TLC

Solutions that Deliver

Library•Solution

Reference Manual

Circulation

Version 3.3.5
July 2005
The Library Corporation
Research Park, Inwood, West Virginia 25428-9733

Click here to learn how to navigate through the manual
Click here to view quick reference guide

This portion of the Library•**Solution** *Reference Manual* describes the features in the Circulation Program.

The Library Corporation's (TLC's) expert and friendly support staff and librarians are available via toll-free telephone to answer all of your questions. Our strong commitment to service is backed by prompt responsiveness to your concerns.

This *Manual* is copyrighted and may only be reproduced by TLC customers for their use.

For further information about The Library Corporation's products and services, visit our website at www.TLCDelivers.com, call TLC support toll-free toll free at 800-852-4911, or email support @TLCDelivers.com.

Copyright The Library Corporation 2001. All rights reserved.

Revised July 2005

Contents

Introduction

How to use this manual

This manual is divided into the following sections to help you locate what you need quickly and easily:

- Getting Started (Chapter 1)
  - How to start the Circulation program
  - Quick Reference
- Main Circulation Tabs (Chapter 2)
  - Describes the main features on the Patron Transaction, Check In / In House Use, and Item/Title Information tabs
- Setup Menu Options (Chapter 3)
  - Describes many configurable features of the system
- Messaging (Chapter 4)
  - Explains how to check messages
- Utilities Menu options (Chapter 5)
  - Describes internal utility programs for Items Transfer, Recall, Repair, and Holds
- Reserves Tools Menu Options (Chapter 6)
  - Describes how to place items on reserve.
- Help Menu Options (Chapter 7)
  - Explains the Contents of online Help and how to use it.

- Circulation Utilities (Chapter 8)
  - Describes external Circulation utilities programs for generating notices, performing inventory, outreach, vendors, and server down activities.

To make this manual as compact and informative as possible, we have included links to more detailed information sources in most sections. Many of the elements in this program are interrelated, and we encourage you to familiarize yourself with the relevant functional descriptions found in the following chapters before you begin using the program.

Navigating in this Reference Manual

This manual has been formatted to utilize the navigational features available in Adobe Acrobat Reader (Version 5 or later).

Use the **Fit Page** or **Fit in Window** feature on the Adobe Acrobat **View** drop-down menu to see the entire page on your screen.

Use the **Next Page** or **Previous Page** arrows to move forwards or backwards one page in the text (Figure 1). Use the **First Page** or **Last Page** arrows to move to the front or back of the manual. Underlined portions of the text are links to related information. Click on a link with your mouse to go to the destination. Use the **Back** button to return to the last page viewed. The **Content**s and **Index** links at the top of every page will take you to the appropriate section. Page numbers in the **Index** are linked to their referents in the text.

Click the **Bookmarks** tab in the panel to the left of the page to view and use navigational links from any place in the document.

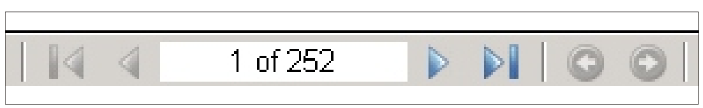

Figure 1. The Adobe Acrobat Reader navigation bar.

Use the **Search** feature on the Adobe Acrobat Reader **Edit** drop-down menu (Figure 2) to search for specific words in the manual.

Screen Sizing Option

If you are using a screen resolution larger than 640 x 400, you can stretch the Circulation window by dragging a corner or edge to fill the screen area. The screen will resize to fill the available space and lists (like **Items Out** on the F2 tab) will have more space to display titles, etc.

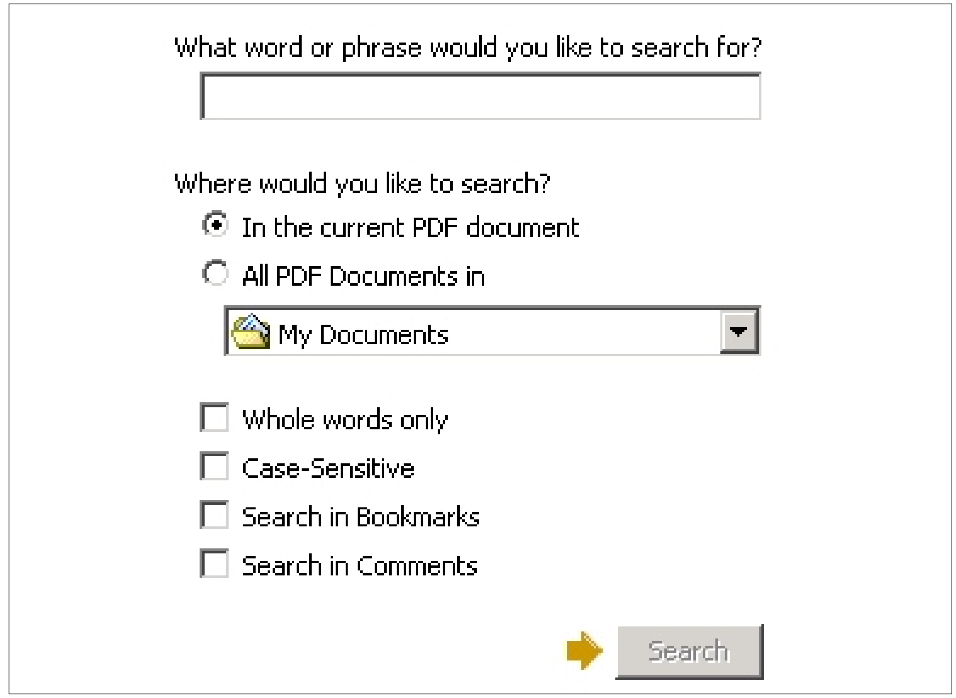

Figure 2. The Adobe Acrobat search menu

1. Getting Started

1.1 How to start the Circulation Program

When you start Circulation, the **Database Login** window (Figure 1-1) will first require you to enter your **User Name** and **Password**. Click **OK**.

User Names and Passwords are established in the **L·S System Configuration Users Setup**. If you do not know the passwords entered by TLC staff during your system installation, call TLC Support.

Note: The default user name used in the **Login Window** is **circ**. If you want to be able to modify the **Circulation Security Setup**, login as **circ_admin**. See section 3.5 for more information.

Inside Circulation, if a user with a different level of security needs to login to Circulation, go to the **Utilities** menu and select **Re-Login**. The user will not need to close and restart Circulation.

In Circulation v3.3 dialogs that request a user "action" such as "click yes" or "click no," Cancel, OK, etc., the user can now initiate the action with a single keystroke. If one of the letters on the button label is underlined, press the matching letter on the keyboard to initiate the action.

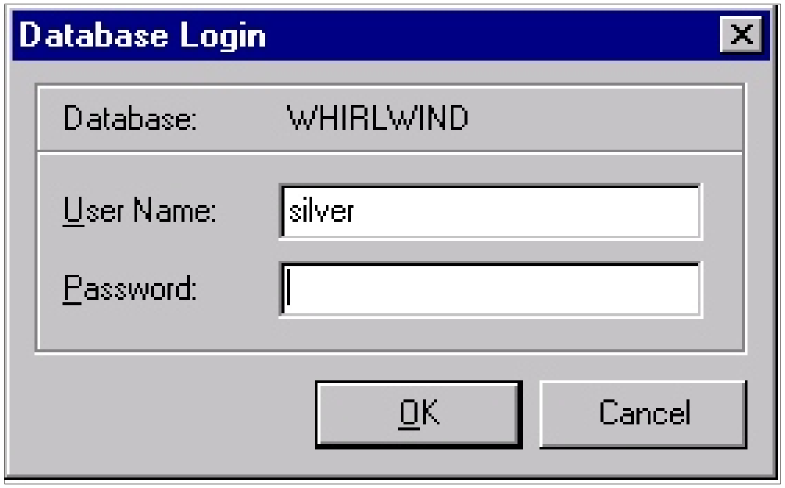

Figure 1-1. The Database Login window

1.2 Quick Reference

Click on a link to view information on a topic.

Authority Control

- To apply authority control to uncontrolled authors

Blocks

- To override an Enter Override Password block and allow the transaction
- To exit the Enter Override Password block and deny the transaction
- To review or remove block conditions

Branch Setup

- To complete the Branch Setup

Calendar

- To set up the Daily Calendar
- To set up the Weekly Calendar

Cash Drawer

- To configure the Cash Drawer

Charge Types

- To set up new Charge Types

Re-Login

- To re-login to Circulation

Recalls

- To recall an item through the Utilities menu
- To find out if an item has been recalled

Renewals

- To renew an item or items

Repair History

- To add repair notes

Reserves

- To edit a reserve
- To place items on reserve
- To remove items from reserve
- To view or edit reserves

Rotating Collections

- To create a Rotating Collection

Security Setup

- To complete Circulation Security Setup for any user qualified to access Circulation (Circulation Users and Circulation Administrators)

Station Options

- To set Station Options

Titles

- To add a new title
- To change the Title Search Configuration

Transfers

- To transfer items

Uncataloged Collection Codes

- To set up Uncataloged Collection codes

Vendors

- To link to (or remove link from) a Vendor

2. Main Circulation Tabs

2.1 Patron Transactions Tab F2

The **Patron Transactions** tab is the default menu displayed when the Circulation program opens. Once Circulation is running and you have navigated to other parts of the program, you can reach it by clicking the **Patron Transactions** tab or pressing the **F2** key.

When Circulation starts, the **Patron Transactions** tab contains no specific borrower information, and portions of the window are empty or truncated (Figure 2-1).

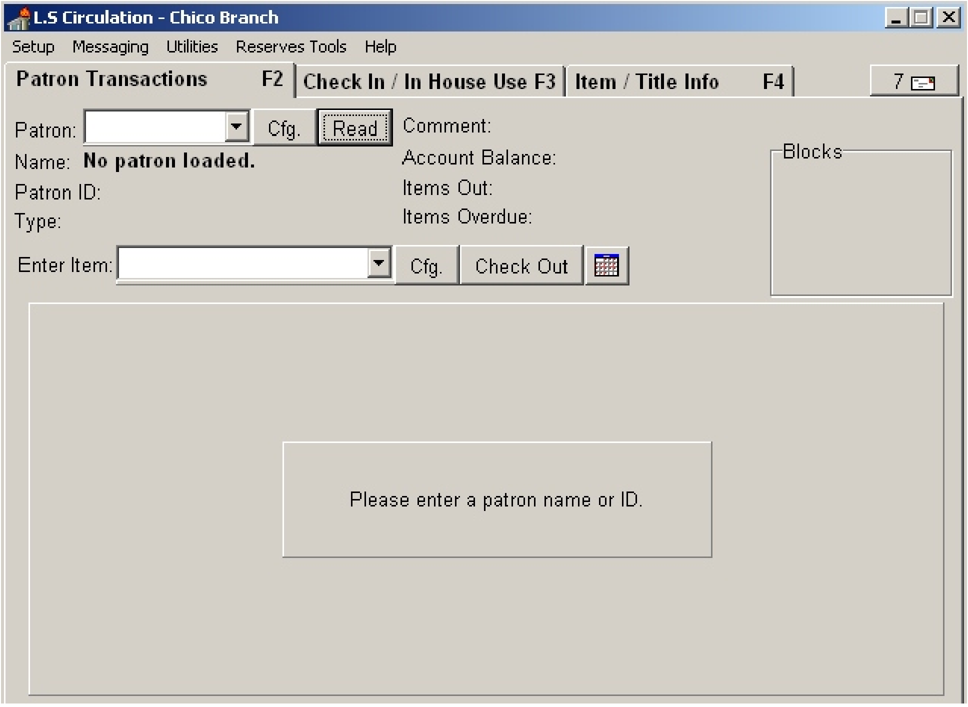

Figure 2-1. The initial Patron Transactions tab

To begin any borrower-related activity or inquiry, you must first access the borrower's record. To do this, scan the borrower barcode label. You can also type the Patron ID (usually barcode number), borrower name or part of a name, or the Alternate ID in the Patron entry box on the tab and click the **Read** button (or press **Enter**). You can also search for borrower records by street address, city, ZIP, phone number, first name, or e-mail address.

You can also search for records in Circulation using the following codes (not case-sensitive) that Cataloging uses in its search dialog:

> \L - LCCN; \B - ISBN (in Circulation v3.3 you must use a 10 or 13 digit ISBN); \N - ISSN; \T - Title; \H - Author; \J - Subject; \S - LC Class;

\W - Dewey; \G - GPO; \M - Music; \E - Series; \O - Barcode; \C - Local Call Number; \D - Control Number; \P- Borrower ID; \A - Alternate ID; \N - Borrower Name; \M - Borrower Address; \Z - Zip Code; \T - Phone Number; \E - E-mail Address.

To use these, the operator must type the backslash and the appropriate code, followed immediately by the search term (e.g., entering **hclancy** will return a list of titles whose author is Clancy).

Note: The search entry boxes for Patron and Item searches on the F2, F3, F4 tabs, and the search or lookup entry boxes in Item Transfers, Recall Item, and Item Repair History, now contain a drop-down arrow to display a history list of the ten most recent search arguments, allowing the user to easily repeat a previous search.

For the main Circulation Tabs (F2, F3, F4) the history list will be retained from session to session. In Item Transfers, Recall Item, and Item Repair History the list is only retained during the current session. To reuse one of the previous search terms locate and click the term on the history list, and the entry box will be populated with that term. Then press **Enter** or click the appropriate button to initiate the search.

Administrators control security for this option for each individual user, in Circulation, under **Setup | Security Setup**. On the Patron Screen tab for the selected User Name, checking or un-checking the check box labeled “Do Not Save Searches” toggles the option off or on for both borrower and title searches.

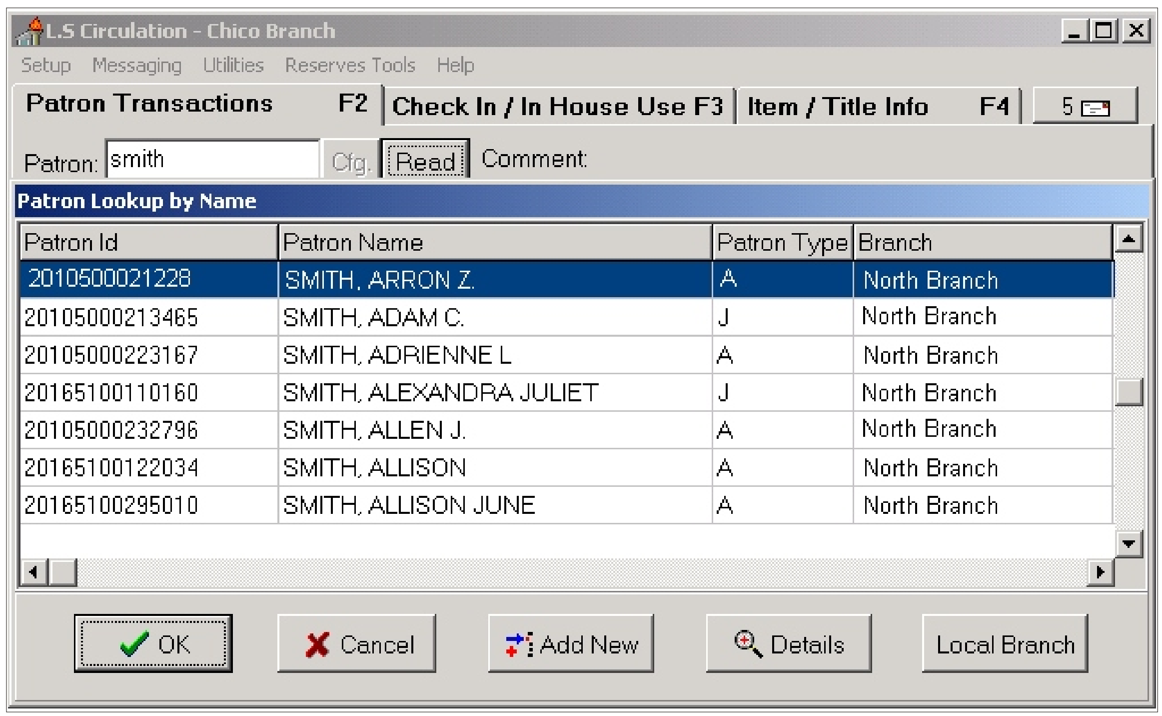

Figure 2-2. The Patron Lookup by Name window

If you entered the borrower's name or part of it, a **Patron Lookup by Name** window will appear (Figure 2-2), displaying the **Patron ID**, **Patron Name**, **Patron Type**, and **Branch** at the top. Highlight the name you want and click one of the following option buttons on the lower part of the window:

- **OK** - Loads the borrower information for the name selected.
- **Cancel** - Cancels the selection process and returns you to the **Patron Transactions** tab.
- **Add New** - Displays the **Add New Patron** window (Figure 2-3), where you can enter a Patron ID, Last Name, First Name, Patron Type (from drop-down menu), and Expiration Date. (Click **OK** to save your new entry.)
- **Details** - Displays the **Quick Patron Info for Verification Purposes** window (Figure 2-4). (Click **OK** to close it.)
- **Local Branch** - Displays only names found at the local library. (Click **All Branches** to return to the full list of names.)

Figure 2-3. The Add New Patron window

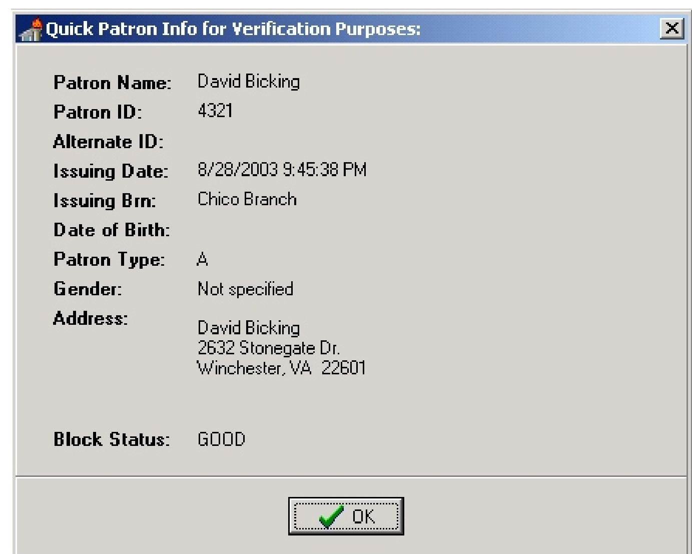

Figure 2-4. The Quick Patron Info for Verification Purposes window

Contents Index

After the borrower is found, summary information about the borrower is displayed on the tab (Figure 2-5).

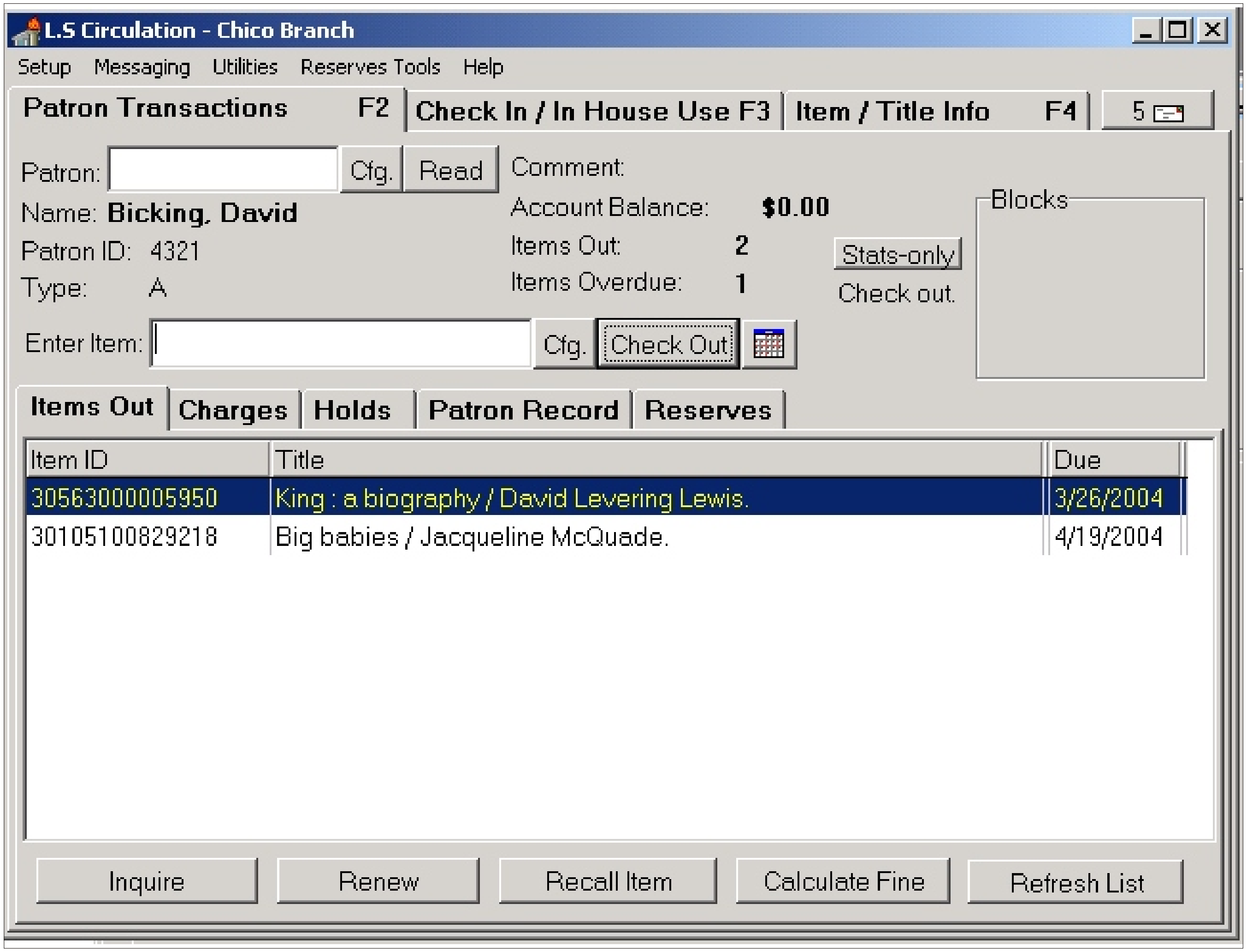

Figure 2-5. The Patron Transactions tab for a selected patron

The top section of the window contains the following features:

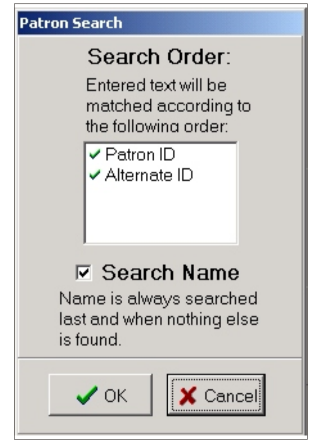

Figure 2-6. The Patron Search window

- **Patron:** Entry box for Patron Name or ID number
- **Patron Search** button**:** Configuration option button (only available to administrator users). Click to reach **Patron Search** window (Figure 2-6), where you can set the search order for text entered in the Patron box (above)
- **Read** button**:** Click to launch search for borrower. (You can also press **Enter**.)
- **Comment:** Displays contents of **Comment** field on **Patron Record | Basic Information** tab.
- **Name:** Name of borrower in current record
- **Account Balance:** Amount owed
- **Patron ID:** Patron ID number
- **Items Out:** Number of items checked out
- **Type:** Patron type
- **Items Overdue:** Number of items overdue
- **Enter Item:** Entry box for item title or ID
- **Cfg.** button**:** Search Configuration option button (only available to administrator users). Click to reach the **Title Search Configuration** window, where you can set the search order
- **Check Out** button**:** Searches for entry in **Enter Item** box and displays title lookup list (Figure 2-7). From here you can: select a title and click **OK** to check it out; click the **New Item** button to reach the **On-the-Fly-Item Entry** window and enter information for a new item, or click the **Show "NO ITEMS"** button and then the **New Title** button to reach the **On-the-Fly-Item Entry** window and enter information for a new title.

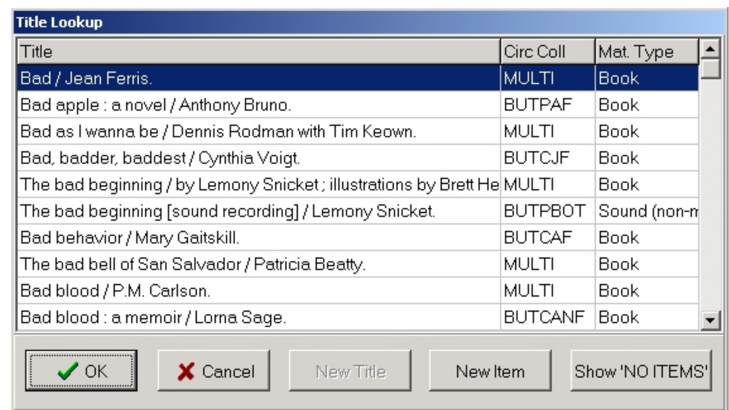

Figure 2-7. The Title Lookup window

- **Calendar** icon**:** Click to display the **Please Choose a Date** window (Figure 2-8), where you can enter a new date to use for checkouts.
- **Stats-only Check out:** Click to display **Stats Only Check-Out** window, where you select the collection type and quantity of non-cataloged/non-barcoded items to be checked out.
- **Blocks:** Displays blocks on borrower privileges, such as fines, expired card, etc.

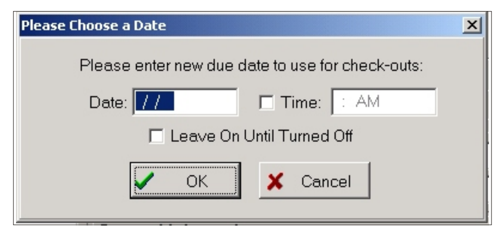

Figure 2-8. The Please Choose a Date window

Patron Transaction Subtabs

The lower part of the **Patron Transactions** tab contains a series of subtabs that display several types of borrower information: **Items Out**, **Charges**, **Holds**, **Patron Record**, and **Reserves**.

2.1.1 Items Out

The **Items Out** tab (Figure 2-9) displays the **Item ID**, **Title**, and **Due Date** of all items checked out by the current borrower. Highlight the desired item and click one of the following buttons at the bottom of the window to perform a specific function:

- **Inquire:** Displays the **Item / Title Info** tab, where you can find additional information about the title selected
- **Renew:** Renews the highlighted item
- **Recall Item:** Displays the **Recall Item** window (Figure 2-10), where you can place a "recall" message on a checked out item. **Note:** Only items with an "in-transit" (T) or "checked out" (CO) status may be recalled. If a recalled item is checked in as damaged, the item will be assigned to the Repair Shop designation first. When the item is returned to circulation the recall will take effect.
- **Calculate Fine:** Displays the **Current Item Fine** window, where the fine amount is displayed for an item if it were checked in immediately

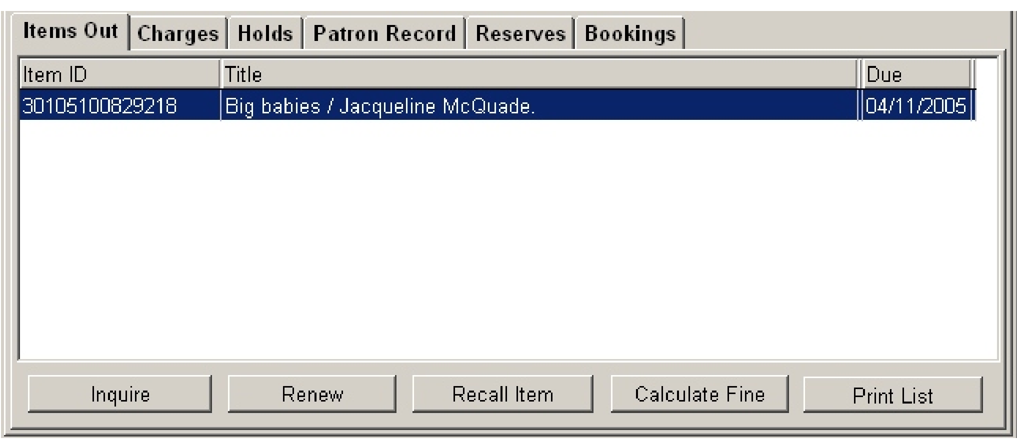

Figure 2-9. The Patron Transactions | Items Out subtab

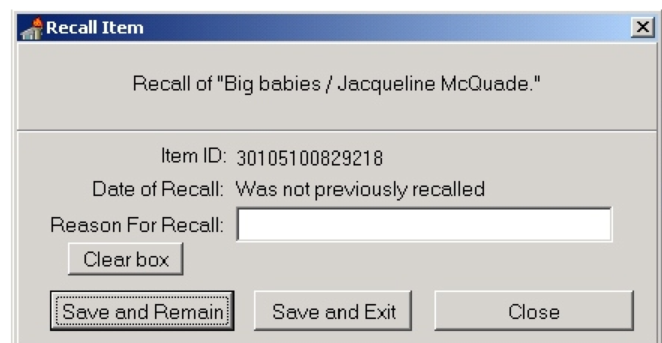

Figure 2-10. The Recall Item window

- **Print List:** Prints the currently displayed Items Out list for a selected borrower. Use Print List if you have been performing other activities, such as checkin, which might have changed the status of the items currently displayed.

To perform **Items Out** activities for selected borrower:

1. Select the **Patron Transactions** tab, or press **F2**.

2. In the **Patron** text box, access the borrower by scanning the borrower barcode label, or typing the Patron ID, Alternate ID, or name. **Items Out** is the first subtab displayed on the lower part of the screen.

3. When the borrower's information is displayed, select the **Items Out** tab. Then select an item from the list of items out. To select, click the item line to highlight it, or you can press the **Down** or **Up** Arrow to move the highlight to an item. Use **Page Up** or **Page Down** to see other items out.

   If you want to **Renew**, **Recall Item**, or **Calculate Fine** for more than one item, you can select multiple items if they are above or below each other on the list. Drag the mouse down the list to highlight multiple items.

4. Then click any of the special activity buttons on the lower part of the **Items Out** tab:

   Inquire **Renew** **Recall Item** **Calculate Fine** **Refresh List**

2.1.2 Charges

The **Charges** tab (Figure 2-11) displays the following information:

- **All Charges for Current Patron:** Shows the **Branch For**, **Title**, and amount **Due** for each overdue item. Click the **New Charge** button to open the **Add Charge to Patron** window (Figure 2-12), where you can add a comment, code, and charge. Information about the highlighted item is displayed on the right side of the window.
- **Tender / Waive options:** Displays the **Patron's Total Balance** plus **Amount to Tender** and **Amount to Waive** entry boxes. Click the **Fine History** button (if available) to display the **Fine Payment History** window (Figure 2-13), showing a descriptive list of past and present fines. Click the **Balloon Pay / Waive** button to apply the amount tendered or waived to the current balance. Select the **Receipt** button to print a receipt for the transaction. Use the **Print Charges** button to print an itemized list of current charges. Select the **Modify Credit Balance** button to change charge or credit information.
- **Individual Item Charges and History:** The right panel on this tab reflects information about the item highlighted on the left. This information includes Item Title, Item ID, Due Date, Branch, Comment (optional), and Charge Type in the upper portion and the Original Charge, the amount Tendered so far, the amount Waived so far, and the Charge Left in the lower portion of the panel.

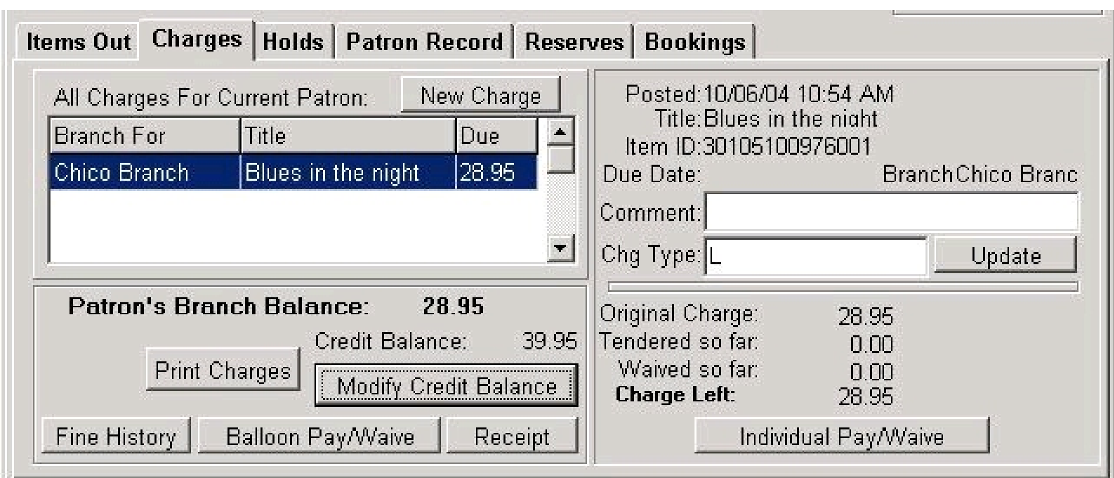

Figure 2-11. The Patron Transactions | Charges subtab

Figure 2-12. The Add Charge to Patron window

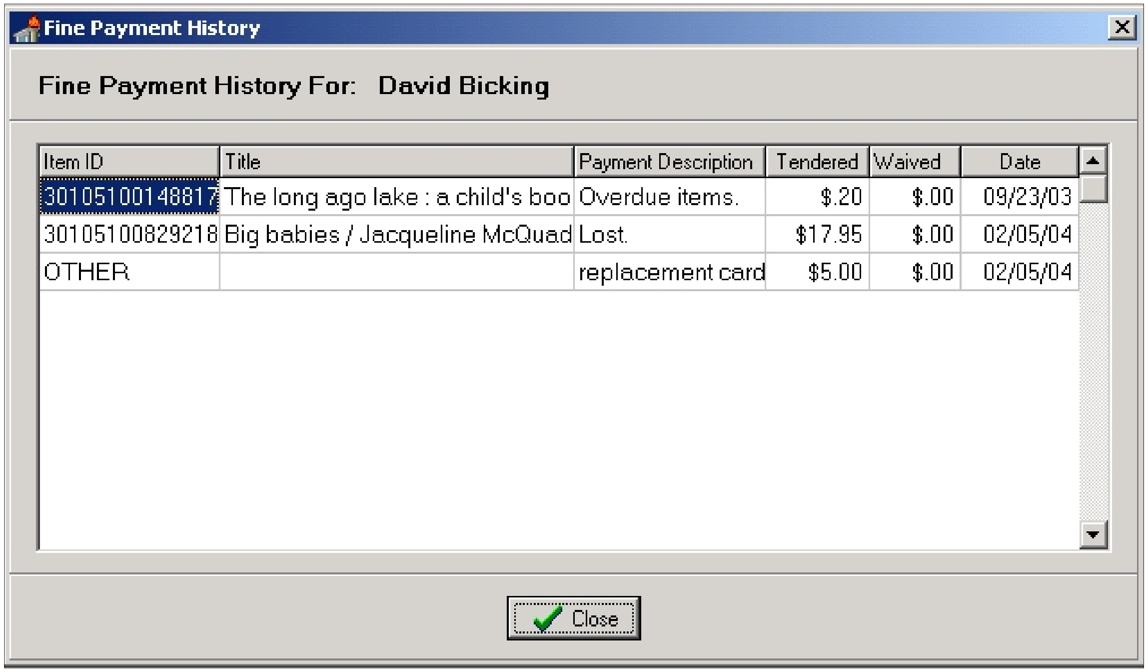

Figure 2-13. The Fine Payment History window

To view and handle Charges:

1. Select the **Patron Transactions** tab or press **F2**. Access the borrower.

   All Charges for Current Patron appear individually in a list box on the left. The first list entry will be highlighted, with details of that entry displayed on the right half of the **Charges** tab. (The type of balance shown depends on the **Pay Local Fines Only** selection in the **Branch Setup**.)

   The **Patron's Branch Balance** (or **Patron's Total Balance**) is displayed under the list box . **Branch** or **Total** is displayed according to the **Pay Local Fines Only** setting on the **Fines/Overdues** tab in **Setup | Branch Setup**.

   The **Patron's Credit Balance** is displayed below and to the right of the **Branch Balance**.

2. Click the **Balloon Pay/Waive** button. A **Payment Transactions** dialog will display. If you are waiving, enter the password if requested. You can accept payment or waive payment on total charges due (either at this library or for any library, depending on the configuration). In the **Cash Tendered** or **Circulation Charges to be Waived** field, type the amount, type the decimal if the amount is not a whole dollar, cents, if any (dollar sign not necessary), for example: **5.25**

   Tip: The total amount to be paid and/or waived must equal the amount in the **Circulation Charges to be Paid**. If you want to waive part or all of a fee, be sure to reduce the total in the **Cash Tendered** box by that amount.

   For the operator to accept full payment: type the amount to be paid in the **Cash Tendered** entry box, and/or the amount to be waived in the **Circulation Charges to be Waived** entry box. and click **Finish**. If the patron wants to pay less than the full amount, the user can click and overtype the amount already in **Circulation Charges to be Paid**, then type the same amount in the **Cash Tendered** entry box, and then click the Finish button.

3. Make a payment or waive a single charge: Select a charge from the **All Charges for Current Patron** list on the left. On the right, detailed information will appear for the selected (highlighted) charge. You can change or add the **Comment** or change the **Charge Type** (**Chg Type**) code for a selected charge. To save, select **Update**. To accept payment or waive payment on a single charge, click the **Individual Pay / Waive**. Enter the amount to be paid or waived. If you are waiving, enter the password if requested.

4. **New Charge:** To add a new charge to the borrower's account, select the **New Charge** button.

   Enter a **Comment** (a title or description of situation). Enter a **Charge Type Code** (select from the drop-down list). The default code is "OT" for other/miscellaneous charge. Enter **Amount.** Select **OK** to save.

5. **Print Charges:** Click this button to print the current borrower's charges to the locally configured printer.

6. **Modify Credit Balance:** Click this button to display the **Payment Transaction** dialog. Make adjustments to the **Credit Balance** as necessary.

7. **Receipt / Print Setup:** If the **Payment Receipts** option in the **Printer Configuration** setup has been turned on, one copy of a receipt will be printed automatically. Whether that option is enabled or not, you can always print a receipt by selecting the **Receipt** button on the lower portion of the **Charges** tab.

8. **Fine History:** If the button is visible, try clicking it to view the history. If fine data is available for this borrower, it appears in the **Fine Payment History** window. To see an example display, click here.

Dealing with Lost Item Charges

When an item is marked lost, but checked in at a later date, Circulation Check in will include a series of steps that will identify outstanding charges, related charges, and fees already paid, and will adjust the borrower's account to reflect the credits.

When the lost item is checked in, and there are existing charges pending payment, an **Outstanding Charges** window (Figure 2-14) will display the current pending charges. The staffers can selectively elect to waive these charges by checking the items on the list. Click **OK** to continue.

If the borrower made previous payments for the lost item, a **Lost Item Charge Payments** window (Figure 2-15) will display a list of all payments made. Staff should select the entries that are to be refunded and click **O**K. The check in will continue normally. Review the Charges tab for that borrower to be certain that the fines/fees were removed from the borrower record.

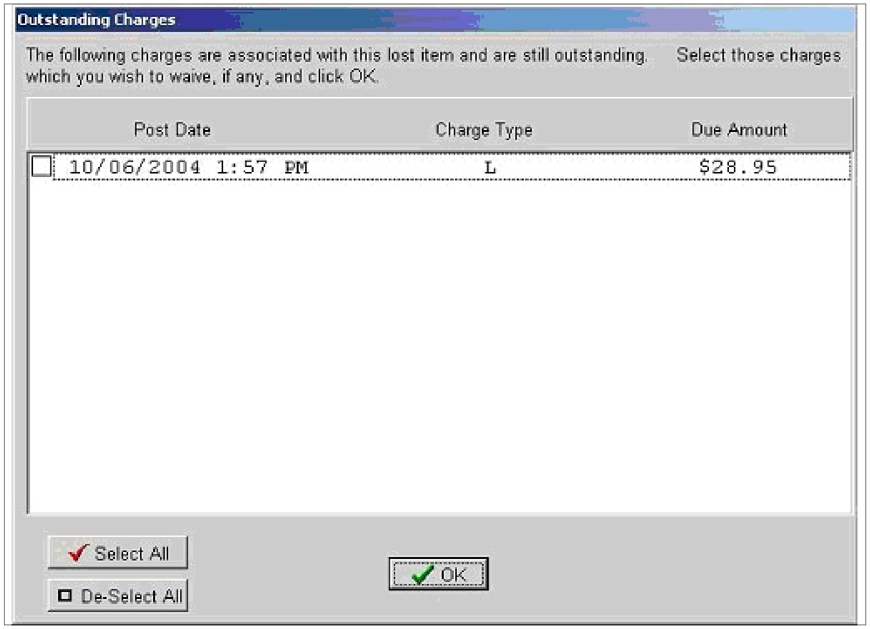

Figure 2-14. The Outstanding Charges window

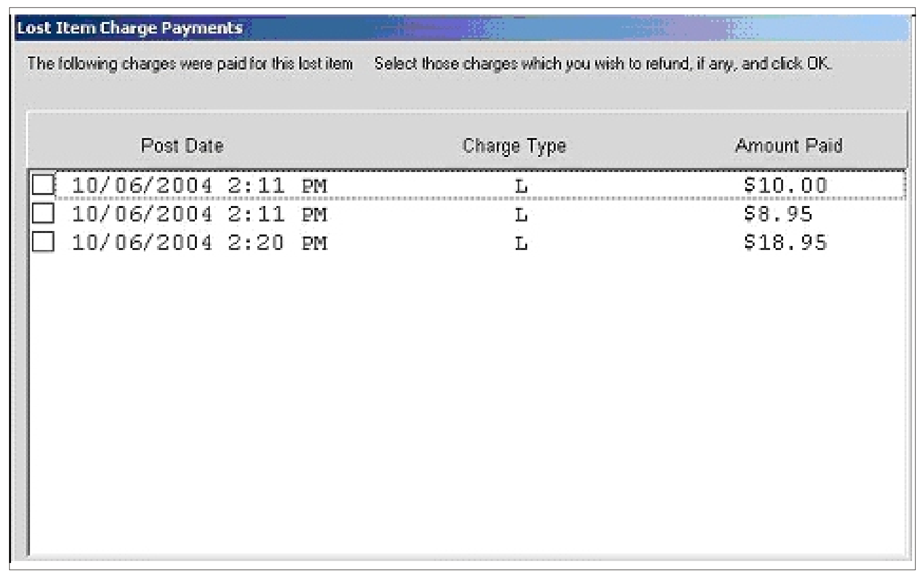

Figure 2-15. The Lost Item Charge Payments window

2.1.3 Holds

The **Holds** tab (Figure 2-16) displays the following information:

- **Patron Holds list:** Lists titles on which holds have been placed. Click the **Place** button to open the **Define New Holds Basics** window (Figure 2-17), where you can change the Expires date, Priority, and Send to Branch parameters.
- **Selected Hold** information**:** Displays a **Description**, **Status**, **Send to Branch**, and **Definition of Hold** for a highlighted title on the holds list.
  - **Description:** An optional description of the hold. If you place a multiple item hold, this field can be used to enter an overall description (e.g., "Titles by Mark Twain"). The Description also appears in the Holds Queue display.
  - **Status:** The possible **Holds Status** codes are listed below. Codes are supplied by the system. When an item is on hold (with a status of pending, arrived, or in transit), the **Item Status** code varies, as shown in the right column.

