WorldShare Circulation

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
  ◦ 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

In Circulation, discover how to research patron accounts to assist in circulation activity, create new patrons, and work with bills and fines.

◦ Block a patron
◦ Create new patron
◦ Delete patron account
◦ Edit patron barcodes
◦ Look up patron
◦ Patron accounts in WorldCat Discovery
◦ Patron history
◦ Patron notes
◦ Proxy patrons
◦ Work with bills and fines

• Item management

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
◦ Change the location for multiple items
◦ Check item status or location
◦ Claims lost, returned, never had
◦ Container management
◦ Item notes
◦ Look up item
◦ Manage serial issues
◦ View and use serial item records
◦ View item history
◦ View statistics and reminders sent
◦ Work with a single item
Work with multipart items

**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
- Holds for review
- 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.

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

**Reference**

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Additional resources for WorldShare Circulation users.


Updated: Wed, 28 Aug 2019 09:17:30 GMT

Powered by MindTouch
• **WorldShare Circulation release notes and known issues**

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**

Find training on WorldShare Circulation.

- Standard check out and check in
- Check out and check in exceptions
- Patron management
- Item management
- Placing holds
- Exercises
- Videos

• **Troubleshooting**

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

- 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 include patron pictures in the records we provide for uploading?
- Can I manually update a subset of patrons instead of using patron update?
- 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?
Customize text for Circulation Notices

- Digby not showing the Share link
- 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?
- Hold Pull List Patron Name and Borrower Category sorts don’t appear correct
- How can I find out about planned maintenance outages?
- How can I get a list of my current transactions in Digby?
- How can I tell if my institution is set up for SIP2?
- How do fixed due dates affect our loan policies?
- How do I add a new patron type?
- How do I add Laptops or other items to WMS for Circulation?
- 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?
- 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 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 activate room scheduling in WMS Circulation for our library?
- How often can I submit a patron load file?
- 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 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 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 there an impact to changing our Item call number types to Unknown?
- Is there a character limit to how long a notification policy can be?
- 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 trying to log in to the service configuration site, but I am getting an error that says "We are unable to process your request at this moment."
- I am unable to log in to the FTP server
- I am unable to sign in to Service Configuration using my OCLC Services Account
- I am unfamiliar with a barcode being 'depreciated', 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 updated my notifications but the old notifications are still going out
- 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 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 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?
- The search in WorldShare Circulation is defaulting to My Group Holdings instead of My Library Holdings, how do we change this?
- We are seeing odd due dates that don't follow the check-out policies that we have set up.
- 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 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 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 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 the message "OCLC has detected a problem with your institutions authorization credentials" when trying to login to WorldShare Management Services?
- 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 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 items falling due on days when the libraries are closed?
- 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 notifications not showing under patron's history?
- Why are some buttons greyed out when editing an item in Circulation?
- 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 I not find an item by its OCN, Title, etc., 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 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 my loan policy not being applied correctly?
- Why is my renew button deactivated in circulation?
- 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