WorldShare Circulation

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WorldShare Circulation facilitates requesting, loaning, and processing of physical items to eligible patrons and affiliated institutions.

- Get started
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  - Get started with WorldShare Circulation.
    - Circulation account roles
    - Add a privacy notice
    - Contact OCLC Order Services
    - Set or reset your password
    - Sign in to Circulation

- Check out
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  - Discover how to check out materials.
    - Change due date
    - Change loan status
    - Check out
    - Check out a held item
    - Check out exceptions
    - Check out temporary item
    - Download and run the offline circulation client
    - Renew items
    - Use offline circulation and upload transactions

- Check in
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  - Discover how to check in materials.
• Check in exceptions
• Check in items
• Download and run the offline circulation client
• Inventory
• Soft check in
• Use offline circulation and upload transactions
• Work with fines for checked in items

• Patron management

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In Circulation, discover how to research patron accounts to assist in circulation activity, create new patrons, and work with bills and fines.

• Create new patron
• Delete patron account
• Edit patron barcodes
• Look up patron
• Patron history
• Patron notes
• Proxy patrons
• Work with bills and fines

• Item management

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Discover procedures for tasks that you may perform (e.g., look up items, edit items, add temporary items, etc.) in order to maintain item records related to circulation activities

• Add temporary items
• Advanced search and expert search
• Check item status or location
• Claims lost, returned, never had
• Container management
• Edit multipart items
• Edit single item
• Item notes
• Look up item
• Manage serial issues
• View and use serial item records
• View item history
- View statistics and reminders sent

- Holds management
  
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  Discover how to place and delete holds from bibliographic records, item records, and from patron accounts.
  
  - Circulation hold workflow
  - Clear hold shelf
  - Edit or delete hold
  - Place hold
  - Pull list
  - Recall items
  - Schedule items
  - View holds

- Room reservations
  
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  Use the Room Scheduling feature to manage the rooms in your library and create events (reservations) for patrons.
  
  - Browse rooms
  - Create a room event (reservation)
  - Delete (cancel) an event
  - Set up room scheduling

- Configuration
  
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  Discover how to set your circulation policies with OCLC Service Configuration.
  
  - Group aware for consortia
  - Integration with ZFL-Server
  - OCLC Service Configuration - WMS Circulation
  - Set up your POS printer
  - Tipasa integration
  - WorldShare Interlibrary Loan integration

- Reference
  
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  Additional resources for WorldShare Circulation users.
Course Reserves in WorldCat Discovery
  ◦ Digby® app FAQ
  ◦ Mobile best practices for third-party IDPs with the Digby® app

• WorldShare Circulation release notes and known issues

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Find WorldShare Circulation release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

  ◦ 2019 WorldShare Circulation release notes
  ◦ 2018 WorldShare Circulation release notes
  ◦ 2017 WorldShare Circulation release notes
  ◦ Known issues

• WorldShare Circulation training

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Find training on WorldShare Circulation.

  ◦ Standard check out and check in
  ◦ Check out and check in exceptions
  ◦ Patron management
  ◦ Item management
  ◦ Placing holds
  ◦ Circulation configuration
  ◦ Exercises
  ◦ Videos

• Troubleshooting

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Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

  ◦ Can a bill receipt be printed after the transaction has been completed?
  ◦ Can I include patron pictures in the records we provide for uploading?
  ◦ Customize text for Circulation Notices
  ◦ Do items that are checked in through Digby show up only in the “Soft checkout” statistics?
  ◦ Fines are being accrued despite a grace period being in place. Why is this?
  ◦ How can I find out about planned maintenance outages?
  ◦ How can I get a list of my current transactions in Digby
  ◦ How do fixed due dates affect our loan policies?
How do I add a new patron type?
◦ How do I change the branch library name on the hold pick up slip?
◦ How do I get a new location added to our WMS?
◦ I am getting an error message when cataloging a book and it shows 'null' in the call number.
◦ How do I activate room scheduling in WMS Circulation for our library?
◦ I'm getting an error stating "There are no matching hold priority policies." How can I fix this?
◦ If a scanned item has a status such as billed or paid, but is found in the library and scanned with Digby, will the app alert us to this?
◦ If a scanned item is checked out, will it be checked in via the app?
◦ If I am paying multiple bills in one transaction and the full amount is not tendered, which bill is paid in full?
◦ In the renewal page, can I see at a glance if an item is reserved?
◦ Is it possible to have student pictures on WorldShare Circulation profiles?
◦ Is there an impact to changing our Item call number types to Unknown?
◦ Is there a way to re-send a circulation receipt to a patron's email?
◦ Items are not being removed from the patrons hold list, why?
◦ I am having trouble setting up our POS Printer with our new Windows 10 computers and when I try to install it gives me an error and refuses to continue.
◦ I am unfamiliar with a barcode being 'deprecated', what does that mean?
◦ I have set my loan policy for a location to be not for loan but items within this location are still showing as available for loan
◦ I need my Circulation Override Credentials?
◦ I'm trying to make changes to my loan policy. When I select WMS circulation it takes me to a blank page
◦ My due dates are set in the wrong date format
◦ No matching Location Policy error
◦ No possibility to set/reset password for manually entered patron
◦ One of our PCs is displaying different menu options in Check In
◦ Our patrons began receiving bill notifications from WorldShare Management System (WMS), but we are no longer subscribers to WMS so we don't have access to Service Configuration.
◦ Our policy for Room Expiration Notification appears to be malfunctioning. It is sending out notifications hours and hours after the event occurred.
◦ Patron unable to login to my account, they receive the error message "The login system failed with error: Problem processing ACS Response in IDM Bridge"
◦ Strange order in hold request list
◦ There are no checkboxes next to the items in the patron hold list. How do I fix this?
◦ The "Items Claimed Returned" in my patron's account is not clickable. How do I find out which items were marked in this status?
◦ We can't find a way to activate the room configuration functionality in Service Configuration
◦ We would like to enable authentication for SIP2 circulation transactions, which authentication services are supported?
What causes orphan holds to appear against a patrons record, but not display in the title hold queue in Circulation or in a Pull List?

- What does the error message mean in my Patron Exception Report?
- What should I do when I get the message "Limit reached" in Digby?
- When uploading a patron record that matches an existing patron record in the system, what happens to the notes in that patron record?
- Where can we find our Supervisor username and pin?
- Where would I set a rule that items in a certain collection may not be placed on hold?
- Why am I directed to a specific item / title / patron / order / invoice record when I first log in to WMS?
- Why am I getting the message "OCLC has detected a problem with your institutions authorization credentials" when trying to login to WorldShare Management Services?
- Why am I receiving the message "We cannot reach your site to verify your credentials. Try again later."
- Why am I seeing "OCLC has detected that your institution’s encryption has changed" when I log into WorldShare?
- Why are changes made to the OPAC Statuses, Locations and Circulation Policies grid not taking effect?
- Why are items renewing from today's date instead of from the original due date as we have it set up?
- Why are my changes to the email notifications not saving?
- Why can't my student worker search for patrons or scan barcodes?
- Why do deleted items still display with a status of Withdrawn, when they should be purged?
- Why isn't updated bibliographic information showing on my Item Inventories report?
- Why is my loan policy not being applied correctly?
- Why can't I see the check box when I want to delete a hold?
- Why were fines not applied to my circulation transaction?
- Would it be possible to let our patrons limit their searches by branch location?