Admin/General

Find settings for Branch Locations, Deleted Items, Display Patron Information, History, Override Credentials, and UI Preferences.

To access this screen, sign in Service Configuration, open the WMS Circulation left navigation, and then select Admin/General.

Branch Locations

Use this screen to configure multiple pickup locations per branch for hold requests.

By default, the list of Branch Locations will be empty. To add a branch location:

1. Select the Create New option to open the create form.
2. Enter the following information under General Settings:
   - Location: Enter a location name.
     - Location names may be up to 50 characters in length.
     - The name may be changed at any time without impacting any existing holds or policies.
   - Branch: Select the Branch to associate with the location. See Branches for more information.
   - Notes: (Optional). Enter internal notes for the location.
   - Identifier: (Optional). Enter identifiers for consistency with third party applications.
3. Enter the following information under Request Fulfillment:
   - Select the Service Status for the location to determine whether to allow the location to be a pickup option for library users in WorldCat Discovery. Use the drop-down to select one of the available Service Status options:
<table>
<thead>
<tr>
<th>SERVICE STATUS</th>
<th>PICKUP OPTION IN CIRCULATION AND HOLD PICKUP LOCATIONS MAP?</th>
<th>PICKUP OPTION IN WORLDCAT DISCOVERY AND MY ACCOUNT?</th>
<th>ITEM LOCATION OPTION AT CHECK IN AND ITEM STATISTICS?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Pickup Location</td>
<td>Yes ▪ Override required if not allowed by library policy.</td>
<td>Yes, if otherwise allowed by library policy.</td>
<td>Yes</td>
</tr>
<tr>
<td>Inactive Pickup Location</td>
<td>Yes ▪ Override required.</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Not a Pickup Location</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

- Select a **Fulfillment Method**. Options include:
  - **Collect for Loan**: Default. Allows items on hold to be checked out to the requesting patron.
    - When an item is on hold at a collect for loan pickup location, the system will still allow the hold to be updated to **In use** status after library staff acknowledge the policy conflict.
  - **In-House use only**: Items in this location must be used within the library.
    - When an item is on hold at an in-house use pickup location, the system will still allow the item to be checked out if library staff acknowledge the policy conflict.
  
  Notes:
  - A hold's Fulfillment Method will be set to **Collect for Loan** if the pickup location is a branch only. The **In-House use only** method can only be assigned to branch locations.
  - The Fulfillment Method can be added to the Hold receipt. See [Receipts](#) for more information.

4. Click **Save**.

Note: After a location has been saved, you will not be able to delete the location or change its branch.

- Service Status for Branch Locations can be altered at any time if a location is discontinued or is temporarily inaccessible to patrons. Before changing the Service Status for a location, review the Open Holds Report to ensure that existing holds are appropriately canceled or updated to a new pickup location. See [Circulation Reports, Open Holds Report](#) for more information.

Caution: For libraries using the **Hold Pickup Locations Map**:

- Review and update the Map whenever your library:
  1. Adds a new branch location
  2. Updates the status of existing locations such that a branch location becomes a pickup location (active or inactive) or is no longer a pickup location.
• No changes to the Hold Pickup Locations Map are needed if you modify a location's service status from active to inactive (and vice versa).

• Invalid entries in the Map are highlighted in red. You will be prevented from saving changes to the Map until all issues are resolved. Invalid entries include:
  ◦ A branch alone cannot be selected in the Map if that branch has at least one branch location that is a pickup location (active or inactive).
  ◦ A branch location that is no longer a pickup location cannot be selected in the Map. An invalid location message will appear.
  ◦ All branch locations for a specified branch are no longer pickup locations and cannot be selected in the Map. An invalid location message will appear. If the branch alone should be a pickup option, be sure to select the branch in the Map.

## Deleted Items

Use this screen to set a retention period for deleted items.

Note: The maximum retention period for deleted items is 12,000 months (1,000 years).

• Items deleted from WMS will not display to the public, but will be saved by the system.
• Until the item is purged from the system, staff will be able to retrieve the item by barcode in WMS.
• The system-wide job to purge deleted items runs every Sunday. Deleted items will be retained until the job runs.
• The system retains old barcodes until the deleted items are purged.
• A deleted item's status is Withdrawn.
• A deleted barcode may not be able to be reused until the item has been purged.

