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

- **Get started**

  [No image available](https://help.oclc.org/Library_Management/WorldShare_Circulation)

  Get started with WorldShare Circulation.

  - Circulation account roles
  - Add a privacy notice
  - Set or reset your password
  - Sign in to Circulation

- **Check out**

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  Discover how to check out materials.

  - Check out
  - Check out a held item
  - Check out temporary item
  - Bulk renew items
  - Change due date
  - Change loan status
  - Check out exceptions
  - 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 items
  - Check in exceptions
  - 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.
  
  - Patron record details
  - Block a patron
  - Create new patron
  - Delete patron account
  - Edit patron barcodes
  - Manage library memberships
  - Patron history
  - Patron notes
  - Proxy patrons
  - Suspend 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 items
  - Add temporary items
  - Advanced search and expert search
  - Change the location for multiple items
  - Check item status or location
  - Claims lost, returned, never had
  - Container management
  - Delete items
  - Edit items
  - Item notes
  - Manage serial issues
  - Search for items
• Set search preferences
• 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
• Available hold types
• Place hold
• Edit or delete hold
• Schedule items
• View holds
• Holds for review
• Pull list
• Fulfill holds
• Recall items
• Clear hold shelf

• 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

• My Account

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Learn how library users can access their accounts to renew items, remove and edit holds, and view fines in WorldCat Discovery.

• Access and customize My Account
• Checked out
• Requested
• Fees
• Configuration

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

◦ OCLC Service Configuration - WMS Circulation
◦ Group aware for consortia
◦ Integration with ZFL-Server
◦ WorldShare Interlibrary Loan integration
◦ Tipasa integration
◦ Integration with Relais D2D

• Capira Curbside

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Find information about Capira Curbside.

◦ Get started with Capira Curbside

• Reference

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Additional resources for WorldShare Circulation users.

◦ Course Reserves in WorldCat Discovery
◦ Digby® app FAQ

• 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.

◦ 2020 WorldShare Circulation release notes
◦ 2019 WorldShare Circulation release notes
◦ 2018 WorldShare Circulation release notes
◦ Known issues

• WorldShare Circulation training

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Find training on WorldShare Circulation.
Troubleshooting

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

- Are my notifications sent according to how I set them in Service Configuration, or at the top of the hour/the next morning?
- A patron received a recall notification for an item, but the item was never recalled.
- Can a bill receipt be printed after the transaction has been completed?
- Can a shelving location be changed in bulk to a different shelving location?
- Can Demco Spaces be integrated with WMS?
- Can Digby support check digits in barcodes?
- Can I convert monographs to multi-part items?
- Can I include patron pictures in the records we provide for uploading?
- Can I turn off circulation notifications in WorldShare?
- Can we add a cost to an individual item?
- Can we make our own item material types?
- Can we reset the password for offline circulation?
- Can we set up automatic email receipts for items borrowed by patrons?
- Can we stop notifications from being sent out on closed days?
- Customize text for Circulation Notices
- Digby not showing the Share link
- Does OCLC have to share a key for encrypted SIP2 connection?
- Does the bulk due date renewal client update ILL due dates as well?
- 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?
- For Digby "Remove All Items", When it says: " inventoried items cannot be retrieved once removed from this list" What list is it referencing?
- Hold Pull List Patron Name and Borrower Category sorts don't appear correct
- How can I change the sort order of serial checkin records?
- How can I configure my SIP2 device to work with WMS?
- How can I find out about planned maintenance outages?
- How can I get a list of my current transactions in Digby?
- How can I get a record into WMS for the laptops my library wants to circulate?
- How can I identify duplicates in the Circulation Item Inventory within Excel
- How can I tell if my institution is set up for SIP2?
- How can we prepare for an outage?
- How do fixed due dates affect our loan policies?

https://help.oclc.org/Library_Management/WorldShare_Circulation
Printed: Thu, 10 Dec 2020 10:18:10 GMT
How do I add a new hold pickup location?
◦ How do I add a new patron type?
◦ How do I add a temporary shelving location that will appear in the drop-down menu in my LHRs?
◦ How do I add Laptops or other items to WMS for Circulation?
◦ How do I change a branch library name?
◦ How do I delete a container?
◦ How do I get a location removed from our WMS?
◦ How do I get a new location added to our WMS?
◦ How do I keep withdrawn barcodes from being purged?
◦ How do I limit number of holds allowed for a patron on popular resources, such as High Use, New Titles, DVD's or Laptops?
◦ How do I locate/access our Circulation Item Inventory Report?
◦ How do I make a shelving location non-circulating?
◦ How do I perform a stocktake?
◦ How do I permanently delete items that are still showing the status of "Withdrawn" after the purge date if I have already deleted the branch from our configuration?
◦ How do I prevent fines from generating on closed days?
◦ How do I prevent holds being placed on items I do not want holds on?
◦ How do I prevent the WSKey for my offline circulation client from expiring?
◦ I am getting an error message when cataloging a book and it shows 'null' in the call number.
◦ How do I set my open hours to go past midnight?
◦ How do we stop overdue fines from being created, on overdue items?
◦ How do I activate room scheduling in WMS Circulation for our library?
◦ How long does it take loan policy changes to apply to library resources?
◦ How long until my WSKey expires?
◦ How often can I submit a patron load file?
◦ If an item with fines on it is withdrawn and purged, do the fines remain on the patron's account?
◦ 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 patrons in the delete file have outstanding checkouts or bills, will they still be deleted by the bulk patron delete process?
◦ 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 Digby training available?
◦ Is it possible for any existing "title" (Mr., Mrs., Professor, etc.) information in patron records to be removed via a batch process?
◦ Is it possible to add student photos to WorldShare Circulation profiles?
Is it possible to set up a SIP2 connection for Hoopla?

