OCLC WorldShare

Trexler Library Circulation

a student worker guide to basic circulation procedures
EXTREMELY IMPORTANT!

• Student Worker privileges are limited to the functions explained in this presentation and it is essential that you do not attempt to perform other functions even though it appears to be possible. (i.e., creating patron records, editing patron records, changing due dates, waiving fines/bills, opening the patron’s profile, etc).

• Do not use “Discover Items” from the Circulation Tab to assist patrons in their search for library items. Please use the new Discovery search from the library’s main page.

• As you will be logging in with your MyDSU user name, we are able to track any transactions made by you. Any procedures performed by you that are not approved, will be discussed with you individually, and could possibly affect your future employment.
If you are working the first shift of the day, as part of the opening procedures, you need to open WMS.

- Log into the network using the libstaff log in and the current Bulldog__
- Click on the WorldShare student log in shortcut on the desktop.
- Sign in using your MyDSU user name and password.
- Select Trexler Library, and click OK.
- Log out at the end of your shift.
Sign in at the beginning of your shift using your MyDSU username and password.
You are now signed in to WMS, and your name appears in the upper right corner of the screen. Here is where you will need to log out. As there are usually 2 students working per hourly shift, one student will be signed in at one station, and the other will sign in at the other station. Please use the station you are signed into while you are on duty assisting patrons. You must log out at the end of your shift.
Click on the Circulation Tab. This is the only tab you will be using. All student functions are performed from this tab.
Click on Assist Patrons, if not already expanded, and click in the barcode box.
Scan the patron’s barcode to bring up their record to perform checkouts, collect fines, or renew items. You will see the patron’s name at the top left of the screen. All items currently checked out to the patron will be listed below under the enter barcode box. Any overdue items, money owed, and holds are viewable just above the box.
Scan the item barcodes.

*If a Staff Notes message with a -! pops up asking to Acknowledge, click Acknowledge to proceed with checkout/in. If the message states the “item should not be in circulation” and is asking for an override, **do not** click Acknowledge.

**If a pop up appears to create a temporary record, please report this to the Library Staff.
The newly checked out items will be added to the top of the list, with the due date showing in the due date column. Record the due date on the date due slip, and deactivate books as usual.
To renew items, from the list of checked out items, select the item to be renewed by clicking in the box next to the item title. Click on the renew button on the lower left. The new due date will appear in the due date column.
To collect a fine, click on the Bills tab on the patron’s record. All fines and bills owed will be listed. Select the fine you will be collecting, and click on the Pay/Waive/Refund button on the lower left.
The action is defaulted to pay, (do not change) and the amount to pay in this case is $74.95. Enter the amount tendered, and choose if the patron would like a receipt. There are no payment method options. We can only accept cash or check. Click on resolve.
When you have finished assisting a patron, close their record by clicking on the X next to their name listed just below the Search button on the left.
If a patron does not have their card, from Assist Patrons, search for their name using the Search box on the left. Choose “name” from the menu, and type their first and last name as you normally would type it. This system does not use the “n” prefix.
Select the patron from the list of results using their home address to verify. The home address will be listed after the patron’s name and barcode, there is no need to view the patron’s full record. Click on the correct patron name to access their record. When you have finished assisting the patron, close the search for the patron’s record in addition to closing the patron’s record.
To check in items – from Assist Patrons, click on the Check In button. Scan all item barcodes. Messages concerning the item will appear in the Action column, last column to the right, not in a pop up. Click on the Clear button to clear the screen. The Check In function will remain on the screen until you assist another patron.
SEARCHING FOR LIBRARY MATERIALS

Please take a look at the new Discovery Search on the library’s main page, which replaces the previous One Search. Instructions for using the new system with a Trexler Librarian may be part of your regular classes, and an introduction will be part of our student worker orientation.

There are many new features of the new Discovery Search, for example patrons will be able to place Holds on items through the library’s new system by clicking on the Place a Hold button, and entering a pick up date. This will no longer need to be done through library staff.