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**

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**

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**

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?
- 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?
- 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 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 were fines not applied to my circulation transaction?