WorldShare Circulation

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](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Add a privacy notice](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Set or reset your password](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Sign in to Circulation](https://help.oclc.org/Library_Management/WorldShare_Circulation)

• **Check out**
  
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  Discover how to check out materials.
  
  ◦ [Check out](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Check out a held item](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Check out temporary item](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Bulk renew items](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Change due date](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Change loan status](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Check out exceptions](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Download and run the offline circulation client](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Renew items](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Use offline circulation and upload transactions](https://help.oclc.org/Library_Management/WorldShare_Circulation)

• **Check in**
  
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  Discover how to check in materials.
  
  ◦ [Check in items](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Check in exceptions](https://help.oclc.org/Library_Management/WorldShare_Circulation)
  ◦ [Download and run the offline circulation client](https://help.oclc.org/Library_Management/WorldShare_Circulation)
• **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.
  
  - Patron record details
  - Block a patron
  - Create new patron
  - Delete patron account
  - Edit patron barcodes
  - Manage library memberships
  - Patron history
  - Patron notes
  - Proxy patrons
  - Suspend 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 items
  - 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
  - Delete items
  - Edit items
  - Item notes
  - Manage serial issues
  - Search for items
  - Set search preferences
  - 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
- Available hold types
- Place hold
- Edit or delete hold
- Schedule items
- View holds
- Holds for review
- Pull list
- Fulfill holds
- Recall items
- Clear hold shelf

• **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

• **My Account**

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Learn how library users can access their accounts to renew items, remove and edit holds, and view fines in WorldCat Discovery.

- Access and customize My Account
- Checked out
- Requested
- Fees
- Saved Searches
- View Profile

• **Configuration**

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Discover how to set your circulation policies with OCLC Service Configuration.
• OCLC Service Configuration - WMS Circulation
  • Group aware for consortia
  • Integration with ZFL-Server
  • WorldShare Interlibrary Loan integration
  • Tipasa integration
  • Integration with Relais D2D

• Reference
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  Additional resources for WorldShare Circulation users.

  • Course Reserves in WorldCat Discovery
  • Digby® app FAQ

• 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.

  • 2020 WorldShare Circulation release notes
  • 2019 WorldShare Circulation release notes
  • 2018 WorldShare Circulation release notes
  • Known issues

• WorldShare Circulation training
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  Find training on WorldShare Circulation.

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

  • Are my notifications sent according to how I set them in Service Configuration, or at the top of the hour/the next morning?
  • 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 convert monographs to multi-part items?
  • 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 I turn off circulation notifications in WorldShare?
- 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?
- Can we stop notifications from being sent out on closed days?
- Customize text for Circulation Notices
- Digby not showing the Share link
- Does the bulk due date renewal client update ILL due dates as well?
- 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?
- For Digby "Remove All Items". When it says: “inventoried items cannot be retrieved once removed from this list” What list is it referencing?
- Hold Pull List Patron Name and Borrower Category sorts don't appear correct
- How can I change the sort order of serial checkin records?
- How can I find out about planned maintenance outages?
- How can I get a list of my current transactions in Digby?
- How can I get a record into WMS for the laptops my library wants to circulate?
- How can I identify duplicates in the Circulation Item Inventory within Excel?
- How can I tell if my institution is set up for SIP2?
- How can we prepare for an outage?
- How do fixed due dates affect our loan policies?
- How do I add a new hold pickup location?
- How do I add a new patron type?
- How do I add a temporary shelving location that will appear in the drop-down menu in my LHRs?
- How do I add Laptops or other items to WMS for Circulation?
- How do I change a branch library name?
- How do I delete a container?
- 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 locate/access our Circulation Item Inventory Report?
- How do I make a shelving location non-circulating?
- How do I perform a stocktake?
- How do I permanently delete items that are still showing the status of "Withdrawn" after the purge date if I have already deleted the branch from our configuration?
- 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 set my open hours to go past midnight?
- How do we stop overdue fines from being created, on overdue items?
- How do I activate room scheduling in WMS Circulation for our library?
- How long does it take loan policy changes to apply to library resources?
- How long until my WSKey expires?
- How often can I submit a patron load file?
- If an item with fines on it is withdrawn and purged, do the fines remain on the patron's account?
- 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 Digby training available?
- 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 it possible to set up a SIP2 connection for Hoopla?
- Is there an impact to changing our Item call number types to Unknown?
- Is there a way to increase the default number of items displayed in the patron check screen?
- 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?
- Item record with a blank barcode appears in Copy list and can't be deleted
- 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.
- Why am I getting an error message in Service Configuration: "We are unable to process your request at this moment."
- I am unable to log in to the SFTP server.
- I am unable to sign in to Service Configuration using my OCLC Services Account
- 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 have set open hours for our library to close at 6pm, but our due dates are still showing as 11:59pm on the following day rather than 6pm.
- I have updated my notifications but the old notifications are still going out
- I need a list of the temporary item records for my institution
- 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 Loan Policy found error
- 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"
- Server Communication Failed error when adding item record
- 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?
- Unable to log into the Digby app on an Android phone.
- 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 noticed that the date printed on a retrieval slip was incorrect even though the date on the bib record was correct.
- We see a message about "Digby Limit Reached". What is the Limit, and how would we share the list before removing it?
- 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 happens to the "claimed lost" counter on a patron record if the withdrawn item is never checked-in before being purged from the system?
- What information should I send when reporting a problem to Support?
- 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 an item is renewed what notification policies does it follow?
- 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 an "Error Updating the Entry" error when updating Notifications?
- 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 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 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 due dates being set out by several years?
- Why are due dates not being set according to our policies?
- Why are items falling due on days when the libraries are closed?
- Why are items not being removed from the patron's hold list?
- Why are items renewing from today's date instead of from the original due date as we have it set up?
- Why are items showing up delayed on the Pull List from when they were requested?
- Why are my changes to email notifications 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't I save my changes to "Accrue bills and/or suspension when closed."
- Why can I not find an item by its OCN, Title, etc., only by its barcode?
- Why does Digby crash after a few scans?
- Why does more than one item come up when I search for a barcode?
- Why does the Shelving location field appear red when I'm trying to set up a new rule in the Loan Policy Map?
- Why don't I see the Change Due Date button?
- 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 Digby stuck at a circular loading screen?
- Why is my loan policy not being applied correctly?
- Why is my renew button deactivated in circulation?
- Why is our self-checkout machine allowing checkouts that don't respect our Loan Policy Map
- Why is the system sending all of our checked in items into transit?
- 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