize the display here.

Shelving Location Messages (WMS Only)

Provide messages specific to shelving locations for your library users.

Create custom messages for the Availability display, on the place hold form, and on the place hold confirmation display.

Clicking the “Create Message” button will allow library staff to write a descriptive message of up to 1000 characters:

To link the message with a specific shelving location, first select a holding code from the holding code drop-down. After selecting a holding code, a list of shelving locations associated with the holding code will display on the “Select Shelving Locations” display box. Library staff can create a custom shelving location for both permanent and temporary shelving locations.
The “Place hold workflow” options allow library staff to choose whether a specific message should display to users before placing a hold request (on the availability tray and the place hold request page) or after placing a hold request (on the place hold confirmation) or both.

Please note that a shelving location message can be saved in Service Configuration with a holding code and at least one shelving location. To display the message on the Discovery user interface, a place hold workflow option must be selected:

Additional holding codes and shelving locations can be added to a shelving location message by clicking the "Add holding code" button.

Each shelving location message must have a unique combination of Holding Code, Shelving Location and Place hold workflow option.
Place multiple item-level holds from preferred locations

Fulfillment options are a key benefit to a user’s broad discovery search experience. The place hold request is now more robust to help users with challenges they often face when attempting to place a hold: requesting multiple copies or volumes at once and choosing an item from a preferred location.

Request holds for multiple, specific copies or volumes from preferred locations

The enhanced “Specific Copies or Volumes” place hold functionality helps users save time when requesting multiple items of a record. For example, users can submit a single hold request for up-to 10 volumes or issues of a journal.

Place a hold request from the detailed record by clicking the “Place Hold” button:
Clicking the “Place Hold” button directs users to the new “Place Hold Request” page. If the selected item is a serial, the default place hold request type is “Specific Copies or Volumes,” so users can indicate exactly which items they need. If the selected item is a monograph, the default place hold request type is “Any Copy”. Users can also simply change default hold request types using the drop-down menu:
Check boxes in the “Place Hold Request” page for “Specific Copies or Volumes” allow users to select multiple items from multiple item locations:
Up to 10 item-level holds can be requested at once. The display of call numbers and availability information for each item helps users choose materials more likely to be obtained quickly. Users are required to select at least one item prior to submitting a request for a specific copy or volume. Following the sixth selection, a message will remind the user of the 10 item-level hold limit:

I need: *

Specific Copies or Volumes

I want it from: *

⚠ You are close to your request limit of 10 items at a time.

When the 10 item-level hold limit is reached, a message recommends submitting another batch for additional items:
The default pick-up location is a blank field. Users must select a pick-up location before submitting the request. Hold request dates remain as optional fields:

Provide additional information about the requested item or any specific instructions related to fulfilling the request with a descriptive note of up to 500 characters:
The new place hold feature supports requests for items without barcodes to get newly acquired items to users faster. Please refer to WorldShare Circulation February 2018 release notes for more information.

After submitting a hold request, users are taken to a new “Place Hold Confirmation Page”. Messages specific to each item-level hold request help users understand if the request was wholly or partially successful:
Hold request information including pickup location, hold dates, and hold notes display on the confirmation page. Directly access a user account with the “View Requests” button:

- OCLC Library Main Branch MAIN-Periodicals
  
  I want to pick up at: Main Branch
  
  Dates I need it: 2018-02-02 to 2018-02-16
  I cannot pick up: 2018-02-03 to 2018-02-10
  
  Item description(s) / Notes: I can not pick up the items on 2/10 and 2/11 as well.

Each item-level hold submitted via a “Specific Copy or Volume” hold displays as an individual hold in a user’s account.
Shelving locations, hold notes, and pick up locations also display in a user’s account:

**The New England journal of medicine.**  
by Massachusetts Medical Society  
[Journal, magazine 1928](#)  
[Database: WorldCat](#)  

**Requested from:** MAIN-Periodicals  
**Note:** I can not pick up the items on 02/10 and 2/11 as well.

User’s account also displays additional holding information which allows users to identify a distinct item. Display of holding information such as enumeration (e.g., v.1 n.3) and chronology (e.g., May 1990) is limited to non-barcoded items only:
Each item-level hold request can be edited or deleted to manage unfulfilled requests:

The New England journal of medicine.
📍 v.367:n.11(2012:Sep 13)
by Massachusetts Medical Society

Requested from: MAIN-Periodicals
Note: I can not pick up the items on 02/10 and 2/11 as well.

The New England journal of medicine.
by Massachusetts Medical Society

Requested from: EUS (Shelving Location)
Note: I can not pick up the items on 02/10 and 2/11 as well.

The pick-up location, hold dates, and hold notes can be edited from the hold request area:
**Place any copy on hold**

Users now have the option to request an item from one or more preferred locations and send a hold note with "Any Copy" hold request:

![Edit Hold Request Form](https://help.oclc.org/Disc Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W...)

- **I want to pick up at:** Main Branch
- **Dates I need it:**
  - From: 01/28/2018
  - To: 04/28/2018
  - I cannot pick up...
    - *Must be within the requested date range.*
    - From: mm/dd/yyyy
    - To: mm/dd/yyyy
- **Item description(s) / Notes:**
  - I cannot pick up the items on 02/10 and 2/11 as well.
Place a special hold request

Special requests help when users need specific items but do not have enough information about the items they need from the item metadata. Special requests can also help when a user needs to request a specific material when the library does not have an item-level record for each part of a multi-part item.

To place a special hold request, users can change the default hold request type setting to “Special Request” from the hold request type drop-down menu. The “Special Request” hold type requires a descriptive note of up to 500 characters:
Important links

Product website

More product information can be found here.

Support website(s)

Support information for this product and related products can be found at:

- [WorldCat Discovery support resources](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)
- [WorldCat Discovery training](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)
- [Release notes](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)
- [OCLC customer support](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)
- [OCLC Community Center](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)
- [Browser compatibility chart](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)

Submit a Place Hold Request

Required *

There are 2 holds requested for this title.

The New England journal of medicine.
by [Massachusetts Medical Society](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2018_Release_notes/090_W…)

Journal, magazine
OCLC Number: 1597974

I need:

- Special Request
- Any Copy
- Specific Copies or Volumes
- Special Request:
  - OCLC Library Main Branch MAIN Periodicals
  - OCLC Library Main Branch EUS (Shelving Location)
  - OCLC Library North Branch NORT Periodicals
  - OCLC Library South Branch SOUT Periodicals
  - OCLC Library South Branch

Custom message for Main OCLC Library Main Branch that is displayed on 1. Availability table & Place Hold form and 2. Place hold confirmation Main - Periodicals Main - Reference

Custom message example where I’ve only selected the holding codes, but not the shelving location. This means I can’t select where to display the message in the workflow yet.