WorldShare Circulation release notes, April 2023

Release Date: April 16, 2023

Introduction

This release of WorldShare Circulation provides new features and enhancements:

- Choose a longer retention period for notification history
- View notification history across your circulation group
- 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.

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<th>ACTION</th>
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<td>Choose if your library would like to retain notification history for longer than the current limit of 18 months. You may now choose to retain notification history for up to 24 months.</td>
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Please note that you may no longer select a retention period that is less than one day. For example, if you previously selected to retain notification history for 12 hours, then WorldShare Circulation will now retain your library's notification history for at least one day.
Review your library's Long Overdue and Lost Policy to ensure that a Bill reason for replacement cost value has been selected. This field is now required: loans will not transition to Long Overdue status or charge penalties to the patron's account if a bill reason is not specified.

New features and enhancements

Choose a longer retention period for notification history

Your library can now choose to retain notification history for up to 24 months (2 years). Prior to this release, the maximum retention period was 18 months.

Notification history is visible to library staff working in WorldShare Circulation when viewing a patron's History tab.

To verify or adjust your notification history settings, administrators should navigate to OCLC Service Configuration > WMS Circulation > Admin/General > History.

View notification history across your circulation group

All retained notification transaction history entries now display to library staff across a circulation group. Notification history is visible to library staff working in WorldShare Circulation when viewing a patron's History tab.

As of this release, your library staff will be able to view all retained notification history for a patron, regardless of which library sent the notification. For example, you will be able to view bill receipts and overdue notifications sent by any institution in your group.

To ensure that your library remains in control of the retention of data about your users, the Notification History logic has also been updated so that the retention period is controlled by the patron's home institution. For example, if a patron of Library A checked out an item from Library B's collection, then the retention policy of Library A will be used to determine if or how long to retain information about overdue notifications, etc. for Library B's item. This change is retroactive and will apply to all existing notification history that has already been retained by WMS.

For the best experience, all members of your group should consider retaining notification history for the same period of time.

To verify your notification history settings, administrators should navigate to OCLC Service Configuration > WMS Circulation > Admin/General > History.

Note: If your institution has chosen to never retain notification history, then the Notification History accordion will not display to library staff working in WorldShare Circulation, even if other institutions in your group are retaining history. This behavior will change in a future release of Circulation to make any retained notification history visible to library staff.
Bug fixes

Patron account cannot be reopened
A patron’s account in WorldShare Circulation could not be reopened if the account was closed previously opened and then closed.

Loans do not become long overdue if the policy does not specify a bill reason
Loans were not transitioning to Long Overdue status if the associated Long Overdue and Lost Policy did not specify a bill reason for the replacement cost. Replacement costs and processing charges are also not created against the patron's account.

As of this release, you will no longer be able to save a Long Overdue and Lost Policy without providing a value for Bill reason for replacement cost. You may wish to review your existing policies to ensure that all required information has been provided.

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