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
  ◦ 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
  
  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
  
  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 multiple 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
  ◦ OCLC Service Configuration - WMS Circulation
  ◦ Set up your POS printer

• 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.

  ◦ 2017 Release notes
  ◦ 2018 release notes
  ◦ Known issues

• **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