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.

☐ Review WorldShare Circulation online help.

**Understand and configure circulation policies**

☐ Attend and participate in implementation cohort sessions and discussions related to Circulation Policies.

☐ Attend Circulation Configuration Training.


☐ Review Circulation policies and setting dependencies.

☐ Use the Circulation configuration spreadsheet to map out your policies in advance.

☐ Review Service Configuration online help 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.

☐ Configure and test your circulation policies.

**Prepare to go live with WMS Circulation**

☐ Assign appropriate circulation roles 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.

☐ Set up your POS printer.
☐ 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.