WorldShare Circulation

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
• 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
• 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
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 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
- Digby not showing the Share link

https://help.oclc.org/Library_Management/WorldShare_Circulation
Printed: Thu, 20 Feb 2020 23:35:45 GMT
- 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?
- 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 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 FTP 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
◦ 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 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 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 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