Hold Status	Meaning	Item Status
PE	Pending hold (item still checked out to another borrower)	CO
AR	Arrived (item just checked in, awaiting checkout by requesting borrower)	HD
T	Hold item in transit between brahcnes	T

  - **Position/Copies:** Includes the relative position of this borrower's hold in the Pending Holds Queue, followed by the number of copies available for holds. If this is a multiple-title hold, the number of copies will include the total number of items of every copy in the hold. If it is a multiple-item hold (i.e. a title-level hold), the number of copies will be the total number of available items. Items with a "Lost" or "Missing" Item Status are subtracted from the count for both title-level and item-level holds.
  - **Issued:** The date the hold was issued.
  - **Expires:** The date this hold request will expire. After this date the system will not continue to look for this hold.
  - **Priority:** The priority of the Patron Type in the Holds Queue. Priority values range from 1 (high) to 10 (low). this is established for each **Patron Type in the Setup | Patron Types**

and Codes | Patron Type setup. You can change the priority for a hold by editing on the **Patron Transactions | Holds** tab or through the **Holds Queue**. On the **Holds** tab, if you change the priority, be sure to save by clicking the **Save Hold Info** button.

- **Send to Branch:** specifies the branch where the hold is being sent. You can specify that a pending item (holds stats PE) be sent to another library for pickup by the borrower. Change the library number or name. Save by clicking **Save Hold Info**.

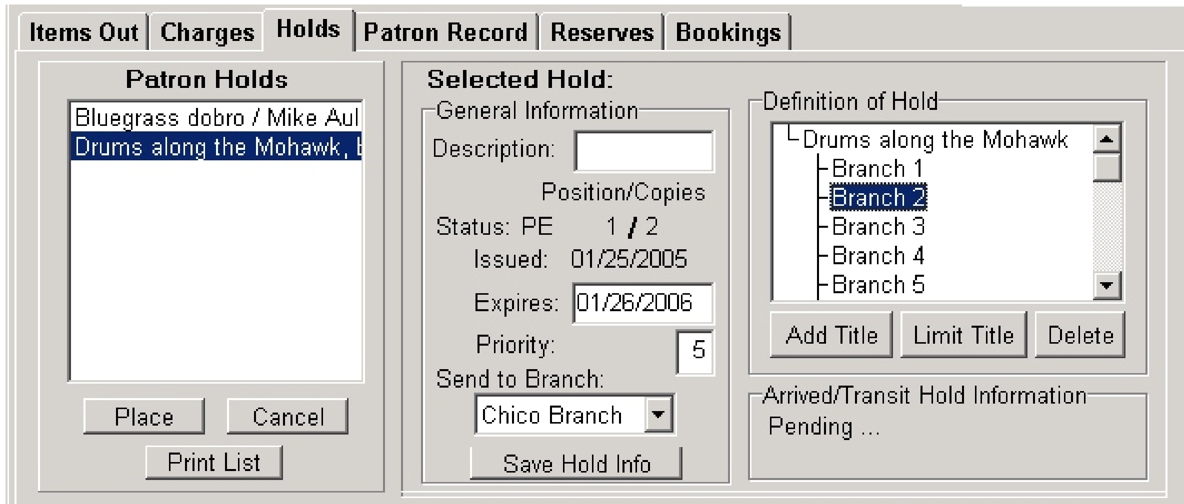

Figure 2-16. The Patron Transactions | Holds subtab

- **Save Hold Info:** Use this button to save any changes you have made in the **Selected Holds** fields.
- **Definition of Hold:** This box contains information about the selected hold. For a multiple title hold, the individual titles are linked together by vertical lines. If a hold has been limited by Branch or Item, you will see the Branch Number and/or the Item ID (barcode number) displayed under the title.
- **Add Title:** Use this button to add another title to an existing hold (i.e., another title that the borrower would be happy to get just as well as the first one).
- **Limit Title:** You can limit a hold to items circulated by a particular library, and you can limit the hold to a particular item (copy or volume).
- **Delete:** Use this button to delete an item or title from a selected multiple title hold. A message will ask you if you are sure you wish to deleted the selected hold. Click **OK** or press **Enter.**

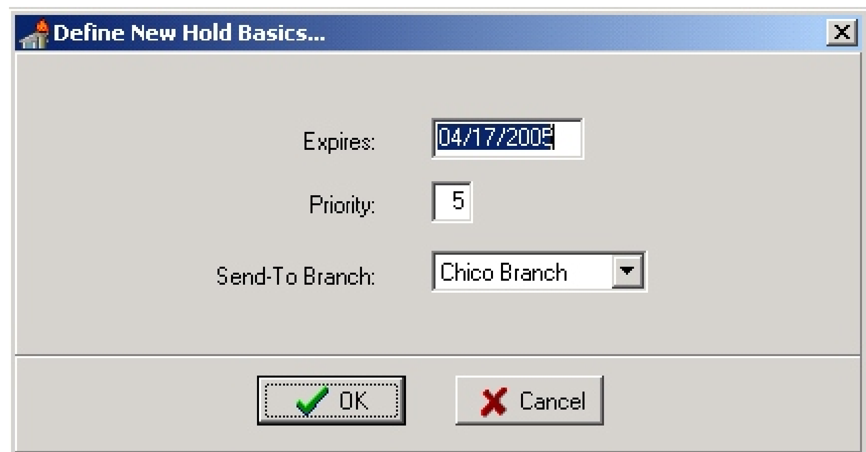

Figure 2-17. The Define New Hold Basics window

– **Arrived/Transit Hold Information:** If the selected title has arrived, the title is displayed below the Add/Limit/Delete buttons, along with the library where the item is now waiting or to which it is now in transit. ("Arrived" means the item has been checked in from the previous borrower and is now available for hold pickup.)

When you select **Place** on the **Holds** tab to place a new hold, you will first see the **Define New Hold Basics** window (Figure 2-17). Enter information and save, and then the **Define Title Specifics** window appears with the **Branches** tab (Figure 2-18). Use the **Items** tab (Figure 2-19) to display information about specific items. (To limit a hold to a branch or item, click here.)

Click the **Save Hold Info** button to save changes made to the information. Select the **Add Title** button to display the **Define Title Specifics** window , where you can enter information about the title or item you want to place on hold. Click the **Limit Title** button to place further limits of the title on hold. Use the **Delete** button to remove a title from the **Holds** list.

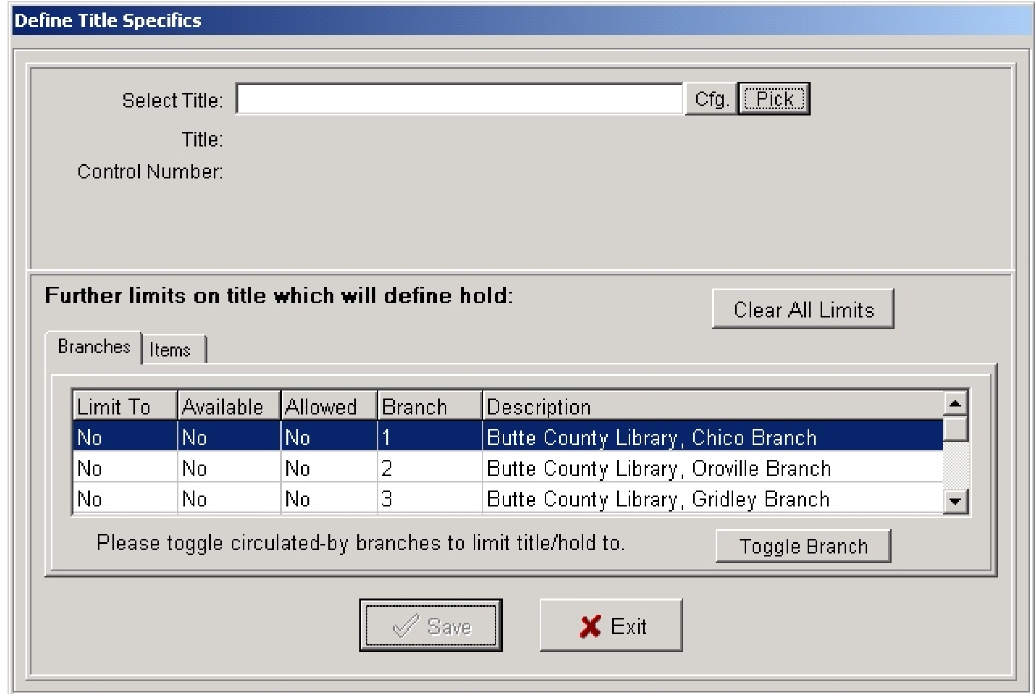

Figure 2-18. The Define Title Specifics window, Branches tab

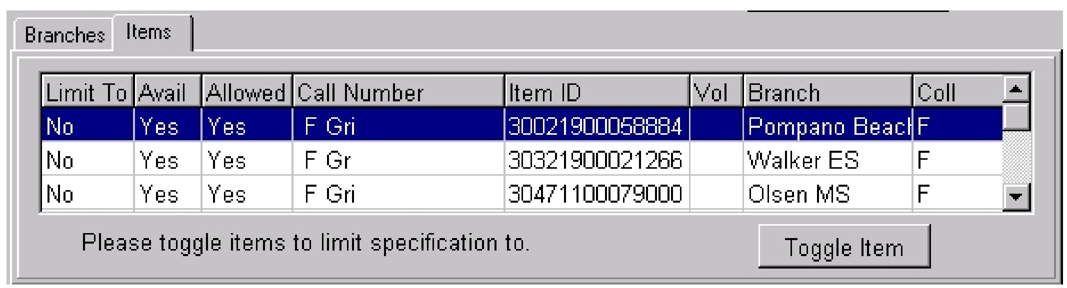

Figure 2-19. The Define Title Specifics window, Items tab

Fill Holds for Current Branch as Pickup Location

A holdings code setting allows Circulation administrators to specify that holds to be picked up at a particular library should be filled by that library's copies in that holdings code before any holds placed for pickup at other libraries are filled with copies from that library.

This setting is available in the Library•**Solution** System Configuration: **Setup | Holdings Codes: FillLocalHoldsFirst (field).** To find details on the setup, see the *System Configuration Reference Manual*.

The available settings for each holdings code are 0 (zero), meaning do not fill local holds first (default setting) or 1 (one), do fill local holds first. If the option is turned on (value 1), then Circulation makes a determination about any possible holds when an item is checked in:

- If Circulation finds that there are PE (pending) holds, it determines the library of the “active” holdings code for the item (this is not necessarily the owning holdings code).
- If the “FillLocalHoldsFirst” flag is turned on (value 1) for the active holdings code, the system searches the holds queue for the first PE hold that is to be picked up at the item’s active library. If such a PE request exists, Circulation then fills that hold request, regardless of whether there are other PE holds to be picked up at other libraries ahead of this hold in the queue.
- If there are no PE holds in the queue to be picked up at the active library for the item, Circulation checks to see if there is a PE hold to be picked up at the current Circulation location (the library where the item is being checked in). If so, it fills the first such request (again, this is regardless of its position in the queue).
- If there are no PE holds in the queue to be filled at the current library location, then Circulation fills the first PE hold in the queue (regardless of which pickup location is specified).

On the other hand, if the “FillLocalHoldsFirst” field for a given holdings code is not turned on (value 0), then the holds queue in Circulation operates normally: “first come/first served.”

See Holds Quick Reference topics for more information about holds procedures.

2.1.4 Patron Record

The **Patron Transactions | Patron Record** subtab contains additional tabs that display Basic Information, Patron Fields, Addresses, Miscellaneous Information, Loan History, and Outreach Services.

2.1.4.1 Patron Record: Basic Info.

The **Basic Info** subtab (Figure 2-20) includes the following information panels:

- **Patron ID:** Includes Patron ID, Alternate ID, Patron Type, Expires (card expiration date), and Hot Status. Click the **Print Patron Info** button to print a copy of this information.
- **Name:** Includes Last Name, First Name, Middle Name, Suffix.
- **General Information:** Includes Salutation, E-mail address, Date of Birth, PIN, Gender, and Comment.
- **Responsible Party:** Name of the person responsible for this borrower's checkouts, outstanding fines or fees, etc. To set a responsible party for the current borrower, click in the entry box, type a name, and select the **Set** button. Choose a name from the borrower hit list and click **OK**.

Click the **Save** button to save changes you make.

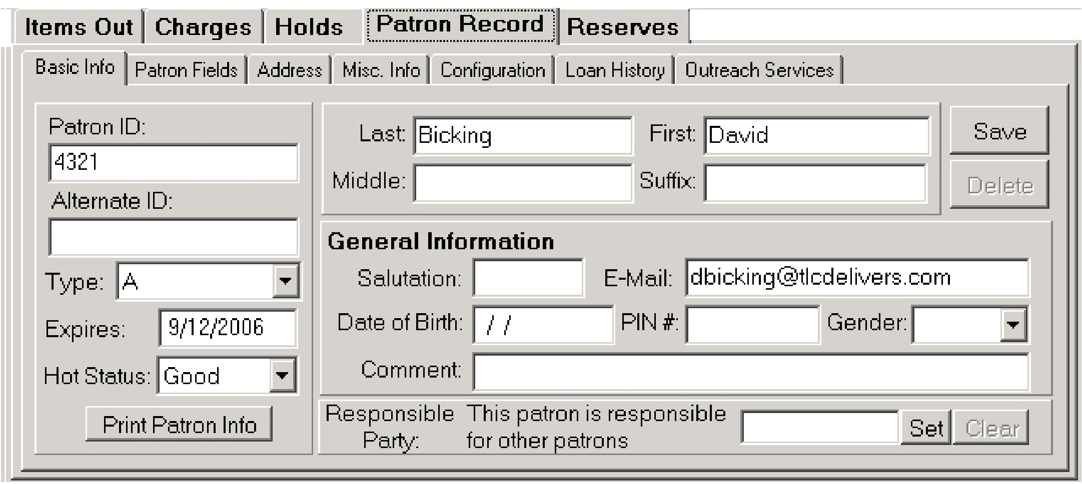

Figure 2-20. The Patron Transactions | Patron Record | Basic Info. subtab

2.1.4.2 Patron Record: Patron Fields

The **Patron Transactions | Patron Record | Patron Fields** subtab (Figure 2-21) displays the Field Name and Value for optional borrower fields. In your initial setup, supervisors can define as many fields as needed: field names, type of data to be entered in the field (codes or free text), and whether or not the fields can be used in statistical reports.

Use the **Delete Highlighted Patron Field** button to remove an optional borrower field.

To learn how to setup patron fields, click here.

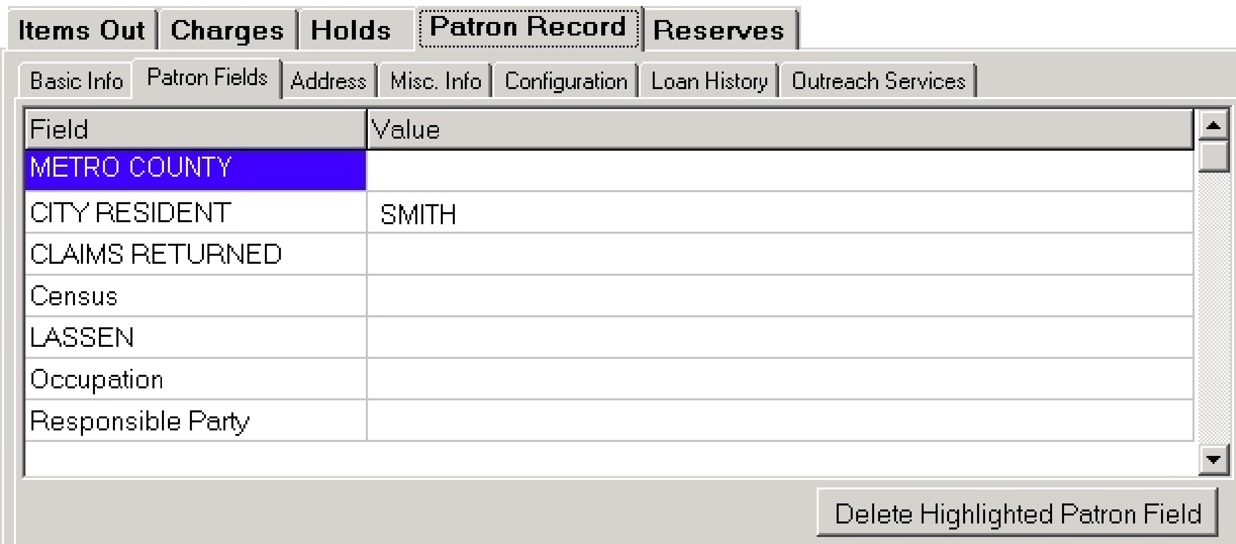

Figure 2-21. The Patron Transactions | Patron Record | Patron Fields subtab

2.1.4.3 Patron Record: Address

The **Patron Transactions | Patron Record | Address** subtab (Figure 2-22) contains the following:

- **Select Address panel:** Choose the **Primary** or **Secondary Address** to display on the right.
- **Copy Address:** To copy the address, click the **Copy Address** button to display the **Copy Address** window (Figure 2-23), where you can copy the address from one borrower's record to another.
- **Address Information panel:** Contains two lines for the street address plus City, State, Zip, Comment, and Phone Number(s). Click the **Organization** button to display the **Lookup Organization Name** window (Figure 2-24), where you can search for and add a link to an organization, or add a new organization to the list. (When a borrower is linked to an organization, the "organization" name is printed between the borrower's name and the first street line of the name and address block on notices, labels, letters, etc.). Use the **Remove Organization** button to remove a link between a borrower and an organization. Click **Address Correction Requested** box if you want to be alerted to check the address of this borrower. This will cause a message in blue, **Address**, to be displayed prominently on the F2 tab any time you search for this borrower. The message will remind staff to update the borrower's address and other contact information.

Use the **Save** button to save your changes.

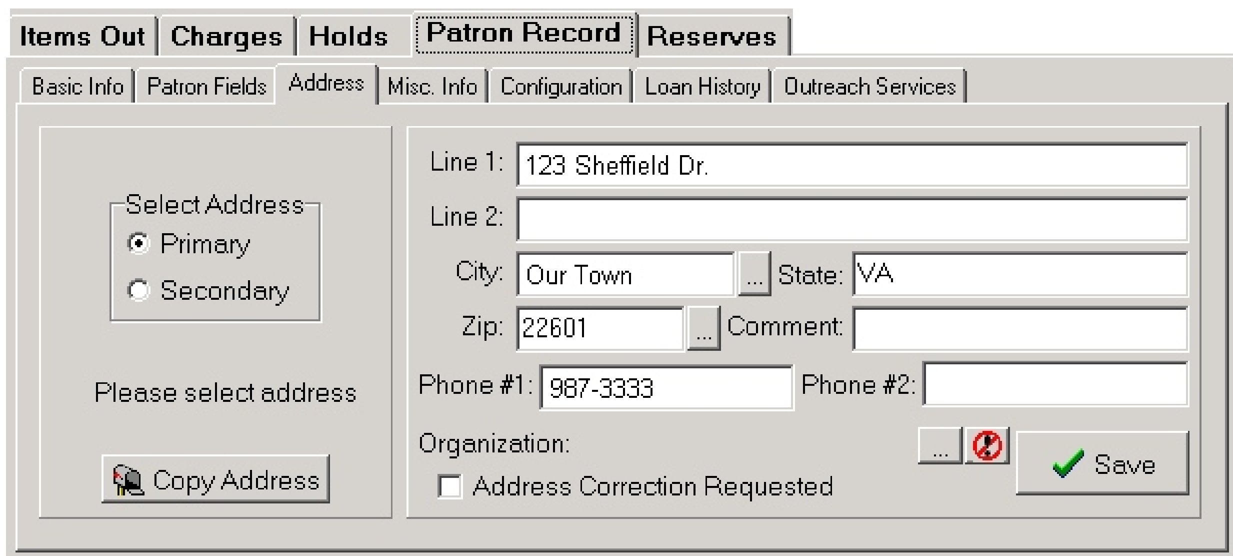

Figure 2-22. The Patron Transactions | Patron Record | Address subtab

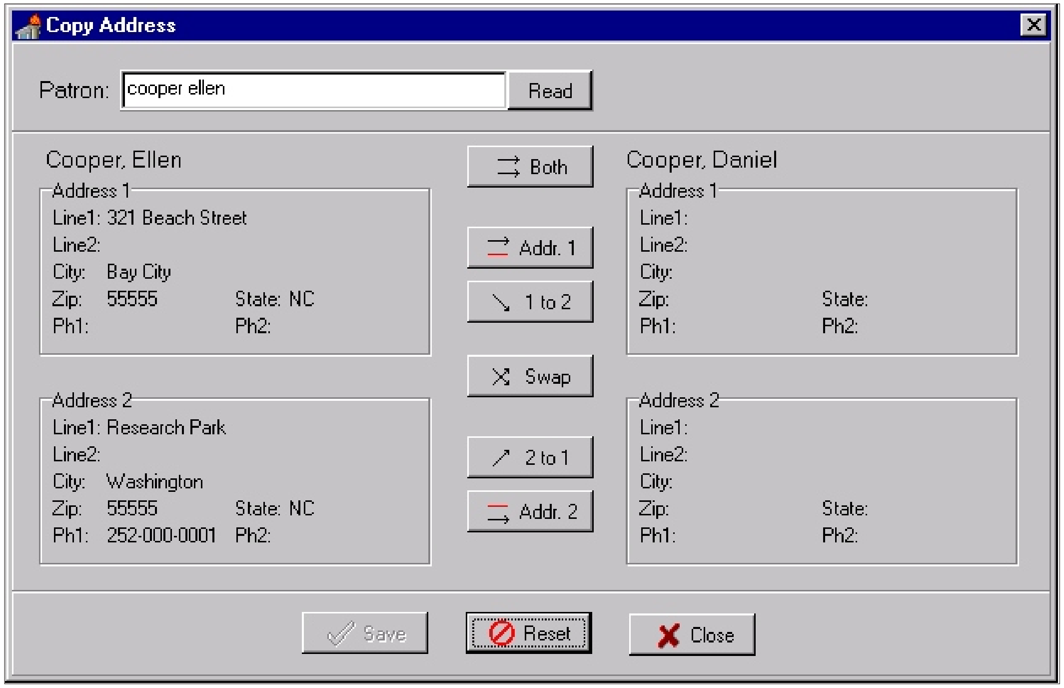

Figure 2-23. The Copy Address window

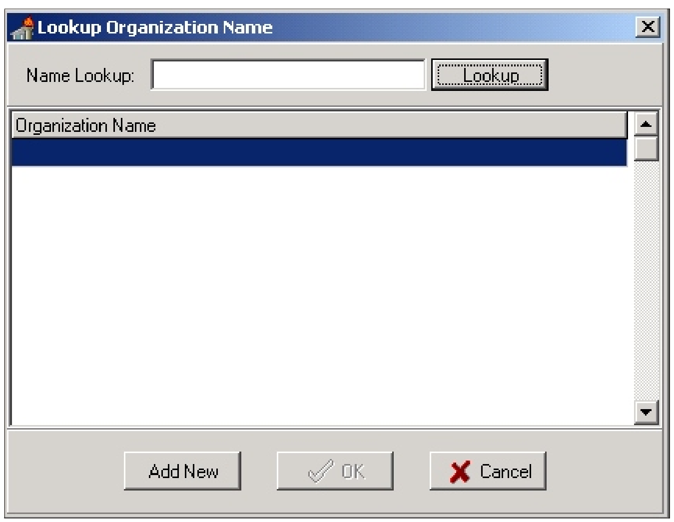

Figure 2-24. The Lookup Organiztion Name window

2.1.4.4 Patron Record: Misc. Info.

The **Patron Transactions | Patron Record | Misc Info** tab (Figure 2-25) contains the following information.

- **Issued:** Date borrower's card was issued
- **Issuing Branch:** The library (number and name) where the borrower's card was issued. To change the issuing Branch, click the arrow beside the drop-down box and select another library. A message will ask you to confirm the change.
- **Last Active:** Date and time of borrower's last activity
- **Last Branch:** Library name where borrower's last activity in the system occurred.
- **Last Edited:** Date and time when Patron Record was last edited by staff.
- **Last Updated:** Date and Time when Patron Record was last updated automatically by the system.
- **Last Patron ID:** If borrower's barcode number was changed, this is the previous barcode number used.

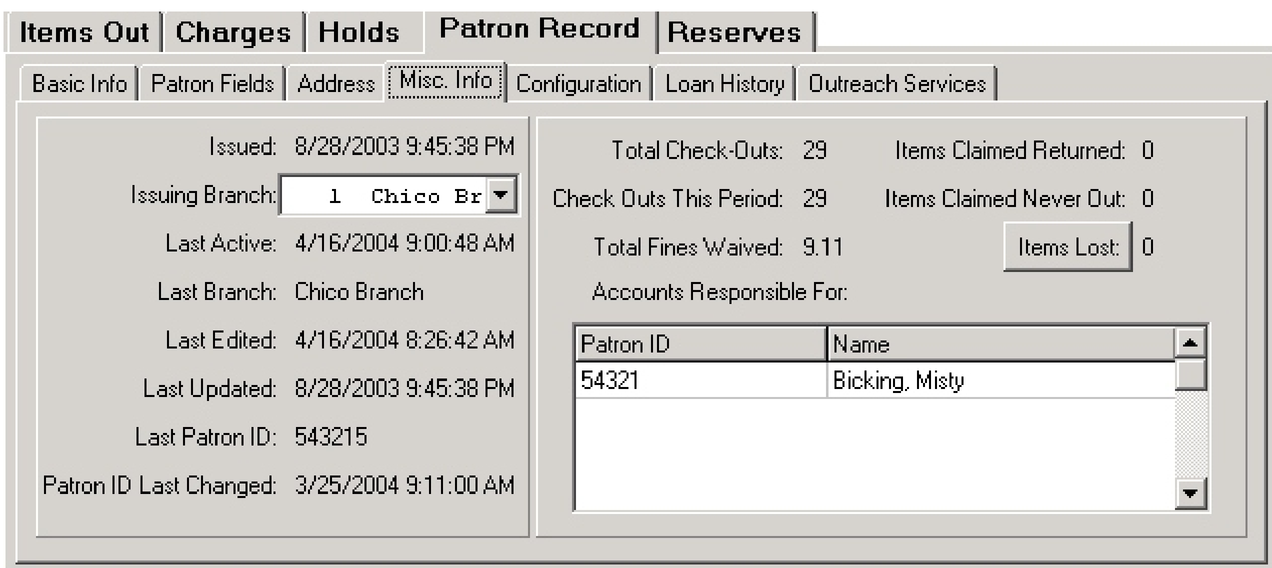

Figure 2-25. The Patron Transactions | Patron Record | Misc. Info. tab

- **ID Last Changed:** Date and time the borrower's barcode number was last changed.
- **Total Check-Outs:** Total number of items checked out by this borrower.
- **Total This Period:** Number of items checked out by this borrower in this defined "year-to-date" period.
- **Total Fines Waived:** Total amount of overdue fines and other charges waived for this borrower.
- **Items Claimed Returned:** Number of items the system considered still checked out, but which the borrower claimed had already been returned.
- **Items Claimed Never Out:** Number of items the system considered checked out to this borrower, but which the borrower claimed had never been checked out.
- **Items Lost button:** Click this button to view a list of all the items the borrower has lost.
- **Accounts Responsible For:** Barcode numbers and names of borrowers for whom this borrower is the responsible party.

2.1.4.5 Patron Record: Configuration

The **Patron Transactions | Patron Record | Configuration** subtab (Figure 2-26) includes the following:

- **User Settings area:** only a user looged on as **system_admin** will see these dro-down lists:
  - **Online Editor Rights:** The following options will display on the drop-down list. Select the desired option and click **Save**.

    None

    Allow Holdings Edit

    Allow Reading Program Edit

    Allow Both

  - **Debt Collections:** From the drop-down list, select CAN SUBMIT or EXCLUDE and then click **Save**. You can enable Debt Collections by selecting **Security Setup** from the **Setup** menu, choose a user, click the **Basic Functionality** tab, and check the box beside **Debt Collection**. The user will need to re-login to enable the security change.

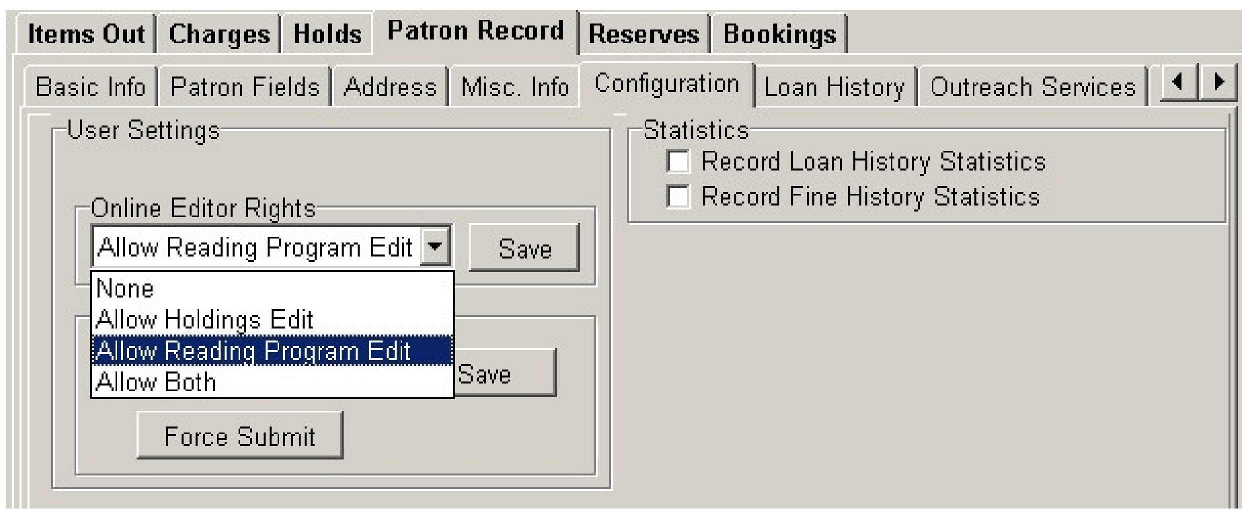

Figure 2-26. The Patron Transactions | Patron Record | Configuration subtab

- **Statistics area:** allows qualified staff to turn on (or off) the following options in the individual borrower record: **Record Loan History Statistics** and **Record Fine History Statistics**. These check boxes control whether or not loan and fine history can be collected for a selected borrower. (Borrowers should give permission before qualified staff select these options.)

Some Circulation staff will not be able to view these boxes on the **Configuration** tab at all. Some users can view but not edit the settings. The rights to view or edit the information are given in the **Security Setup: Patron Screen** selections for the field named **Patron Stats**. (**Note:** To allow loan and fine history data to be collected at all, the **Turn on Loan History** and **Turn on Fines History** boxes must be checked on the **Setup | Branch Setup | Defaults** tab.)2.1.4.6 Patron Record: Loan History

The **Patron Transactions | Patron Record | Loan History** subtab (Figure 2-27) allows qualified staff to view and edit the loan history of a selected borrower. Staff should obtain permission from borrowers before enabling this feature. (Click the **Record Loan History Statistics** option on the **Patron Record Configuration** tab.)

(**Note:** To allow loan history data to be collected at all, the **Turn on Loan History** box must be checked on the **Setup | Branch Setup | Defaults** tab.)

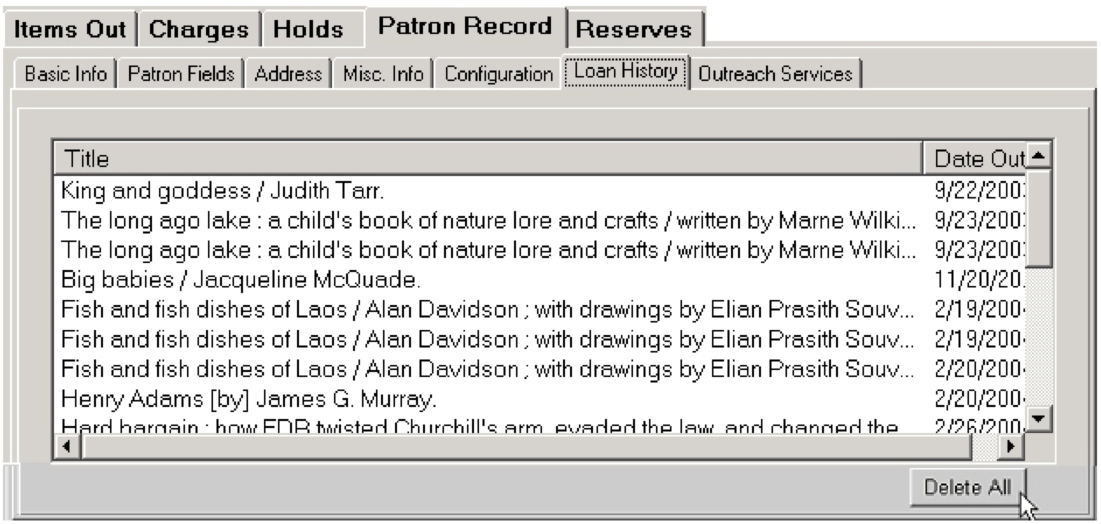

Figure 2-27. The Patron Transactions | Patron Record | Loan History subtab

Some Circulation users will not be able to view the settings at all. Some users can view but not edit the settings. The rights to view or edit the information are given in the **Security Setup: Patron Screen** selections for the field named **Loan History**.

A Circulation user with sufficient security can remove selected items from a borrower's history. When you right-click over an item in the list, the **Remove Title** option appears. To remove the item, click the button. The **Delete All** button (lower right) can be used to delete all of a borrower's loan history.

2.1.4.7 Patron Record: Outreach Services

The **Patron Transactions | Patron Record Outreach Services subtab** (Figure 2-28) can be used to set delivery frequency, set minimum and maximum number of items, and view profile edit history information. (See section 8.4 Library.Solution Outreach Manager for an overview of Outreach Services.)

You can also view the currently displayed selections, or change a displayed field to a different selection, of the optional **Outreach Fields**. In your initial setup, supervisors can define as many fields as needed: field names, type of data to be entered in the field (codes or free text), and whether or not the fields can be used in statistical reports.

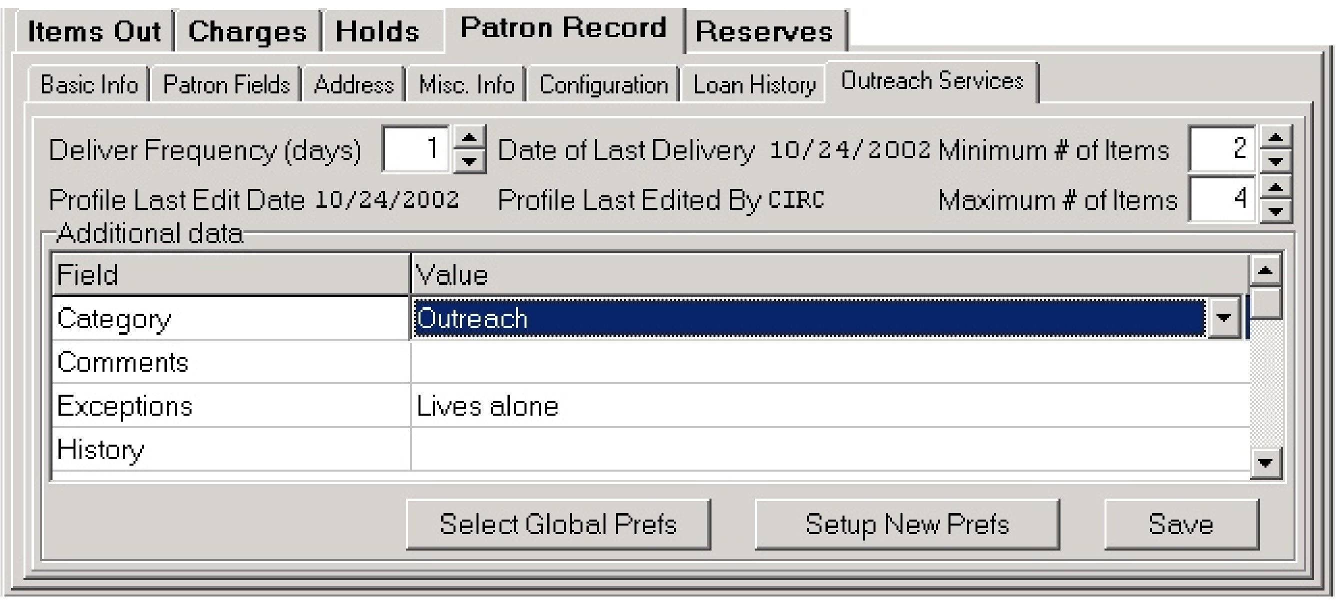

Figure 2-28. The Patron Transactions | Patron Record Outreach Services subtab

The borrower's search preferences can be saved for future searches, and those saved searches are available to be included in any borrower record if they are saved as "global" searches.

The following fields are available:

- **Delivery Frequency (days):** This number indicates how often this Outreach borrower receives delivery of his requested items. Use the **Up/Dow**n arrow keys to change the value to the desired number of days. The valid range is 1 to 999. (**Tip:** Single-click the arrow to increase or decrease the setting value by one. Repeat the single click to change the setting, one digit at a time, to the desired value. You can also set the value by clicking in the box, pressing the delete key until the value equals zero, and then typing the desired value.
- **Minimum # of Items:** This number indicates the minimum number of titles that the borrower wishes to receive for each delivery period. Use the **Up/Down** arrow keys to change the value to the desired minimum number of titles. The valid range is 1 to 999.
- **Maximum # of Items:** This number indicates the maximum number of titles that the borrower wishes to receive for each delivery period. Use the **Up/Down** arrow keys to change the value to the desired maximum number of titles. The valid range is 1 to 999.
- **Date of Last Delivery:** Displays the date of the last delivery to this borrower.
- **Profile Last Edit Date:** Displays the date the Borrower's profile was last edited.
- **Profile Last Edited By:** Displays the User Name of the last person to edit the borrower's profile.
- **Additional Data:** Displays the current selections of the optional Outreach Fields.
- **Select Global Prefs:** Opens the **Outreach Saved Searches** window. To add one of the displayed searches to the current borrower's Saved Searches list on the PAC, select the search Title on the display, and click the **Set** button. That search will now be available on the borrower's PAC display as a **Saved Search**.
- **Setup New Prefs:** Opens a web browser and takes you to the configured PAC. You can perform searches, and then save those search settings to be used in future searches for this borrower. The saved searches can be added to other borrower records by using the **Setup Global Prefs** button as described above. **Note:** If you get a logon error when the browser connects to the PAC, verify that the Patron has a PIN assigned.

Use the **Save** button to save your changes.

See section 3.1.2 Patron Types and the Quick Reference section on Outreach Fields for more information.

2.1.5 Reserves

Reserves are materials set aside for a special use by a borrower (usually an instructor in an academic library), for example, for required reading for a course. Circulation staff can also use reserves to specify special shelving locations, for example, for "New Books" or seasonal displays such as "Halloween Books." Special checkout periods and overdue fines are usually assigned to the items. A reserve is not the same as a "hold."

The **Patron Transactions | Reserves** subtab (Figure 2-29) is used to place items on reserve for a selected borrower (instructor). Special checkout periods and other circulation rules can be assigned to the items when they are placed on reserve by specifying a different holdings code.

Holdings codes also determine location displays in the PAC and shelving location messages in Circulation when reserve items are checked in.

The following function buttons are available:

Place: Click this button to open the **Place Item on Reserve** window (Figure 2-30), where you can select a Department, Course, and Expiration Date, and search for items to place on reseve,

Remove: Click this button to remove the highlighted items from the group of reserve items.

Edit: Select this button to display the **Edit Reserve Information** window (Figure 2-31), where you can select an existing reserve and modify the Department, Course, and Expiration Date.

View All: Click this button to view all reserves.

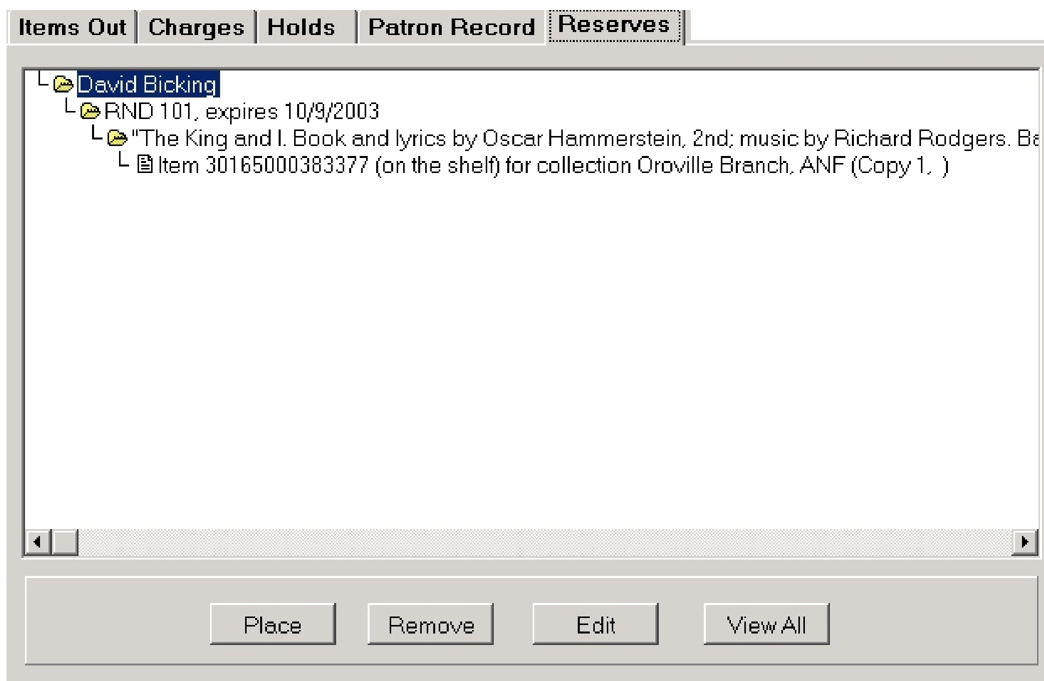

Figure 2-29. The Patron Transactions | Reserves subtab

Note: Department and Course choices must be setup in **Setup | Types and Codes | Department Codes** OR **Course Codes**.

