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
  
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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 location removed from our WMS?

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?

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?

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 are not saving?
° Why are some buttons greyed out when editing an item in Circulation?
° Why can't my student worker search for patrons or scan barcodes?
° Why can I not find an item by its OCN or Title, only by its barcode?
° 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?
° You are already logged into another institution error