Notes:

• A withdrawn, barcoded item will only be deleted by WorldShare Circulation if the item’s previous status was Available, Unavailable, Missing, Lost, Claimed Never Had, or Claimed Returned. If an item is in any other status, you must check it in at its holding location to release the item.
• The system will not delete a withdrawn item in a container if the container still exists. Remove the item from its container before withdrawing it from the collection.
• You may need to check in items in a Claimed or Lost status to clear the patron’s claim count before withdrawing the item from the collection. A claim cannot be removed from the patron’s account after the item record is deleted.

## Deleted Items fields:

• **Retain Deleted items for:** The length of time deleted items will be retained. It is recommended to retain deleted items for a minimum of two weeks. Enter 0 to purge deleted items the next time the system-wide job runs.

## Display Patron Information

Use this screen to configure patron notes display settings and patron expiry warnings in WMS.
Patron Notes

Use this setting to display the types of notes visible in the Account Overview section of the patron account.

- See View and use patron records for more information on public and staff notes.

Patron Notes fields

- Patron Note Types to Display: Select the note types to be shown on the patron account to either Staff Notes Only or Both Public and Staff Notes.
  - The default setting is to display staff notes only.

Patron Expiry Warning

Use this setting to configure a popup notification when a patron's account is approaching its circulation expiration date.

- This is a global setting for all patron accounts, regardless of patron type or home branch

Patron Expiry Warning fields

- Display on Accessing Patron Account: Select if you want to receive popup notifications about patron account expiration dates As a Blocking Popup or Never.
  - The default setting is not to display a notification.
- Display Period: If you select to receive popup notifications, you must set the length of time prior to the patron account's expiration date that the notification should appear.

History

Use this screen to store transaction history and notification history.

- Transaction history and notification history are not dependent on one another; you can choose to store one, both, or none.

Transaction History

Use this setting to store transaction history for items and patrons.

- The system retains circulation transactions (check ins, check outs, etc.) when transaction history is stored.
- When stored, transaction history can be viewed:
  - In the Transaction History section of the Item Details screen (item transaction history)
  - In the History tab of a patron account (patron transaction history)
Transaction History fields:

- **Retain history for:** If you select to store transaction history, you must set the length of time transaction history will be retained.
  - Enter 0 to turn off automatic purging and retain history indefinitely.
- **Store history:** Select if you want to store transaction history.
  - If you select No (default), transaction history will not be stored.
  - If you select Yes, transaction history will be stored for the specified length of time.

Purging

Note: Purging transaction history in Service Configuration only applies to what is visible to staff in WorldShare Circulation. To remove patron data from a circulation event in WorldShare Reports and Report Designer, see Disassociate patron data from circulation events.

- On the item statistics screen, the patron associated with the status of the item and the last patron the item was issued to will always be shown, regardless of the transaction history setting.
- Only transactions that take place after transaction history has been set to Store will be retained.
- Once transaction history is purged, it cannot be recovered.
- Changing transaction history from Store to Do Not Store will not retain previously stored history. All transactions will be purged.

Notification History

Use this setting to store notification history.

- The system retains the notifications sent to patrons when notification history is stored.
- When stored, notification history can be viewed in History tab of the patron record

Notification History fields

- **Retain history for:** If you select to store notification history, you must set the length of time transaction history will be retained.
  - The maximum time notification history can be stored is 18 months.
- **Store history:** Select if you want to store notification history.
  - If you select No (default), notification history will not be stored.
  - If you select Yes, notification history will be stored for the specified length of time.

Override Credentials

Use this screen to reset the password associated with your library's override credentials.

- In the Circulation staff interface, these credentials can be entered by a supervisor to allow a student or other desk
worker to temporarily exceed your library's policies or to complete a restricted action. See Circulation account roles to learn more about when a supervisor's override credentials are required.

- A set of credentials was created for your library during implementation. If no credentials have been created, contact OCLC Support.
- Select a user name to open the Reset Password settings.
- You will be able to:
  - Reset the override password
  - See the circulation barcode of the user account linked to the override credentials, i.e. the user to act as.
    - A 'User not found' message will display if the linked user account has been deleted. Contact OCLC Support for assistance.

**UI Preferences**

Use this screen to set check in alerts for selected item statuses.

Click the check boxes to select that staff receive an alert in WorldShare Circulation when items with the following statuses are checked in:

- **Lost**: Checked by default.
- **Missing**: Checked by default.
- **Claimed Never Had**: Unchecked by default.
- **Claimed Returned**: Unchecked by default.

For information on how to mark items as claimed lost, claimed returned, or claimed never had, see Change loan status.

For information on how to mark items as missing, see View and use item records.