WorldShare Circulation

Last updated: Mon, 11 Sep 2017 20:16:41 GMT

WorldShare Circulation facilitates requesting, loaning, and processing of physical items to eligible patrons and affiliated institutions.

• Get started

Get started with WorldShare Circulation.

◦ Circulation account roles
◦ Contact OCLC Order Services
◦ Set or reset your password
◦ Sign in to Circulation

• Check out

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

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

No image available

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

No image available

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

No image available

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

• Release notes and known issues

No image available

Release notes contain information about new product features and enhancements as installed in scheduled releases.

○ WorldShare Circulation release notes, May 2016
○ WorldShare Circulation release notes, October 2016
○ WorldShare Circulation release notes, January 2017
○ WorldShare Circulation release notes, July 2017
Known issues

◦ WorldShare Circulation release notes, October 2017

• Training

No image available

Find training on WorldShare Circulation.

◦ Live classes
◦ Standard check out and check in
◦ Check out and check in exceptions
◦ Patron management
◦ Item management
◦ Placing holds
◦ Circulation configuration
◦ Exercises
◦ Videos

• Reference

No image available

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