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**
  
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  Get started with WorldShare Circulation.

  ◦ Circulation account roles
  ◦ Add a privacy notice
  ◦ Set or reset your password
  ◦ Sign in to Circulation

- **Check out**
  
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  Discover how to check out materials.

  ◦ Check out
  ◦ Check out a held item
  ◦ Check out temporary item
  ◦ Change due date
  ◦ Change loan status
  ◦ Check out exceptions
  ◦ 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 items
  ◦ Check in exceptions
  ◦ 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.
- Look up patron
- Block a patron
- Create new patron
- Delete patron account
- Edit patron barcodes
- Patron accounts in WorldCat Discovery
- Patron history
- Patron notes
- Proxy patrons
- Suspend 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 items
- Add temporary items
- Advanced search and expert search
- Change the location for multiple items
- Check item status or location
- Claims lost, returned, never had
- Container management
- Delete items
- Edit items
- Item notes
- Manage serial issues
- Search for items
- Set search preferences
• 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
◦ Available hold types
◦ Place hold
◦ Edit or delete hold
◦ Schedule items
◦ View holds
◦ Holds for review
◦ Pull list
◦ Fulfill holds
◦ Recall items
◦ Clear hold shelf

• 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.

◦ OCLC Service Configuration - WMS Circulation
◦ Group aware for consortia
◦ Integration with ZFL-Server
◦ WorldShare Interlibrary Loan integration
◦ Tipasa integration

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Integration with Relais D2D

• Reference

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Additional resources for WorldShare Circulation users.

◦ Course Reserves in WorldCat Discovery
◦ Digby® app FAQ

• 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.

◦ 2020 WorldShare Circulation release notes
◦ 2019 WorldShare Circulation release notes
◦ 2018 WorldShare Circulation release notes
◦ Known issues

• WorldShare Circulation training

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Find training on WorldShare Circulation.

• Troubleshooting

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Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

◦ Can a bill receipt be printed after the transaction has been completed?
◦ Can a shelving location be changed in bulk to a different shelving location?
◦ Can Demco Spaces be integrated with WMS?
◦ Can Digby support check digits in barcodes?
◦ Can I convert monographs to multi-part items
◦ Can I include patron pictures in the records we provide for uploading?
◦ Can I manually update a subset of patrons instead of using patron update?
◦ Can we add a cost to an individual item?
◦ Can we make our own item material types?
◦ Can we reset the password for offline circulation?
◦ Can we set up automatic email receipts for items borrowed by patrons?
◦ Can we stop notifications from being sent out on closed days?
◦ Customize text for Circulation Notices

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- Digby not showing the Share link
- Do items that are checked in through Digby show up only in the “Soft checkout” statistics?
- Fines are being accrued despite a grace period being in place. Why is this?
- For Digby "Remove All Items", When it says: “inventoried items cannot be retrieved once removed from this list” What list is it referencing?
- Hold Pull List Patron Name and Borrower Category sorts don't appear correct
- How can I find out about planned maintenance outages?
- How can I get a list of my current transactions in Digby?
- How can I identify duplicates in the Circulation Item Inventory within Excel?
- How can I tell if my institution is set up for SIP2?
- How can we prepare for an outage?
- How do fixed due dates affect our loan policies?
- How do I add a new patron type?
- How do I add a temporary shelving location that will appear in the drop-down menu in my LHRs?
- How do I add Laptops or other items to WMS for Circulation?
- How do I change a branch library name?
- How do I get a location removed from our WMS?
- How do I get a new location added to our WMS?
- How do I keep withdrawn barcodes from being purged?
- How do I limit number of holds allowed for a patron on popular resources, such as High Use, New Titles, DVD's or Laptops?
- How do I make a shelving location non-circulating?
- How do I permanent delete items that are still showing the status of "Withdrawn" after the purge date if I have already deleted the branch from our configuration?
- How do I prevent fines from generating on closed days
- How do I prevent holds being placed on items, I do not want holds on?
- How do I prevent the WSKey for my offline circulation client from expiring?
- I am getting an error message when cataloging a book and it shows 'null' in the call number.
- How do I set my open hours to go past midnight?
- How do we stop overdue fines from being created, on overdue items?
- How do I activate room scheduling in WMS Circulation for our library?
- How often can I submit a patron load file?
- 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?
- If patrons in the delete file have outstanding checkouts or bills, will they still be deleted by the bulk patron delete process?
- If I am paying multiple bills in one transaction and the full amount is not tendered, which bill is paid in full?
In the renewal page, can I see at a glance if an item is reserved?

