WorldShare Circulation release notes, February 2018

Last updated: Thu, 08 Feb 2018 21:05:25 GMT

Release Date: February 15, 2018

Introduction

This release of WorldShare Management Services provides several new features in addition to numerous bug fixes. The new features are the direct result of user 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 to be significant for most institutions. We encourage you to review all 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>
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<tr>
<th>ACTION</th>
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<tr>
<td>• If desired, add the new fields related to Preferred Locations to your default view of patron holds and the pull list.</td>
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<td>• Review staff procedures for fulfilling special requests.</td>
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<td>• Review your library's Hold Request Policies to determine if the Forwarding Policy setting is correct.</td>
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<td>• Determine if and how your library will use hold notes.</td>
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New features

Holds with Preferred Location(s)

To speed fulfillment, you and your library's patrons may choose to specify that only items held at one or more locations...
can be used to fulfill a title-level or special request hold. When preferred fulfillment locations are selected:

- Only available items at the preferred location(s) will appear on the pull list
- The hold can only be fulfilled by an item shelved at a preferred location

You can view Preferred Locations in Circulation from:

- The new Branch/Shelf Location column in the patron hold list. Note that this column does not display by default.
- The new Fulfill From entry field in the create or edit hold dialog box
- The Shelf Location and (where applicable) the new Alternate Shelf Locations columns in the pull list

The list of possible item locations is populated by all locations with local holdings. In Circulation, this includes item holding locations at your institution and (where applicable) at other institutions in your WMS group.
Note:

- Your patrons can submit title-level and special request holds with preferred location(s) from WorldCat Discovery. They cannot edit locations on submitted requests.
- You can only create or edit Preferred Locations for title-level holds.
Holds on unbarcoded items

WorldCat Discovery now allows patrons to place hold requests for specific unbarcoded items represented in your library's Local Holdings Records (LHRs). Examples of unbarcoded items include an LHR with a call number and no other item information, an unlinked 866-868 field, or an 853-855/863-865 pair not associated with an 876-878 $p. To learn more, see WorldCat Discovery's release notes.

In Circulation, a hold on an unbarcoded item will function as a special request hold, requiring you to locate or create an appropriate barcoded item prior to fulfilling the request in the system. The special request will include a Preferred Location that represents the location of the holding to ensure that the request displays on the appropriate branch's pull list.

You can fulfill a special request by checking in the system-generated barcode and linking the hold to the relevant barcoded item for circulation. Click here to learn more about fulfilling special requests.
Improvements

Fulfillment Policy honored at check in

The Forwarding Policy set in the Hold Request Policy is now honored when fulfilling title-level holds. Depending on your library's configuration, this enhancement will decrease the likelihood that the system will ask you to route an item that appears on your pull list for same-branch pickup to fulfill a hold at a different location.

Prior to this release, Forwarding Policy was used to determine if available items should first appear on the pull list of only the pickup branch (i.e. 'Prefers Pickup Location') or at all locations with available item (i.e. 'Globally Forwarded by default.').

As of this release, the location of the item at check in will be used to determine if it should satisfy a hold at its current location.

Note:

• Using a Forwarding Policy that prefers pickup location may cause a patron's place in the hold queue not to be honored. If your library wants all holds to be fulfilled in queue order, then all Forwarding Policies should be set to 'Globally Forwarded by default.'
• Forwarding a hold from the pull list will not override a Forwarding Policy that prefers pickup location.

Hold Request Policies > Edit Policy: Elizabeth’s Hold Request

Hold notes visible to patrons in WorldCat Discovery

Patron are now able to view notes on their hold requests from WorldCat Discovery's My Account. Patrons can also submit or edit hold notes on any hold. To learn more, see WorldCat Discovery’s release notes.
Note: Hold notes are public notes that can be added, edited, and removed by you or your patrons.

Bug fixes

Editing hold in My Account clears hold note

Editing a hold in WorldCat Discovery My Account will no longer remove the value of the hold note.

Known issues

No new issues were introduced in this release.

Important links

Post release sessions

No post release session is scheduled at this time.

Support websites

Support information for Circulation and related products can be found at:

- Browser compatibility chart
- Release notes
- User Support Center

Next release

To be determined.