See section 6.0 Reserves Tools Menu for an overview of reserves procedures.

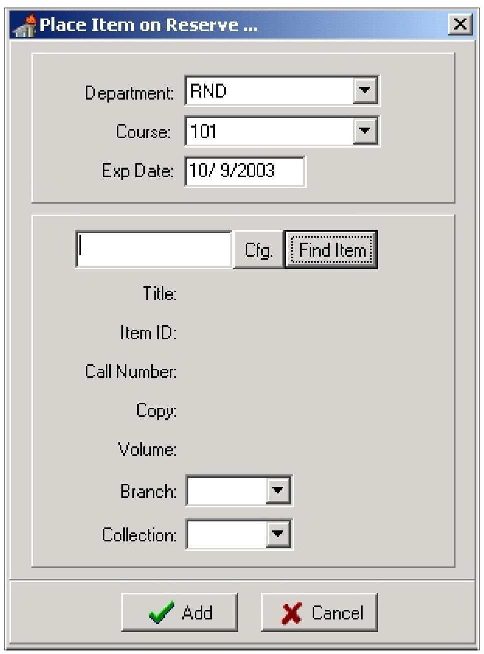

Figure 2-30. The Place Item on Reserve window

Figure 2-31. The Edit Reserve Information window

2.2 Check In / In House Use Tab F3

The **Check In / In House Use Tab** (Figure 2-32) is used to:

- Check in items that were checked out and have now been returned to the library.
- Check in new items to make them fully available to borrowers. (When new titles or items are added in either Cataloging or Circulation, the system automatically assigns a modified Item Status of **T-In Processing**. When you run new items through Check In, this clears the "T" status so the items will be displayed as "available" in the PAC. If an item should be circulated by another library, a check in message will remind you to move it.)
- Determine the current item status or library status of an item. If the item happens to have a "T" item status, a "Relocate Item" message will alert you to move items to another library. If an item is already checked in and should stay at this library, no special message is displayed.
- View a list of items checked in recently. For information on any item, select a checked in item from the list, and then click the **Item Inquire** button on the lower left. For more information on a borrower, click the **Patron Inquire** button on the lower right.
- Record borrowers' in house usage of items which were not checked out.

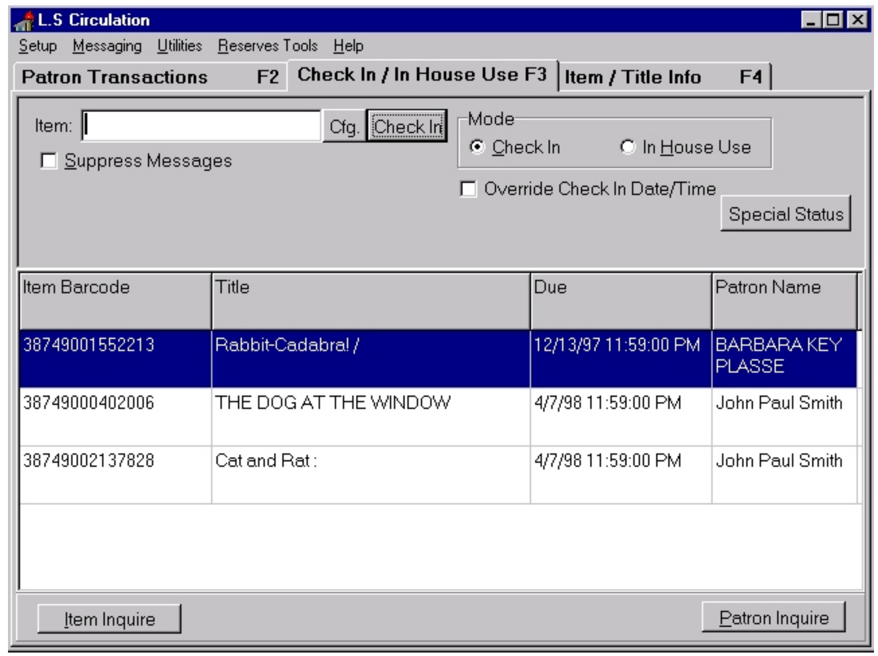

Figure 2-32. The Check In / In House Use Tab

The following features are available on this tab:

- **Item box:** Enter information about the item to be checked in or recorded for in house use. Scan the barcode label or type the item ID or the title.
- **Configuration (Cfg.) option** button: Click to reach **Title Search Configuration** window, where you can set the search order. **Note:** this is the same configuration used on the **Patron Transactions** (Check-Out) tab.
- **Check In** button**:** After you enter information about the item to be checked in or recorded for in house use, click the **Check In** button or press **Enter** to display the **Title Lookup** window (Figure 2-33). From here you can highlight the desired item and click **OK** to check it in or use the **New Item** or **Show "NO ITEMS"** buttons (if available) to add an item or title on-the-fly.
- **Mode: Check In / In House Use:** Use the **Check In** option button to check in items that were checked out and returned. Use **In House Use** to record usage of items that have been used in the library but not checked out.
- **Override Check In Date / Time:** When you are checking in items or recording in house usage, you may wish to override the date and time.
- **Special Status** button: You may need to check in an item with special circumstances, such as damaged, lost, borrower claimed never checked out the item, or borrower claimed the item had already been returned. Before you enter information about the item to be checked in, click the **Special Status** button and select the **Item Status** code to be assigned. If the item status was previously "Lost", the Adjust Claims window will ask: Should the claims counter be adjusted for this claim? ' Respond **Yes** or **No** as desired. For additional information, see descriptions at trhe end of this section.
- **Item Barcode area:** Displays brief information about items recently checked in or recorded for in house use. The following information is displayed: Item ID (usually a barcode number), title, date and time due, and the borrower who last checked out the item.

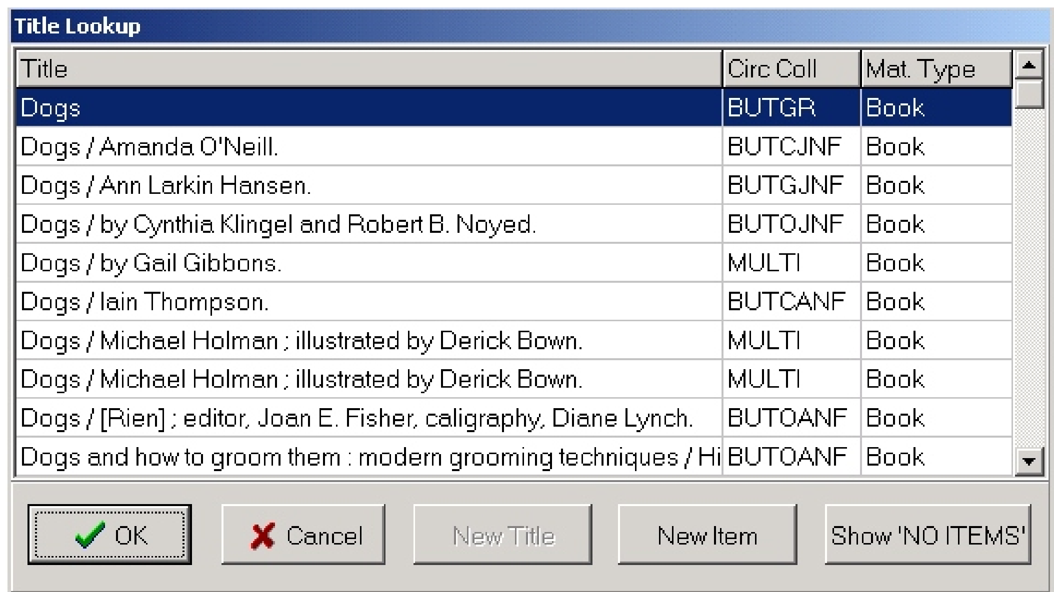

Figure 2-33. The Title Lookup window

- **Item Inquire button:** Displays the **Item/Title Information** tab with the **Circulation** subtab information for the selected title.
- **Patron Inquire button:** Displays the **Patron Transaction | Patron Record | Basic Info.** sub tab.

Messages

During checkout, if the item is already checked out to a borrower, an **Are You Sure You Want To Do This?** message will display asking: “Do you want to check-in item from existing borrower and check-out to new patron?” Clicking **Yes** will result in the item being checked in from the previous borrower and checked out to the current borrower. If this is the same borrower, clicking **Yes** will result in a renewal.

Handling Lost or Missing Hold or In-Transit Items

When a hold is placed against a title, and Circulation believes there are copies available on the shelf, Circulation will pick an available item to fill the hold. Depending on the "On the Shelf Hold to HD Status" setting on the Defaults tab under the Setup menu, Branch Setup option, and the present library of the item, the item will either be placed in a Hold (HD) or In-Transit (T) status. Based on normal library usage, when the operator attempts to retrieve the item to place it on the Holds Shelf, it may not be found.

To Replace the Lost or Missing Item on the Hold Request:

1. The operator should check-in the requested item which could not be located, using a Special Status check-in, and selecting one of the modified Lost or Missing statuses.

2. The **Hold Replacement** form will display (Figure 2-34).

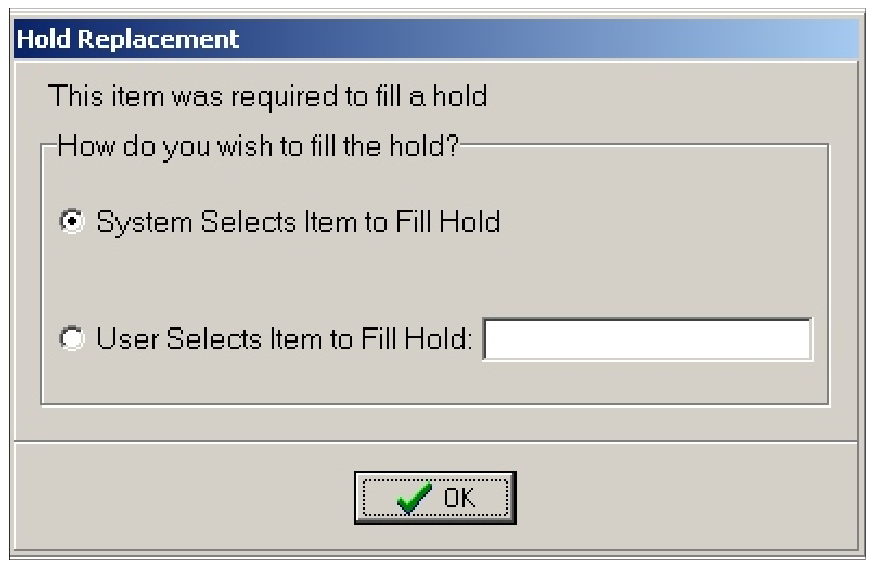

Figure 2-34. The Hold Replacement form

3. The form will display two choices: **System Selects Item To Fill Hold** and, **User Selects Item to Fill Hold**. Select the desired option and click **OK**.

4. If the item is Lost or Checked out, Circulation will ask if the user wants to proceed. In this situation, if overdue fines are applicable, the system will ask if the user wants to charge them.

Handling Lost or Missing Arrived Holds

This process can also be used if a borrower asks for an arrived hold and it cannot be found. The operator can use the Special Status check-in and place the item in the Missing (MS) status.

The same options will be available to the user to either select another copy to fill the hold, let the system select the copy, or revert that hold to a PE (pending) status to be filled when another copy becomes available.

Dealing with lost item charges

When the previously Lost item is checked in, and there are existing charges pending payment, an **Outstanding Charges** dialog will display the current pending charges (Figure 2-36). The staffers can selectively elect to waive these charges by checking the item(s) on the list and then clicking **OK** to continue.

If the borrower made previous payments for the lost item, a **Lost Item Charge Payments** dialog will display a list of all payments made (Figure 2-37). Staff should select the entries that are to be refunded and click **OK**.

The check in will continue as normal. Review the **Charges** tab for that borrower to be certain that the fines/fees were removed from the borrower record.

- If Option 1 is selected, the system will pick another copy to fill the hold. It will display a message advising the operator which copy to select, or will send another message to another library to fill the hold.

- If Option 2 is selected, the operator will scan the selected copy's barcode into the box provided. Circulation will ensure this copy can fill the hold.

  Circulation will report errors as appropriate, and will not allow the following items to be used:

  – The wrong title

  – An item that is on Hold for another borrower

  – An item in an In-Transit (T) status to fill another hold

  – An item involved in a Booking (BK) status

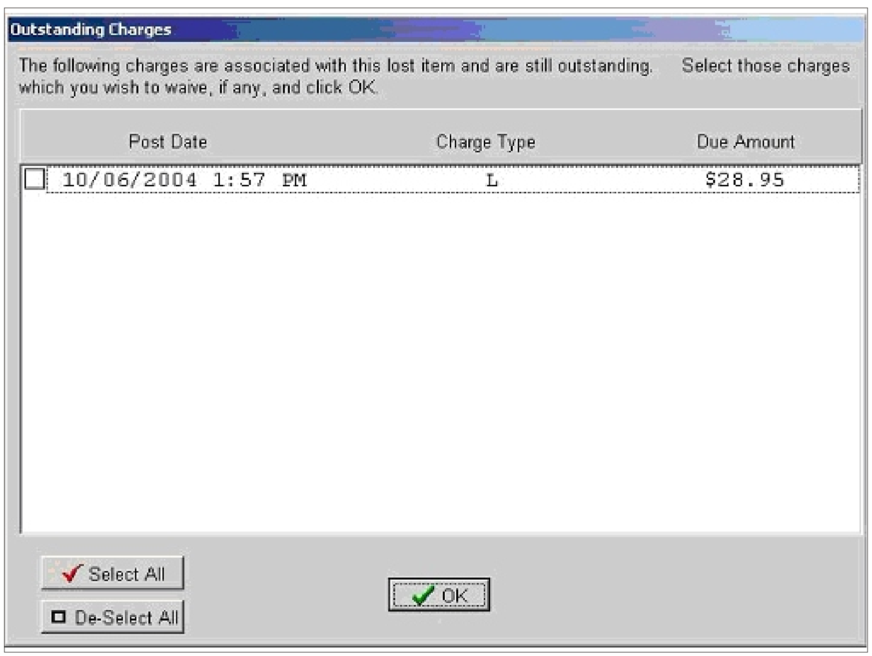

Figure 2-36. Outstanding Charges window

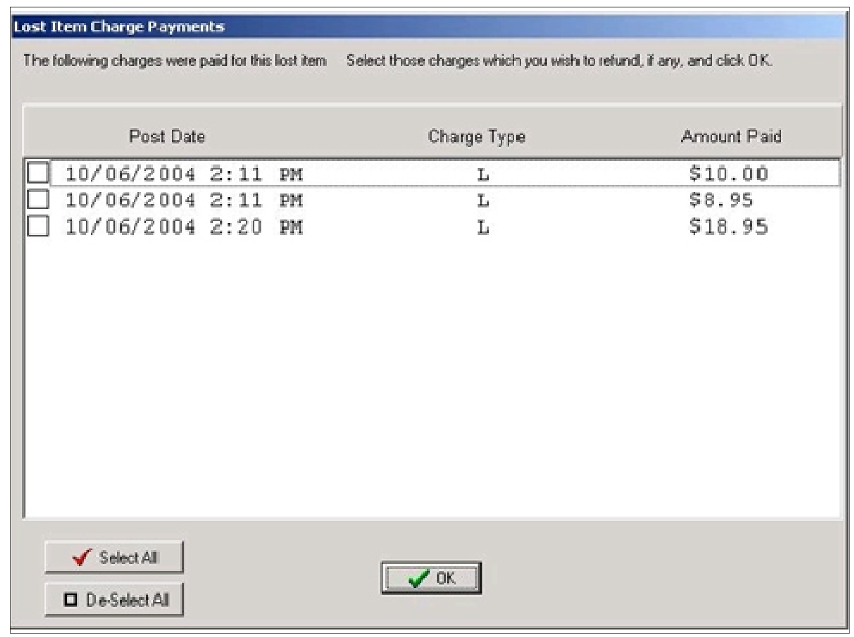

Figure 2-37. The Lost Item Charge Payments window

Holds routing Among libraries

In Circulation Version 2.1.1 and higher, when an item is checked in that is on hold for a borrower at another library, Circulation will forward the arrived hold item directly to the pickup library requiring the hold and thus eliminate the extra step of sending it to the home library first. Sometimes when you check in an item, the system will display a special message in a "Relocate Item" window.

This occurs if the item should be shelved with reserves, or if it is on hold and should be shelved locally on the Arrived holds shelf or transferred to another library for pickup. The Relocate Item window says, "Please move item as described" and includes the title, the call number, and a description of the item status. If the item is a reserve, the department, the course, and the name of the instructor are also shown. Appropriate instructions will tell you to move the item to the proper pickup library. A **Print** button is available to print a hard copy of the **Relocate Item** message.

If the checked in item is on hold, a holds slip with the borrower's name and telephone number can be printed automatically. To set up printing, select **Printing Setup** on the Setup menu: Local Configuration.

If a borrower has been notified of an arrived hold via e-mail, the holds message or printed holds slip will include the message "E-mail Notification" to notify the operator that this borrower has been notified of the arrived hold via e-mail. In this case, there is no need to print the holds slip.

To ensure that action is taken, the Relocate Item messages are also recorded in the **Messaging** window, which you can access on the Circulation menu.

You can turn off the display of some messages by selecting the Suppress Messages check box.

2.3 Item/Title Information Tab

Use the **Item/Title Information** tab (Figure 2-35) to find information about any title or item in Circulation. You can find bibliographic information (like title and author), item-specific information (like barcode number, call number, owning and circulating libraries and collections, etc.), Circulation status (what borrowers have which items checked out, holds and shelf status, etc.), and more.

Note: You can also access item/title records from the other two main tabs. If you are already working with a selected borrower on the **Patron Transactions** tab, use the **Item Inquire** button for a selected title on the **Items Out** tab. From the **Check In/In House Use** tab F3, select an item just checked in, and then use the **Item Inquire** button. The inquire buttons on either tab will take you quickly to the **Item/Title Information** tab.

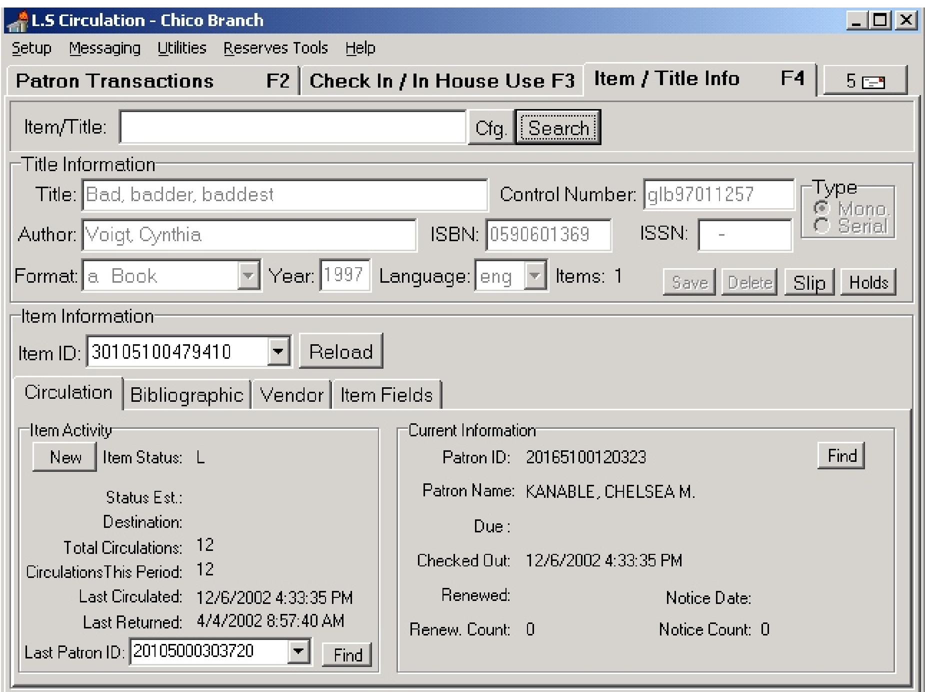

Figure 2-35. The Item/Title Information tab

The **Item / Title Info.** window contains the following panes:

- **Item / Title entry box:** Scan the barcode or enter a title, the Item ID (barcode number), ISBN, the control number, or use **\C** to search by call number. If you type the information, click **Search** or press **Enter**. If desired, use the **Cfg.** button to reach the **Title Search Configuration** window and modify the search order. (Note: This requires administrator level rights.)

- **Title Information:** Includes the following fields and features:
  - **Title:** The title, up to 40 characters.
  - **Control Number:** The unique number for a title record. If the title has been catalogued in the Cataloging module, the Control Number displayed in Circulation is from field 001 in the MARC record. The control number consists of three spaces and / or lowercase letters, followed by eight numerals. (**Note:** Bibliographic records created after the year 2000 may have 2 letters and 10 numbers. On-the-Fly entries always have 3 letters and 8 numers.)

    For titles you add to Circulation on-the-fly, the system will assign control numbers automatically. It also creates MARC records with these control numbers in the Local Database accessible through the Cataloging module. Supervisors may wish to set the same control number prefix (three leters, like "otf") in each library's Branch Configuration, or they may assign a separate prefix for each library in the system. Different prefixes may help catalogers track which library added which titles.

    The bibliographic portion of this section will be grayed or not grayed, depending on whether Cataloging "owns" the record. If the screen says "Circulation Record" in red, you can edit it if security allows.

    Note: The numeric portion of the automatic control number (eight digits) is not configurable. There is a single numeric sequence which applies system-wide. The first number used by any library in the system for the first title added to the system on-the-fly is 00000001, with the appropriate assigned prefix.

  - **Author:** The author's name, up to 50 characters. If entering data, type the last name first, like this: **Twain, Mark**.
  - **ISBN:** Enter the ISBN (International Standard Book Number), if known. Type the 10 characters without the hypens supplied in the printed number.
  - **ISSN:** If the title is a serial, this field contains the ISSN (International Standard Serial Number). If you are entering a new title record in the **On-the-Fly Item Entry** window, type all eight digits of the ISSN. The hyphen between the first and last four digits will be supplied automatically.

– **Type Mono / Serial:** Monograph is displayed as the default type of record. To change the default, click the radio button beside **Monograph** or **Serial.**

– **Format:** Contains a code to describe the physical format of the item. The code for book is displayed as the default format. To change the default for a Circulation on-the-fly record, click the drop-down menu to display the list of available material types.

– **Year:** The year published. If this item is a serial (like an almanac or a magazine issue), enter (or look for) the date this piece was published in the "Serial Year" field in **Item Information** instead.

– **Language:** The code for English is displayed as the default. If you are entering a new record or adding an on-the-fly record, you can change the default. Click the drop-down arrow to display the list box of individual languages and codes.

– **Items:** The number of items (copies or volumes) associated with this title. For item information, click the down arrow next to the Item ID field in the **Item Information** area. A list of barcode numbers associated with the title will be displayed. Select a barcode number. Then click one of the Circulation tabs below: **Circulation** or **Bibliographic**.

– **Save button:** To save changes or entries in an on-the-fly record, click the **Save** button.

– **Delete button:** Click this button to delete a Circulation on-the-fly record.

– **Slip button:** If a printer is attached to this station, you can print all information for this title and all items by selecting the **Slip** button.

– **Holds button:** To review, change, or cancel holds for this item, click the button. The **Holds Queue** window will be displayed.

- **Item Information:** This portion of the **Item/Title Information** tab includes information about each item (copy or volume) of the selected title. This area is divided into four subtabs which provide item-specific information: **Circulation** , **Bibliographic**, **Vendor**, and **Item Fields** tabs.

2.3.1 Circulation Subtab

The Circulation subtab (Figure 2-38) includes two areas of information: **Item Activity** and **Current Information**. To add a new item (barcode), click the **New** button. The **Item Activity** area includes Item Status (e.g., checked out), the barcode number of the last borrower who checked out this item, and more. The **Current Information** area includes a **Find** button for access to the borrower record for the person who currently has the item checked out.

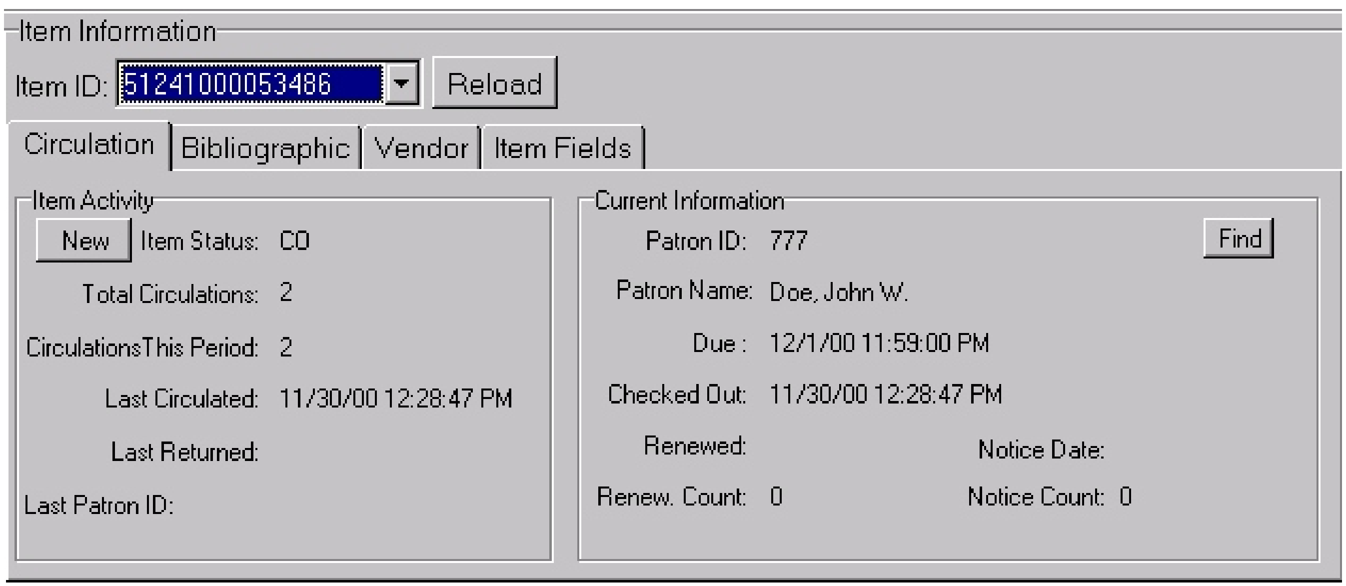

Figure 2-38. the circulation subtab

2.3.2 Bibliographic subtab

The **Bibliographic** subtab (Figure 2-39) contains the following item (holdings) information: barcode number (Item ID), call number prefix (for Dewey or LC class numbers), classification number, cutter or author information, physical condition, checkbox to show the condition note during the checkout, comment, item price, accession number, identification of owning and circulating libraries and collections, year (serial volume), volume number, and part subdivision numbers. (An optional checkin note may appear in the **Part Subdivs** field. Users cannot edit **Part Subdivs** data. A **Check In/Out Note** may also appear in this area.)

From this tab, authorized users can edit holdings data, delete items, change the current library or collection, etc. You can edit item information (holdings, call numbers, volume numbers, branch/collection, etc.) in either Cataloging or Circulation, but check with supervisors about your library's editing policies and your current Circulation security privileges.

If there is a condition note in the **Condition** field for a title and the **Show** check box is checked, the **Condition** note will display during checkout.

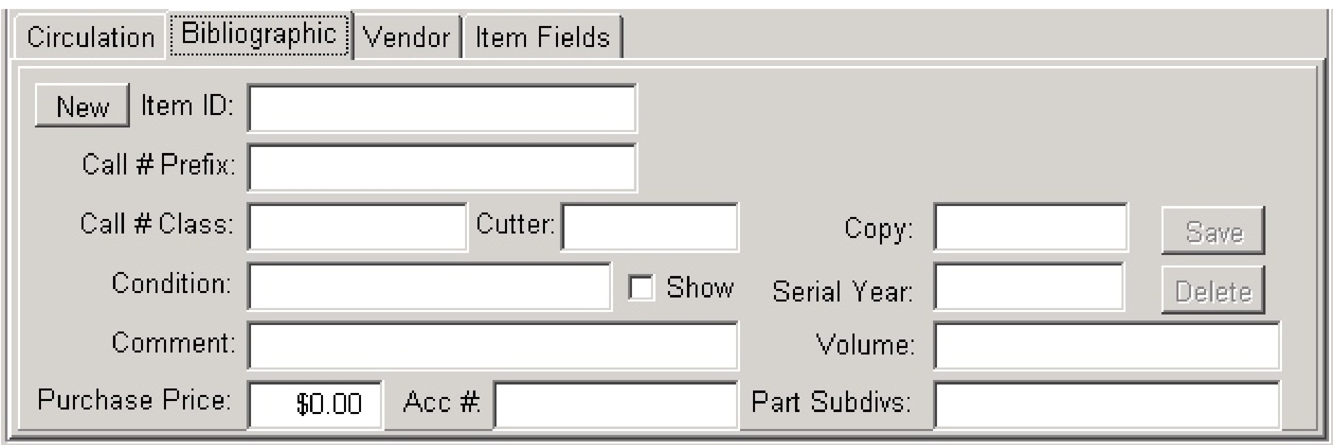

Figure 2-39. The Bibliographic subtab

To change an item's branch or collection code:

- **Owning Branch and Collection:** On the **Bibliographic** tab of the **Item/Title Information** tab F4, if you want to change the library, click the drop-down arrow beside **Branch** to display the list of libraries, and select.

  In the **Collection** field, you can quickly locate the collection you want. Click in the field, or "tab" there to highlight it. Then type the first letter of the collection code. For example, to find **REF**, type **R -** then press the **Down** or **Up** arrow keys to scroll through the list from there (or press **Right** arrow to go down, **Left** arrow to go up). If you type a different letter, this will reveal another part of the list (codes beginning with that letter).

  If the circulating library and collection are the same as owning, you do not need to reenter them in the **Circ'ing Branch** fields.

- **Circulating Branch and Collection:** If you wish to change the circulating library or collection, use the same procedure as above. If you make changes in Branch or Collection, select the **Save** button.

  Note: If an item is on reserve, the branch/collection specified for the reserve becomes the active branch and collection.

To change a barcode number on an existing physical item: Sometimes a barcode label affixed to an item will be damaged or become unreadable. Place a new label on the item. Then delete the old barcode number from the **Bibliographic** subtab, and scan or type the new number. Select **Save**. All transactions using the old number will be updated automatically. The barcode number in the MARC record will also be changed. (It is also possible to change a barcode number through the Cataloging module, but you must use the correct procedure -- you cannot simply overtype the barcode number.)

2.3.3 Vendor Subtab

The **Vendor** subtab (Figure 2-40) contains available vendor information and options to link items to new vendors. Use the **Link to Vendor** button to identify an item's vendor (supplier or distributor). For example, you can specify which vendor sold the library a piece of equipment like a projector. Use **Remove Link** to disassociate an item from a vendor.

To link to (or remove link from) a Vendor:

1. On the **Item/Title Info** tab (F4) search for and select a title, and then select an item in the **Item ID** drop-down list.

2. Select the **Vendor** tab. Select the **Link To Vendor** button.

3. In the **Search for Vendor** window (Figure 2-41), search for the vendor by name or code. Select a vendor and click **OK**. The vendor's code number and name will appear on the left side of the Vendor tab.

4. To remove the link, select the **Remove Link** button.

Note: Vendor records are setup using the L.S. Vendor Editor. See section 8.6 Vendor Editor for more information.

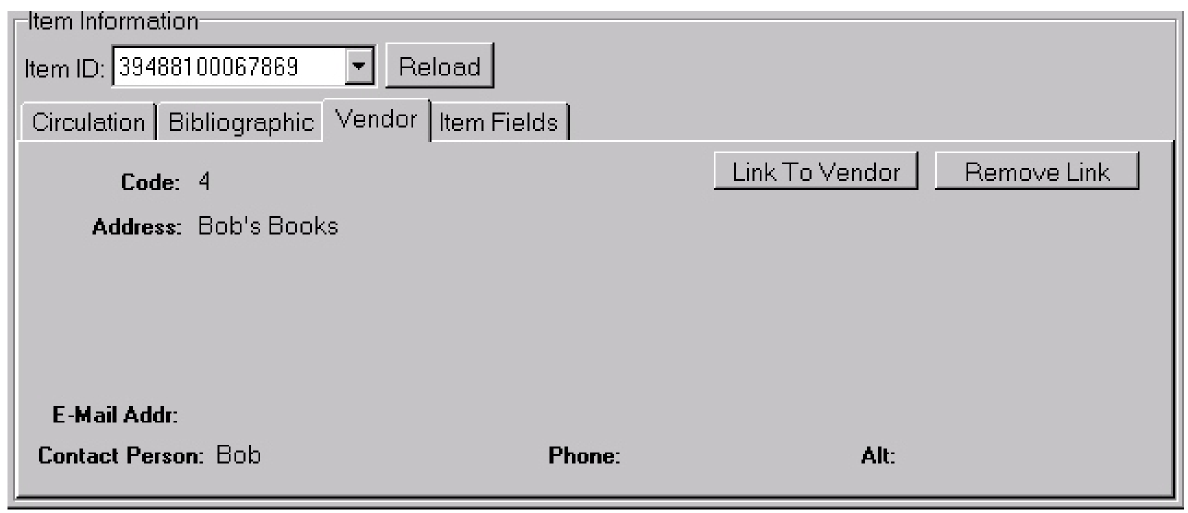

Figure 2-40. The Vendor subtab

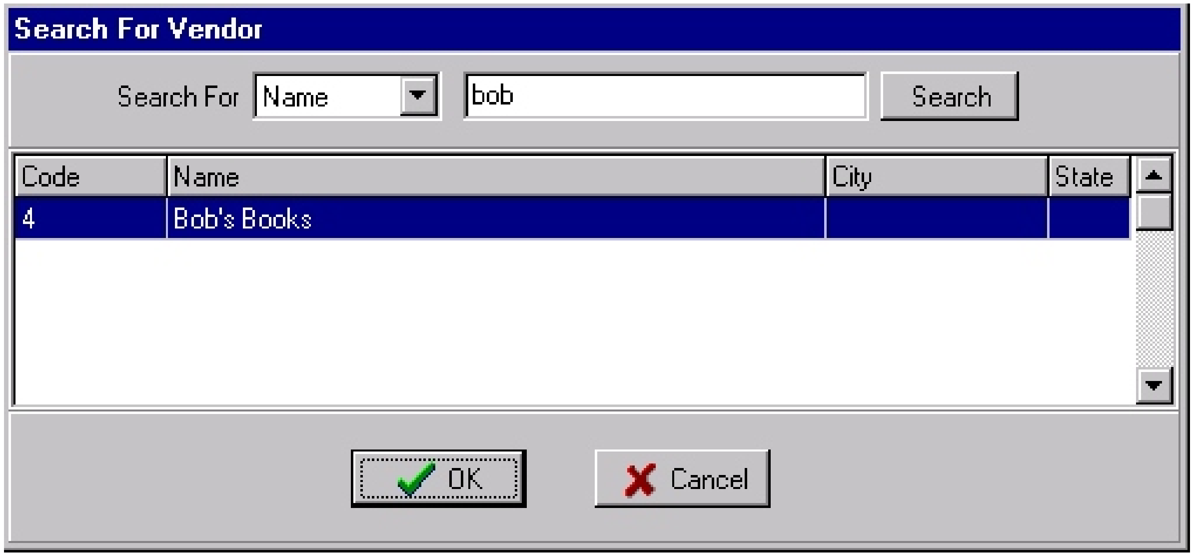

figure 2-41. The Search for Vendor window

Display of "Bound With" Titles

In Library•**Solution** you can easily determine which title is the "primary" title that has one or more titles bound to it, and which titles are bound to the main title.

Figure 2-42 shows the primary title on the F4 Item/Title Information tab. Notice the **Bnd w/** button on the Circulation tab of the Item Record.

To see a list of the titles bound to the main title, click the **Bnd w/** button. The Bound Titles window appears (Figure 2-43), listing the other titles.

To see the record for either of these subsequent titles, search for one of them by typing it in the **Item/Title** search box at the top of the F4 tab. During the search, notice that the CircCollection column in the **Title Lookup** window (partially shown in Figure 2-44) contains the word BOUND. This is an immediate clue that this title is bound to another. Select the title.

Figure 2-45 shows the "second cat..." title that is bound to the primary title. Notice the **Bnd to** button on the Circulation tab of the Item Record.

To view the record to which this title is bound, simply click the Bnd to button, and the "primary cat..." record will be displayed.

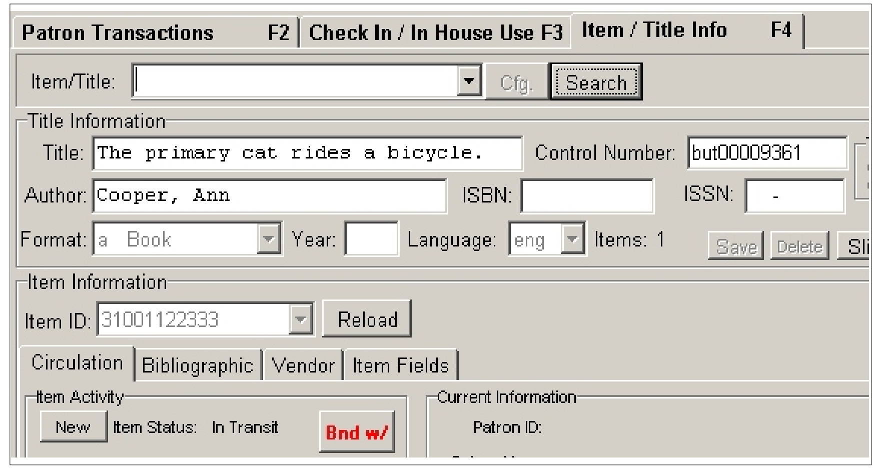

Figure 2-42. Primary title on the F4 Item/Title Information tab

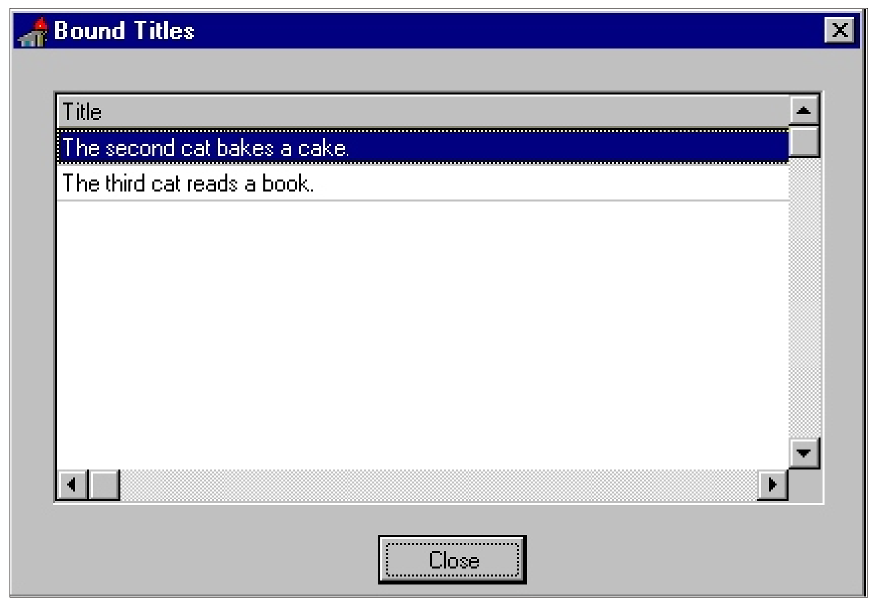

Figure 2-43. Bound Titles window

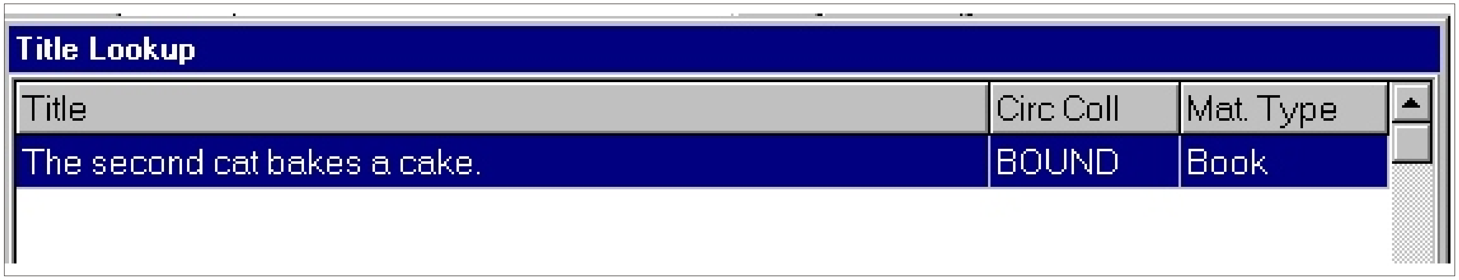

Figure 2-44. Title Lookup window

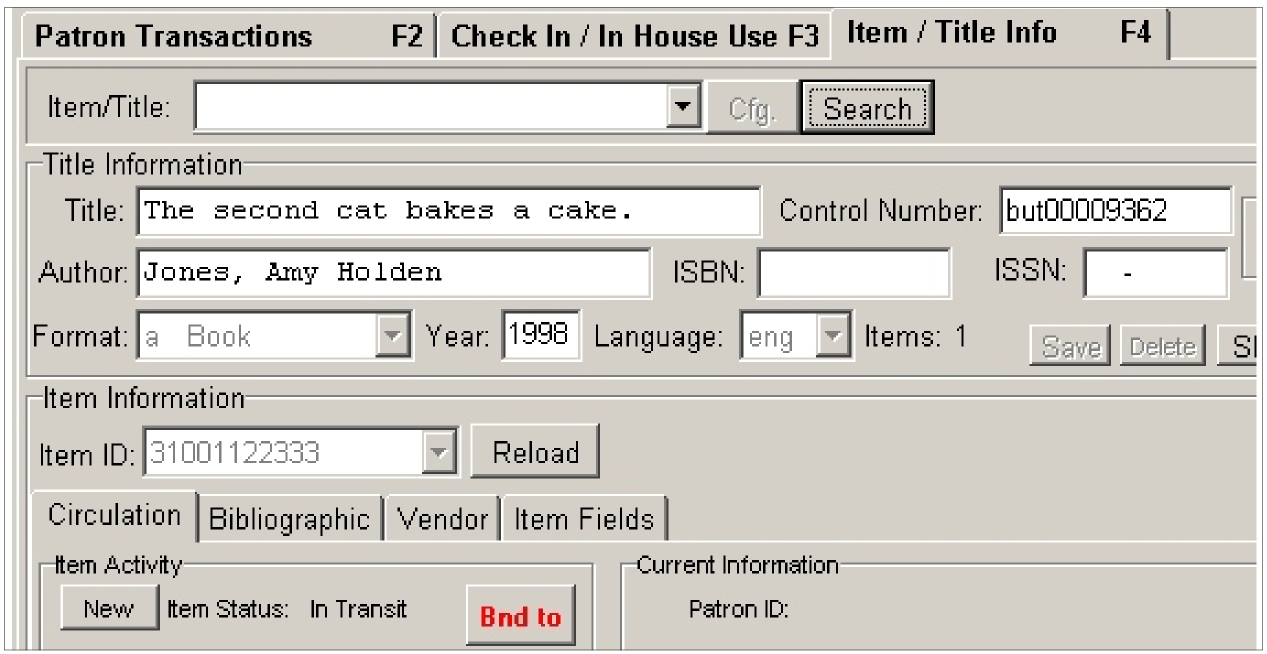

Figure 2-45. The "second cat..." title that is bound to the primary title

2.3.4 Item Fields Subtab

Use the **Item Fields** subtab (Figure 2-46) to enter special information you want to have associated with selected items.

