WorldShare® Management Services
In Processing Mode and Item Status

WorldShare Management Services provides three options for In Processing Mode, which determines the status that displays in Circulation, and in WorldCat Local / WorldCat Discovery after add holdings for an item.

Add holdings in this document means doing any of these actions:
- Add single part monographs in the WorldShare Acquisitions receiving process
- Add holdings on the copies screen in WorldShare Acquisitions or Circulation
- Add a Local Holdings Record (LHR) to a bibliographic record in WorldShare Record Manager or Connexion browser.

In Circulation Configuration, you can set the three options “None”, “Until Checked In”, or “For a period that you specify” independently for different combinations of holding location, shelving location, and material format. You can also set the same option for all locations and material formats.

Example 1
- Desired result: You want new items to show the status as “Available” (in the staff interface and the public catalog) as soon as add holdings occurs.
- How to accomplish this: In Circulation Configuration, under Location Policy, you set the In Processing Mode to “None.”
- Workflow: When an item is received and processed in Technical Services, it has the status “Available” in the staff interface and the public catalog, regardless of whether the item has been shelved where patrons can access it.

Example 2
- Desired result: You want new items to show the status as “Available” (in the staff interface and the public catalog) only after a staff member checks them in.
- How to accomplish this: In Circulation Configuration, under Location Policy, you set the In Processing Mode to “Until Checked In.”
- Workflow: Once an item is received and processed through Acquisitions, staff forward it to Circulation. Circulation staff Check In the item and place it on the shelf, ready for patrons to check out.

Example 3
- Desired result: New items are in high demand and staff time is limited. You want new items to show the status as “Available” (in the staff interface and the public catalog) 3 calendar days after add holdings occurs, to allow circulation staff time to shelve the items.
- How to accomplish this: In Circulation Configuration, under Location Policy, you set the In Processing Mode to “For Period”, and the In Processing Period to “3 days”.
- Workflow: New items are in high demand and staff time is limited. Having a time period of 3 days allows circulation staff time to shelve the items. The status automatically shows as “Available” after 3 days. The item does not require a separate Check In action to change the status to “Available.”
In Processing Mode and Status Display

The following chart shows the relationship between the In Processing Mode setting and the status display for staff (WMS) and patrons (WorldCat Local or WorldCat Discovery) when you add holdings.

<table>
<thead>
<tr>
<th>If Circulation Configuration In Processing Mode is:</th>
<th>Then Status Display in Circulation Staff Interface Is:</th>
<th>And Status Display in Public Catalog (WorldCat Local or WorldCat Discovery) Is:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>Until Checked In</td>
<td><strong>Before Check In:</strong> In Processing</td>
<td><strong>Before Check In:</strong> Not available</td>
</tr>
<tr>
<td></td>
<td><strong>After Check In:</strong> Available</td>
<td><strong>After Check In:</strong> Available</td>
</tr>
<tr>
<td>For Period <strong>And</strong> Circulation Configuration In Processing Period Is: x {Minutes, Hours, Days, Weeks, Months} After</td>
<td><strong>Before In Processing Period elapses:</strong> In Processing</td>
<td><strong>Before In Processing Period elapses:</strong> Not available</td>
</tr>
<tr>
<td></td>
<td><strong>After In Processing Period elapses:</strong> Available</td>
<td><strong>After In Processing Period elapses:</strong> Available</td>
</tr>
</tbody>
</table>
Circulation Configuration

To set these options, log in to Service Configuration (http://worldcat.org/config), and go to WMS Circulation > Location Policy. You can set In Processing Modes independently for different combinations of Holding Location, Shelving Location, and Material Format. You can also set the same option for all locations and material formats.

For each combination of Holding Location, Shelving Location, and Material Format [1], set the In Processing Mode and In Processing Period [2].