WorldShare Circulation

Last updated: Mon, 11 Sep 2017 20:16:41 GMT

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

• Get started

  No image available

  Get started with WorldShare Circulation.
  ◦ Circulation account roles
  ◦ Contact OCLC Order Services
  ◦ Set or reset your password
  ◦ Sign in to Circulation

• Check out

  No image available

  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

  No image available

  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

No image available

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

No image available

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
- Integration with ZFL-Server
- 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**

No image available

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**

No image available

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**

No image available

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 can I find out about planned maintenance outages?
- 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.
- 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?

Items are not being removed from the patrons hold list, why?

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

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"

Strange order in hold request list

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?

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?

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 can't my student worker search for patrons or scan barcodes?

Why isn't updated bibliographic information showing on my Item Inventories report?

Why is my loan policy not being applied correctly?