To view or enter **Item Field** data:

1. On the **Item/Title Info** tab (F4) search for and select a title, and then select an item in the **Item ID** drop-down list.

2. Select the **Item Fields** tab. If any **Item Fields** have been set up, the fields are listed under **Field** on the left. If codes or data have been entered for a field for this item, this will be displayed in the **Value** column.

3. To enter data, select a field. Then click in the **Value** area. If codes have been defined for this field, a drop-down list will appear. Select a value.

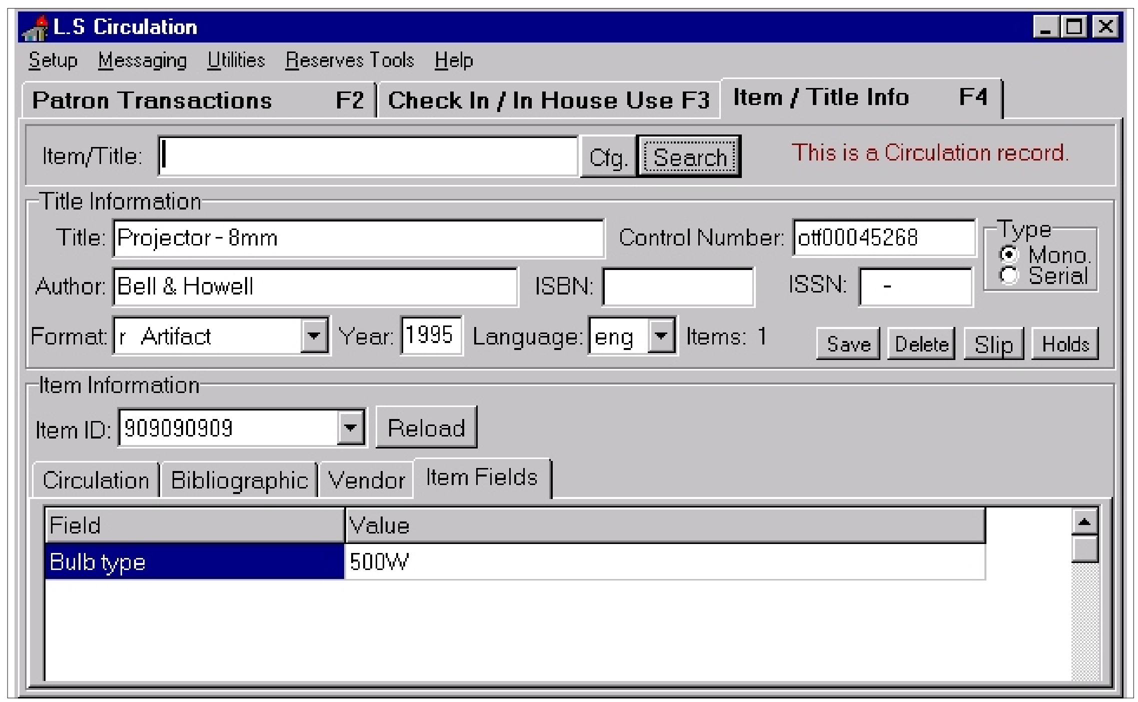

Figure 2-46. The Item Fields subtab

In the example shown in Figure 2-46, the **Value** for the **Item Field** "Bulb type" for the selected title/item (a projector) is "500W."

To learn how to set up Item Fields, click here.

To learn how to delete item or title records, click here.

2.4 Messages Button

The **Messages** (envelope icon) in the upper right of the **Patron Transactions** tab alerts you to the presence of system messages (Figure 2-47). The number of waiting messages is also displayed.

Select the **Messages** menu, **Check Messages** option to view the **Messages** window (Figure 2-48). Typical messages are concerned with inter-library requests, reminders to send items to another library, and to place items on the "arrived" holds shelf.

If you wish to print a list of the messages, a "Messages List" report is available in the **Reports** module. This report will print all messages from a specified date to the present. To delete a message, select the message line and then the **Delete** button. You can select multiple messages:

- Multiple non-sequential selections may be highlighted for deletion by pressing and holding the **Ctrl** key, while clicking the **Time** field for each item to be deleted.
- Sequential items can be deleted by pressing and holding the **Shift** key, and clicking the **Time** field of the first and last items of the list to be deleted.
- When all desired items are highlighted, releast the **Shift** or **Ctrl** key and press the **Detete** button.

WARNING: Be certain that all messages being deleted have actually been handled. There is no **Undo** function after messages are deleted.

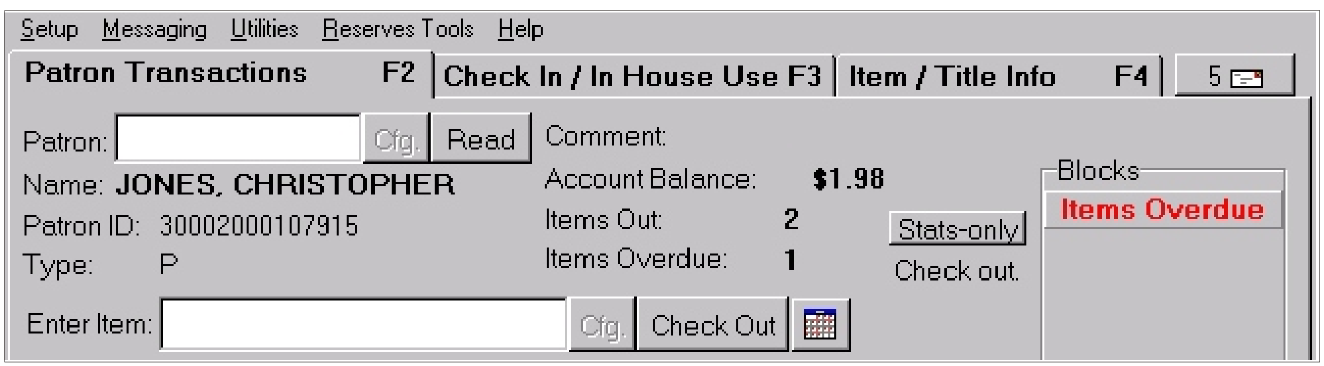

Figure 2-47. Upper portion of Patron Transactions tab showing Messages icon in upper right

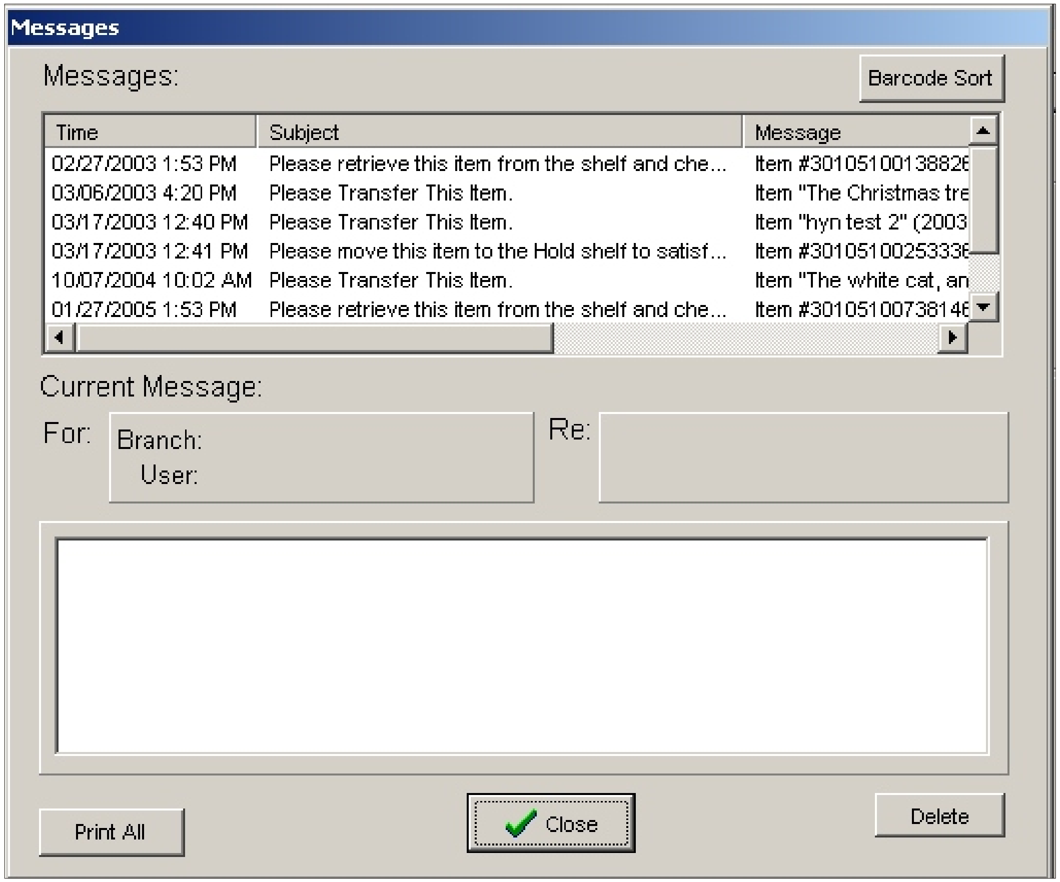

Figure 2-48. The Messages window

3. Setup Menu options

Use options on the **Setup** menu to control various types and codes, such as Patron Types, the circulation "rules" (checkout periods, overdue fines, etc.), Charge Types to control payments, and (optional) user-defined fields in borrower records. You can also assign or change local library passwords, define some library-specific Circulation options such as the calendar for open and closed days and hours, overdue notice intervals, prefixes for on-the-fly record control numbers, user security, and much more.

Important! Before the Library·**Solution** system is installed, TLC sets most **Setup** options for your library system, based on the specifications submitted by the library during the implementation process. Before you check out items for the first time, you may wish to review the setups.

Note: Some aspects of Circulation operations are controlled by the Library·**Solution System Configuration**, outside of the Circulation **Setup**. Use the **System Configuration** to add new holdings codes, change PAC or Circulation displays of libraries and collections, and set up system Users (access security). Any user who needs access to certain Circulation Setup options, such as Security Setup and Branch setup, must be assigned the Circulation Role of "Circulation Administrator." More detailed Circulation privileges are set in Circulation's **Setup | Security Setup** section.

3.1 Types and Codes

Use the **Types and Codes** submenu of **Setup** to define system-wide codes for Charge Types, Patron Types, and user-defined Patron Fields. You must also use the Patron Type Setup to define or modify the circulation "rules" for each Patron Type checking out each type of item (as defined by holdings codes). If you want to use the course reserves features, you will also need to set up Department and Course codes in **Setup | Types and Code**s.

3.1.1 Charge Types

Select the **Charge Types** option to display the **Charge (Payment Type) Codes** window (Figure 3-1), where you can establish codes for the types of payments your library can accept as Charges. Establish a different type for each kind of charge you wish to track in reports.

Default Charge Type codes: In the initial setup, five (5) system-supplied codes are included as defaults. These are described as "System Code (Read Only)." You cannot edit or delete the following codes:

- **OT:** Other Charge
- **D:** Damaged
- **L:** Lost
- **OV:** Overdue Items
- **RF:** Rental Fee

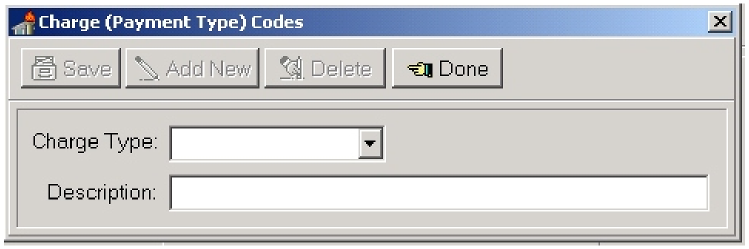

Figure 3-1. The Charge (Patron Type) Codes window

To set up new **Charge Types**:

1. Select **Setup** from the menu bar at the upper left of the Circulation window. Select **Types and Codes**, and then **Charge Types**.

2. To view a list of default and other existing **Charge Type** codes, click the down arrow beside the **Charge Type** list box. Select a code to view its **Description**.

3. To add a code, type the code in the **Charge Type** text box. Press **Tab** or click in the **Description** text box, and type a meaning for the code. Then click the **Add New** button.

4. When you have finished adding or editing, click **Done**.

3.1.2 Patron Types

Use the **Patron Type** setup option to display the **Patron Type Setup** window (Figure 3-2), where you can define codes for the types of borrowers your library serves, modify or delete setups for existing types, and define the specific circulation "rules" (checkout policies, overdue fines, etc.) for each Patron Type checking out each type of item (defined by holdings codes).

To add or modify **Patron Types**:

1. Select the **Setup** menu, then **Types and Codes**, and then **Patron Types**.

2. To view existing **Patron Type** codes, select the down arrow beside **Patron Type**. To change the entries about an existing type, select that type, and then go to step 5 below.

3. To add a new **Patron Type**, type the new code in the **Patron Type** field. If another code is already displayed, click the field to highlight it, and then type the new code. Codes can consist of letters and/or numbers, up to a maximum of 10 characters (but do not use spaces).

   As soon as you type a new code, a message appears to the right in red: "New Patron Type." Also, the **NEW** button on the right becomes "available."

4. If this **Patron Type** will be used for **Outreach Services** patrons, click in the check box under the **Patron Type** field label.

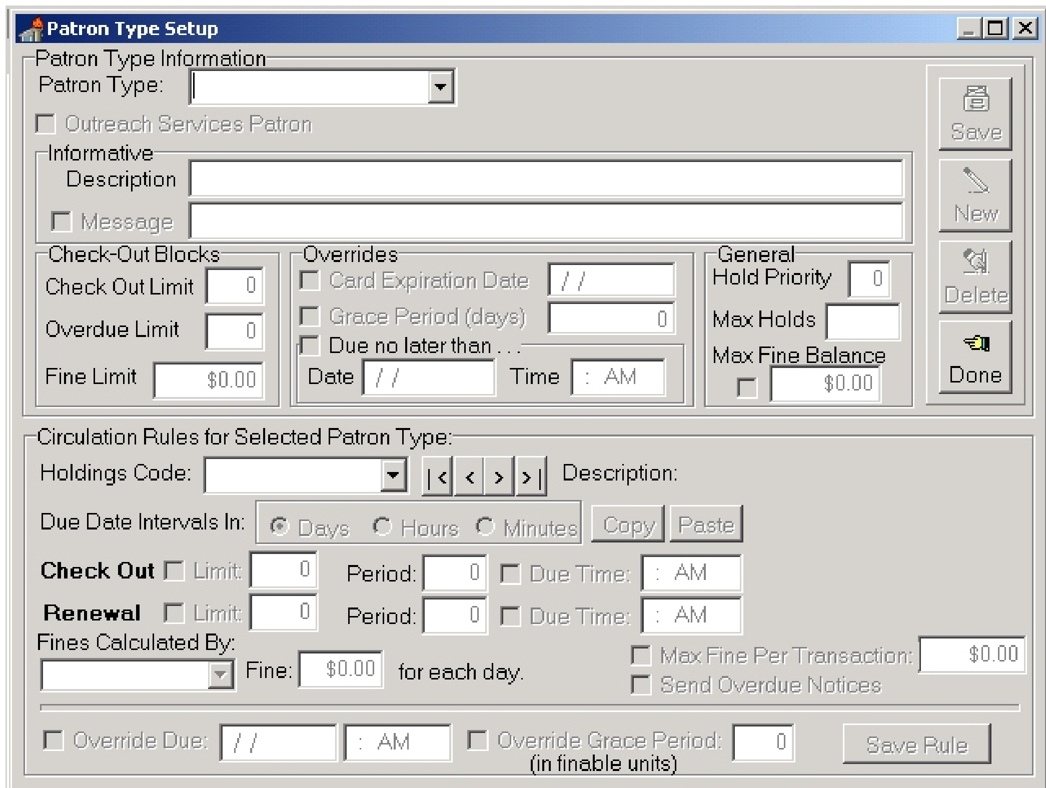

Figure 3-2. The Patron Type Setup window

5. Press the **Tab** key to move the cursor to **Informative Description**, and type a description.

6. Use **Tab** to move from field to field. Enter any other needed information. The only required fields are **Patron Type**, **Description**, and **Hold Priority** (if in doubt, enter "5" as default).

   Some fields have check boxes to the left of the field, for example, **Max Fine Balance**. To use a field with a check box, select the check box (check mark appears), and then enter a value in the text box. Please note that even if a value appears in the text box, the field is not active unless the check mark appears.

7. To save a new **Patron Type**, select the **NEW** button. If you modify an existing type, select **SAVE**. To delete a **Patron Type** code, select **DELETE**.

   Caution: The system will not permit you to delete a **Patron Type** when there are borrower records using that **Patron Type** code.

8. Now go to the lower portion of the **Patron Types** window, and set the **Circulation** rules

Use the **Circulation Rules** section to link each Patron Type with each type of item in the library (as defined by holdings codes). The rules determine which Patron Types can check out what type of item for what checkout period, overdue fines, etc. To review your current settings easily, print a report of the current rules setup. On the **Start** menu, select **Library.Solution Reports**. Select the **File** menu, **Open**, and select the report **Rules Matrix.rpt**. (**Caution:** If your system has many Patron Types, Holdings Codes, and Branches, this could be a lengthy report.)

To set up or modify **Circulation Rules**:

1. Select that **Patron Type**.

2. Select the holdings code for which you wish to modify the checkout rules. To view the list of holdings codes, click the down arrow beside the field, or click the right or left arrow buttons further to the right of the field. These buttons access the first code in the list, the previous, next, or the last code. A description of the holdings code is displayed.

3. Press the **Tab** key to move to the rule field to be changed, or click the field you want. Make any necessary changes. Refer to the field guidelines described below.

4. **Important!** Before you select another holdings code to view or edit, save the changes you have made by selecting the **Save Rules** button.

5. If you wish to copy the set of rules (for the **Patron Type** checking out this **Holdings Code**) to another **Holdings Code**, select the **Copy** button. Select the next **Holdings Code**, and then select **Paste**. Then select **Save Rules**.

6. After you have finished making all changes, select **Done**.

Circulation Rules fields

- **Holdings Code**: When TLC builds your library's initial Library·**Solution** database, your holdings codes are loaded into the initial **Circulation Rules** setup, along with rules based on your specifications. You may want to review the initial setup before you check out items to borrowers for the first time. If you need to add new holdings codes, use the **Library·Solution System Configuration**. Call TLC Library·**Solution** Support for help.
- **Due Date Intervals in: Days, Hours, or Minutes:** Select the unit of time to be used in calculating the check out period, renewal check out period, and "finable units."
- **Check Out (check box):** If an item with this holdings code can be checked out by a borrower of the selected type, select this check box.
- **Check Out Limit:** Use this field to enter the maximum number of items of this Holdings Code that this Patron Type can have checked out at any time. When the borrower attempts to borrow an item of this type which would cause the total number of this type the borrower has checked out to exceed the limit, a checkout block will occur. To set a checkout limit, activate the field by selecting the check box, and then enter a value.

  If borrower is not allowed to check out this type of item at all, enter **0**. If there is no limit on the number of items of this Holdings Code allowed to be checked out, do not select the check box.

Note: It is a good idea to enter a default checkout period, fines, etc. anyway. These checkout policies will then be used if authorized staff decide to override a checkout block and allow the loan.

Comparison note: Check Out Limit in the Patron Type setup is an overall limit on the number of items allowed to the Patron Type, with no regard to the types of items (holdings codes) checked out.

- **Check Out Period:** Enter the checkout period in days, hours, or minutes, depending on the **Due Date Interval** selection above. Please note that the due date (or time) will fall only on open days (or hours or minutes). The library's calendar of open/closed days or hours is controlled by the **Calendar Configuration**.
- **Check Out Due Time:** When the **Due Date Interval** is in days, activate the field by selecting the check box. Set the recommended default time: 11:59 p.m.

Caution: For checkout periods of hours or minutes (any period less than one day), for example, a 1-hour loan (60 minutes), do NOT activate **Due** time (or **Renewal Due** time).

- **Renewal (check box):** If an item with this holdings code can be renewed by a borrower of the selected type, select this check box.
- **Renewal Limit: Renewal Limit** is a limit on the number of times an item of this type can be renewed by this Patron Type. (This is NOT a limit on how many items can be renewed.) To set a limit on the number of times an item can be renewed, activate the field by selecting the check box. If the item should not be renewed at all, enter **0**. If there is no limit on the number of renewals, do not check the check box. **Note:** Items with pending holds cannot be renewed without entering an override password.
- **Renewal Period:** Enter the checkout period allowed for a renewal. Enter in days, hours, or minutes, depending on the **Due Date Interval** selection above. (**Note:** The renewal due date or time is calculated from the date or time renewed, not from the date or time the item was originally due.)
- **Renewal Due Time:** When the **Due Date Interval** is in days, activate the field by selecting the check box. Set the recommended default time: 11:59 p.m.

Caution: For check out intervals of hours or minutes, for example, for a 1-hour loan (60 minutes), do NOT activate **Due Time** or **Renewal Due Time**.

- **Fines Calculated By:** Select the method to be used for calculation of overdue fines when you want the library's open or closed days/hours to be considered. (The open/closed days and hours are defined in the **Calendar Configuration**. Calculating fines based on open days only is optional.) Select an option from the **Fines Calculated B**y choice list.
- **Fine:** Enter the overdue fine to be charged for every day or finable unit. Type the amount in dollars and cents (no dollar sign necessary). Examples: One dollar = 1.00 ; ten cents = .10
- **[:="Finable Unit" of time: overdue fine interval]:** displayed after the word **Fine** as: **...for every** [number of designated units]. The unit of time (days, hours, or minutes) of the finable unit is the same as selected in the **Due Date Interval** field above. Specify the number of time units in the finable unit.

Note: If the **Fines Calculated By** selection is one of the daily choices (All Days, Business Days Only, or All Days No Nearby Closed), then the custom finable unit is not available. The fine will be **...for each day**.

Tip: If your **Due Date Interval** is in **Days**, and you need a finable unit that is more than one day, then choose **All Periods** in **Fines Calculated By**. Then you will be able to specify a number of days. For example, the fine may be $1.00 for every 3 days overdue.

- **Maximum Fine Per Transaction:** To set a maximum fine per transaction (for this Patron Type checking out an item of this Holdings Code), activate the field by selecting the check box. Enter the maximum fine (in dollars) that can be charged for an overdue item.

Comparison note: The **Fine Limit** established in the Patron Type setup is a limit on unpaid charges that causes a checkout block. The **Max Fine Balance** in the Patron Type setup may be relevant in the calculation of overdue fines.

- **Send Overdue Notices:** This field controls whether or not overdue notices are printed for a specific Patron Type checking out a specific Holdings Code. To produce notices, select the check box (check mark should appear). To turn off notices, select the check box again (to remove the check mark).

Note: The number of notices to be produced and the interval between notices are configured in the **Setup | Branch Setup**.

- **Override Due [Date]:** Use **Override Due date** to set a fixed due date which would override the due date normally calculated by the Circulation rules. To activate the field, select the check box. Enter the date in this format: dd/mm/yyyy (do type the slashes), and a default time of 11:59 pm, like this example: "03/01/1999 11:59 pm"

Comparison note: Due no later than [date] in the Patron Type setup is a slightly different kind of override. It applies to a specific Patron Type checking out any kind of item. Normal checkout periods apply, except that items will be due no later than the specified date.

- **Override Grace Period:** Use this field to set a specific grace period for a particular Patron Type checking out a specific Holdings Code. To use an override grace period, activate the field by selecting the check box. The override grace period uses the same finable units as specified in **Fine ... for every [finable unit]** described above. (In contrast, the grace period setups in Patron Type and in Branch Setup are in days only.)

Comparison note: Grace Period in the **Patron Type** setup allows a grace period (in days) specific to the Patron Type, with no consideration of the type of item checked out. There is also a default Grace Period (also in days) in the Branch Setup. The system uses this if no grace periods are set up in the Circulation Rules or in the Patron Type setup.

3.1.3 Patron Fields

Select the Patron Fields option to display the **Patron Fields, Codes, and Descriptions** window (Figure 3-3), where you can define special information fields to be entered in Patron Records. You can set up as many fields as necessary. Define field names, type of data to be entered in the field (whether codes or free text), and whether or not the data is to be used in statistical reports. The fields are displayed in the **Patron Record** tab (Patron Transactions) on the subtab labeled **Patron Fields**.

Note: If your library's borrower data was converted into Library·**Solution** format from another system, such as BiblioFile Circulation, the borrower fields in Circulation may have the same names as the fields in your other system. If you used codes in those fields, for example, in the **Census** field, you will need to reenter the codes in your initial Circulation setup.

To set up Patron Fields:

1. Select the **Setup** menu, **Types and Codes**, and then **Patron Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) for that field.

   The first field is displayed by default. To view the **Field Name** of any Patron field previously entered, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field.

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** fields on the lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

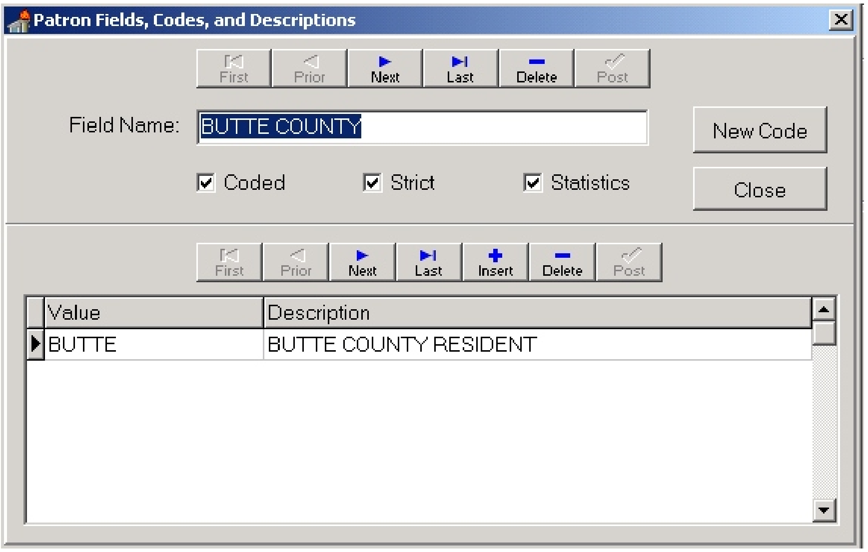

Figure 3-3. The Patron Fields, Codes, and Descriptions window

3. To insert a new field, select the **New Code** button to display the **Define New Patron User Field** window (Figure 3-4).

Enter a **Field Name**. (**Suggestion:** Enter name in all UPPER CASE, since case affects the sorting of names in the saved list.)

To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for **Coded**, **Strict**, or **Statistics**. If no boxes are checked, the entries are "Free" text.

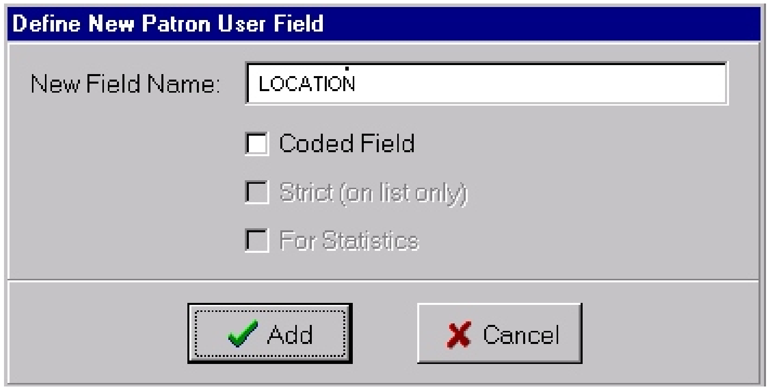

Figure 3-4. The Define New Patron User Field window

– **Coded:** User may choose from a list of library configured codes AND may "make up" a new code by typing it in the field.

– **Strict:** User may ONLY select codes from the library configured codes list.

– **Statistics:** Whenever a checkout is recorded for a borrower the contents of this field will be recorded in the statistics table so that reports can be run for this field. If you want to report out on any Patron Field, select **For Statistics**.

If you make any changes in the field name or type of coding, select the **Post** (check mark) button on the upper toolbar. **Note:** You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended.

4. If you selected **Coded**, insert a code for a selected field by selecting the **Insert** button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar. **Note:** The system will not allow you to delete a field or code if any borrower record currently includes the field or code.

3.1.4 Item Fields

Select the **Item Fields** option to display the **Item Fields, Codes, and Descriptions** window (Figure 3-5), where you can define special information fields to be associated with selected items. The fields can be used for any kind of item data, like the name of a donor, a fund, information about a piece of equipment (like the light bulb type for a projector), etc. You can set up as many fields as necessary: define field names and the type of data to be entered in the field (codes or free text).

The fields are displayed on the **Item/Title Info** tab (F4), under **Item Information**, on the **Item Fields** tab for a selected item (barcode number).

To set up **Item Fields**:

1. Select the **Setup** menu, **Types and Codes**, and then **Item Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) set up for that field.

   When you open the setup window, the first **Item Field** is displayed by default. To view other **Field Names**, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** columns on the

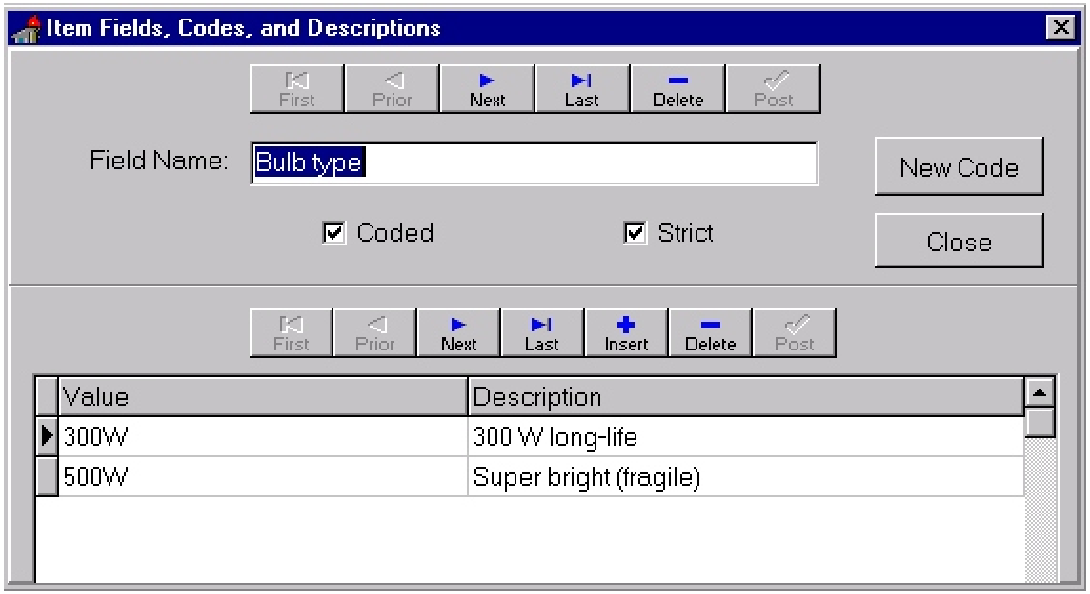

Figure 3-5. The Item Fields, Codes, and Descriptions window

lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

3. To insert a new field, select the **New Code** button.

   In the **Define New Item User Field** box, enter a **New Field Name**.

   To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for **Coded** or **Strict**. If no boxes are checked, the entries are "Free" text.

   – **Coded:** User may choose from a list of library configured codes AND may "make up" a new code by typing it in the field.

   – **Strict:** User may ONLY select codes from the library configured codes list.

   If you make any changes in the field name or type of coding, select the **Post** (check mark) button on the upper toolbar.

   Note: You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended.

4. To insert a code for a selected field, select the **Insert** button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar.

   Note: The system will not allow you to delete a field or code if any item currently includes the field and a code.

3.1.5 Outreach Fields

Select the **Outreach Fields** option to reach the **Outreach Fields, Codes, and Descriptions** window (Figure 3-6), where you can define special information fields to be entered in Patron Records. You can set up as many fields as necessary. Define field names, type of data to be entered in the field (whether codes or free text), and whether or not the data is to be used in statistical reports. The fields are displayed in the **Patron Record** tab (Patron Transactions) on the subtab labeled **Outreach Services**.

To set up **Outreach Fields**:

1. Select the **Setup** menu, **Types and Codes**, and then **Outreach Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) for that field.

   The first field is displayed by default. To view the **Field Name** of any Outreach field previously entered, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** fields on the lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

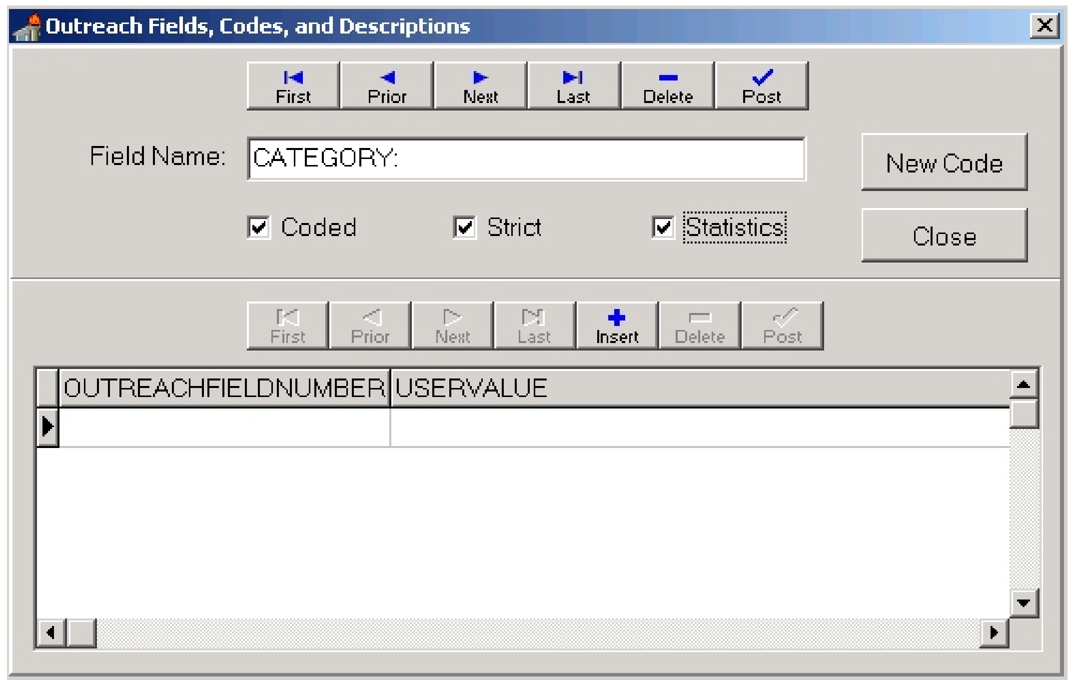

Figure 3-6. The Outreach Fields, Codes, and Descriptions window

3. To insert a new field, select the **New Code** button. The **Define New Outreach User Field** window will be displayed (Figure 3-7). In the **New Field Name** box, enter a Field Name. (**Suggestion:** Enter name in all UPPER CASE, since case affects the sorting of names in the saved list.) See Figure 3-8 for examples of typical outreach fields.

   To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for **Coded**, **Strict**, or **Statistics**. If no boxes are checked, the entries are "Free" text.

   – **Coded:** User may choose from a list of library configured codes AND may "make up" a new code by typing it in the field.
   – **Strict:** User may ONLY select codes from the library configured codes list.
   – **Statistics:** Whenever a checkout is recorded for a borrower the contents of this field will be recorded in the statistics table so that reports can be run for this field.

   Note: You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended.

4. To insert a code for a selected field, select the **Insert** button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar.

   Note: The system will not allow you to delete a field or code if any borrower record currently includes the field or code.

   For more information on Outreach Services, see Section 3.6 Outreach User PAC Setup and Section 8.4 Outreach Manager.

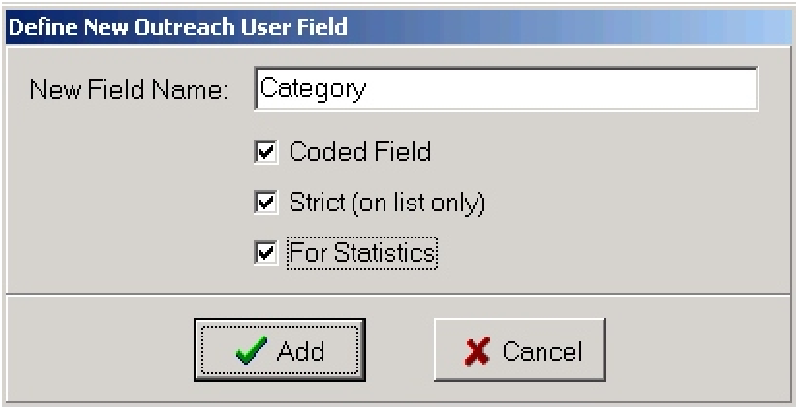

Figure 3-7. The Define New Outreach User Field window

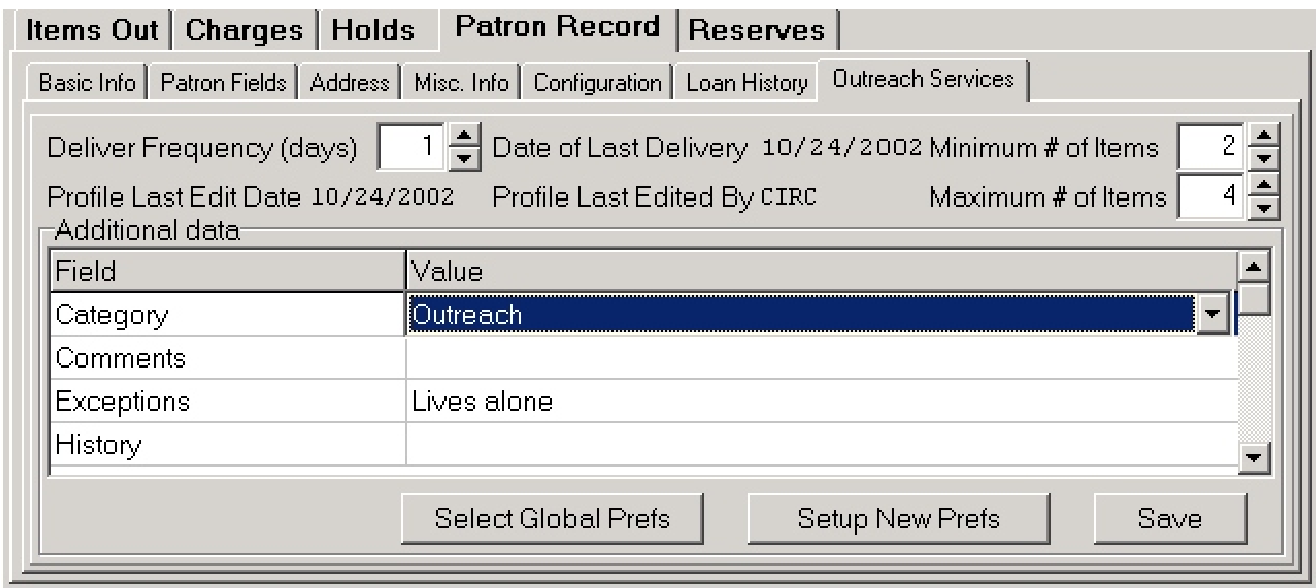

Figure 3-8. Sample Outreach Services tab with typical fields

3.1.6 Department Codes

Select the **Department Codes** option to display the **Department Codes** window (Figure 3-9), where you can define codes for academic departments, such as "English," to be used when placing items *on reserve*. You can set up as many departments as you need. Define a code for the department and a free text description.

Note: Reserves are materials set aside for a special use by a borrower (usually an instructor in an academic library), for example, for required reading for a course. Circulation staff can also use reserves to specify special shelving locations, for example, for "New Books" or seasonal displays such as "Halloween Books." Special checkout periods and overdue fines are usually assigned to the items. A reserve is not the same as a "hold."

The fields are displayed on the **Reserves** tab of the **Patron Transactions** tab when you place or view a reserve for a selected borrower (e.g., a course instructor). They are also used in reports. In addition to **Department Codes**, you should define **Course Codes** to be used along with the **Department Codes**.

To set up **Department Codes**:

1. Select the **Setup** menu, **Types and Codes**, and then select **Department Codes**.
2. To view a list of existing codes (if any), click the down arrow to the right of the **Department** edit box. Select a code to view its **Description**.

