Find a checklist of tasks necessary to perform in order to implement WorldShare Circulation.

**Understand circulation workflows**

- ☐ Attend and participate in implementation cohort sessions and discussions related to Circulation Workflows.
- ☐ Attend [live instructor-led training or view recorded training, videos, and exercises](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).

**Understand and configure circulation policies**

- ☐ Attend and participate in implementation cohort sessions and discussions related to Circulation Policies.
- ☐ Attend [Circulation Configuration Training](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).
- ☐ Review [Circulation policies and setting dependencies](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).
- ☐ Use the [Circulation configuration spreadsheet](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan) to map out your policies in advance.
- ☐ Review [Service Configuration online help](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan) as you work through each WMS Circulation section.
- ☐ Work with your implementation manager to determine when you can start setting policies in Service Configuration.
- ☐ Determine who will be responsible for configuring and maintaining policies locally and make sure they have access to [Service Configuration](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).
- ☐ Configure and test your circulation policies.

**Prepare to go live with WMS Circulation**

- ☐ Assign appropriate [circulation roles](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan) to staff accounts.
- ☐ Set up SIP2 client integration for self-checkout service (if applicable).
- ☐ Set up debt collection integration with Unique Management Services (if applicable).
- ☐ Set up your [Offline Circulation client](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).
- ☐ Set up your [POS printer](https://help.oclc.org/Librarian_Toolbox/Implementation_rollout_plans/Circulation_rollout_plan).
☐ Set up ILL / Circulation integration.

☐ Share the override credentials provided by your Implementation Manager with other staff members as needed.

☐ Workflow for processing hold requests from the pull list.

☐ Workflow for processing expired holds that were not picked up.

☐ Utilize the Circulation reports in WorldShare Reports.

☐ Utilize the SFTP circulation reports.

☐ Utilize the Digby mobile app for Circulation.

☐ Workflow for completing an item inventory.

☐ Course reserves.