Find the WorldShare Circulation authorization roles available in the Admin module and compare the actions available for each role.

Roles

- CIRCULATION_ADMIN
- CIRCULATION_DESK
- STUDENT_WORKER
- STUDENT_WORKER_CIRCULATION
- CIRCULATION_DESK_PRIVACY
- STUDENT_WORKER_RESTRICTED

Circulation role comparison

Service Configuration

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIRCULATION_ADMIN</td>
</tr>
<tr>
<td>Access the WMS Circulation section of the OCLC Service Configuration.</td>
<td>x</td>
</tr>
</tbody>
</table>

Analytics
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>View content in the Analytics module, including Reports available via My Files.</td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Run Circulation Reports from the Analytics module.</td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Access WorldShare Collection Evaluation's My Library tool from the Analytics module.</td>
<td>CIRCULATION ADMIN</td>
</tr>
</tbody>
</table>

### Cataloging
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Search WorldCat, local, and temporary item holdings.</td>
<td>x</td>
</tr>
<tr>
<td>View basic item details, status, statistics, and transaction history.</td>
<td>x</td>
</tr>
<tr>
<td>Create, update, or delete items associated with a WorldCat LHR.</td>
<td>x</td>
</tr>
<tr>
<td>Create, update, or delete a temporary or container item. Add or remove items from a container.</td>
<td>x</td>
</tr>
</tbody>
</table>

**Assisting patrons**
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the Circulation module in WorldShare.</td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Process in-policy circulation activities on behalf of the patron, such as checkout, renew, place hold/item schedule, or check in.</td>
<td>x</td>
</tr>
<tr>
<td>Search for existing user accounts.</td>
<td>x</td>
</tr>
<tr>
<td>View a patron's current account:</td>
<td></td>
</tr>
<tr>
<td>• Checkout</td>
<td></td>
</tr>
<tr>
<td>◦ Includes Account Overview and items on loan.</td>
<td>x</td>
</tr>
<tr>
<td>• Holds</td>
<td></td>
</tr>
<tr>
<td>◦ Includes Holds and Item Schedules.</td>
<td></td>
</tr>
<tr>
<td>• Bills</td>
<td></td>
</tr>
<tr>
<td>◦ Outstanding</td>
<td></td>
</tr>
</tbody>
</table>
bills only.
• Suspension

View a patron's account history and other personal information:
• Bills (Account History)  
  x  x  x  x  
• Profile
• History (Transaction and/or Notification)

View a patron's name at Check In when the item needs to be held or scheduled for a patron or when a hold has expired in transit to the pickup location.
  x  x  x  x  

View a patron's name when assisting a patron:
• When verifying that patron account is correct
  x  x  x  x  x  x  x
before checkout, resolving a bill, etc.

- When viewing patron account search results, selecting a patron when placing a hold, etc.

- When patron name is included in the library-configured receipt or notification.

- When assisting a patron that wishes to create, delete, or check the status of a room schedule.

- When assisting a patron who is or has a proxy user.

View a patron's name when not assisting a patron:

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
• When viewing an item's status, statistics, or transaction history.

• When viewing the Pull List or Clear Hold Shelf Report.

• When viewing a title's hold or item schedule queue.

• When checking in items.

• When recalling an item currently on loan.

Checkout
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Within policy, checkout an item to a patron or renew an item already on loan</td>
<td>x</td>
</tr>
<tr>
<td>Use the Set Due Date feature at Checkout to select a specific due date.</td>
<td>x</td>
</tr>
<tr>
<td>Use the Change Due Date and Renew with Due Date functions at Checkout to select a specific new due date for an item already on loan.</td>
<td>x</td>
</tr>
<tr>
<td>Acknowledge and proceed if selected due date is beyond Loan Policy.</td>
<td>x</td>
</tr>
</tbody>
</table>