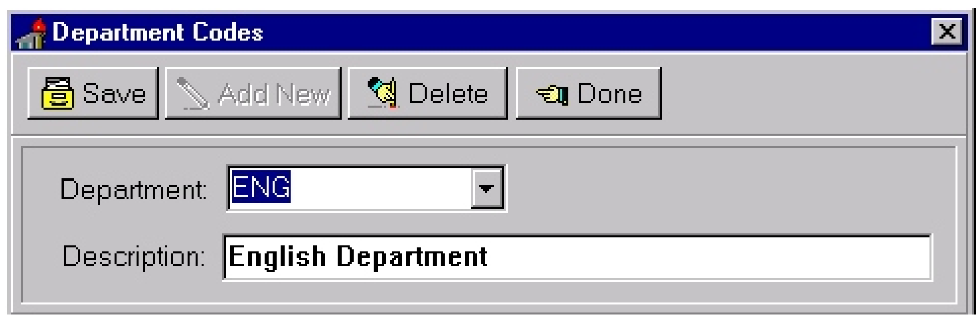

Figure 3-9. The Departmentment Codes window

3. To add a new code, type the code, up to a maximum of 20 characters. As soon as you start typing a previously unknown code, the **Add New** button becomes available, and the message **New Type Code** is displayed in red at the right.

4. After typing the code, press the **Tab** key to move to **Description**, or click in that field. Enter a description for the department, up to 250 characters (a brief description is recommended).

5. If you edited the **Description** of a current code, select **Save**. If you added a new code and description, select **Add New** to save it. If you wish to delete a code, select **Delete**. To exit the setup after saving, or to exit without saving changes, select **Done**.

3.1.7 Course Codes

Select the **Course Codes** to display the **Course Codes** window (Figure 3-10), where you can define codes for academic courses, such as "Eng 100," to be used when placing items on reserve. You can set up as many codes as you need. Define a code for each course and a free text description.

The fields are displayed on the **Reserves** tab of the **Patron Transactions** tab when you place or view a reserve for a selected borrower. They are also used in reports. You should also define **Department Codes** to be used along with the **Course Codes**.

To set up **Course Codes**:

1. Select the **Setup** menu, **Types and Codes**, and then select **Course Codes**.
2. To view a list of existing codes (if any), click the down arrow to the right of the **Course** edit box. Select a code to view its **Description**.
3. To add a new code, type the code, up to a maximum of 20 characters. As soon as you start typing a previously unknown code, the **Add New** button becomes available, and the message **New Type Code** is displayed in red at the right.

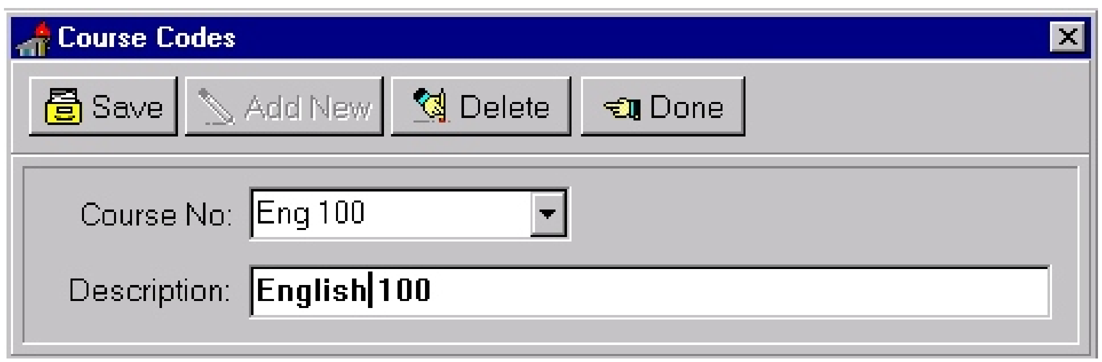

Figure 3-10. The Course Codes window

4. After typing the code, press the **Tab** key to move to **Description**, or click in that field. Enter a description for the **Course**, up to 250 characters (a brief description is recommended).

5. If you edited the **Description** of a current code, select **Save**. If you added a new code and description, select **Add New** to save it. If you wish to delete a code, select **Delete**. To exit the setup after saving, or to exit without saving changes, select **Done**.

3.1.8 Uncataloged Collections

Select the **Uncataloged Collections** option to display the **Uncataloged Collections** window (Figure 3-11), where you can establish codes for any groups of uncataloged items (i.e., items not barcoded) that you wish to check out for statistics only. For example, many libraries have paperback collections that are not cataloged or barcoded. It is not necessary to add the Circulation "rules" or configure displays in the **System Configuration**, since **Uncataloged Collections** codes are not real holdings codes.

To set up **Uncataloged Collection** codes:

1. Select **Setup** from the menu bar at upper left of the Circulation window. Select **Types and Codes** and then **Uncataloged Collections**. The name of the current library is displayed, that is, the library currently selected in: **Setup | Local Configuration | Station Options.**

2. Type a new collection code (up to 20 characters). The **Add New** button becomes available. Tab to the **Description** field and type a description.

3. To save a new code, click **Add New**. If you are modifying an existing code's description, click **Save**.

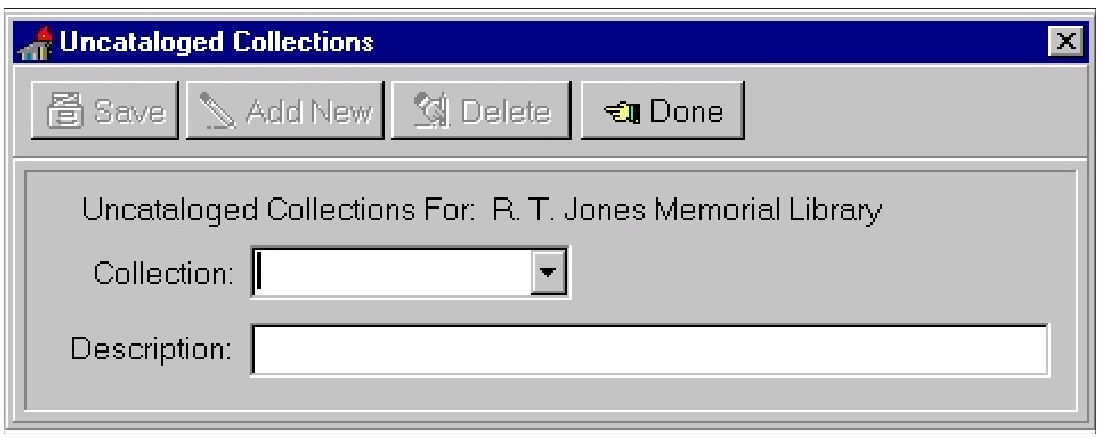

Figure 3-11. The Uncataloged Collections window

3.2 Branch Setup

Select the **Branch Setup** option to reach the **Branch Level (System) Configuration** window (Figure 3-12), where you can define several basic functions and default settings for each library. These options include security passwords, overdue notice intervals, default values for grace period, "long overdue" items, checkin lag period, holds and borrower card expiration dates, a prompt to delete on-the-fly Circulation records, the default maximum fine value, and more. When Library•**Solution** is first installed, certain defaults are already entered based on information from your library's implementation.

To complete the **Branch Setup**:

1. Click **Setup** | **Branch Setup** option.

2. The **Enter Supervisor Password** window may appear (if you are not logged in to the database as an administrator user). Type the **Supervisor Password** if requested. Click **Try**, or press **Enter**.

   Note: If you do not know the default **Supervisor Password**, first try simply pressing **Enter** to bypass the security window. If this works, it means no passwords have been defined yet.

3. The **Branch Level (System) Configuration** window will open. The options are grouped on four tabs: Security (below), Defaults, Fines/Overdues, and Misc.

4. After you make changes or additions, click **OK**.

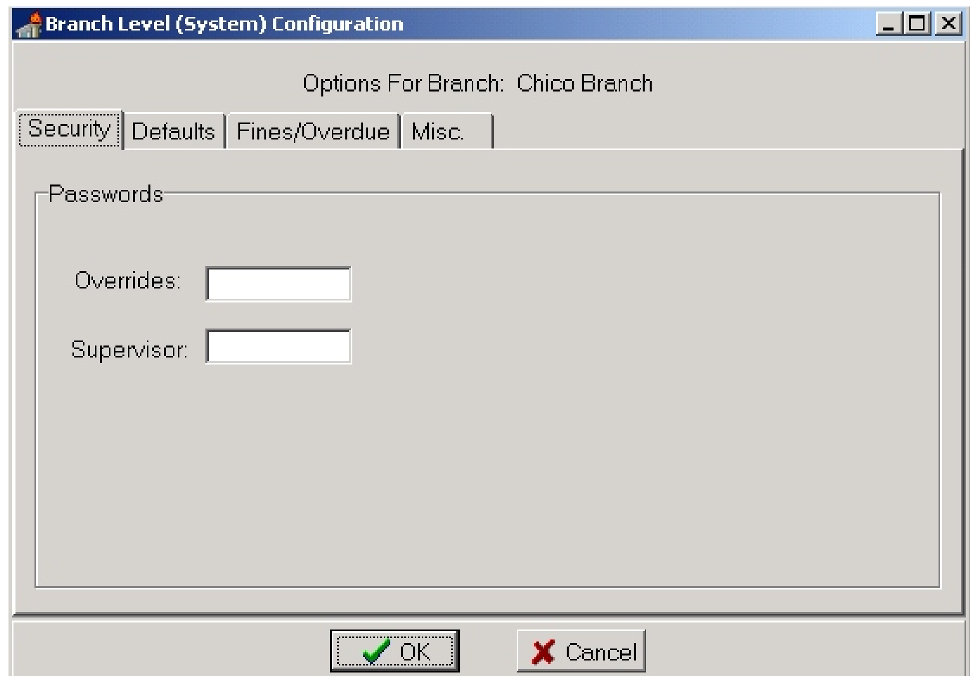

Figure 3-12. The Branch Level(System) Configuration window

Note to supervisors: If you wish to define the setup for another library by working at this station, go to **Setup | Local Configuration | Station Options**. Change the library. **Caution!** After making configuration changes, be sure to change the **Station Options** setting back to this library!

3.2.1 Branch Setup: Security Subtab

Enter your own passwords in the **Override and Supervisor** password boxes (Figure 3-12). Your staff will use these to override blocks and to gain supervisor access to certain secured functions (like the **Branch Setup**). Enter up to 8 characters (letters, numbers, and/or punctuation marks are allowed, but begin with a letter). If you do not wish to use passwords, leave the fields blank. (Then, any time the system requests a password, users could click **OK** or press **Enter** to exit the password request window.)

3.2.2 Branch Setup: Defaults Subtab

The following fields can be edited from the **Defaults** subtab of the **Branch Setup** (Figure 3-13):

- **Grace Period:** Enter the number of days an item is allowed to be overdue before a fine is imposed. For no grace period, enter **0**. If there is no grace period in the **Circulation Rules** or the **Patron Type** setup, and if a grace period has been established in the **Branch Setup**, then that grace period will be used.
- **Check-In Lag Period:** Define the number of days after checkin before items are usually back on the shelves. If any lag period is configured, then when an item is checked in, the **Item Status** code becomes "S" for "reshelving," and a special status display appears in PAC. If items are usually available for checkout the same day as they were checked in from previous loans, enter **0** here. The purpose of this option is to allow time for reshelving before the Public Access Catalog (PAC) displays shelf status for the item as "available."
- **Hold Expiration:** This option is to be used to control the number of days a hold remains **Pending** before it displays on a report of **Holds by Type**.
- **Card Expiration:** Enter a default number of days a new borrower's registration will be active before expiration. To change the date or extend a specific borrower's registration, go to the **Patron Transactions** tab, **Patron Record, Basic Info** tab.

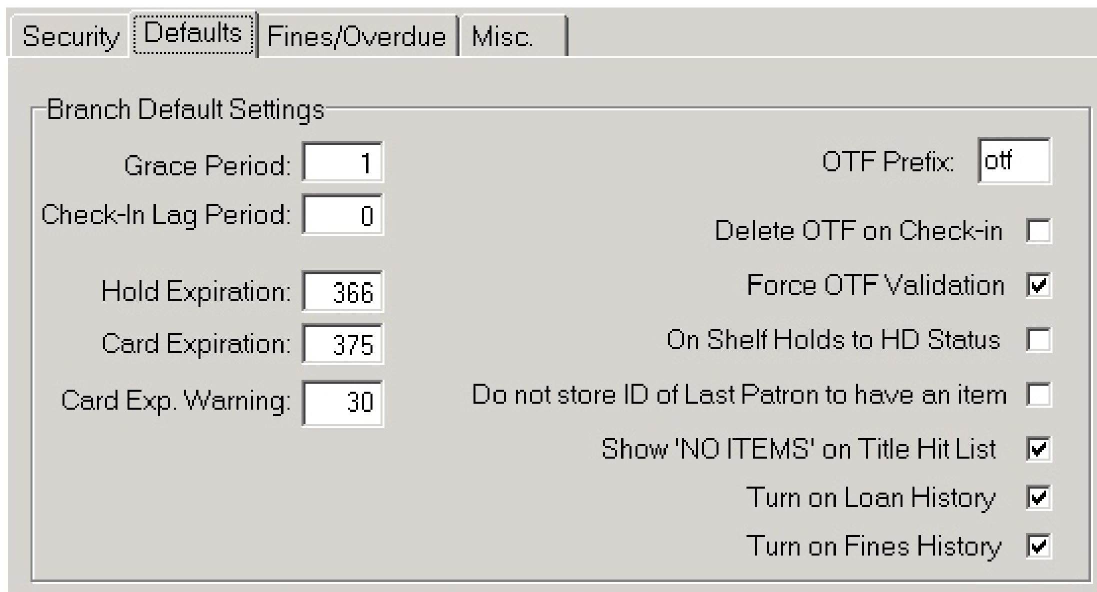

Figure 3-13. The Defaults subtab

- **Card Exp[iration] Warning:** Enter the number of days to be used in a message warning to Circulation staff that a borrower's card is almost expired.
- **OTF Prefix:** Enter a three-letter prefix to be used for control numbers of **Item/Title** records that Circulation staff add to Circulation on-the-fly.
- **Delete OTF on Check-in:** Check this box if you want Circulation staff to see a special message during Check In, whenever they check in an item that was added to Circulation on-the-fly. The message will ask if you want to delete the item and title from the database. (This option makes it easy to delete items that Circulation staff added for a single checkout.)
- **Force OTF Validation:** Check this box if you want all records added to Circulation on-the-fly to require ISBN/ISSN validation.
- **On Shelf Holds to HD Status:** This check box determines the default **Item Status** and **Hold Status** codes that will be automatically assigned to an item owned (or circulated) by your library when the title is placed on hold, and when there are copies "available" on the shelf at your library. When such a hold is placed through the Circulation module, the system picks a copy to fill the request, but the status codes that are assigned will be different, depending on the setting in this **Branch Setup** check box. (See **Note on PAC Holds** below. The current version of PAC disregards this setting.)

When this check box is checked (the initial default), such items will be assigned an "HD" (on hold) Item Status and an "AR" (hold has arrived) Hold Status. (This assumes the item is located on the "arrived" holds shelf, when in fact it is actually probably still in its regular shelving location.)

TLC recommends the unchecked option. When the check box is NOT checked, the items are given an in-transit Item Status (status code "T") and a Holds Status of pending ("PE").

Then when you are placing a hold in Circulation (on an item at your library, when the item is available), a message will appear on the screen listing the item, barcode, and call number and reminding you to go to the shelves to retrieve the item, and then check it in at this library. When it is checked in, it will receive an arrived ("AR") hold status.

There are two important advantages to using the unchecked setup option: an arrived Holds slip will be printed for the item, and in case the item was not found on the shelf, other action can be taken without having to cancel an "AR" arrived hold.

If a shelved title level hold item is checked out to another borrower and you attempt a Special Status check in of the item, this message will display: "Were you looking for this item because a system message requested it to fill a hold?" If you click Yes the system will attempt to find another copy of the item to fill the hold or change the hold's status to PE. Also a message will be generated advising you to retrieve another copy and check it in.

If you check out an item with an HD status to a borrower other than the person who held the title, an Arrived Hold Override form will display. Select the original borrower from the list and click the Change Status to PE button. The Hold Replacement form will display. Select the "System Selects Item fo Fill Hold" option and click OK. You will be advised to retrieve the second copy of the item and check it in. This can now be checked out to the original borrower.

- **Do not store ID of Last Patron to have an item:** This check box allows your library to record (or not record) the Patron ID (barcode number) of the last borrower to check out an item (after it is checked in). This information would appear on the **Item/Title Info** F4 tab, on the Circulation tab on the lower left, in the **Last Patron ID** field.

By default, this **Branch Setup** check box is not checked. This means that the last borrower ID WILL be recorded. If you do not want this information to be recorded for your library, click the setup check box to insert a check.

- **Show 'NO ITEMS' on Title Hit List:** If enabled and the **Local Titles Only** option in checked in **Station Options,** users can still see ALL titles in the database but the "NO ITEMS" display will appear beside titles belonging to other libraries.
- **Turn on Local History:** If Loan History is configured for this library checking this box will cause the Loan History box to be checked when a NEW borrower record is added. Existing borrower records (added before checking this box) are NOT affected by this action.

- **Turn on Fine History:** If Fine History is configured for this library checking this box will cause the Fine History box to be checked when a NEW borrower record is added. Existing borrower records (added before checking this box) are NOT affected by this action.
- **Loan History Clearing:** This Branch Level setting works in conjunction with the **Patron Record | Configuration** tab, **Record Loan History Statistics** setting. If **Loan History Clearing** is selected and you uncheck the **Record Loan History Statistics** setting, you will be warned that "All loan history for this borrower will be deleted. Is that what you want to happen?" If **Loan History Clearing** is not checked, the warning will not display and the deletion will occur.

3.2.3 Branch Setup: Fines/Overdue Subtab

The following information can be edited in the **Fines/Overdue** subtab (Figure 3-14)

- **Pay Local Fines Only:** Each library can choose to accept only the fines/charges that are due at the library, or accept charges due at any/all libraries. By default, the option in **Branch Setup** is checked, meaning this library can accept only the charges due to this library. To allow this library to accept charges due to any library, click the check box in **Branch Setup** to remove the check mark.

Note: The **Circulating Branch** of an item (not the **Owning Branch**) controls where the charges are due. You can view the Circulating **library** for a specific item on the **Item Information** (**Bibliographic** tab) area on the F4 **Item/Title Information** tab.

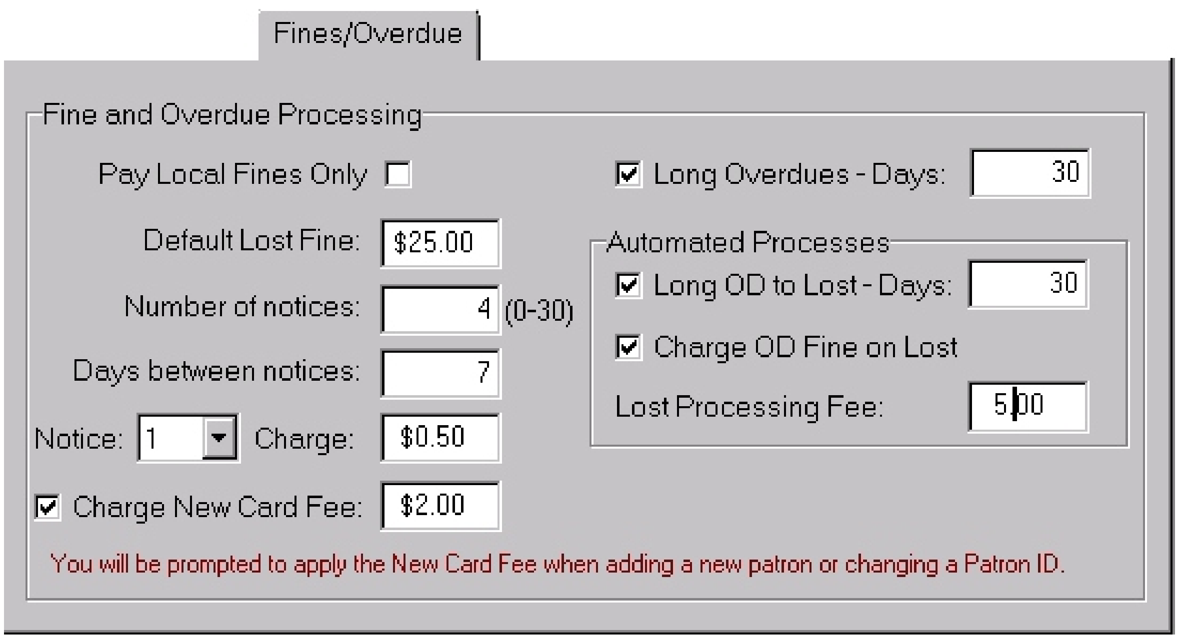

Figure 3-14. The Fines/Overdue subtab

- **Default Lost Fine:** In the **Branch Setup** window, enter a default dollar value to be charged for lost items for which no price is entered in the item record. The maximum fine that ever can be charged for an individual transaction is the value of the item, so if there is no price in the item record, the program uses the **Default Lost Fine** for that maximum.

  Note: If the value in this field is zero ($0.00), this means no fine could ever be charged if there is no price in the item record. Thus, you should set this figure high enough to accommodate the largest fine anticipated by the library. Then use the **Circulation Rules** area of the **Patron Type** setup to set individual maximum fines that are less than the **Default Lost Fine** amount.

- **Number of notices:** Enter the maximum number of overdue notices to be produced for an overdue item. Type a number between **0** (meaning no notices will be printed) and **30** (meaning a maximum of 30 notices).
- **Days between notices:** Enter the number of days between each notice.
- **Notice** and **Charge fields**: Use this combination of fields if you want to specify that borrowers should be charged a fee for a specific overdue notice (first, final, etc.) or charged each time a notice is sent. The **Notice** field will automatically include the same value that you entered in the **Number of Notices** field. For example, if you entered **4** in **Number of Notices**, the list beside Notice will include 4 entries (1, 2, 3, 4). If you want a charge to be applied with a certain notice number, select the number in the **Notice** box. Then type the amount in the **Charge** box. Repeat for each notice for which you want a fee to be charged.

  For example, if you select **2** in the **Notice** box and type **1.00** in the **Charge** box, and then select **4** in the **Notice** box and type **2.00** in the **Charge** box, borrowers will be charged a fee of $1.00 for the second notice and $2.00 when the fourth overdue notice is sent. (The charges are applied when the **Generate Overdues** program is run.)

- **Charge New Card Fee:** Click the check box (to insert a check mark) beside this field when you want borrowers to be charged when new cards are issued or borrower barcode numbers are changed. If the box is checked, type the amount of the charge. A red information message appears under these fields in the **Branch Setup,** for example "You will be prompted to apply the New Card Fee when adding a new borrower or changing at Patron ID."

If this option is turned on, when Circulation staff add a new borrower or change a borrower's barcode (Patron ID), a message box appears, asking "Charge New Card Fee?" Staff can select **Yes** or **No**. If **Yes** is selected, the set fee is added to the borrower's **Charges** tab total.

- **Long Overdues - Days:** Use the check box and the entry box beside it to set up a borrower block message. To turn on this feature, click the check box on the left (so a check mark appears), and then type a number in the box on the right. This is the number of days an item must be overdue before it is considered to be Long Overdue and will thus produce the borrower block.

The block will be displayed in the **Blocks** area of the F2 **Patron Transactions** tab if the currently selected borrower has an item overdue for the designated number of days. (The overdue item must be owned or circulated by the local library, that is, the library currently selected in the **Local Configuration: Station Options** of **Setup**.)

If this check box is NOT checked, the check boxes and entry boxes in the **Automated Processes** area below it will not be available.

- **Long Overdue to Lost - Days:** Use this option in the **Automated Processes** area of the tab if you want a long overdue item to be assigned a "Lost" Status automatically. Click the check box to the left of the field (to insert a check mark). In the text box to the right, type the additional number of days after an item is considered "Long Overdue" when the item's **Item Status** should be changed from **Overdue** (Item Status code "OD") to **Lost** ("L").

Example: In the example setup in Figure 3-14, any item that is more than 30 days overdue will be considered "Long Overdue," and the "Long Overdue" block will be displayed when the borrower is searched on the F2 tab. The **Long Overdue to Lost - Days** box includes the value "30," so this means that 30 days after the "Long Overdue" designation (that is, when the items is a total of 60 days overdue), the item will automatically be moved to the **Lost** status.

The system runs the automatic change-to-Lost process once every night. This will also charge the appropriate fees/fines (depending on the configuration settings in the fields below) and discharge the item from the borrower's list of overdues.

- **Charge OD Fine on Lost:** Select this check box if you want the borrower to be charged the overdue fine due on an item when the system automatically changes it to the **Lost** status from "Long Overdue." (The fine will equal the amount that would be due if the item had been returned and checked in "overdue" on the date the item is shifted to the automatic **Lost** status.)
- **Lost Processing Fee:** If you want the borrower to be charged an additional fee when an item is automatically changed to **Lost** status, enter the fee amount in the **Lost Processing Fee** entry box.
- **Apply Long Overdue Blocks:** You can apply blocks by selecting one of the following options:
  - For items Circulated at ALL Locations (default)
  - ONLY for items circulated at this location
- **Repair Holdings Code:** This setting is concerned with designating a preferred holdings code where repairs will be "sent" (this becomes the "Active" holdings code for items checked in with the Special Status of "Damaged"). If a repair holdings code has been selected, when an item is checked in via the Circulation F3 tab, and the Special Status of "Damaged" is selected, the process will remind the Circulation operator to move the item to the repair location. After installation, a Circulation library administrator can easily add or change a holdings code in the **Repair Holdings Code** box found in the **Branch Setup**. During check in the operator has the option of adding a **Condition Note** to the item describing the damage detected. This note is available when either the first or second choice (above) is selected.

3.2.4 Branch Setup: Misc. Subtab

The following information can be edited on the Misc. subtab (Figure 3-17)

- **Fiscal Month, Fiscal Day, and Host Branch:** These fields are currently inactive and will be used in a future release.
- **Collection Rotation:** Rotating Collections allows individual items to move in a preset pattern, based on the options set up for it. Using **Rotating Collections**, you decide the items to be included, the sequence and timing of the library rotation, how many times the item travels through the rotation, and the number of days that an item will stay in the indicated Circulating Collection. Enter the number of days that any combination of should stay in the Circulating collection indicated. For more information on Rotating Collections, click here.
- **Deletion of NR and RH items:** Enter the number of days an item with NR (Not Rotating), or RH (Returning Home) status should remain on the daily rotating collection report, before being deleted.
- **Repair HoldingsCode:** This setting is concerned with designating a preferred holdings code where repairs will be "sent" (this becomes the "Circulating" holdings code for items checked in with the Special Status of "Damaged"). If a repair library has been selected, when an item is checked in via the Circulation F3 tab, and the Special Status of "Damaged" is selected, the process will remind the Circulation operator to move the item to the repair library. After installation, a Circulation library administrator can easily add or

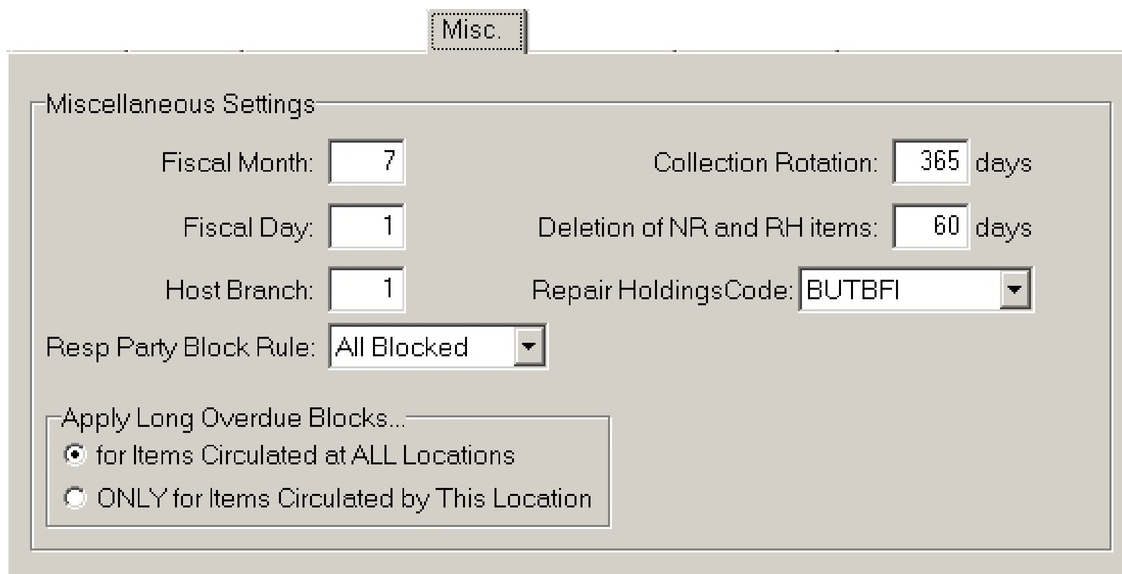

Figure 3-17. The Misc. subtab

change a library in the Repair Holdings Code box found in the Branch Setup.

When a holdingscode is selected in this field, Items checked in as "Damaged" will be assigned to the displayed "Repair Holdings Code". These Items will be assigned a 'T' status and cannot be used to fill pending holds until the item is checked back in.

From the drop-down list select the holdingscode that items to be repaired should be sent to (picking the blank entry will clear this field and treat damaged items as recalls).

- **Resp. Party Block Rule:** From the drop-down list, select which Responsible Party action is appropriate for your library. Each option is described below.

Note: These settings are ONLY concerned with the "Hot Status' block field. Other blocks to borrowing (e.g., Items out, Fine Balance, Overdue Items, Long overdue Items) are not checked.

  - **NO ACTION -** No blocks on the Responsible Party or any family members, except those for the record accessed.
  - **WARNINGS ONLY:** Blocks are applied only to the record with the block condition, but whenever the responsible party record is accessed, a warning that "this borrower is responsible for blocked borrowers" will be displayed.
  - **UPWARD BLOCKS:** Whenever any child record has a Hot Status of Blocked, the responsible party, and the child record in question are blocked, but no other member of the group is blocked.
  - **ALL BLOCKED:** Whenever any member of the group has a Hot Status of Blocked, all members of the group are blocked from borrowing (without an override password) until the block in question is cleared.

- **Apply Long Overdue Blocks:**
  - For items Circulated at ALL Locations
  - Only for items Circulated by This Location

Depending on which option is selected, borrowers will be blocked from borrowing items if they have any "long overdue" items. After installation, Circulation administrators at a library can easily change this setting in the Branch Setup on the Miscellaneous tab.

3.2.5. Notice Text

You can enter the message to be included on printed notices in the Notice Text window (Figure 3-15.) There are three system-controlled types of notices (you can change the text, but not the name of the notice) **Overdue Notice**, **Arrived Hold Notice**, and **Recall Notice**. You may add other types of notices and the text to appear on that notice and use that text in reports by selecting from a drop down list of notice types.

Button Definitions:

- **Save:** After adding or editing a notice, click the Save button to retain the changes.
- **Add New:** Typing the first letter of the new notice name in the empty drop-down entry box causes the Add New button to be activated.   Finish typing the new notice name.   Click in the main entry box and type the contents of the notice. Click the Add New button and the new item will display on the drop-down list. Click the **Save** button.
- **Delete:** Click the notice name on the drop-down list. Ensure the correct notice name that you wish to delete is displayed. Click the **Delete** button.

To Add a new notice, highlight the currently displayed notice name, or click in the empty drop-down entry box. Type the new notice name. Then click in the main entry box and type the content of the notice.   When you are satisfied with the text, click the **Add New** button, and then click the **Save** button.

To edit an existing notice, on the drop-down list click the notice name to display the message in the text box. Click in the text box to make changes as desired. When done click **Save**.

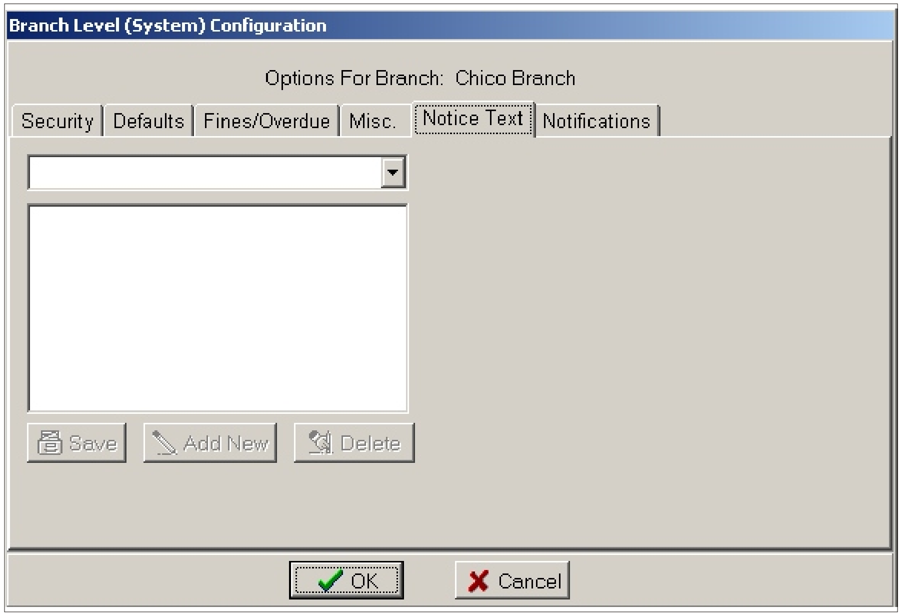

Figure 3-15. The Notice Text window

3.2.6 Notifications

Circulation staff can set up the defaults for how different automatic notifications are sent to borrowers by telephone and email (Figure 3-16). The available notices are “Friendly Warning,” “Overdue,” “Final Overdue,” “Arrived Holds,” “Cancelled Holds,” and “Expired Holds." The options for each notice are “Email” (code **E** in the setup) and “Telephone” (code P). If valid email addresses and telephone numbers appear in borrower records, the setup will use these with the automated email and telephone (Talking Tech Itiva) systems, if currently installed. These default settings may be overriden on an individual borrower basis. To override the default settings, use the **Notifications** subtab of **Patron Transactions | Patron Record F2**.

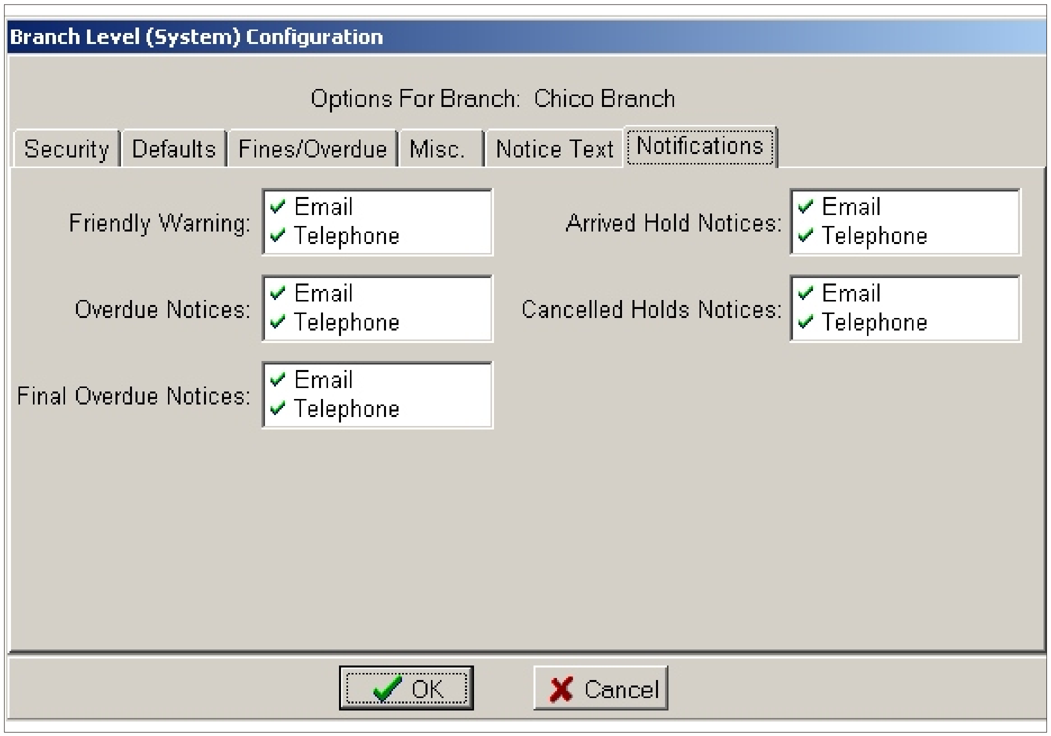

Figure 3-16. The Notifications window

3.3 Calendar Configuration

Use the **Setup | Calendar Configuration** sub-menu options to define the following:

- Normal open and closed days and hours in a typical week: use the **Weekly Calendar** setup.
- Exceptional days and hours, like holidays or school vacation periods when the library may be closed on different days or hours than established in the Weekly Calendar: use the **Daily Calendar** setup.

The calendar setup affects date and time due for checked out items in the following manner: items checked out for a period of days (or hours or minutes) will be due only on open days (or hours or minutes).

The calendar affects overdue fines calculation according to the settings in the field **Fines Calculated By** in the Circulation "rules."

3.3.1 Weekly Calendar

Use the **Local Configuration | Weekly Calendar** setup (Figure 3-17) to define normal open and closed days and hours for a typical week. If there are occasional days like holidays when the library will be closed or have different hours, use the **Daily Calendar** setup to override the default weekly settings and enter exceptions.

To set up the **Weekly Calendar**:

1. Select the **Setup | Calendar Configuration | Weekly Calendar** option.
2. Select a day: Select the option button beside the first day you want to define or change.

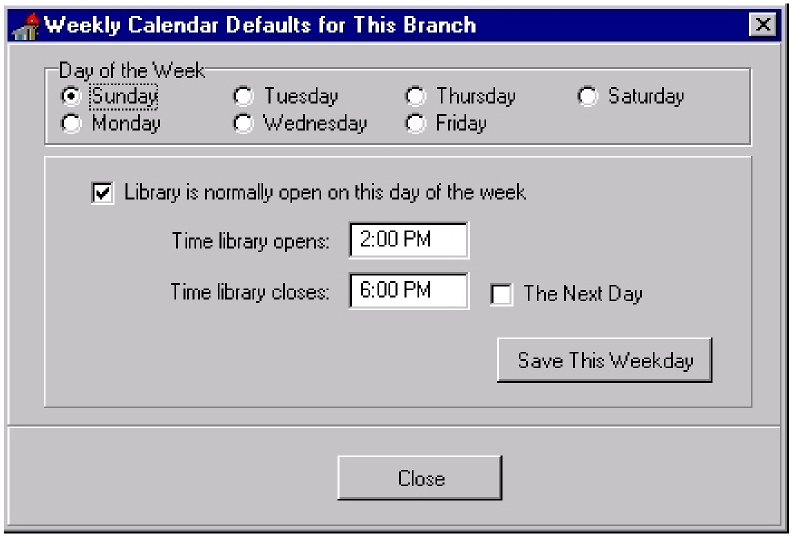

Figure 3-17. The Weekly Calendar Defaults for This Branch window

3. **Library is normally open on this day of the week:** If the library is normally open on this day, select the check box beside "Library is normally open on this day of the week"; a check mark will be displayed. If the library is closed, click the box to clear it. You can also press the spacebar to enter or clear the check mark.

4. **Time library opens:** Enter the time the library opens on this day. Type the time like this: 9:00 am or 10:00 pm (type am or pm in lower or upper case).

5. **Time library closes:** Enter the time the library closes. If the closing time is after midnight, enter the time, and then select the check box beside **The Next Day**.

6. **Save this weekday:** Select the **Save This Weekday** button.

7. Select the next day of the week, and follow the steps above.

8. After making all necessary changes, close the setup window by selecting the **Close** button.

Additional information: To set up holidays or other exceptional days, use the **Daily Calendar** setup.

3.3.2 Daily Calendar

The **Local Configuration | Daily Calendar** setup (Figure 3-18) displays a calendar for each month of the year. Use the calendar to define exceptional closed days or different hours for a normally open day. These settings will override the calendar for a normal work week defined in the **Weekly Calendar**.

You should initially define settings for the current year and next year, but you can also define several years into the future if you wish. (You can access any year in the past or future.) Near the end of each year, review the settings for the next year, to be sure due dates in the new year will be calculated correctly.

To set up the **Daily Calendar**:

1. Select the **Setup | Calendar Configuration | Daily Calendar** option.

2. Select a month/year: Use the **Next Month** or **Previous Month** buttons to display the month of the year you want.

3. Select a day: To change the default for a particular day, click on the day, or use the arrow keys to move among the days. The selected day will be highlighted. A **Default** or **Overridden** message at upper right will show whether the settings already established for the selected day have been overridden or if they are the **Weekly Calendar** defaults. To change **Overridden** settings quickly to the default, select **Set to Weekly Default**.

4. **Library is open on this day:** If the library is open on this day, a check mark will appear in the check box beside this option. If the library should be set to closed, click on the check

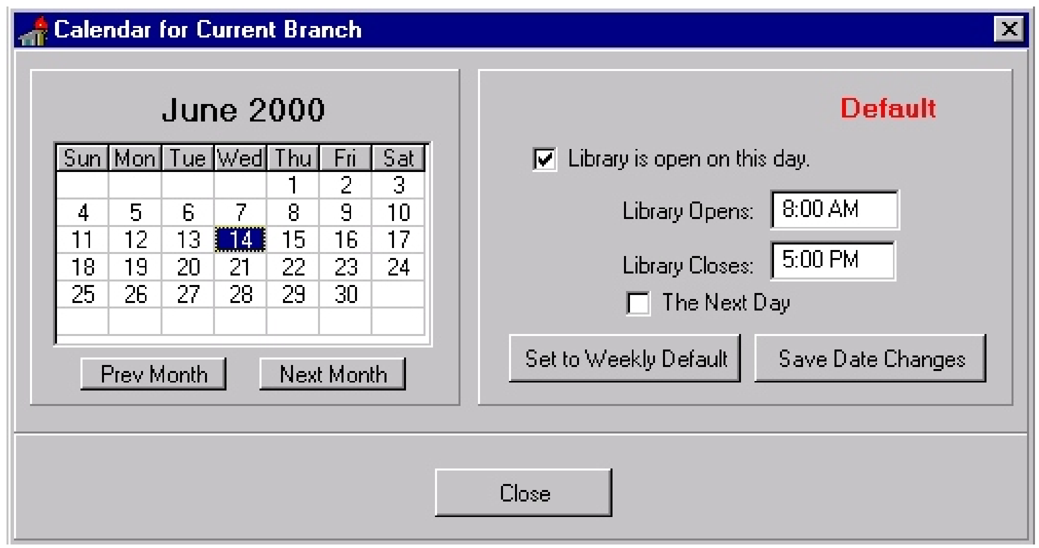

Figure 3-18. The Calendar for Current Branch window

box to clear it. You can also press the spacebar to enter or clear the check mark. If closed, the text boxes beside **Library Opens** and **Library Closes** (below) will not be available for entry.

