WorldShare Circulation

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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
  [No image available]

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.

   ◦ 2018 Release notes
   ◦ 2017 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

• **Troubleshooting**

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   Find frequently asked questions (FAQ), instructions on how to complete specific tasks (How-to), and troubleshooting steps (Troubleshooting).

   ◦ Do items that are checked in through Digby show up only in the “Soft checkout” statistics?
   ◦ I am getting an error message when cataloging a book and it shows ‘null’ in the call number.
   ◦ I’m getting an error stating “There are no matching hold priority policies.” How can I fix this?
   ◦ 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?
   ◦ We would like to enable authentication for SIP2 circulation transactions, which authentication services are supported?
   ◦ Why are items renewing from today’s date instead of from the original due date as we have it set up?
   ◦ Why isn't updated bibliographic information showing on my Item Inventories report?
   ◦ Why is my loan policy not being applied correctly?