WorldShare Circulation

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**

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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 multipart 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
  ◦ Tipasa integration
  ◦ WorldShare Interlibrary Loan integration

• **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.

◦ 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).

◦ Can a bill receipt be printed after the transaction has been completed?
◦ Can I include patron pictures in the records we provide for uploading?
◦ Do items that are checked in through Digby show up only in the “Soft checkout” statistics?
◦ How do I add a new patron type?
◦ How do I change the branch library name on the hold pick up slip?
◦ 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?
◦ If I am paying multiple bills in one transaction and the full amount is not tendered, which bill is paid in full?
◦ Is it possible to have student pictures on WorldShare Circulation profiles?
No possibility to set/reset password for manually entered patron

- 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.
- 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"
- We would like to enable authentication for SIP2 circulation transactions, which authentication services are supported?
- Why are changes made to the OPAC Statuses, Locations and Circulation Policies grid not taking effect?
- 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?