5. Time library opens: Enter the time the library opens on this day.

6. Time library closes: Enter the time the library closes. If the closing time is after midnight, enter the time, and then select the check box beside **The Next Day**.

7. Save the changes for a day: After changing the setting for a day, select the **Save Date Info** button.

8. Change other days: If there are other days you want to change in this month, select another day, and follow the steps above.

9. If you want to change a date back to the **Weekly Calendar** default, simply select the button for **Set to Weekly Defaults**. Be sure to **Save Date Info** for each day you change. Repeat in this month and other months until all necessary changes have been made.

10. After making all changes, close the setup window by selecting the **Close** button.

Additional information: To review or change settings for a normal work week, use the **Weekly Calendar** setup.

3.4 Local Configuration

Use the **Local Configuration** options on the **Setup** menu to select the printer to be accessed by this station, establish what types of slips will be printed, or to identify the library where this station is located.

3.4.1 Printing Setup

Use the **Printing Setup** option (Figure 3-19) to identify the printer available to a local station for printing slips. Select which types of slips (date due, holds notification, inquiries, receipts, etc.) you wish to print from this station. You can also set the number of line feeds to print after each slip, and you can run a printing test.

To configure the local printer:

1. Select the **Setup | Local Configuration | Printing Setup** option.

2. In the **Slips Printer** field, select a printer that has been configured for the workstation. Click the drop-down arrow to view a list of configured printers in Windows, and select the printer.

3. In the **Printer type** field, click the drop-down list to choose either **Single Sheet** or **Continuous Feed.** For slips printers or dot matrix printers that use a continuous feed of paper, select **Continuous Feed**. For a single sheet printer, for example, a laser printer, choose **Single Sheet**. The **Single Sheet** selection ensures that a form feed command will be issued after each print job to clear the sheet from the printer.

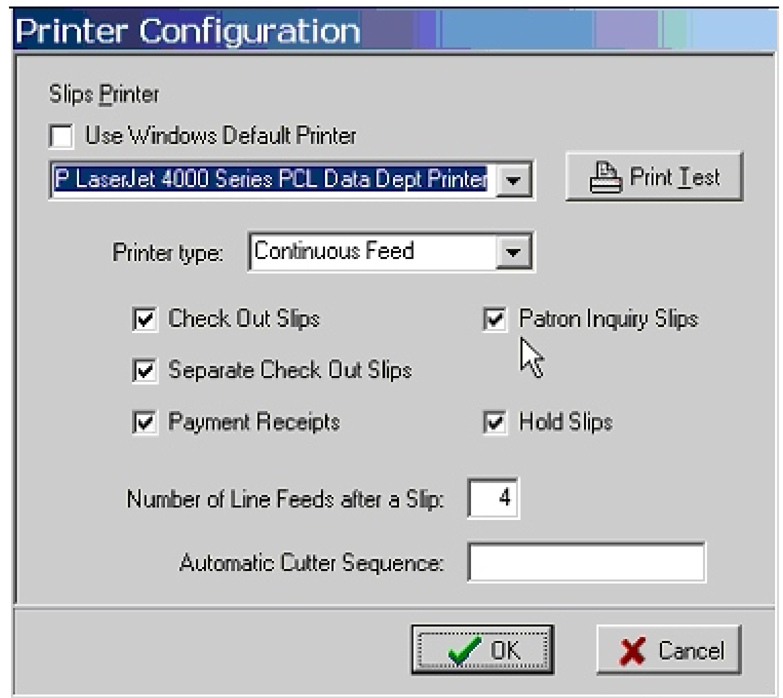

Figure 3-19. The Printer Configuration window

4. Click the check box beside each type of slip you wish to print at this station:

   Check Out Slips (date due slips): When this is selected, checkout slips are printed when items are checked out. If you selected **Continuous Feed** for the **Printer Type**, and you want to print a separate slip for each checked out item, also select the **Separate Check Out Slips** check box. (The separate slip option is not available when **Single Sheet** is selected; this setting automatically prints a separate sheet for each checked out item.)

   Payment Receipts: To print a receipt automatically for any payment received, select this check box. Please note that even if this option is turned off, you can still print a receipt or multiple receipts on demand. To do this, use the **Receipt** button on the **Charges** tab.

   Patron Inquiry Slips: If you want to allow Circulation staff to print information about a selected borrower (i.e., a Patron Info Slip), select this check box (so a check mark appears). To print a Patron Info Slip, staff will search for the borrower on the F2 tab, select the **Patron Record: Basic Info** tab, and then click the **Print Patron Info** button.

   Holds Slips: When this is selected, a slip is printed automatically when you check in an item that is on hold. The slip includes information about an "arrived" hold, including borrower name and phone number.

5. Number of line feeds after a slip: Enter the number of blank lines you want the printer to feed after printing each slip. The default is 4 lines.

6. To set up the slips printer's auto cutter escape sequence, enter the escape sequence into the **Automatic Cutter Sequence** edit box and then press **OK** to save. (If you do not have a printer with a cutter attached to your station, leave this box empty.) The **Automatic Cutter Sequence** should be available in the User's Manual from the printer.

7. If you want to test the print setup, click the **Print Test** button before you leave this window.

8. To save changes, click **OK**, or press **Enter**. To exit without saving, select **Cancel**.

Default Printer with Windows Terminal Services

When using Windows **Terminal Services** to run Circulation remotely, the **Default Printer** setting is used to direct receipts to the local receipts printer. Set the Windows Default printer on your station to the receipts printer. Then go to **Setup | Local Configuration | Printing Setup**. Check the box for "Use Windows Default Printer" and click on the ok button. Your receipts will print to that printer without having to manually select a printer when you access Circulation via Windows Terminal Services.

3.4.2 Station Options

Use the **Station Options** window (Figure 3-20) to identify station-specific settings: the library where this station is located, a setting pertaining to override due dates, options to limit borrower and title search results to the local library or all libraries, and more.

To set **Station Options**:

1. Select **Setup | Local Configuration | Station Options**.

2. Click the drop-down arrow to the right of the **Branch where this station is [Branch Name]** field. Select the library where this station is located. (Once the library has been identified correctly on this station, there should be no need to change it.)

3. The **Station Settings** area includes two fields with check boxes

   Override Due Date Stays On: Click this check box if you want an override due date to remain turned on during Checkout, even when multiple borrowers are checking out materials.

   Color Comment Field: Click this box to display a check mark, if you want **Patron Record Comments** displayed in red text on the F2 tab. (Add a **Comment** to a selected borrower's record on the **Patron Record | Basic Info.** tab.)

4. The **Station Level Searches** area includes three check boxes, detailed below, that allow you to limit borrower or title search results to borrowers or items at this library, or view all borrowers or titles/items at all libraries. You can choose to view your library's barcode items first in the items list on the F4 display.

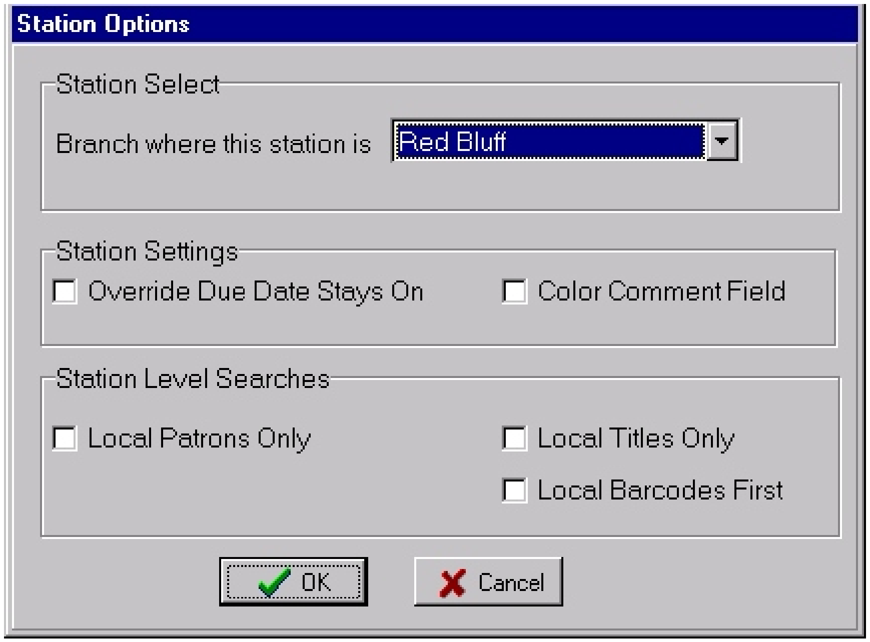

Figure 3-20. The Station Options window

Local Patrons Only: Supervisors at each station can configure the default for the borrower search hit list to include local borrowers only (meaning this library is their "home" library) or all borrowers. This option is unchecked by default, meaning all borrowers will be displayed. (The **All Branches** or **Local Branch** buttons will still be available in the borrower search hit lists to allow expanding or limiting the display.)

Local Titles Only: Supervisors at each station can choose to configure the title/item search hit list to include detailed item information for the local library only, or all libraries.

If enabled (check box is checked), **Local Titles Only** is a security feature designed to prevent libraries from editing other libraries' holdings. Users can still see ALL titles in the database (but the optional "NO ITEMS" display will appear beside titles belonging to other libraries) and can add on-the-fly copies of their own to those titles. When the **Local Titles Only** option is selected, the title/item search hit list includes titles at all libraries, but if the local library does not own them, "NO ITEMS" will appear in the **Circ.Coll.** column.

Local Barcodes First: Check this box if you want your library's items (barcode numbers) for a selected title to be listed first in the drop-down list beside the Item ID field. (This field is not available, if the **Local Titles Only** check box is checked.)

5. To save **Station Options** changes, select **OK**, or press **Enter**. To exit without saving, select **Exit**.

3.4.3 Cash Drawer Setup

Use the **Cash Drawer Setup** option (Figure 3-21) to enable users to connect and configure an automatic cash drawer to a Circulation station.

The cash drawer is attached to the computer via a COM port. The default settings are specific for the APG Cash Drawer, Model 484 SerialPRO II. If you wish to use another type of cash drawer, call TLC Support for information on possible compatibility issues.

The first time you run Circulation on any workstation, the following message will appear: "There is no COM Port assigned to the cash drawer. This can be assigned through the Setup menu" (by selecting **Local Configuration | Cash Drawer Setup**). The message is only a reminder; you are not required to modify the setup unless you want to use a cash drawer.

To configure the **Cash Drawer**:

1. Select the **Setup | Select Local Configuration | Cash Drawer** option.
2. If you do not have a cash drawer, leave the **Cash Drawer COM Port** default selection at "None." If you do have a drawer attached, select the correct COM port from the drop-down list (COM 1, 2, 3, or 4).
3. The **Control Character in Hex** is the signal sent to the cash drawer to open. The default ("07" which corresponds to key combination Ctrl + G) is the setting for the APG cash drawer. You must determine the appropriate setting from the manufacturer's instructions that come with your cash drawer.
4. The **Allow Cash Drawer to Open Without Payment** field allows supervisors at each library to set more security on when the cash drawer can be opened.

   The initial setting for the check box is unchecked. This setting provides more security for access to the cash drawer. If the

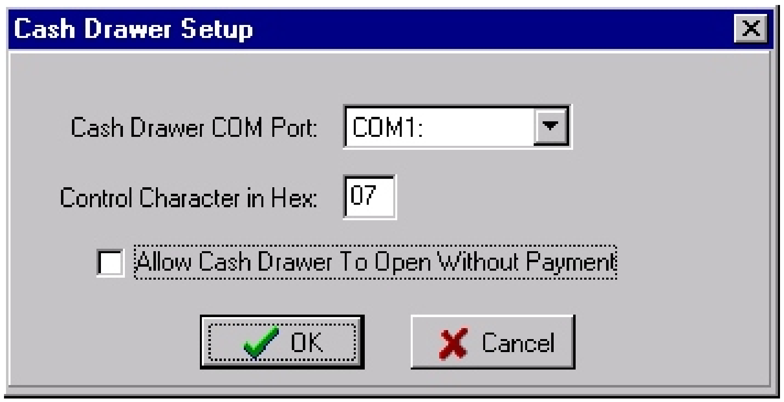

Figure 3-21. The Cash Drawer Setup window

box is unchecked, this means that the cash drawer will open only if a payment is made (for a selected borrower on the F2 **Charges** tab). When Circulation staff enter an amount and select the **Balloon Pay/Waive** or **Individual Pay/Waive** button on that tab (whatever is appropriate to this payment), the cash drawer will open automatically.

When the box is checked, the **Open** button is available on the F2 **Charges** tab for a selected borrower, and the **Cash Drawer** item is available on the main Circulation menu. Circulation staff at this station can open the drawer by selecting either option, even if no payment is made.

5. To save changes, click the **OK** button.

3.5 Security Setup

Use the **Circulation Security Setup** option to define each user's level of access to Circulation activities and displays. Before the Circulation Security Setup can be completed, however, administrators can use the Library•**Solution** System Configuration to set up administrative level security. This allows administrators to control which users can access specific Library•**Solution** modules and activities and to control their "roles," e.g., Circulation User, Circulation Administrator, or no Circulation role. Defaults are in place for both administrative (System Configuration) and Circulation levels of security.

To complete Circulation Security Setup for any user qualified to access Circulation (those with Circulation User or the Circulation Administrator role set in System Configuration):

1. First, administrators may wish to check the System Configuration. (Start the configuration from the **Start** menu.) Login, using system or Circulation administrator default login information. Then select **Setup** and **Users**. Then select **Create** (for new users) or **Edit/Remove** (for existing users). Set up **User Names**, individual **Passwords**, and access privileges ("Circulation Roles") for users of Circulation.

   Important! Any user who needs access to Circulation Security Setup must be assigned the Circulation Role of "Circulation Administrator."

2. In Circulation, select **Setup | Security Setup** to reach the **Security Configuration** window (Figure 3-22). Click the down arrow beside the **User Name** box to display a list of Circulation users or administrators (as authorized in the Library·**Solution** System Configuration). Select a user. The Security Configuration window for the selected user type will appear.

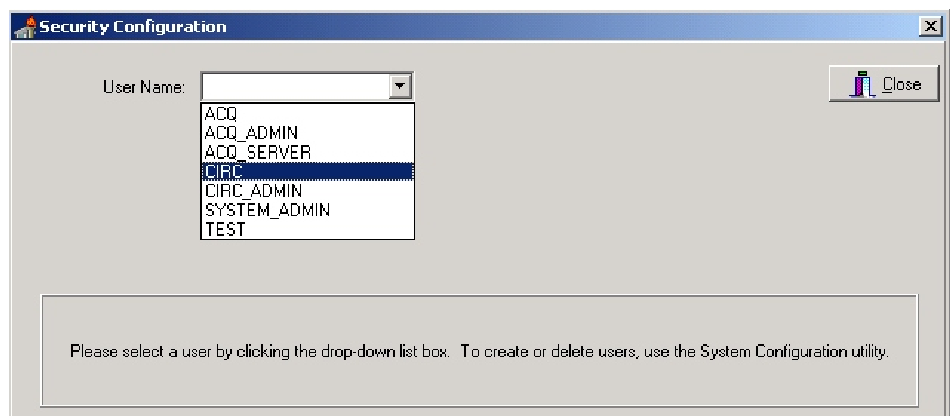

Figure 3-22. The initial Security Configuration window

3. The activities available for security setup are arranged on five tabs in the **Security Configuration** window (described below). Administrators (as

authorized in the System Configuration) can view or change setups for any user.

4. After reviewing or changing options on the five tabs, save by selecting the **Post** button, or cancel the changes by selecting **Cancel**.

5. To make any changes effective, you must re-login. Select **Re-Login** on the **Utilities** menu in Circulation.

3.5.1 General Subtab

The **General** subtab (Figure 3-23) includes the following fields and options:

- **Security Level:** Choose one of these options from the drop-down menu:

  No Special Clearance: Default. User must know either the Override or Supervisor password to perform normally protected activities, such as waiving fines, overriding due dates, etc.

  Automatic Override: User has automatic override clearance and will not be prompted to enter the Override password to complete activities which normally require a password, such as waiving fines. In operations which would normally require a password (like overriding a block condition), the system would simply ask the user to confirm the completion of the activity: "Do you really want to do this?" The user would simply choose "Yes" or "No." User will still be required to enter Supervisor password for those activities requiring that password, such as Branch Setup.

  Supervisor: User has full supervisor level access to all functions and will not be prompted to enter any passwords to perform controlled activities. As with the Automatic Override level, the system may sometimes display a message asking the user to confirm the completion of the activity: "Do you really want to do this?" Choose "Yes" or "No."

  Note: Only users with Supervisor Security Level can access the **Patron Cfg.** and the **Item Cfg**. buttons used in borrower or item searches. The buttons are unavailable to

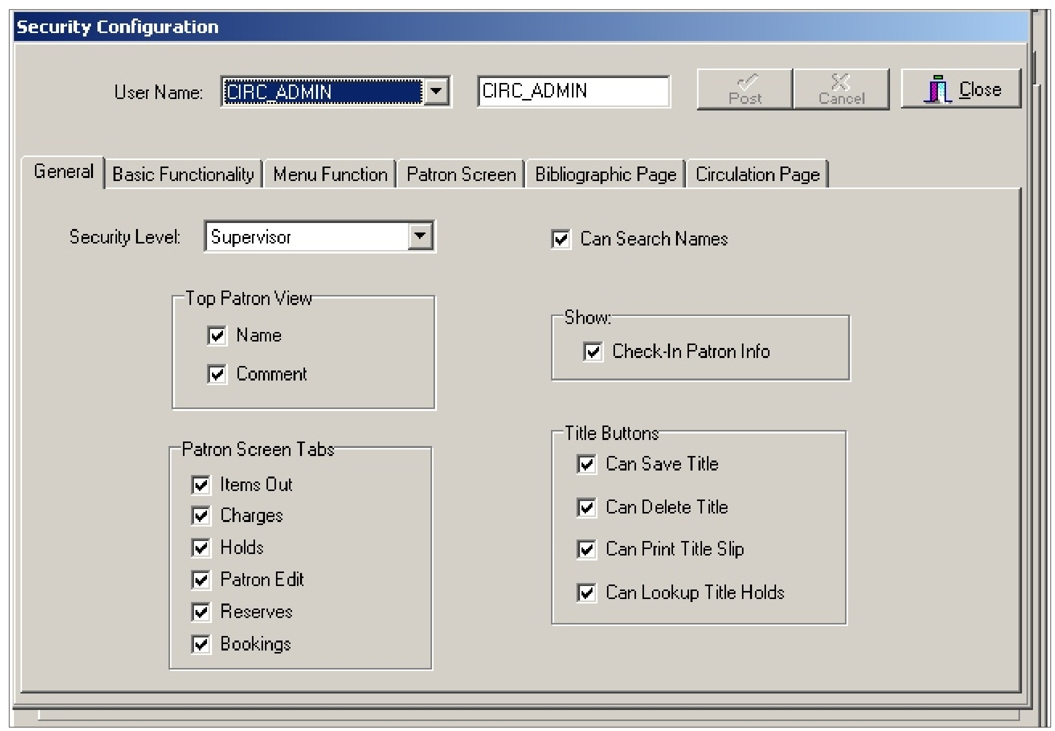

Figure 3-23. The General subtab

users with No Special Clearance or Automatic Override.

- **Can Search Names:** If option is turned off, the **Patron Search Name** field is not available on the **Patron Search Configuration**; users will not be able to asearch for borrowers by name.
- **Top Patron View: Name and Comment:** Controls whether or not a user can view **Patron Name** or **Comment** fields on the upper part of the **Patron Transactions** tab F2.
- **Patron Screen Tabs:** Controls whether or not user can view tabs on the **Patron Transactions** tab F2: Items Out, Charges, Holds, Patron Edit (Patron Record tabs), Reserves.
- **Show: Check In Patron Info:** View names of borrowers on the **Check In/In House Use** tab F3. If the option is turned off, borrower names are not visible, and the **Patron Inquire** button on the F3 tab is unavailable. Patron names that may already be in the list of items just checked in are not cleared.
- **Title Buttons:** These options control whether or not user can access the four buttons located in center right of the **Item/Title Information** tab F4: Save Title (bibliographic data) Edits, Delete Title (bibliographic data), Print Title/Item Inquiry Slips, access the Holds Queue.

3.5.2 Basic Functionality Subtab

The **Basic Functionality** subtab (Figure 3-24) fields control the following activities:

- **Check Out:** Check out items. If access not allowed, the **Enter Item** box on F2 tab is not visible.
- **Check In:** Check in items. If access not allowed, and if **Check In** button is selected on F3 tab, the **Item** box on F3 tab is not visible.
- **Renew:** Renew items. If access not allowed, the **Renew** button is unavailable (grayed) on **F2 Items Out** tab for the selected borrower.
- **Stats-Only Check Out:** Check out uncataloged, unbarcoded items for "statistics only" using **Stats-Only** button. If access not allowed, the button is not visible on F2 tab.
- **Inhouse Use:** Gather inhouse use data. If you do not want the **In House Use** button to appear on Circulation F3 tab, leave this check box unchecked.
- **Place Holds:** Place holds. If access not allowed, the **Place** button on **Holds** tab is not visible.
- **View Only Default Branches When Placing Holds:** When checked, only default libraries available for placing holds.
- **Edit Payment Information:** Add, edit, or delete charges on the **Charges** tab. If the option is off, the user cannot edit or add any payment information for the selected borrower, e.g., the user cannot take payments for fines.
- **Patron Inquiries:** When checked, the user can perform borrower inquiries from **Find** buttons on the **Item/Title Information** tab **F4** on the **Circulation** tab. The **Find** buttons lets you find the last borrower and current

Figure 3-24. The Basic Functionality subtab

borrower checkouts. If access is not allowed, the **Find** buttons are not visible.

- **Title/Item Inquiries:** When checked, the user can perform title/item inquiries from the **Item Inquiry** buttons on **Patron Transactions** tab F2 and **Check In/In House Use** tab F3.
- **OTF Title / Item:** Add items/titles in Circulation in any of the activities which allow you to search for an item/title. If the option is turned off, the user cannot add any new titles or items or edit any existing title data including editing bibliographic data for titles which were added on-the-fly to Circulation.

Note: Access to editing the holdings/item information fields on the **Bibliographic** tab of Circulation F4 tab is controlled by the options on the **Security | Bibliographic Page**.

- **OTF Patron:** When checked, the user can add borrower records in Circulation on the **Patron Transactions** tab F2.
- **Debt Collection:** View and work with the **Setup** menu and **Circulation** menu items concerning the optional **Debt Collection Module**. If this check box is not checked, these menu items will be hidden from the currently logged in user. **Note:** Only the "system_admin" user can actually access the **Setup | Debt Collection Module** setup screens.

3.5.3 Menu Function Subtab

The **Menu Function** subtab (Figure 3-25) controls the following functions:

- **Check Messages:** Controls access to messages. If turned off (no check mark), the **Check Messages** option in the **Messaging** menu and the **Mail** button at upper right are not available.
- **Can Delete Messages:** Lets the user delete messages on the **Message** form.
- **Item Transfers:** Enables **Item Transfers** on the **Utilities** menu.
- **Recall Item:** Enables **Recall Item** on the **Utilities** menu and the **Recall Item** button on **Items Out** tab.
- **Inventory:** [The feature enabling users to run Inventory from inside the Circulation module is not yet available.]
- **Change Password:** Enables **Change Password** on the **Circulation Utilities** menu, so current user can change own password.
- **View Reserves:** Enables **View Reserves** on **Reserves Tools** menu and **View All** (reserves) on the **Reserves** tab of **Patron Transactions** tab F2.
- **Remove Reserves:** Enables the **Remove Reserves** option on the **Reserves Tools** menu.

Figure 3-25. The Menu Functions subtab

3.5.4 Patron Screen Subtab

The **Patron Screen** subtab (Figure 3-26) shows all of the fields in the **Basic Info** tab of the **Patron Record** on the F2 **Patron Transactions** tab. On the lower part of this tab you can control access to the other **Patron Record** tabs: Address, Patron Fields, Misc. Info, Configuration, and Loan History.

For each field or tab, you can select: **Disallowed** (user cannot view or edit field); **Viewable** (user can view but not edit the field); or, **Editable** (user can view and edit the field).

Delete: This check box refers to deleting borrower records. If this check box is checked, the Circulation user is allowed to delete borrower records.

Note on Name field: If **Disallowed** is selected, the **Patron Name** fields are removed from the **Patron Record | Basic Information** tab and from the **Circulation** tab of the F4 tab (**Item/Title Information**), which normally displays the name of the borrower who currently has an item checked out. If **Viewable** is selected, these fields are displayed but cannot be edited.

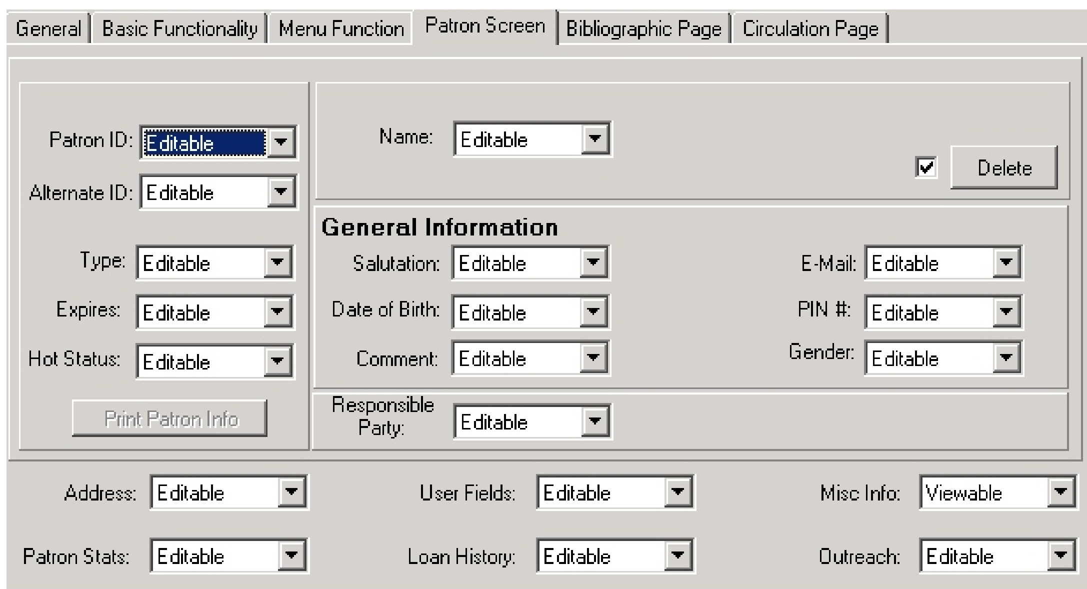

Figure 3-26. The Patron Screen subtab

3.5.5 Bibliographic Page Subtab

The **Bibliographic Page** subtab (Figure 3-27) shows all of the fields in the **Bibliographic** tab of the **Item Information** display on the F4 **Item/Title Information** tab. This tab displays all holdings and item-specific information. For each field, you can select: **Disallowed** (user can view but not edit field); or, **Editable** (user can view and edit the field). **Editable** is selected by default The check boxes beside **Save** and **Delete** (on the right of the tab) control whether or not the equivalent buttons on the F4 tab are available (allowing the user to save or delete item information).

The **Collections** section contains check boxes to allow Circulation staff to change the collection code for an item (to or from, owning or circulating), without having the ability to change the Branch of the item.

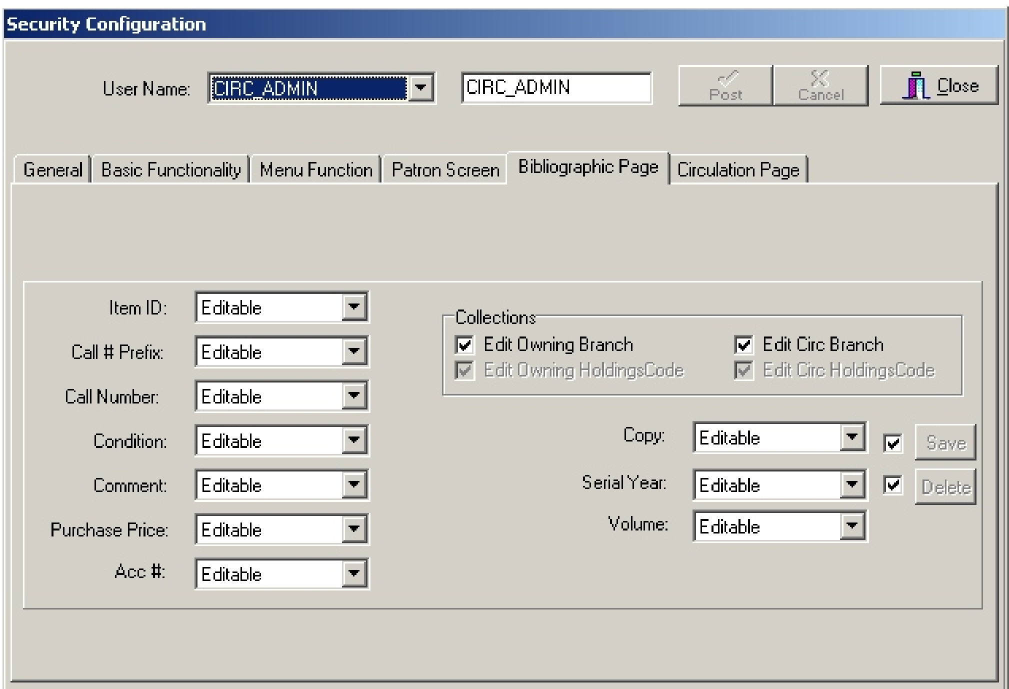

Figure 3-27. The Bibliographic Page subtab

3.5.6 Debt Collection Setup

The **Debt Collection Module** can be configured to run for the entire library system or for specified libraries. Certain configuration parameters must be set up independently of the module.

Note: To use this module you will first need to establish a contract with Unique Management Services (UMS), Inc. (See below.)

To access **System** or **Branch Setup**:

1. Select the **Debt Collection** menu item from the **Setup** menu on Library•**Solution** Circulation. Then select the **System Setup** submenu item. This will open the Debt Collection System Setup form (Figure 3-28). **Note:** This menu item is accessible only to users with Circ_admin or System_admin user rights.

2. Set the **Mode** (upper left hand corner) to either **System** or **Branch**. In **System** mode, the module will monitor borrower balances over all libraries in the system.

3. Set the **Scheduling** option to **Automatic** or **Manual.** In **Automatic** mode, the module will automatically issue the **Submission Report** on a regular schedule. In **Manual** mode, an operator will transmit the report as necessary.

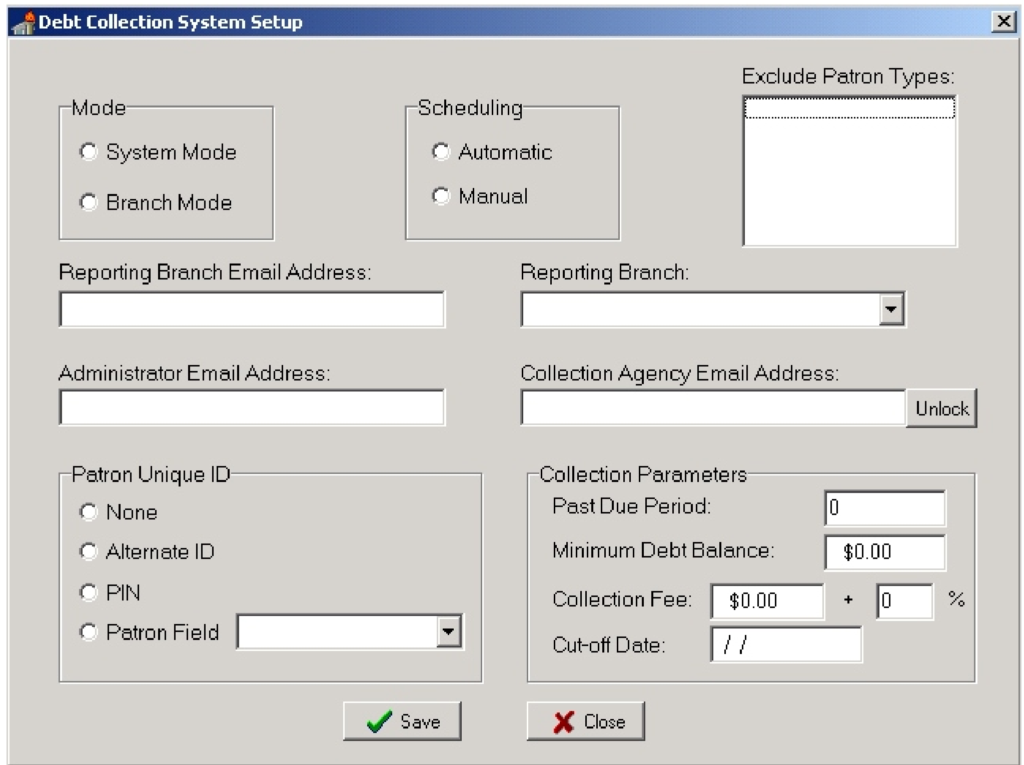

Figure 3-28. The Debt Collection System Setup window

4. Use the **Exclude Patron Types** option to select those **Patron Types** the library has determined should never be submitted to UMS. (Multiple borrower types can be selected by holding down the **Ctrl** key and clicking on the desired **Patron Type** in the list box.)

5. If you have selected the **System Mod**e, provide information on the following:

   – **Reporting Branch Email Address -** The e-mail address for the institution that will be sending the reports. (This is essentially the **From** address on the email.)

   – **Reporting Branch -** Select the **Main Branch** when operating in **System Mode**.

   – **Administrator Email Address -** The address where a copy of the report can be sent if a library administrator wishes to see it. (This box can be left blank.)

   – **Collection Agency Email Address -** Contains the email address of UMS. Do not change this unless requested by UMS. (The edit box is disabled to ensure accidental changes are not made. The **Unlock** button to the right can be clicked to enable the edit box.)

   – **Patron Unique ID -** The information selected for this ID will be Unique Management System's borrower reference when communicating with the library about a borrower account. The options are: None, Alternate ID, PIN, and Patron Field. If, for example, you choose the PIN option, any references from Unique Management System concerning a borrower, would use the Patron's PIN number to identify the borrower to you. Your library should determine which option is best for local practices.

   Select the option button associated with your library's choice of where it stores the borrower's unique identification number. The option buttons correspond to the field where the value is stored. If the value is in a Patron Field, the drop-down list to the right of this option button is enabled, and you should select the appropriate Patron Field.

   Note: If "None" is selected, the only identifier sent to the collection agency is the internal, system generated number (this is always included in communications sent to the collection agency) which is not searchable in Library•**Solution** Circulation.

– **Collection Parameters** - Includes the configurable parameters for the module.

  Past Due Period contains the number of days a borrower has had a charge before it will be submitted to UMS.

  Minimum Debt Balance contains the minimum balance a borrower must accrue before notice is sent to UMS.

  The **Collection Fee** parameter includes separate fields for the flat fee assessed for the borrower and for the percentage of the balance that the borrower is charged. These values can be applied in any combination. The percentage box cannot exceed 100%. Enter 0 (zero) if the charge is not applicable.

  The **Cut-Off Date** edit box establishes a limit for charges incurred.

  Charges incurred before this date will not be considered when determining if the Minimum Debt Balance has been reached, but WILL be added to the balance owed that is submitted to the collection agency.

6. Click the **Save** button when you have made your changes. (The **Close** button closes the form with no changes saved.) Error messages will be displayed if the **Reporting Branch Email Address** or **Collection Agency Email Address** boxes are left blank or if any data fields in the **Collection Parameters** section are blank or contain entries that are out of the following ranges:

   – Past Due Period: 0 - 999

   – Minimum Debt Balance: 0 - $9999.99

   – Collection Fee (flat fee): 0 - $9999.99

   – Collection Fee (percentage): 0 - 100%

   – Cut-off Date: Must have date - no blanks allowed.

7. If the module is placed in **Branch Mode**, each participating library must configure debt collection setup for their own library. The **Branch Setup** sub-menu item will be enabled under the **Debt**

Collection Setup item on the **Setup** menu. Selecting this item will open the **Debt Collection Branch Setu**p form. This menu item requires **Supervisor** rights to access it.

Checking the **Branch Participates** box on this form, indicates that the library will participate in debt collection. The other edit boxes and buttons control the same functions as in system setup, except they apply only to the specific library.

Contacting Unique Management Services

Unique Management Services can be contacted at the following:

- Toll-free Telephone: 800-879-5453
- Electronic Mail: info@unique-mgmt.com
- World Wide Web: http://www.unique-mgmt.com/aboutus/index.html
- U.S. Mail or Courier Service: Unique Managment Services Inc., 119 East Maple St., Jeffersonville, IN. 47130

See section **8.7 Debt Collection Module** for additional information.

3.5.7 Circulation Page Subtab

There are currently two options available on this tab. These options are set on the **Circulation Page** tab of the **Security Configuration** screen, under the **Setup | Security Setup** menu.

- **Number of Last Out Patrons to view:** This setting configures the number of previous borrowers of an item number to display on the F4 Circulation tab. The maximum setting is three (3), the minimum setting is zero (0).
- **Hide Current Patron:** This setting controls the display of the Patron Name of the borrower who currently has the item checked out. When checked, the user name is displayed in the Current Information section under the Item / Title Info F4, Circulation Page tab.

To change these settings:

1. Log into Library•**Solution** as an Administrator (i.e., as the circ_admin user name or an equivalent logon).
2. Click **Setup | Security Setup**.
3. The **Security Configuration** screen will display. Select the appropriate User Name from the drop-down menu.
4. Click the **Circulation Page** tab (Figure 3-29).
5. As appropriate for your library, type a number from 0-3 in the **Number of Last Out Patrons** to view box. If the setting is 0 (zero), this user will see no borrowers listed. A setting of 3 (three) will display the last three borrowers that checked out this item.
6. Click **Post** when the settings are displayed as desired, or click **Cancel** to abandon the changes.

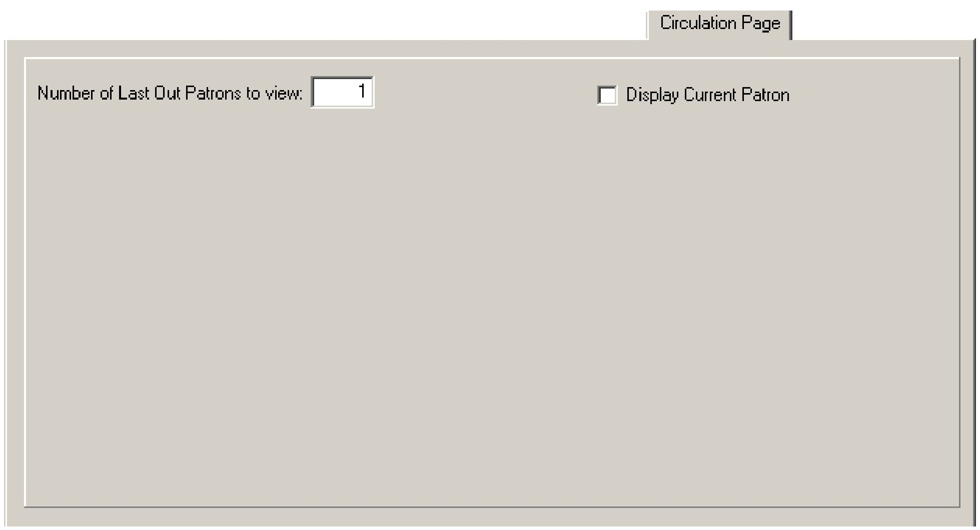

Figure 3-29. The Circulation Page subtab

3.6 Outreach User PAC Setup

The **Outreach User PAC Setup** option (Figure 3-30) lets you set the address for the Outreach PAC Server.

To set or change the Outreach PAC Server address:

1. Select **Setup | Outreach User PAC Setup**.

2. The **Outreach User PAC Setup** window will appear. If this is a first-time setup, the box for the **Outreach PAC Server** address will be empty. Type the address (e.g., **pacserver.library.org**) and click **OK**. If an address was previously set, clear the current contents and then type the new address. Then click **OK**.

Note: The address information should be provided by your administrator.

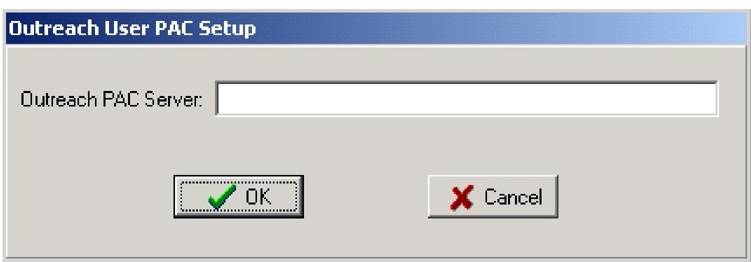

Figure 3-30. The Outreach PAC Server window

3.7 Holds Routing Setup

The **Holds Routing Setup** command on the Circulation **Setup** menu enables a library administrator to set a list of other libraries that will be checked for available titles to fill holds to be picked up at that library. Thus, this setup allows you to preconfigure the limitation of hold requests by library, so that holds to be picked up at a selected library will be filled only by items belonging to the specified libraries.

The setup also allows you to set the order in which those libraries will be checked for available items that can fulfill a hold, when your library is selected as the pickup library.

This feature was introduced in Version 3.2, but in that version it was necessary for TLC Support to establish or change the settings for each library. In Version 3.3, users can access the new setup dialog in Circulation to set the defaults for the current library. A typical Hold Routing Setup dialog is shown in Figure 3-31.