◦ Is there an impact to changing our Item call number types to Unknown?
◦ Is there a way to increase the default number of items displayed in the patron check screen?
◦ Is there a way to re-send a circulation receipt to a patron's email?
◦ Is there a way to turn off the last issued to field in item statistics so that you don’t see the patron’s name?
◦ Item record with a blank barcode appears in Copy list and can’t be deleted
◦ 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.
◦ Why am I getting an error message in Service Configuration: "We are unable to process your request at this moment.".
◦ I am unable to log in to the SFTP server.
◦ I am unable to sign in to Service Configuration using my OCLC Services Account
◦ 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 have set open hours for our library to close at 6pm, but our due dates are still showing as 11:59pm on the following day rather than 6pm.
◦ I have updated my notifications but the old notifications are still going out
◦ I need a list of the temporary item records for my institution
◦ 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 Loan Policy found error
◦ No matching Location Policy error
◦ No possibility to set/reset password for manually entered patron
◦ One of my patrons did not get deleted when the patron delete batch job was run, why?
◦ One of our PCs is displaying different menu options in Check In
◦ 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"
◦ Server Communication Failed error when adding item record
◦ 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?
◦ The search in WorldShare Circulation is defaulting to My Group Holdings instead of My Library Holdings, how do we change this?
◦ Unable to log into the Digby app on an Android phone.
We can't find a way to activate the room configuration functionality in Service Configuration.

- We need a list of IPs or URLs that the offline circulation client connects to so that we can make firewall exceptions on our end.
- We noticed that the date printed on a retrieval slip was incorrect even though the date on the bib record was correct.
- We see a message about "Digby Limit Reached". What is the Limit, and how would we share the list before removing it?
- 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 "Assess" and "Pending Payment" status mean?
- What does the error message mean in my Patron Exception Report?
- What happens to the "claimed lost" counter on a patron record if the withdrawn item is never checked-in before being purged from the system?
- What information should I send when reporting a problem to Support?
- What is OCLC's data backup schedule for WMS?
- What is the impact if we change from linking or unlinking patron usernames and barcodes?
- What should I do when I get the message "Limit reached" in Digby?
- When an item is renewed what notification policies does it follow?
- When do emailed inventory reports from Digby get sent, is it immediate?
- 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?
- Who do I contact for SIP2 connection set up?
- Why am I directed to a specific item / title / patron / order / invoice record when I first log in to WMS?
- Why am I getting an "Error Updating the Entry" error when updating Notifications?
- Why am I getting the message "We cannot reach your institution to verify your credentials. Try again later" when I try to log in?
- 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 institution 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 due dates being set out by several years?
- Why are due dates not being set according to our policies?
- Why are items falling due on days when the libraries are closed?
Why are items not being removed from the patron's hold list?
- Why are items renewing from today's date instead of from the original due date as we have it set up?
- Why are items showing up delayed on the Pull List from when they were requested?
- Why are items that are received in Acquisitions going straight to an Available status?
- Why are my changes to email notifications not saving?
- Why are notifications not showing under patron's history?
- Why are some buttons greyed out when editing an item in Circulation?
- Why are there multiple due dates for the same item showing on my due date receipt?
- Why are the Replacement and Processing fees disappearing when a lost or long overdue item is returned?
- Why can't I see the check box when I want to print a receipt?
- Why can't my student worker search for patrons or scan barcodes?
- Why can't I save my changes to "Accrue bills and/or suspension when closed)?
- Why can I not find an item by its OCN, Title, etc., only by its barcode?
- Why does Digby crash after a few scans?
- Why does more than one item come up when I search for a barcode?
- Why does the Shelving location field appear red when I'm trying to set up a new rule in the Loan Policy Map?
- Why don't I see the Change Due Date button?
- 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 an item not automatically renewed?
- Why is a staff note popping up when checking-in an item when there is not a note on the item?
- Why is Digby not scanning a full barcode that has an 'Enter' suffix on an iOS device?
- Why is Digby stuck at a circular loading screen?
- Why is my loan policy not being applied correctly?
- Why is my POS Printer not printing automatically?
- Why is my renew button deactivated in circulation?
- Why is our self-checkout machine allowing checkouts that don't respect our Loan Policy Map
- Why is the system sending all of our checked in items into transit?
- Why are the check boxes missing when we go to select an item on a patron's account?
- Why were fines not applied to my circulation transaction?
- Would it be possible to let our patrons limit their searches by branch location?
- You are already logged into another institution error