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
• 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.
  - 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 can I find out about planned maintenance outages?
  - 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 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 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’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
- 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 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?
- Why am I directed to a specific item / title / patron / order / invoice record when I first log in to WMS?
- 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?