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
  - 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

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

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

Discover how to set your circulation policies with OCLC Service Configuration.

- Group aware for consortia
- OCLC Service Configuration - WMS Circulation
- Set up your POS printer
- Tipasa integration
- WorldShare Interlibrary Loan integration

• Reference

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.

  ◦ 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?
  ◦ How do I add a new patron type?
  ◦ How do I change the branch library name on the hold pick up slip?
  ◦ I am getting an error message when cataloging a book and it shows ‘null’ in the call number.
  ◦ 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?

◦ No matching Location Policy error
◦ No possibility to set/reset password for manually entered patron
◦ 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.
◦ 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"
◦ We would like to enable authentication for SIP2 circulation transactions, which authentication services are supported?
◦ When uploading a patron record that matches an existing patron record in the system, what happens to the notes in that patron record?
◦ 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 isn’t updated bibliographic information showing on my Item Inventories report?
◦ Why is my loan policy not being applied correctly?