WorldShare Circulation

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

Query Search

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

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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 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