Note that a supervisor can establish the settings for all libraries by running the System Configuration, logging in as an administrative user, and selecting **Setup | Holds Routing Setup**, also newly available in Version 3.3.

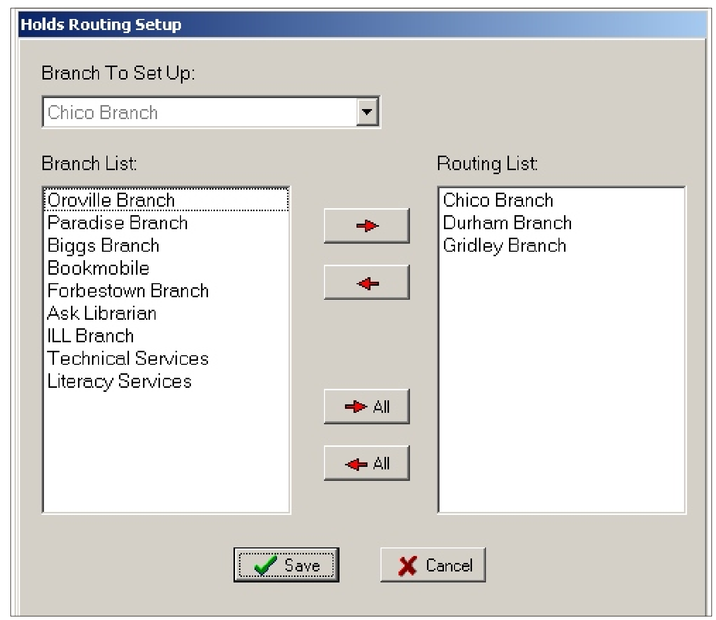

Figure 3-31. The Holds Routing Setup window

When a Circulation user places a hold for a borrower, the **Define New Holds Basics** dialog first appears, including the **Send to Branch** field (the desired pickup library). The borrower's home library is always the default (whether the hold is being placed by the borrower in PAC or by a Circulation operator). The Circulation user placing the hold can change the desired pickup library. (Note that two factors may influence the list of libraries in the location selection list: the Holds Routing Setup for the pickup library and a Circulation Security setting for the currently logged in Circulation user; see more about this below.)

When the Circulation operator clicks **OK** in the **Define New Holds Basics** dialog, the **Define Title Specifics** dialog appears.

If you also want to limit the display of supply libraries when a selected Circulation user is logged in, select **Security Setup** on the Circulation **Setup** menu, select the user, and click the **Basic Functionality** tab. Check the box beside **View Only Default Branches When Placing Holds** and post the change. (This feature was also introduced in Version 3.2.)

If this field is checked, when this user selects **Place** on the **Holds** tab for the selected borrower, the **Send To Branch** list on the **Define New Holds Basics** dialog is set to the current library, and the list of available pickup libraries is limited to those selected in the **Holds Routing Setup**. Then, on the **Define Title Specifics** dialog on the Branches tab, only the selected libraries are displayed, each with **Yes** in the **Limit To** field.

Note: If the title to be placed on hold is not owned by any of the limited libraries, the hold cannot be filled and Circulation displays an information message to the operator placing the hold (Figure 3-32), unless a new copy is eventually added to one of those locations.

At this point you can Cancel out of the hold, check the ownership on the F4 tab, or choose another pickup library. If you are restricted by the Security check box from viewing more pickups, ask a your supervisor to login so you can see more pickup libraries.

To edit the Holds Routing Setup in Circulation for the current branch:

1. Login to Circulation as a user with administrative rights (for example, the **circ_admin** user).

2. On the main Circulation menu, select **Setup** and then **Holds Routing Setup**. The **Holds Routing Setup** dialog appears, like the example shown in Figure 3-33.

   The defaults in the **Holds Routing Setup** may be identified by a note in red text at the top of the form as a "generic" setup: Routing has not been configured.

Figure 3-32. Information message

Holds for available items will be filled without regard to library order below. That is, all libraries are included in the routing list, so in effect there are no library limitations. The generic setup ensures a faster holds placement process, since a library-limited hold requires Circulation to take extra steps to locate an item to fulfill it.

3. The current library appears in the **Branch To Set Up** box (the field is grayed, so you cannot select a different library here). The **Branch List** on the left includes libraries in the system that have not already been moved to the **Routing List** (on the right).

4. To move a library from one list to the other, highlight the library and click the right or left arrow. To move all libraries, use the right or left **All** arrows.

   To select multiple libraries, you can click on a library, hold down the **Ctrl** key and select others, or select one library, hold down the **Shift** key, and use the keyboard down arrow to select the next branch(es) in the list.

   Note that you would usually include the library you are configuring in the **Routing List** as the first library, but there is no requirement to include it or to list it first.

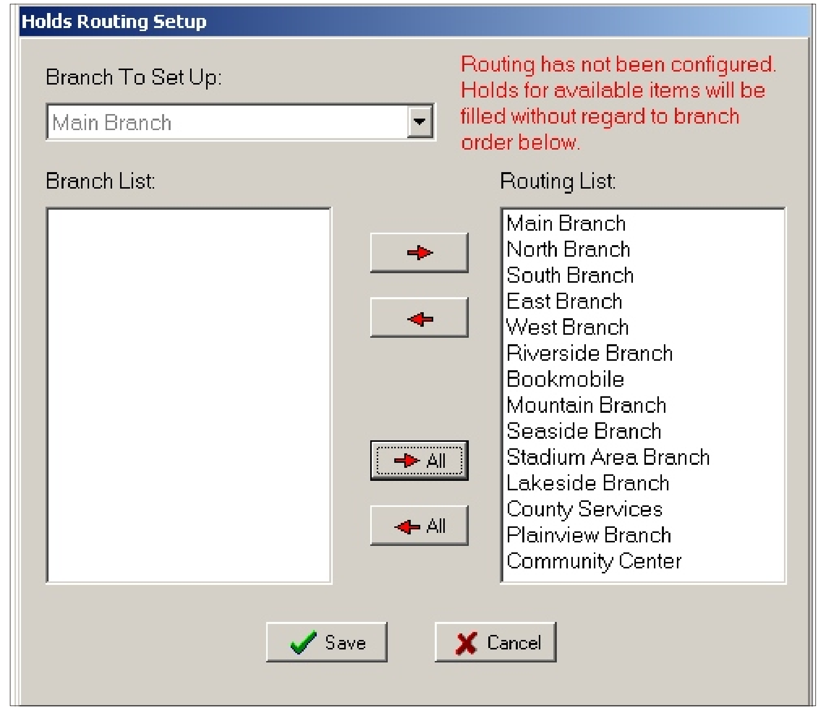

Figure 3-33. Holds Routing Setup

   Generic routing setup tip: To reset a library-limited setup to a generic setup, simply click the left-facing **All** button to remove all libraries from the **Routing List** column, and then click the right-facing All button to move all libraries into that column.

5. When your selections are complete, click the **Save** button, or exit without saving by clicking the **Cancel** button.

4. Messaging

4.1 Check Messages

Select the **Messaging | Check Messages** option (Figure 4-1) to view system messages. Typical messages are concerned with inter-library requests, reminders to send items to another library, and to place items on the "arrived" holds shelf.

When messages are received, a "New Messages" display is visible on the **Patron Transactions** tab (under the **Blocks** area on the right of the tab). The number of new messages is shown.

- To view messages, select the **Messaging** option on the menu bar. Then select **Check Messages**.
- To sort the display by Barcode number, click the **Barcode Sort** button
- If you wish to print a list of all of the messages, click the **Print All** button.

Multiple non-sequential selections may be highlighted for printing by pressing and holding the CTRL key, while clicking the **Time** field for each item to be deleted. Then click the **Print Selected** button. The button label will change from Print All when you click the first individual item.

You can also print selected items by using a "Messages List" report that is available in the **Reports** module. This

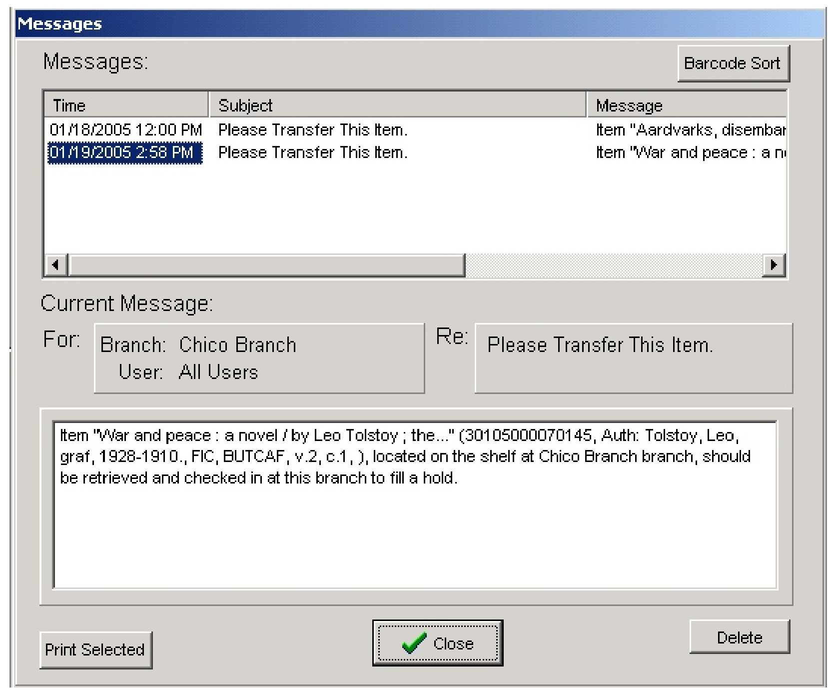

Figure 4-1. The Messages window

report will print all messages from a specified date to the present.

- To delete a message, click the **Time** field of the message line and then press the **Delete** button.

  Multiple non-sequential selections may be highlighted for deletion by pressing and holding the CTRL key, while clicking the **Time** field for each item to be deleted.

  Sequential items can be deleted by pressing and holding the **SHIFT** key, and clicking the Time field of the first and last items of the list of items to be deleted.

  When all desired items are highlighted, release the **SHIFT** or **CTRL** key and press the **Delete** button.

5. Utilities Menu Options

5.1 Re-Login

Use the **Utilities | Re-Login** option to login a different user to Circulation. This allows a user with a different level of security to login to Circulation, without having to close and restart the program.

Note: If you have changed the **Security Setup** access setup for any user, that user must re-login to Circulation to make the changes effective.

To re-login to Circulation:

1. Select **Utilities | Re-Login**. The **Database Login** window will be displayed (Figure 5-1).

2. Enter a different **User Name** and **Password**.

3. Click **OK**.

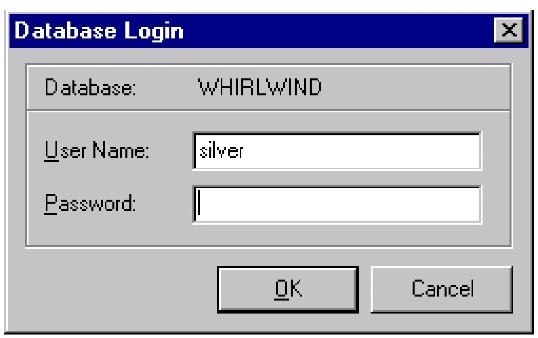

Figure 5-1. The Database Login window

5.2 Item Transfers

Use the Item Transfers option to reach the **Item Reassignment** window (Figure 5-2), where you can transfer items to another location for circulation.

5.2.1 Single Reassignment

The **Single Reassignment** subtab (Figure 5-2) is used to transfer single items to another location for circulation, when you do not wish to change the ownership of the item.

To transfer items:

1. Select **Utilities | Item Transfers** to display the **Item Reassignment** window.
2. On the **Single Assignment** tab, select an option in the **Reassign specified items to** area:

- Owning library/collection: to transfer items back to the original location.
- Specified library: to transfer items to a selected library.
- Specified branch/collection: to transfer items to a specified library and collection.

3. In the **New Location** area, click the down arrow to select a library and a collection, if relevant.

   Note: You cannot use this utility to place items on reserve.

4. **Specify item:** In the edit box in the center of the window, scan the barcode number of an item to be transferred.

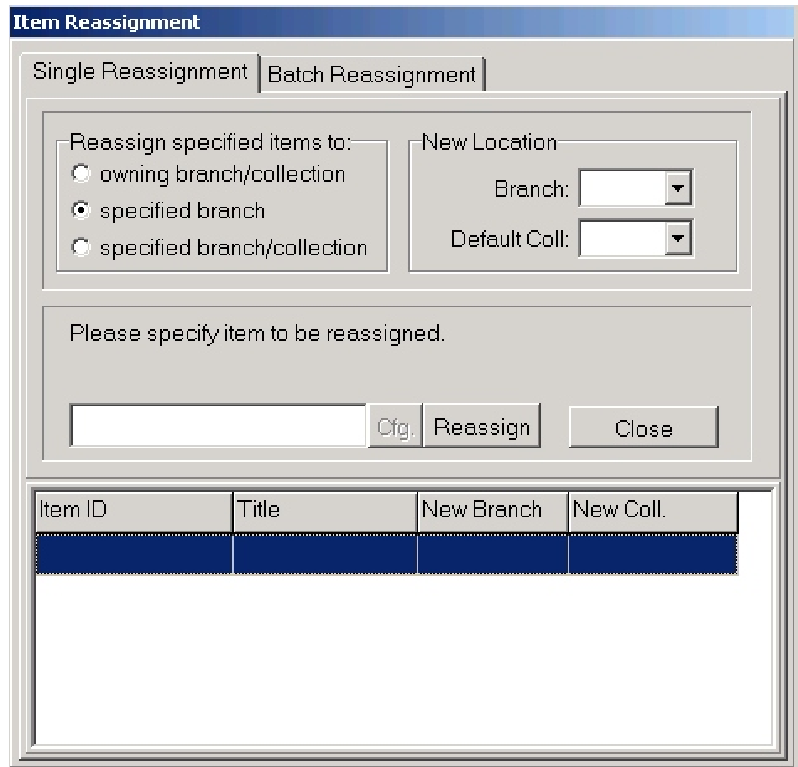

Figure 5-2. The Single Reassignment subtab

You can also type the title, the barcode number, or the control number of the item to be reassigned. If you type data, press **Enter** or click the **Reassign** button. To configure an item/title search, click the **Cfg.** button.

5. Continue entering other items to be transferred.

   The **Item Transfers** process changes the Item **Status** code of an item to "T" (in transit).

6. When you are finished, click **Quit**. Place the items in a designated location for transport to other branch(es).

7. When items are received at the other library, check in each item. This action changes the Item Status code "T" to the appropriate code.

5.2.2 Batch Reassignment

Use the **Batch Reassignment** subtab (Figure 5-3) to transfer whole collections of items to another location for circulation. **Batch Reassignment** operates on the premise that ALL items in a specified holdings code are to be relocated to a different specified holdings code (usually a different location).

To use the **Batch Reassignment** feature:

1. Create a location/collection (holdings code) for each location which will be using the items that are being relocated. For example: create a new holdings code, for each location, that has a short description of **TRAV** (for "traveling collection").

2. Select the items that you will put into the new **TRAV** holdings code.

3. In Circulation, assign that holdings code to those items, using the **Circulating | Brnch/Coll** drop-down lists, on the **Bibliographic** sub-tab, of the **Item / Title Info** F4 tab. This can be done at each location, for a separate set of materials. You can also just start with one group at a single location, with the intent of moving that group of materials through all participating locations over a period of time.

4. When it is time to move the group of items to the next location, follow the instructions in the **To Batch Transfer Items** section later in this section.

   Note: This process does NOT change the individual items' status. (Only the circulating holdings code is changed.) The advantage of this is that when the items are received at the new location, they do not have to be checked in; just place them on the shelf. The drawback

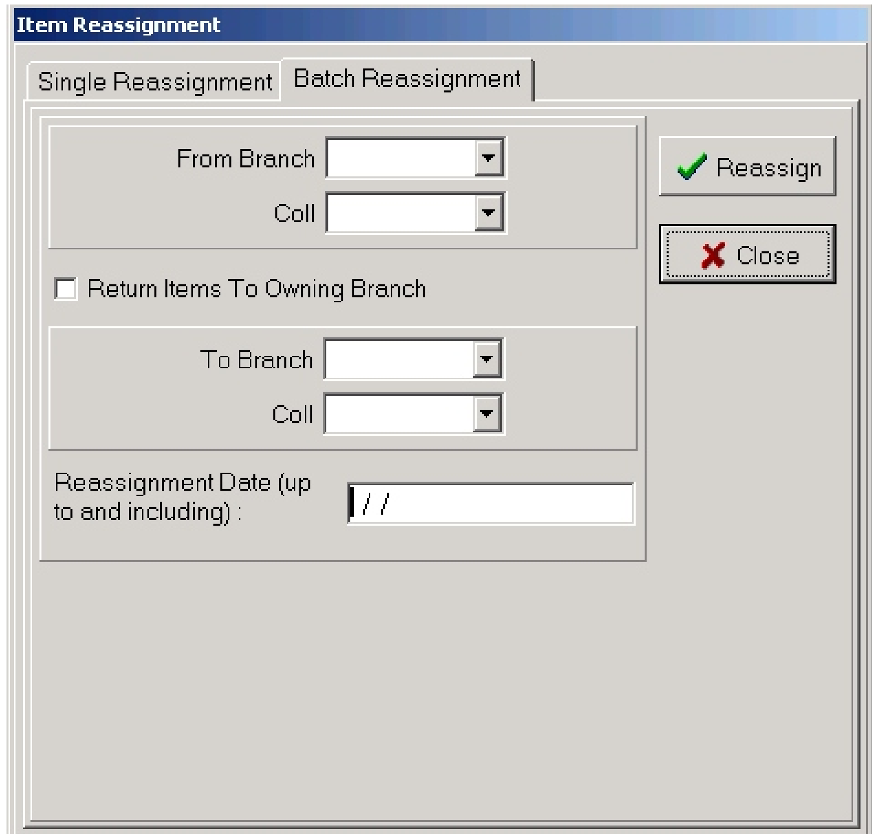

Figure 5-3. The Batch Reassignment window

to this is that, during the time the items are between locations, they will still appear in the PAC as "available" so there could be some borrower confusion if the items are not delivered quickly to the new location.

The following table is an example of moving several groups of items, in tandem, through multiple locations.

Location	Name	Jan. 1, 2004	April 1, 2004
1	Main Library	55	35
2	Small library	60	55
3	Green Memorial	35	60

All of the items' locations are defined by circulating holdings codes with the short description of "TRAV".

- On the first Monday of every quarter, each library gathers up all of the materials on its "TRAV" shelf, and places them in boxes for transport.

  Note: Items that are currently not in "available" status will have their circulating holdings code changed. When they are eventually checked in, the operator will be directed to send them on to the appropriate location.

- Then the operator changes the circulating holdings code of all of the items in the TRAV collection at that location. (Use the instructions below.)

TIP: To facilitate proper handling of the materials in this rotating collection, the ENTIRE contents of the TRAV collection shelves should be removed before the Batch Transfer, and more importantly, BEFORE items from another location are shelved on those shelves. Otherwise, you will not know which items will need to be moved to the next location.

To **Batch Transfer** items:

1. Select **Utilities | Item Transfers** to display the **Item Reassignment** window (Figure 5-3).

2. On the **Batch Reassignment** tab, choose the library and collection the items will be transferred from:

   – Select a library on the **From Branch** drop down list.

   – Select a code from the **COLL** drop down list.

3. On the **Batch Reassignment** tab, choose the library and collection the items will be transferred to:

   – Select a library on the **To Branch** drop down list.

   – Select a code from the **COLL** drop down list.

4. Enter the **Reassignment Date**. This date controls which items should be transferred. Items which were assigned the current **Circulated by** collection, up to and including the entered date, will be reassigned. Other items, if any, in that collection will be left in place.

5. Click in the **Return Items to Owning Branch** check box if you wish to have the selected items transferred back to the **Owned by** location. If checked, the **To Branch** option will not be available.

   Note: Before performing this action, you should run the report: **Items in Circulated by Holdings code To Be Returned to Owning Holdingscode**.

6. Click the **Reassign Button**.

7. Continue entering other **Branch** and **Collection** codes to be transferred, as needed.

8. When you are finished, click **Close**.

9. Place the items in a designated location for transport to other branch(es).

10. When the items are received at the new location, place them on the shelf.

5.3 Recall Items

Use the **Recall Item** window (Figure 5-4) to flag a checked out item so a specified message will be displayed when it is checked in. For example, the item may need to be repaired when it is returned from the current loan.

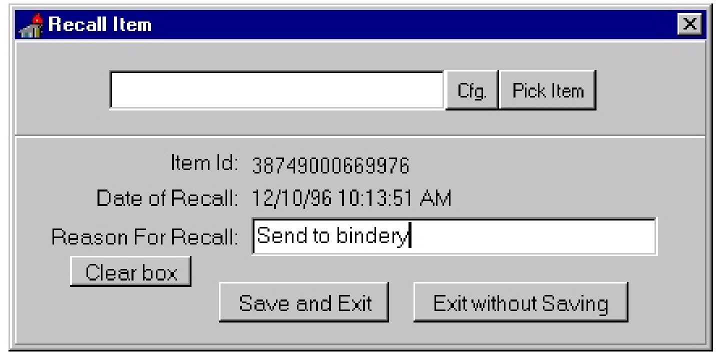

Figure 5-4. The Recall Item window

Hint: If an item has been recalled and is checked in, the recall item stops all other checkin processes, so the item gets a **T** status immediately and will not fill a hold or be transferred to another location until it is checked in again.

Note: Only items with an "in-transit" (T) or "checked out" (CO) status may be recalled. If a recalled item is checked in as damaged, the item will be assigned to the Repair Shop designation first. When the item is returned to circulation the recall will take effect.

There are two ways to access the **Recall Items** window:

Go to **Utilities | Recall Items**, described below, or use the **Recall Item** button on the **Patron Transactions | Items Out** tab. The latter method is the easier when you have just checked out the relevant item to a borrower.

To recall an item through the **Utilities** menu:

1. Select the **Utilities | Recall Item** option to display the **Recall Item** window.

2. In the text box, scan or type the **Item ID** (barcode number) of the item, or type the title or first word(s) of the title. Then click **Pick Item** or press **Enter** and select the title or item you want. The **Recall Item** window will then display the **Item ID**.

3. In the **Reason for Recall** box, type the message to be displayed when the item is checked in. If you need to correct the message before saving, select the **Clear Box**.

4. To complete the recall, select **Save and Exit** or **Exit without Saving**. If an item is on the shelf (not checked out), a message will be displayed: "Item is available and cannot be recalled."

5. When the item is checked in, the recall message will be displayed in the **Item Has Been Recalled** window. To exit the window, click **OK**.

To find out if an item has been recalled:

- Follow the first two steps above. If the item has been recalled, the **Date of Recall** box will display that date. If the item has not been recalled, the **Date of Recall** box will be blank or may display "Was not previously recalled."

5.4 Item Repair History

Use the **Item Repair History** utility to record details about repairs to an item, usually a piece of equipment loaned out through Library•**Booking**. If a vendor/distributor has made the repairs, you can select the **Repaired by Vendor** check box and select a vendor from the drop-down list. You can add a repair note about an item as often as needed.

To add repair notes:

1. On the **Utilities** menu, select Item **Repair History**. The **View Repairs** window (Figure 5-5) displays.

2. Type an item keyword or ID number in the **Lookup Item** entry box and press enter or click **Go!**

3. Select an entry from the search results list and click **OK**. On the **View Repairs** window click **Add**.

4. The **Add New Repair** window is displayed (Figure 5-6). Enter the following information:

   - **Date of Repair:** Today's date is entered by default. Change if necessary.
   - **Repaired by Patron:** (Optional): Search for and select a borrower.
     – Type a borrower last name and press enter, or click **Pick**.
     – From the **Patron Lookup by Name** results set, click the desired borrower name to highlight it, and click OK.
   - **Repaired by Vendor:** (Optional): Select a vendor from the drop-down list.

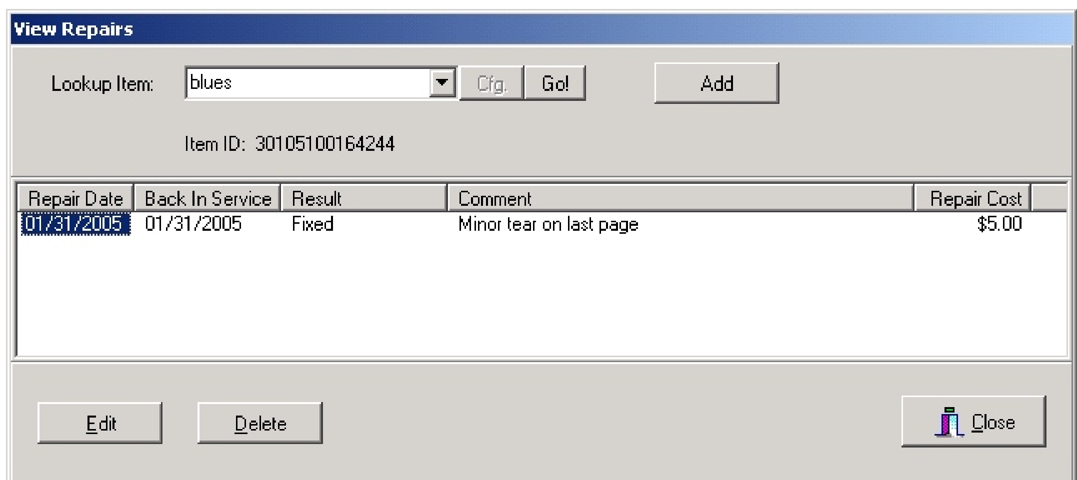

Figure 5-5. The View Repairs window

- **Back-in-Service:** Today's date is entered by default. Change if necessary.
- **Result:** Select from the drop-down list: Fixed; Replaced; Temporarily Out-of-service; Permanently Out-of-service.
- **Comment:** Enter an optional free-text comment. Suggestion: mention name of the repairing vendor or borrower here, so this can be viewed in the future in the View Repairs window.
- **Repair Cost:** Enter an amount, if any.

5. To save, click **OK**.

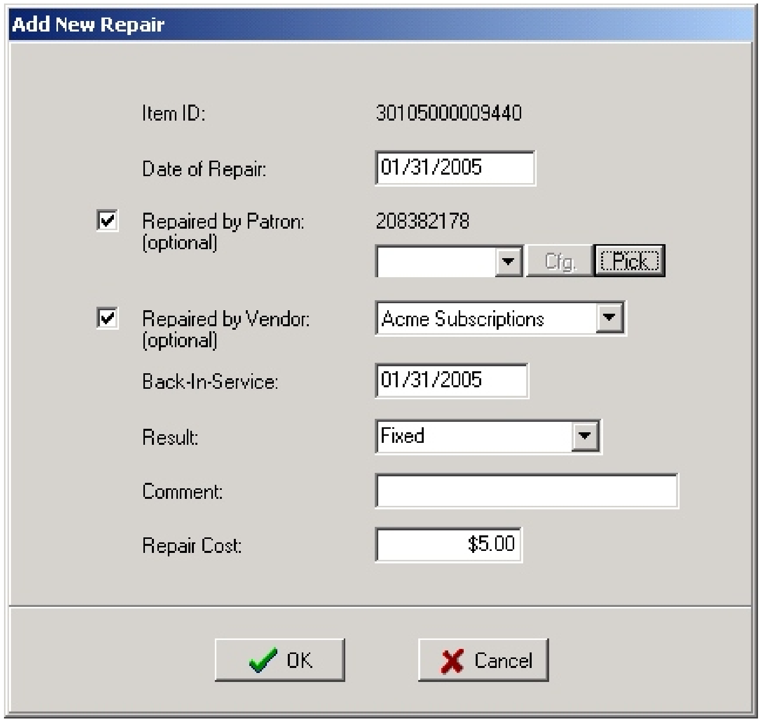

Figure 5-6. The Add New Repair window

To Edit or Delete repair notes:

1. On the **Utilities** menu, select **Item Repair History**. The **View Repairs** window displays.
2. Click the entry that you wish to edit or delete, and then click the **Edit** or **Delete** button as appropriate. A Supervisor Override password may be required.
3. An **Are you sure you want to do this?** message will ask you to confirm that you want to delete or edit the selected item. Click **Yes** if you wish to proceed.
4. If you are:
   - **Editing** the entry, the **Add New Repair** window will display the selected entry, ready for editing of any fields. Click **OK** when done.
   - **Deleting** the entry, you will be asked to confirm again that you wish to delete the item. Click **Yes** if you wish to proceed.

5.5 Holds Shelf

Use the **Holds Shelf** utility to manage the "arrived" holds shelf. View a list of arrived holds, cancel an arrived hold, or change the status of an arrived hold to "PE" (Pending) and assign it to another borrower. You can also override an arrived hold during Check Out.

Holds and Item ID (barcode) linked: In Circulation V3.2 and higher, items on hold (HD status) and items in-transit (T) to fill a hold are linked to a specific item (barcode). For title holds, the Item ID column of the Arrived Holds Shelf form will now display a barcode instead of ANY COPY. If a copy is checked out to a borrower, and that copy was on hold for another borrower, a new Arrived Hold slip will be printed for the borrower whose copy was checked out, and that slip will reflect a new Item ID   This slip should be placed on the holds shelf with the appropriate copy of the title.

Filling Holds with local copies: In Circulation v3.3, a new Library•**Solution** System Configuration option (Fill Local Holds First) allows administrators to specify that holds to be picked up at a particular library will be filled by that library's copies BEFORE any holds placed by other borrowers are filled with copies from that library. In previous versions, holds were satisfied based solely on a hold's position in the Holds Queue.   See the Library•Solution*System Configuration Reference Manual* for more information.

To view and work with **Holds Shelf** items:

1. Select the **Utilities | Holds Shelf** to display the **Arrived Holds Shelf** window (Figure 5-7). A list of all titles currently on the "arrived" holds shelf appears in the window. The list includes Title, Item ID (barcode number), Patron name, number of Days on Shelf, and number of PE (pending) holds.

2. To remove or reassign an item to another borrower, select the item by clicking it in the **Title** column. Then select a button on the lower part of the window to **Cancel Hold** or Change **Status to PE**. The buttons have the same security features as for other checkout overrides, and access depends on the current user's security rights.

Instead of using the buttons, users can right-click on an item in the **Title** column, and a popup menu containing the options **Cancel Hold** and **Change Status to PE** will appear. Select from the menu.

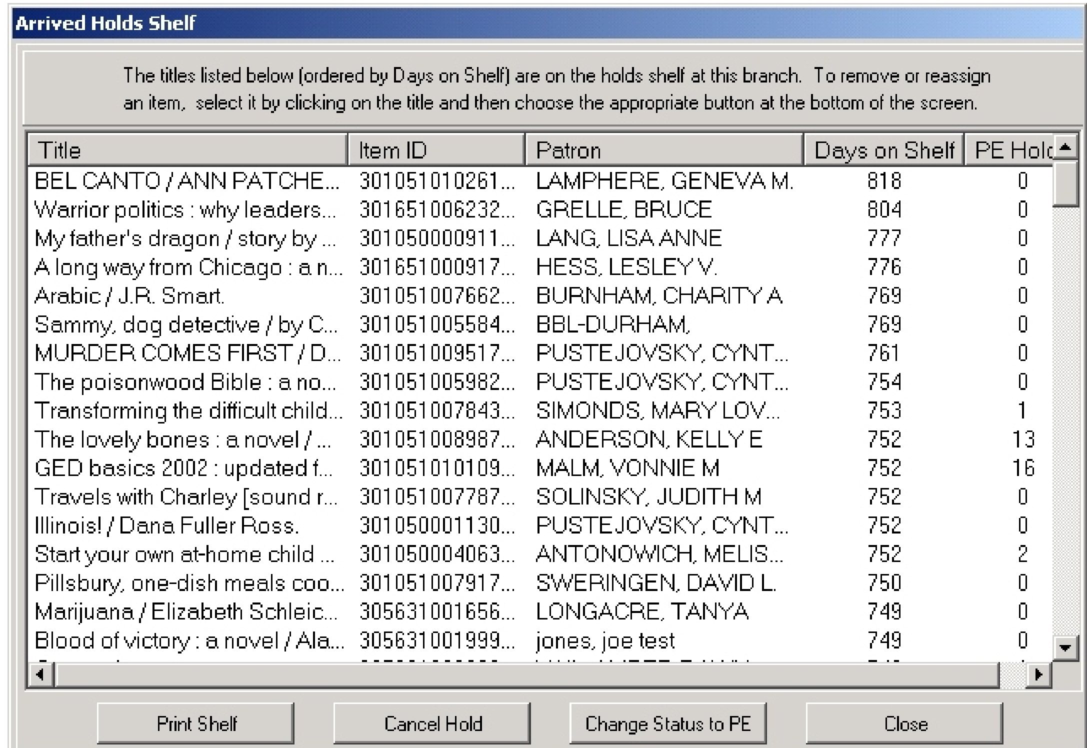

Figure 5-7. The Arrived Holds Shelf window

- **Cancel Hold:** If you choose this button, a confirmation box will appear, asking you to confirm that you want to cancel the item. Then a **Relocate Item** box will pop up, asking you what to do with the item. This is followed by another box reminding you to notify the borrower that the hold has been cancelled.
- **Change a hold to PE (pending) status from AR (arrived):** When you do this, the item will become available for another borrower. A new form will display, asking you to enter a new priority for the hold. The default will be "1" plus whatever the original priority may have been. For example, if the priority was "5," the new priority will be "6." You can enter only "1" through "10" in the edit box.

If you click **Cancel** here, no change will be made to the hold. If you click **OK**, the hold will be changed to the **PE** status, and the next borrower in the holds queue will be assigned the item. A **Relocate Item** box will appear telling you where to send the item, followed by a box telling you to notify the original borrower of the status change.

To sort items in the Arrived Holds Shelf list:

1. The default sorting of items in the list is descending order by [number of] **Days on Shelf**. Users can reorder the list by clicking another column heading. Click once for ascending order, and click again for descending order. For example, to see the list arranged alphabetically by title, click the **Titles** column once.

2. To exit the list, click the **Close** button.

To Print the Arrived Holds shelf list, Click the **Print Shelf** button after selecting the desired "sort by" column heading.

5.6 Branch Statistics

Use the **Utilities | Branch Statistics** option to display the **Branch Statistics** window (Figure 5-8), where you can view current statistics for your branch on:

- Number of Arrived Holds
- Number of Items Checked Out
- Number of Items Lost
- Number of Patrons
- Number of Titles

Note: The query that generates this information reviews all data for your library and can take several minutes.

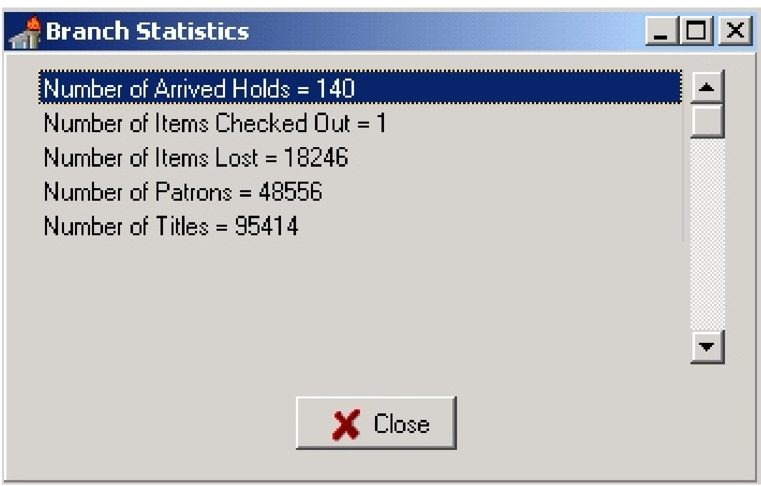

Figure 5-8. The Branch Statistics window

Contents Index

5.7 Loan/Payment History Purge

Use this option to purge Loan History and / or Fine History entries. Entries older than the Purge Date will be removed. For Loan History purges you can selectively remove entries by Branch or All Branches, and also by Agency (Borrower) Type.

To purge Loan and Payment History entries:

1. Log on as system_administrator. On the Utilities menu, click **Loan/Payment History Purge**.

2. The **Loan/Payment History Purge** dialog will display (Figure 5-9). You can choose to purge both Fine and Loan History entries, or either one separately. Only the fields for the checked option(s) will accept input.

3. **If you wish to purge Fine History** entries, click the check box to the left of Fine History Purge. A check mark will display and the date field is now available. In the entry box type the **Purge Date**. (All items dated up to and including the entered date will be purged.)

4. **If you wish to purge Loan History** entries, click the check box to the left of Loan History Purge. A check mark will display and the associated fields will accept input.

   - In the entry box type the **Purge Date**. (All items dated up to and including the entered date will be purged.)
   - On the **Agency Types to Purge** list select the types you wish to purge. (To select multiple entries, press and hold the CTRL key while clicking each desired entry.)

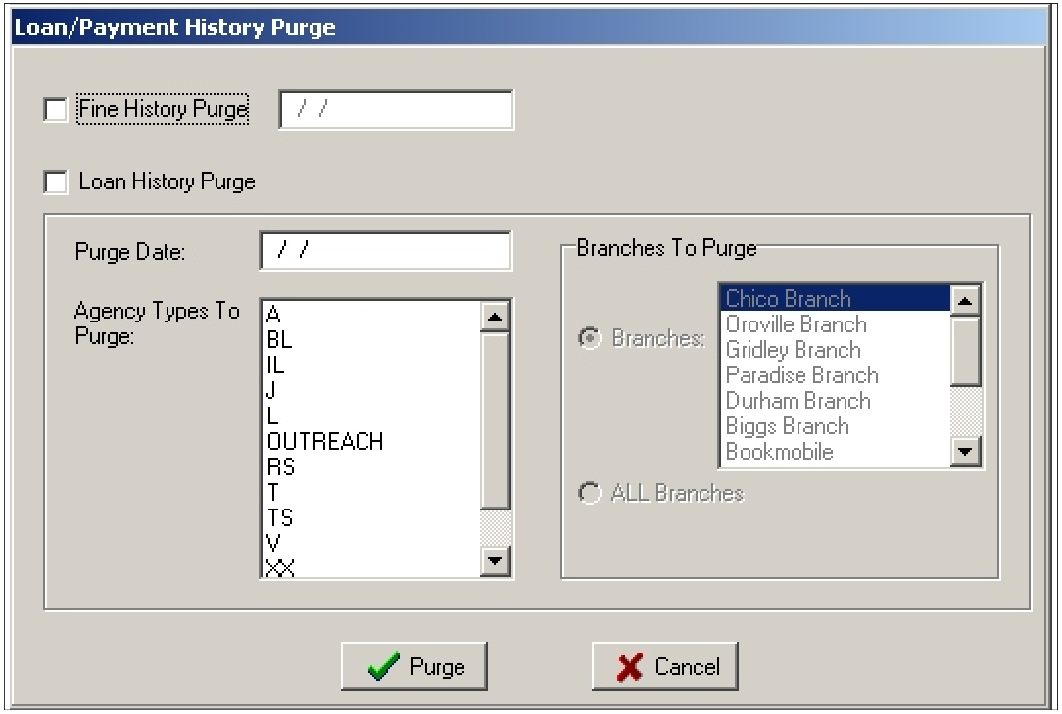

Figure 5-9. The Loan Payment History Purge window

- On the **Branches to Purge** list click the Branches or All Branches option button as desired. (If you select Branches, you can select multiple entries by pressing and holding the CTRL key while clicking each desired entry.)

  Note: The **Branches to Purge** options are available only to users logged as System_Admin.

5. When you are satisfied with the selections made, click the **Purge** button.

6. You will be advised the history has been purged. Click **OK**.

5.8 Lost Item Charges Purge

Users with the system administrator (system_admin) login can use this Utilities menu option to purge Lost Item Charge entries. Entries up to and including the Purge Date will be removed.

To Purge Lost Item Charges

1. Log on as system_administrator, on the Utilities menu, click **Lost Item Charges Purge**.

2. The **Lost Item Charges Purge** dialog will display (Figure 5-10). Type the desired purge date.

3. Click the **Delete** button to delete all entries up to and including the Purge Date.

4. You will be advised the lost item charges have been purged. Click **OK**.

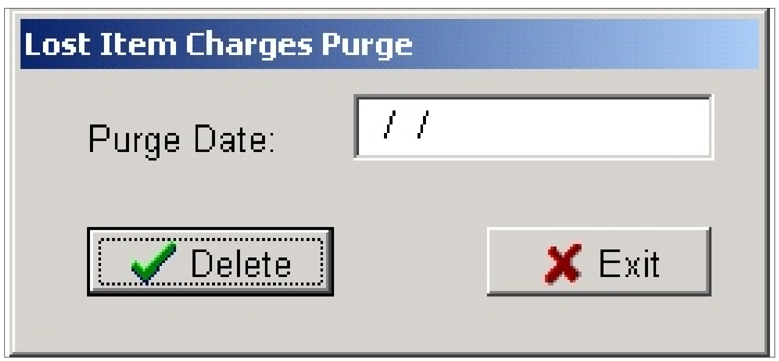

Figure 5-10. The Lost Items Charges Purge window

5.9 Check In/Out Notes

The **Check In/Out Note Editor** window (Figure 5-11) enables Circulation users to add, edit, or delete these notes, without having to use Cataloging. You can search for a specific item (barcode). The title, barcode, library and collection descriptions, and the current note (if any) are displayed. Add, edit, or delete the note. Users can also choose whether or not the notes should be displayed during checkin and checkout. In the same Circulation dialog, change the setting in the “Show Note” field check box. By default the box is checked, meaning to display the note.

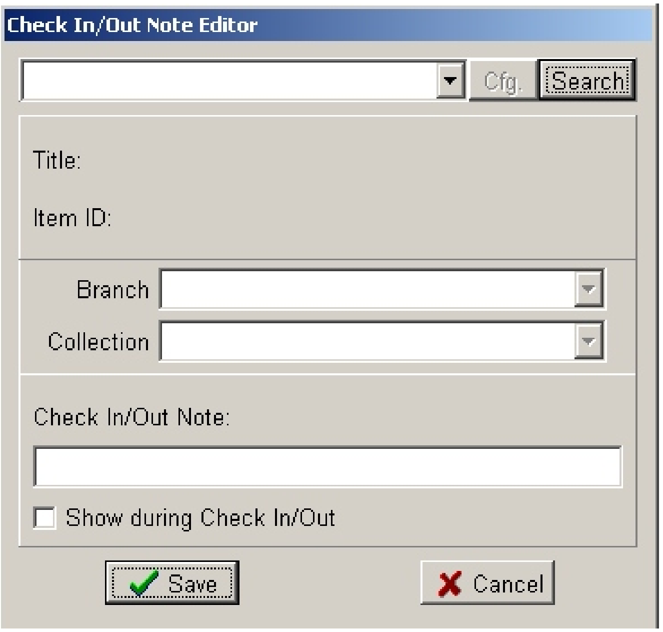

Figure 5-11. The Check In/Out Notes Editor

To Add or Edit Check In / Out Notes:

1. On the **Utilities** menu, select **Check In / Out Notes**. A blank Check In / Out Note Editor dialog will be displayed (Figure 5-11).