Fiscal
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Create a patron bill.</td>
<td>x</td>
</tr>
<tr>
<td>Edit the note on an existing patron bill.</td>
<td>x</td>
</tr>
<tr>
<td>Process payment of a patron bill</td>
<td>x</td>
</tr>
<tr>
<td>Cancel a patron bill</td>
<td>x</td>
</tr>
<tr>
<td>Waive a patron bill</td>
<td>x</td>
</tr>
<tr>
<td>Process a refund of a patron bill that has been partially paid.</td>
<td>x</td>
</tr>
<tr>
<td>Process a refund of a patron bill that has been paid in full.</td>
<td>x</td>
</tr>
</tbody>
</table>

**Holds and schedules**
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>CIRCULATION ADMIN</th>
<th>CIRCULATION DESK</th>
<th>STUDENT WORKER</th>
<th>CIRCULATION PRIVACY</th>
<th>STUDENT WORKER RESTRICTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>View the Clear Hold Shelf Report and Pull List</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Forward a hold on the Pull List to be considered by other branches.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Create a new hold or item schedule.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Edit a hold's pickup location, dates, note, etc. using the Edit Existing Hold Request dialog.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Delete or decline a hold. Use the Delete Hold mode at check-in.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Move a hold request to the top of the hold queue.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Edit an item schedule.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Delete an item schedule</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
User management
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>CIRCULATION ADMIN</th>
<th>CIRCULATION DESK</th>
<th>STUDENT WORKER</th>
<th>STUDENT WORKER CIRCULATION</th>
<th>CIRCULATION DESK PRIVACY</th>
<th>STUDENT WORKER RESTRICTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Blocked patrons cannot check out items. This permission allows a user to override the block.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Update suspension status of user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Access the Admin module in WorldShare.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Create new user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Delete existing user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Edit existing user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Generate reset-password email if using WMS</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
Authentication.

Release deprecated patron barcodes for reuse.

Overrides

See [Admin/General](https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Circulation) for information about Override credentials.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>CIRCULATION ADMIN</th>
<th>CIRCULATION DESK</th>
<th>STUDENT WORKER</th>
<th>STUDENT WORKER CIRCULATION</th>
<th>CIRCULATION DESK PRIVACY</th>
<th>STUDENT WORKER RESTRICTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge and proceed if patron is suspended for circulation</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron is blocked for circulation.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if the patron’s account is unverified</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has exceeded their outstanding fine limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has reached their loan value limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has exceeded their overdue items limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has exceeded their claimed limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed with waiving a bill if the patron has exceeded the maximum waive limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has exceeded their days overdue limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has reached their loan count limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has reached their loan value limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if patron has reached their renewal limit.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if the item's Loan Policy allows circulation with an override.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if the item is not available for circulation per Location Policy.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed if the item is in Withdrawn status.</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Acknowledge and proceed at checkout if the item is needed to fulfill an open hold for a different patron.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed at checkout if the item is on hold for a different patron.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed at checkout if an item is within its embargo period to fulfill an upcoming schedule.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed at checkout if the item is on loan to a different patron.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
<tr>
<td>Acknowledge and proceed at checkout if the item was recalled for a different patron.</td>
<td>x</td>
<td>x</td>
<td>Supervisor required</td>
<td>Supervisor required</td>
<td>x</td>
<td>Supervisor required</td>
</tr>
</tbody>
</table>

https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Circulation
Printed: Sun, 01 Mar 2020 20:50:08 GMT
the operation usually requires a circulating item to be associated with it.

| Acknowledge and proceed the operation usually required extra information. | x | x | Supervisor required | Supervisor required | x | Supervisor required |
| Acknowledge and proceed when the operation usually requires a hold request to be associated with it. | x | x | x | x |

Digby
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CIRCULATION ADMIN</td>
</tr>
<tr>
<td>Manage Pull List</td>
<td>x</td>
</tr>
<tr>
<td>Reshelve non-loan returns</td>
<td>x</td>
</tr>
<tr>
<td>Inventory items</td>
<td>x</td>
</tr>
<tr>
<td>Check in items</td>
<td>x</td>
</tr>
<tr>
<td>Search in WorldCat Discovery</td>
<td>x</td>
</tr>
<tr>
<td>Change item location</td>
<td>x</td>
</tr>
</tbody>
</table>