- Is Digby training available?
- Is it possible for any existing "title" (Mr., Mrs., Professor, etc.) information in patron records to be removed via a batch process?
- Is it possible to add student photos to WorldShare Circulation profiles?
- Is there an impact to changing our Item call number types to Unknown?
- Is there a character limit to how long a notification policy can be?
- Is there a way to re-send a circulation receipt to a patron's email?
- Is there a way to turn off the last issued to field in item statistics so that you don't see the patron's name?
- Items are not being removed from the patrons hold list, why?
- I am having trouble setting up our POS Printer with our new Windows 10 computers and when I try to install it gives me an error and refuses to continue.
- I am trying to log in to the service configuration site, but I am getting an error that says "We are unable to process your request at this moment."
- I am unable to log in to the SFTP server.
- I am unable to sign in to Service Configuration using my OCLC Services Account
- I am unfamiliar with a barcode being 'deprecated', what does that mean?
- I have set my loan policy for a location to be not for loan but items within this location are still showing as available for loan
- I have set open hours for our library to close at 6pm, but our due dates are still showing as 11:59pm on the following day rather than 6pm.
- I have updated my notifications but the old notifications are still going out
- I need a list of the temporary item records for my institution.
- I need my Circulation Override Credentials
- I'm trying to make changes to my loan policy. When I select WMS circulation it takes me to a blank page
- My due dates are set in the wrong date format
- No matching Loan Policy found error
- No matching Location Policy error
- No possibility to set/reset password for manually entered patron
- One of my patrons did not get deleted when the patron delete batch job was run, why?
- One of our PCs is displaying different menu options in Check In
- Our patrons began receiving bill notifications from WorldShare Management System (WMS), but we are no longer subscribers to WMS so we don't have access to Service Configuration.
- Our policy for Room Expiration Notification appears to be malfunctioning. It is sending out notifications hours and hours after the event occurred.
- Patron unable to login to my account, they receive the error message "The login system failed with error: Problem processing ACS Response in IDM Bridge"
- Server Communication Failed error when adding item record
- Strange order in hold request list

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There are no checkboxes next to the items in the patron hold list. How do I fix this?

- The "Items Claimed Returned" in my patron's account is not clickable. How do I find out which items were marked in this status?
- The search in WorldShare Circulation is defaulting to My Group Holdings instead of My Library Holdings, how do we change this?
- We are seeing odd due dates that don't follow the check-out policies that we have set up.
- We can't find a way to activate the room configuration functionality in Service Configuration
- We need a list of IPs or URLs that the offline circulation client connects to so that we can make firewall exceptions on our end.
- We noticed that the date printed on a retrieval slip was incorrect even though the date on the bib record was correct.
- We see a message about "Digby Limit Reached". What is the Limit, and how would we share the list before removing it?
- We would like to enable authentication for SIP2 circulation transactions, which authentication services are supported?
- What causes orphan holds to appear against a patrons record, but not display in the title hold queue in Circulation or in a Pull List?
- What does the error message mean in my Patron Exception Report?
- What happens to the "claimed lost" counter on a patron record if the withdrawn item is never checked-in before being purged from the system?
- What is OCLC’s data backup schedule for WMS?
- What is the impact if we change from linking or unlinking patron usernames and barcodes?
- What should I do when I get the message "Limit reached" in Digby?
- When do emailed inventory reports from Digby get sent, is it immediate?
- When uploading a patron record that matches an existing patron record in the system, what happens to the notes in that patron record?
- Where can we find our Supervisor username and pin?
- Where would I set a rule that items in a certain collection may not be placed on hold?
- Who do I contact for SIP2 connection set up?
- Why am I directed to a specific item / title / patron / order / invoice record when I first log in to WMS?
- Why am I getting the message "We cannot reach your institution to verify your credentials. Try again later" when I try to log in?
- Why am I getting the message "OCLC has detected a problem with your institutions authorization credentials" when trying to login to WorldShare Management Services?
- Why am I receiving the message "We cannot reach your institution to verify your credentials. Try again later."
- Why am I seeing "OCLC has detected that your institution’s encryption has changed" when I log into WorldShare?
- Why are changes made to the OPAC Statuses, Locations and Circulation Policies grid not taking effect?
- Why are due dates being set out by several years
- Why are items are falling due on days when the libraries are closed?
Why are items renewing from today's date instead of from the original due date as we have it set up?

Why are items showing up delayed on the Pull List from when they were requested?

Why are my changes to email notifications not saving?

Why are notifications not showing under patron's history?

Why are some buttons greyed out when editing an item in Circulation?

Why are the Replacement and Processing fees disappearing when a lost or long overdue item is returned?

Why can't I see the check box when I want to print a receipt?

Why can't my student worker search for patrons or scan barcodes?

Why can I not find an item by its OCN, Title, etc., only by its barcode?

Why does more than one item come up when I search for a barcode?

Why does the Shelving location field appear red when I'm trying to set up a new rule in the Loan Policy Map?

Why don't I see the Change Due Date button?

Why do deleted items still display with a status of Withdrawn, when they should be purged?

Why isn't updated bibliographic information showing on my Item Inventories report?

Why is an item not automatically renewed?

Why is a staff note popping up when checking-in an item when there is not a note on the item?

Why is Digby not scanning a full barcode that has an 'Enter' suffix on an iOS device?

Why is Digby stuck at a circular loading screen?

Why is my loan policy not being applied correctly?

Why is my renew button deactivated in circulation?

Why is our self-checkout machine allowing checkouts that don't respect our Loan Policy Map

Why is the system sending all of our checked in items into transit?

Why are the check boxes missing when we go to select an item on a patron's account?

Why were fines not applied to my circulation transaction?

Would it be possible to let our patrons limit their searches by branch location?

You are already logged into another institution error