WorldShare Circulation

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

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