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**

  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**

  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**

  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**

  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