WorldShare Circulation

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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
• 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
◦ 2016 Release notes
◦ Known issues

• Training

Find training on WorldShare Circulation.

◦ Live classes
◦ Standard check out and check in
◦ Check out and check in exceptions
◦ Patron management
◦ Item management
◦ Placing holds
◦ Circulation configuration
◦ Exercises
◦ Videos