2. Type a title search term in the entry box and click the **Search** button.

3. The **Search by Title** screen will display the search results.

4. Select the desired title from the list and click **OK**.

5. The Title, Item ID, Branch, and Collection information will display in the dialog. If a note currently exists for this title, the **Check In / Out Note** field will display the current note.

6. In the **Check In/Out Note:** entry box, type the new note, or revise the current note as desired.

7. By default the **Show during Check In/Out** check box is checked. The note will be displayed during Check In/Out. **Note:** To disable the display of this message, click the check box to remove the check mark.

8. When done click the **Save** button. You will be advised the note has been saved. Click **OK**.

9. The **Note Editor** will redisplay if you wish to add another note. Click **Cancel** to exit.

5.10 Reset Form

If you are using a screen resolution larger than 640 x 400, you can stretch the Circulation window by dragging a corner or edge to fill the screen area. The screen will resize to fill the available space and lists (like **Items Out** on the F2 tab) will have more space to display titles, etc. The **Reset Form** option will return the screen to its default size.

5.11. Delete Patron Records

The **Patron Delete Utility** enables authorized Circulation users to batch delete all borrower records of a selected Patron Type (or multiple selected Types), when the borrower registrations have expired (or will expire) on a specified date.

Tip: The Utility is a separate program outside of the main Circulation program. TLC recommends that authorized staff run it from Windows Explorer (instead of creating a shortcut on the desktop or adding it to the Library•**Solution** Start menu) to prevent accidental use of this powerful tool. See more notes and tips below.

Warning: Once borrower records are deleted they cannot be recovered. Be sure to run system backup BEFORE using this utility.

To run and use the Patron Delete Utility:

1. Go to the Windows Explorer, find the **PatDelete.exe** program (in the ...\circ folder with the Library•**Solution** Circulation program). Double-click the file.

2. In the Login window, you must login with the User Name "SYSTEM_ADMIN" and enter the correct Password. After login, the **Patron Delete Utility** window appears (Figure 5-12).

3. First, you can choose to limit by **Patron Type** which borrower records will be deleted. If you click in the check box next to **By Patron Type**, select at least one Type from the list box. Select more than one type at a time by holding down the **Ctrl** key while clicking each Patron Type

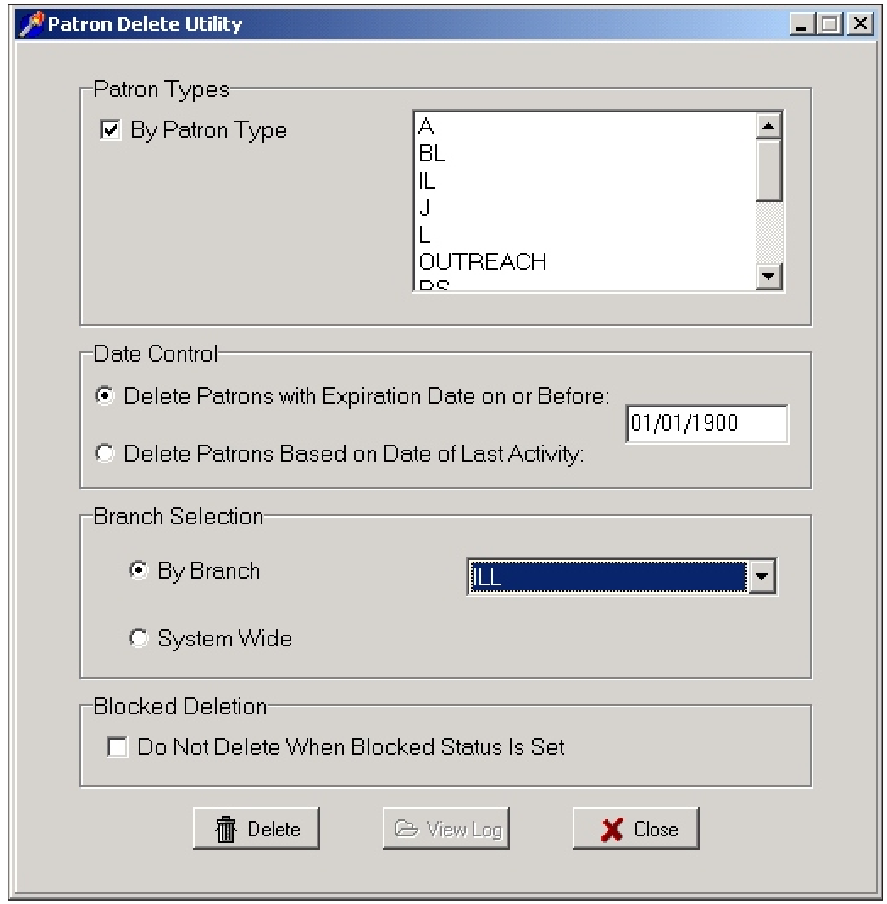

Figure 5-12. The Patron Delete Utility window

you want. (If the box is cleared, the deletion process will not consider Patron Types.)

4. Next, under **Date Control** click the desired option button and enter an expiration date in the date entry box.

   The choices are:

   - **Delete Patrons with Expiration Date on or Before** [date]
   - **Delete Patrons Based on Date of Last Activity** [date]

   Note: As a safety precaution, the default Expiration Date is 01/01/**1900**, in case a user runs the program and clicks the **Delete** button accidentally.

5. In the Branch Selection area, you can choose to delete borrower records for a selected Branch, or select System Wide (meaning borrower records with the selected Patron Types at all libraries).

   If you choose **By Branch**, select a library by clicking on the down arrow and selecting a library from the list. (Note: Branch refers to the **Issuing Branch** field in each borrower's record.)

   If you choose System Wide, a beep will sound, and a red warning message appears next to the S**ystem Wide** button: "Warning: This setting deletes [borrower records] from all branches."

6. Under **Blocked Deletion** click the check box to enable the "Do Not Delete When Block Status is Set" option. When this box is checked, any borrower with blocked status will not be deleted. However if the box is not checked the borrower will be deleted.

7. After selecting the options you want, click the **Delete** button. A message window displays information about what will be deleted, for example: "This will DELETE all borrowers of type(s): 'XXX' with Expiration Dates on or before: [date]. FOR THE ENTIRE SYSTEM [or for specified Branch]. The error log will be overwritten if any errors are detected."

   If you want to cancel the deletion process now, click the **Cancel** button on the lower portion of the **Deletion Information** box. This will redisplay the main form, and no borrower records will be deleted. If you click OK, the program will begin deleting borrower records.

8. When all the borrower records marked for deletion have been run through the program, a message appears, for example: "16 patrons were deleted." To close the message box, click **OK**.

   If some eligible borrower records were **not** deleted, the message may look like this example: "472 patrons were deleted. 56 patrons were not deleted. Do you wish to view the error log?" Click **Yes** to view the log. The log text, displayed in Notepad, includes borrower IDs (barcodes), borrower names, and a message: "Patron cannot have items out or active.

Notes and tips:

- Borrower records will not be deleted if borrowers have books checked out, pending or arrived holds, or outstanding fines, or if they have been marked as "responsible" for other borrowers. When the "Do Not Delete When Block Status is Set" box is checked, any borrower with blocked status will not be deleted. However, if the box is not checked, the borrower will be deleted.
- To clear borrowers who are responsible for other borrowers, run the program twice. This statement assumes that the borrower records to be deleted and borrower records responsible for them have all expired, that the borrower records of both groups are of the selected Patron Types in the deletion utility, and that there are no pending transactions on either group. The first run of the delete utility removes the dependent borrower records, and the second run removes the "responsible" borrowers.
- The **View Log** button is available in the **Patron Delete Utility** program, but the button is not available until the program has deleted borrower records for the first time. After it is run for the first time, the log will be overwritten with a new list of borrowers it could not delete. If it doesn't find any borrower records to delete, the log will stay the same. The log is overwritten each time the delete utility runs and locates borrower records it cannot delete.

6. Reserves Tools Menu options

Use the **Reserves Tools** option to review information about all reserves or to remove items from reserve easily.

Note: Reserves are materials set aside for a special use by a borrower (usually an instructor in an academic library), for example, for required reading for a course. Circulation staff can also use reserves to specify special shelving locations, for example, for "New Books" or seasonal displays such as "Halloween Books." Special checkout periods and overdue fines are usually assigned to the items. A reserve is not the same as a "hold." To learn how to place items on reserve, click here.

6.1 View Reserves

Use **View Reserves** option to see a complete summary of information about all items on reserve. Full details are displayed, including item status and date/time due. You can rearrange the display by any of the elements, for example, by **Course**, by clicking on that column. You can also edit a selected reserve.

To view or edit reserves:

1. Select the **Reserves Tools | View Reserves** option to open the **View Reserves** window (Figure 6-1).

2. To view the reserves for this library only, click the check box beside **Show Current Branch's Reserves Only** (at upper left). To reorder the elements in the display, for example, to arrange the list by title, simply click on that column.

3. To edit a reserve, double-click the Instructor column. This takes you to the **Reserves** tab of that instructor (borrower) on the **Patron Transactions** tab.

4. To close the display, click the **Close** button.

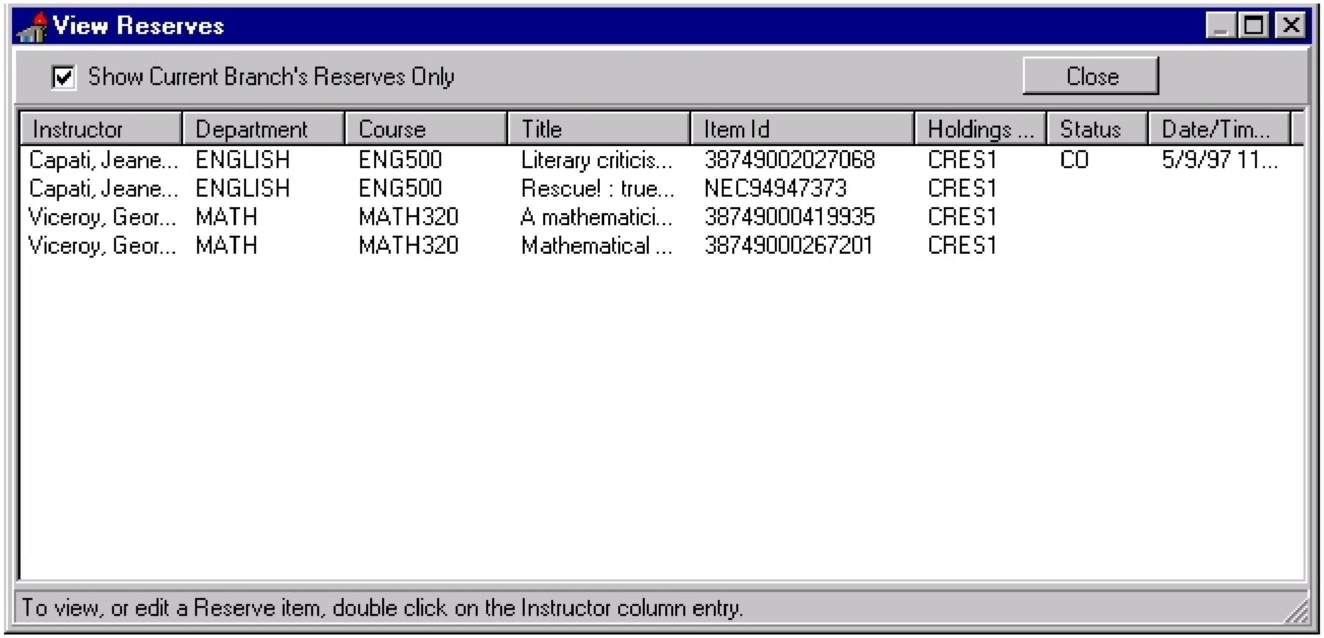

Figure 6-1. The View Reserves window

6.2 Remove Reserve Items

Use the **Remove Reserve Items** option to remove items from reserve quickly. You can simply scan barcode labels on the items. You do not have to search first for the borrower who placed the item on reserve. When you remove an item from reserve, it automatically reverts to the Circulating Branch and Collection used before it was placed on reserve.

You can also remove an item from reserve through the **Patron Transactions** tab F2. Search for the borrower who placed the item on reserve, select the **Reserves** tab, select (highlight) the item on the **Reserves** tab, and then select the **Remove** button.

To use the Remove Reserve Items utility:

1. Select the **Reserves Tools | Remove Reserve Items** option to display the **Take Items Off Reserve** ... window (Figure 6-2).

2. Scan the barcode label, or type the barcode number. If you type the number, press **Enter** or select the **Take Off Reserve** button. A message will inform you that the removal was successful. Then a **Relocate Item** window will remind you to reshelve the item in its correct location, transfer it to another library, or place it on the holds shelf, as appropriate.

3. To remove another item, simply scan or type the number.

4. When you have finished removing items from reserve, exit the dialog by selecting the **OK** button.

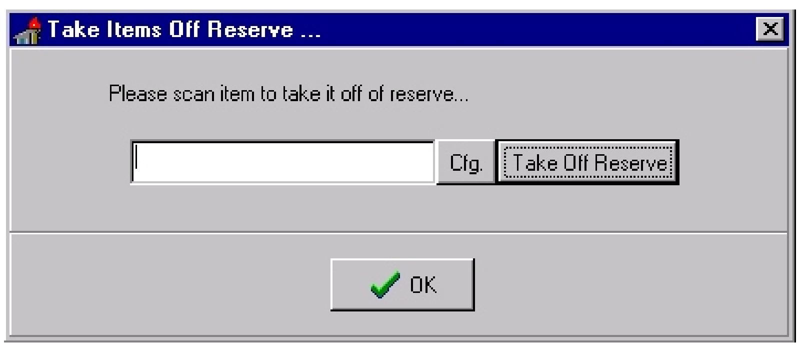

Figure 6-2. The Take Items Off Reserve... window

7. Help Menu Options

7.1 Contents

Use the **Help Menu | Contents** option to display the table of contents for Circulation **Help** (Figure 7-1). Click on an underlined item to jump to the relevant topic, or use the **Index** feature at the top of the page to search for key words in Help.

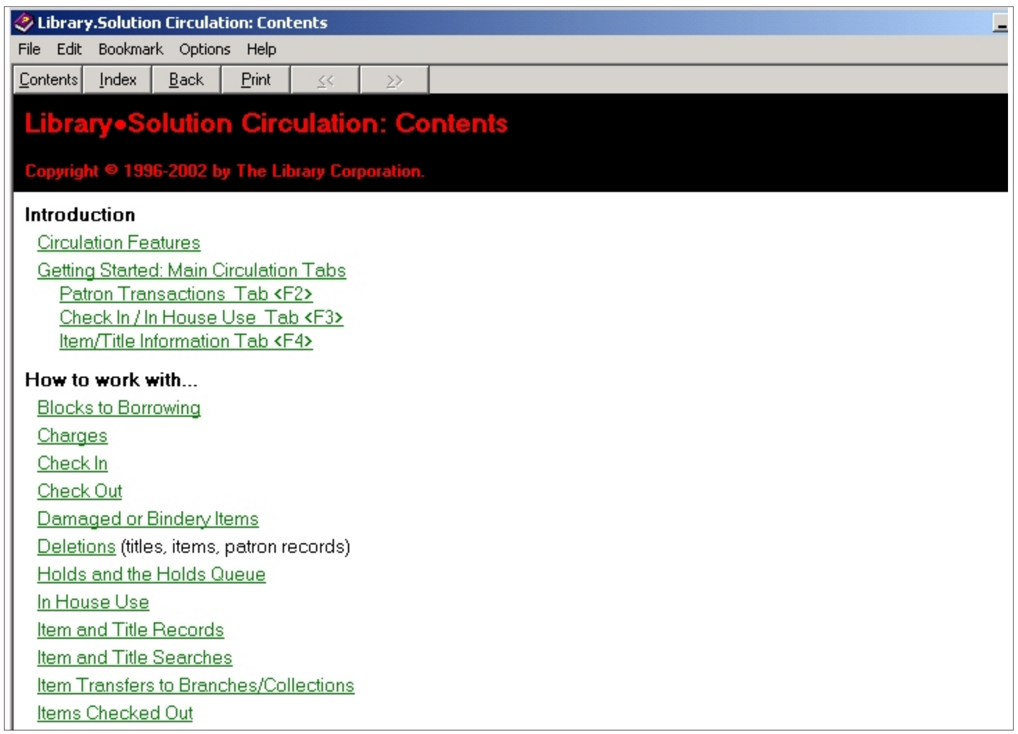

Figure 7-1. The Help Menu | Contents window

7.2 About

Select the **Help | About** option to display the **About Circulation** window (Figure 7-2), where you can view the **Program Version** and **Database Version** of Circulation.

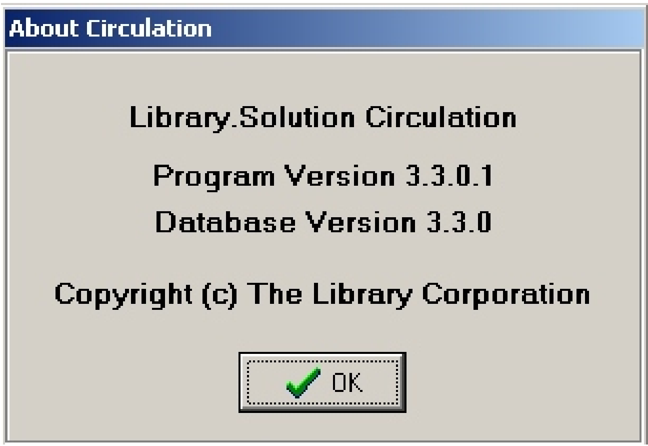

Figure 7-2. The About Circulation window

8. Circulation Utilities Programs

The following Circulation utilities are available from the **Start | Library•Solution | Circulation Utilities** menu:

- L.S Circulation Generate Overdues
- L.S. Circulation Server Down
- L.S Inventory
- L.S. Outreach Manager
- L.S Route Config
- L.S Vendor Editor
- Debt Collection Module

8.1 L.S Circulation Generate Overdues

Use the **Library·Solution Generate Overdues** utility to produce data that can be used in notices and reports.

Briefly, producing overdue notices based on the configured overdue notice intervals for your library is a multiple step process in which you:

- Use the **Library·Solution Generate Overdues** module to compile overdue notice data.
- Use the **Library·Solution Reports** module to run and print the notices.

To generate overdue notice data:

1. Go to the Windows **Start** menu and select **Library·Solution** and then **L·S Generate Overdues**.
2. On the **Database Login** window, type the password. Click **OK**, or press **Enter**.

3. In the **L.S Compile Overdue Notice Data** window (Figure 8-1), select the library (or click the **Process All Locations** check box for all libraries). To see the library list, click the down arrow in the **Branch** text box.

4. **Effective Date:** The system date is displayed by default in the Effective Date entry box. To change to an earlier date, type the desired effective date, or click the drop-down arrow to view a calendar to choose the date. ***Please read the following information before entering a date.***

   Generate Overdues uses the **Effective Date** setting when determining which overdue items should have a notice generated. Overdue notice intervals are determined by the **Notice Interval** in **Branch Setup** (or the override interval in **Setup Types and Codes**). If an overdue interval of seven (7) days is setup, the **Generate Overdues** program will check to see if the **Due Date** is seven or more days prior to the **Effective Date** before generating a first overdue notice for the item. If a notice was previously generated, the program will check to see if the **Last Notice Date** is seven or more days prior to the **Effective Date** before generating a follow up notice (assuming the library has configured the system to send more than one overdue notice).

   Example: The **Effective Date** is used when a library wishes to process overdue notice data "as if" it were a different date than the current computer date. If your library always runs Generate Overdues on Tuesdays with a 7 day notice interval, it is important to keep the interval intact when the library is not open on a specific Tuesday (perhaps it was closed for a holiday or snow day).   When the staff returns on Wednesday (or even Thursday), the person running Generate Overdues will be able to enter Tuesday's date as the override date and the program will process the overdues "as if" it were Tuesday.

5. If necessary, modify the **Message to Patron** to be printed on the notices. **Note:** The message size is limited to 250 characters.

6. To begin compiling notice data, click the **Start** button. A "please wait" message tells you that the process may take some time. Remember, you can use the Windows **Alt+Tab** key combination to return to another application to continue working, if you wish.

7. After the data has been compiled, the wait message disappears. To exit **Generate Overdues**, select the **Cancel** button.

8. **Run and print notices:** Now you will need to run the notices and then print them. To do this, go to the **Start** menu and select **Library·Solution | L·S Reports**.

   Caution: Run and print notices as soon as you have generated the notice data. If you should happen to compile the notice data again before printing the notices that were compiled the previous time, the first batch of notices would be lost. (Each time you compile, the count of the number of notices in each item record is incremented.)

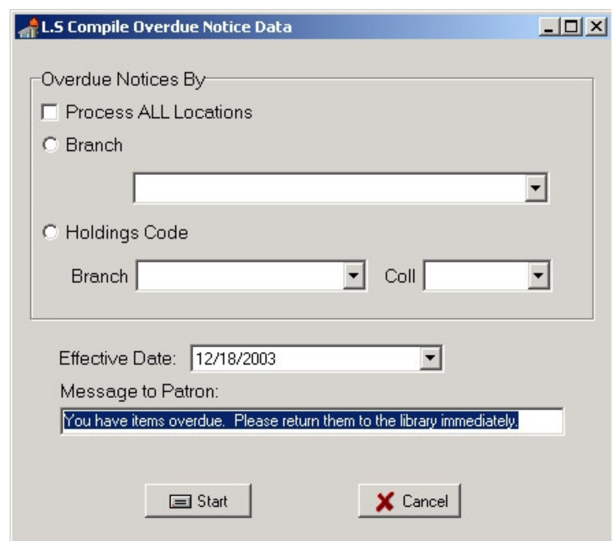

Figure 8-1. The L.S Compile Overdue Notice Data window

8.2 L.S Circulation Server Down

NOTE: A major change has been made to the Server Down program for Circulation v3.3. Click here (or go to p. 281) for more information.

If the Library•**Solution** data server is not operational, you can the use the **Server Down Circulation (SDC)** program to continue Circulation check out and check in activities.

You can also use this utility to process **In House Use**. The Server Down Circulation utility (**ServerDown.exe**) is automatically installed on a workstation when Library•**Solution** Circulation is loaded (or updated).

The program is saved into the following folder:

\program files\the library corporation\library.solution\circ.

NEW!! - The **Server Down Circ Recovery** utility has been eliminated. New in Library•**Solution Circulation v3.3**, the **Server Down Circulation** interface contains menu options to perform the uploading and posting of transactions generated during the use of the **Server Down Circulation**.

If you prefer, you can run SDC on any PC-compatible computer loaded with Windows 95/98/2000 or Windows NT and that has a keyboard wedge type scanner. Use the Library.Solution Installation disc to install the Circulation client on the computer you wish to use. It is best if the computer can be attached to your network, but if not, you can copy the data file that it creates to a disk and transfer it to another workstation that IS on the network to process your transactions.

The SDC transactions will be saved to a database file named **TRANSACTIONS.DBF** on the hard drive in the same folder as the SDC program (See above). When you post the SDC data to your database two log files are produced; these files can be found in the folder where the "Circulation" program is stored (usually the same folder as noted above).

Important! Since SDC was designed for use when there is a problem with the server, you should become familiar with the procedure before an emergency situation occurs. With it, your staff will be able to continue checking materials in and out of the library with no delay.

8.2.1 Menu Selections

The toolbar on the main screen includes **File** and **Utilities** options.

8.2.1.1 File

To Edit the Server Down Circulation Settings:

1. Click **File | Settings**.

2. The **Settings** screen will display (Figure 8-2). Make chages as appropriate to the following fields:

   - **Server IP -** The Internet Protocol (IP) address of the Circulation Server
   - **Server Port -** The Port number of the Circulation Server
   - **Instance -** The Oracle Instance (SID)
   - **Branch Number -** As assigned by library administrators
   - **Station Prefix -** As assigned by library administrators
   - **Use Alternate IDs -** If your library makes use of Alternate IDs, click the gray check box to select it. A check mark will display.
   - **Print Check Out Slips -** If you wish to print slips to your configured printer, click the gray box to select. A check mark will display.

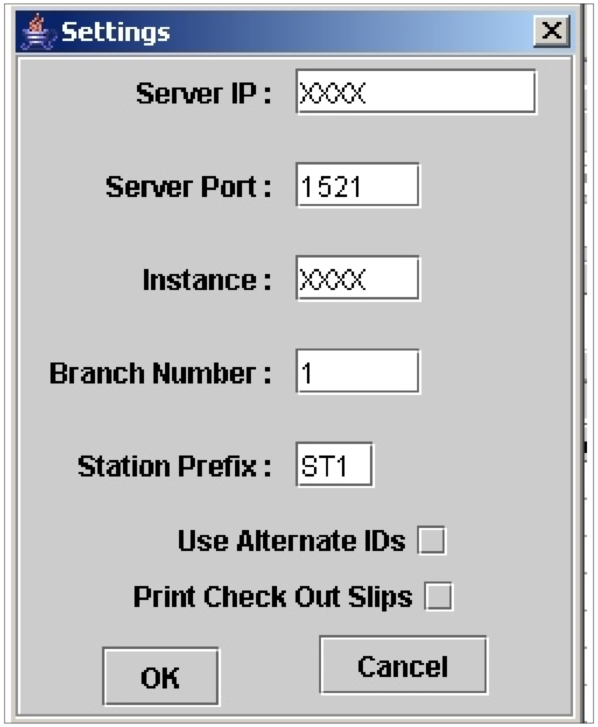

Figure 8-2. The Server Down Circulation Settings window

8.2.1.2 Utilities

The **Utilities** menu on the **Server Down Circulation** main screen displays two options: **Sync Transactions** and **Import Scanner File**.

- **Sync Transactions:** This option allows each Server Down Circulation station to Upload its transactions to the server before the administrator "finalizes" the transactions.

  Sync Transactions and **Finalize Transactions** create log files and error log files (sync.log, sync.err, finalize.log, finalize.err) when they are executed . To view these files use a text editor (NotePad, WordPad etc.) to open them. The files are normally found in: **C:\Program Files\The Library Corporation\Library.Solution\Circ**.

- **Import Scanner File:** This option allows for importation of a file of scanned records created by the Percon Scanner.

To Sync Transactions

1. Click **File | Utilities** and then click **Sync Transactions** to reach the SDC Utilities menu.

2. The **Sync Transactions** dialog will display with the **Upload Transaction** option selected by default. Click **Sync** to upload the transactions. A **Sync Complete** notice will display advising the "Transactions have been synced to the database". Click **OK**.

3. Administrators will have the option to **Finalize Transactions**. See the next section for instructions.

To Finalize Transactions

1. Log on as **circ_admin**.

2. Click **File | Utilities** and then click **Sync Transactions**.

3. The **Sync Transactions** dialog will display. If all transactions have been uploaded from all stations, click **Finalize Transactions**.

4. A **Sync Confirmation** message will ask "Have transactions from every station been synced up to the database?." Click **Yes** to continue or **No** to return to the SDC main screen.

5. A **Sync Complete** message will advise "Transactions have been synced to the database." Click **OK**. If errors are encountered the following error message will display instead. Click **OK**.

6. The main **Server Down Circulation** screen will return. Exit or proceed as desired.

To Import a Scanner File

Important! - Before you begin: The Import Scanner File utility program will use the Branch #, Station Prefix, and User information as displayed on the main SDC screen to automatically populate that information in the imported scanner file records. **Be sure the desired information is in place in those three fields of the main screen BEFORE selecting the scanner file to import.**

1. Click **File | Utilities** and then click **Import Scanner File**.

2. An **Open** dialog will display. Navigate to the file you want to Import. Type the file name, or click the file name and it will display in the **Open** entry box. Click **Open** when the desired file name is displayed.

3. An **Import Finished** message will advise "Importing of scanner file to the database is complete." Click **OK**.

8.2.2 Using the Server Down Circulation Utility

If the Library•Solution data server (or your network connection to that server) is not operational, you can the use the **Server Down Circulation (SDC)** program to continue Circulation check out and check in activities. SDC can also be used on a bookmobile.

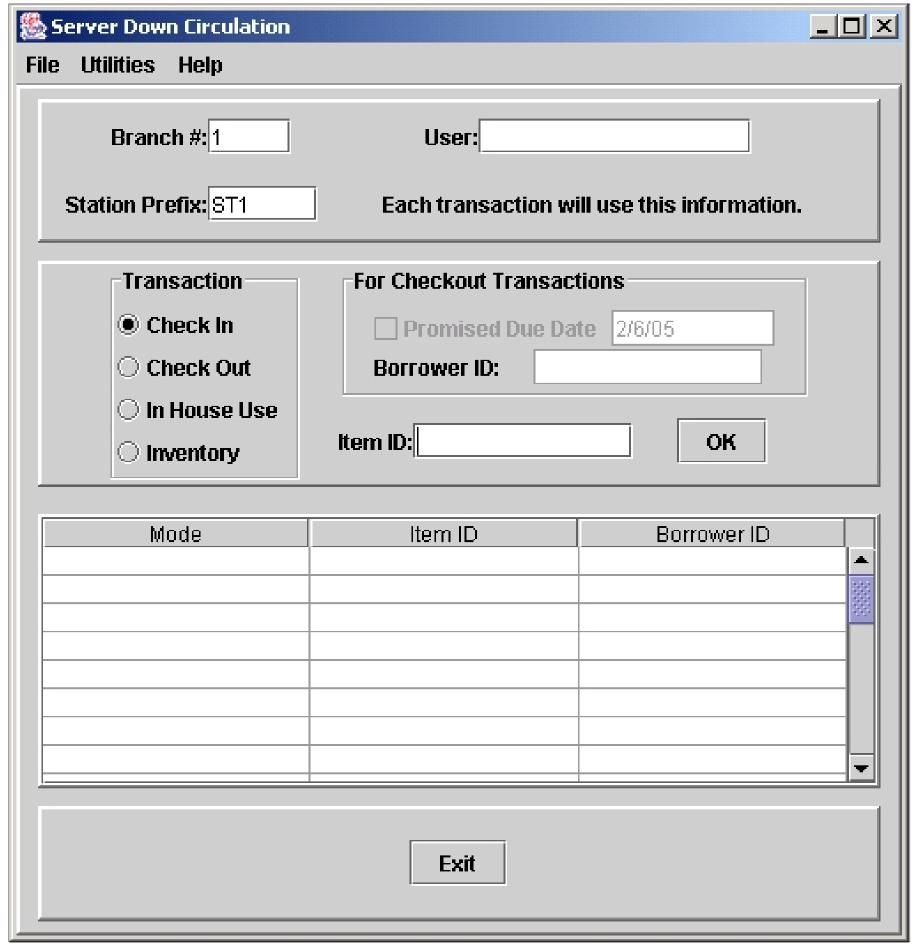

Figure 8-3. The Server Down Circulation window

The program is saved into the following folder:

\program files\the library corporation\library.solution\circ

Using Server Down Circulation

- **Menu Options**
  - File Menu - Edit Database and Station options.
  - Utilities Menu - Upload station transactions to the server, and Post those transactions to the database, after the server is back up.

To Run SDC: Do This first

When a problem with the Library•Solution system data server occurs, follow the steps below to run SDC:

1. Boot a Circulation station or any computer that has SDC loaded, and a keyboard wedge scanner attached.
2. **IMPORTANT!** Check the date and time set on the station. Confirm that every station running SDC is set to the same date and time.
3. Click **Start | Library.Solution | Circulation Utilities | L.S Server Down Circ** to start the program.

4. The first time you use this program, click the **File** menu and choose **Settings**. Enter the **IP address** of your Library•Solution dataserver and **Instance Name** of your database (check with TLC Support if you do not know the instance name). (**Note:** Do NOT change the default setting for the Server Port.) Set the other setup options to suit your needs. The L.S Server Down Circulation window is shown in Figure F8-3.

5. **The L.S Server Down Circ** window will open. (For more information about the Transaction area and Check In see: Server Down Circulation:Check Out / Check In Items)

6. **Setup:** Enter data in the two fields on the upper left of the window, as described below. (**Note:** these fields are automatically filled in based on the Settings choices made earlier, but can be overridden for a specific session.)

   Use the **TAB** key or **SHIFT + TAB** to move forward or back through the fields (or use the mouse). Then see the following sections for details on each type of transaction: Check Out, Check In, In House Use, and Inventory.

   - **Branch #:** Enter the Library•Solution Branch number for this library (up to 4 digits).
   - **Station Prefix:** Enter a number which should be unique for each station, for example, ST1 for check out station #1.
   - **User:** If you normally use a generic Circ user login, leave this field empty. If you normally use a specific user name, enter that in this field.

8.2.3 Check Out / Check In Items

Checking Out Items

1. Enter the **Branch number**, **User name**, and **Station Prefix.**

2. **Select transaction:** In the **Transaction** area , select **Check Out**. When **Check Out** is selected, the **Promised Due Date** check box under **For Checkout Transactions** is enabled.

3. **Borrower ID:** In the **Borrower ID** field, type or scan the patron's ID number (barcode number). Since the Library•**Solution** server is unavailable, you will not have access to patron records by name or access to items by title. You must enter patron and item transactions by barcode number. If you scanned the barcode label, an automatic carriage return at the end of the scan will move the cursor to the **Item ID** field.

   Important! If this is your first transaction, be sure to enter a due date! If you have just entered the Borrower ID for a new borrower, check the due date to be sure it should be the same as used for the previous borrower's transactions. See the next step.

4. **Promised Due Date:** To enter a due date, click the check box to the left of Promised Due Date (if the check mark is not present). This makes the date entry field available. (See notes below)

   Enter a due date for the next item(s) to be checked out. Type the date in this format: **mm/dd/yyy**y (will accept 4 digit year). Example: For **May 7, 2005**, type: **05/07/2005**.

   Note: If you do not check the box and enter a **Promised Due Date**, the system will calculate the due date based on the rules setup for the Patron type and collection code when the server down data is posted to the database later. It will use the date and time of the actual checkout and calculate the due date from that date/time.

   Warning: If the uploading of the server down data is delayed a long time, some items may be overdue as soon as they are posted.

5. **Item ID:** Scan or type the barcode number of the item to be checked out. If you typed the number, press **Enter** or select the **OK** button. If you scanned the label, an automatic carriage return at the end of the scan will save that transaction.

   Repeat for all items being checked out to this borrower. If necessary, you can change the **Promised Due Date** if the borrower is checking out different types of material with different check out periods, or you can leave the **Promised Due Date** box unchecked and let the system calculate the due date when the data is posted.

6. To switch to another borrower, press **Esc**. This moves the cursor to the **Patron ID** box and highlights (blue) the current ID. Scan the next borrower's barcode label, or type the number.

Checking In Items

1. Enter the **Branch number** and **Station prefix**.

2. **Select transaction:** In the **Transaction** area on the lower left, select **Check In**. When **Check In** is selected, the cursor moves to the **Item ID** field.

3. **Item ID:** Scan or type the barcode number of the item to be checked in. If you typed the number, press **Enter** or select the **OK** button. If you scanned the label, an automatic carriage return at the end of the scan will save that transaction. Repeat for all items being checked in.

About overdue items: If items are overdue, the system will not recognize this condition until these transactions are loaded to the server. (The effective checkin date/time will be that recorded in the server down data file when the item was actually checked in.) Overdue fines will not be lost. They are calculated when the file is uploaded to Circulation, and fine amounts are then added to the Charges tab of the relevant borrower records.

In House Use / Inventory

You can use **Server Down Circulation** (SDC) to gather **In House Use** data or to perform **Inventory**. However, it is usually recommended that these transactions be recorded using a portable scanner/storage unit.

To perform **In House Use** or **Inventory**, follow the **Check In** instructions above, but in step 2 select In **House Use** or **Inventory** instead of **Check In**.

Warning: If you are using SDC for gathering inventory data, **DO NOT** mix other types of SDC activities in the same output file. You should upload all of your checkout, checkin, and in-house use data to the server (or rename the **UPLOAD.SD** output file to something else) and then start a fresh UPLOAD.SD file for Inventory transactions.

8.2.4 SDC Log and Error Files

During the time that Server Down Circulation is used certain files are created to capture those transactions and related information. When normal Circulation functionality is restored, the transaction information contained in those files must be recovered and inserted in the Circulation database.

Here are some important details about the Server Down Log, Error, and Transaction files. The files are normally found in: C:\Program Files\The Library Corporation\Library.Solution\Circ.

SDC Log and Error Files

- **Sync Transactions** and **Finalize Transactions** each generate a log file (**SYNC.LOG**, **FINALIZE.LOG**) and an error log file when they are executed. These files are saved in the same location as noted above.
- If errors are reported in the log, you should view the appropriate error log (**SYNC.ERR**, **FINALIZE.ERR**).

8.2.5. Description of SDC Transaction File: TRANSACTIONS.DBF

The **Server Down Circulation** transactions are saved into a text file named **TRANSACTIONS.DBF**.

Here is a field description of this text file, fields left to right:

The first group of characters (between 17 and 20 characters) contains date and time of transaction, the character **X** followed by a transaction type code (see below), and branch number up to 4 digits (no spaces between elements).

Transaction type (1 letter):

O = **Check Out** [uppercase letter **O**, not zero **0**]

I = **Check In** [uppercase letter "eye" not letter "el" or number one]

H = **In House Use**

V = **Inventory**

Station prefix (3 characters)

Item ID (left justified)

Patron ID (left justified): Data present only if Check Out transaction.

Due Date (8 characters formatted: **mm/dd/yyyy**): Date is present only if **Check Out** transaction.

Here is an example of an **UPLOAD*.SD** file; this contains a few transactions of each type:

```
19990304135759XO3 ST9 31001000045602 21001000032456 04/01/1999
19990304135800XO3 ST9 31001000094837 21001000032456 04/01/1999
19990304135800XO3 ST9 31001000095544 21001000889965 04/01/1999
19990304135814XI3 ST9 31001000095433
19990304135817XI3 ST9 31001000095221
19990304135818XI3 ST9 31001000043321
19990304135835XH3 ST9 33001000099934
```

```
19990304135822XH3 ST9 33001000099114
19990304135836XH3 ST9 31004493822007
19990304135843XV3 ST9 34001000067890
19990304135844XV3 ST9 34003100058487
19990304135845XV3 ST9 34001100084727
```

8.3 L.S Inventory

Inventory is a module of the Library•**Solution** integrated library system. Its primary purpose is to identify items that are MISSING (i.e., not on the shelf when the system believes they are). It also helps you maintain items on the shelf in proper sequence according to collection and call number.

User interface includes three main activity tabs: Collection Processing, Identify Missing Items, and Delete Old Tasks. Clearly labeled fields and on-screen instructions help you step through the inventory process.

Iinventory scheduling: Inventory is date-controlled, so you can run inventory as often as you like, for example, weekly for best-sellers or the video collection. This allows your staff to perform a continuous inventory, scheduled at your convenience. Gather data on all items in a collection, or just a few shelves within a limited call number range no need to close the library for weeks at a time while inventory is taking place. The process handles items checked out or misshelved within the area being inventoried.

Data collection and download: Use a portable barcode scanner to scan items on the shelves. Then offload the data, start **Inventory**, and run the processes. Print reports as needed.

Maintain shelf order: The Inventory module helps you maintain items on the shelf in proper sequence according to call number. If you select an option on the **Collection Processing** tab, the program checks the shelving order of the items scanned and creates an error log for misshelved items. The error report, which includes other detected errors, can be printed through the Library•**Solution Reports** module. Your staff can use the report to locate the items and shelve them correctly.

Identify missing items: Inventory identifies items missing from the shelves and codes them with the Circulation item status code of "MS" for missing. You can print optional missing items reports to use in collection management and analysis.

8.3.1 Hints for Successful Inventory

Here are a few tips about workflow and organizing inventory activities. If you prefer to read a **detailed list of steps** in the inventory procedure, see section 8.3.2.1 **Step-by-Step Guide** to the Inventory Process.

You should inventory items in **only one collection** at a time, but if you have multiple data collection devices you can have staff working in multiple areas of the library.

If you have time, **shelf read** the area you plan to inventory, even though the Inventory process allows you to identify items that are shelved out of order.

Keep a **manual log** of the inventory date, the library and collection, and the beginning and ending call numbers for each session of collecting data (that is, for each instance of barcode scanning that will produce a file to be offloaded from the barcode scanner). As an alternative, you can mark the report "Shelf Order for Holdings Code" which provides you with the correct call number data (see more information about this report below). You will need to enter this information later on both of the activity tabs in Inventory: **Collection Processing** and Identify **Missing Items**. After running each process in Inventory, also make a note of the date you ran Collection Processing and the date for Identify Missing Items.

How to enter call numbers in the manual log and in the **From** and **To** boxes under the **Collection Processing** tab and the **Identify Missing Items** tab:

Before you begin an inventory, you will need to run the "Shelf Order for Holdings Code" report to get the proper data for entry. The first column in the report is Type; this refers to the Type of call number. In both, Collection Processing and Identifying Missing items, you are required to select a type under **Call Number Type**. Refer to the Type Column in the report. The letters correspond to Call Number Type. D=Dewey, L=LC, and X=Neither (non-standard).

To determine the call number for entry in the **From:** box, look at the first number under the column "Shelf Order field" and type this into the **From:** box.

To find the call number for entry in the **To:** box, look at the last number under the column "Shelf Order field" and type this into the **To:** box.

The system attempts to verify the call number type (Dewey, LC, or other), so do not take shortcuts. For example, for the beginning range of Deweys, enter "000 A" not simply "0A".

For nonstandard call numbers like "FIC Abcd" the system literally checks call numbers with the exact sequence of characters and spaces you specify. Thus, if some of your fiction items use prefix "FIC" and others with an "F" are intershelved, it is not recommended that you run the shelf-checking process.

Before you begin scanning items on the shelf, check the shelf position of the first item on the shelf to be sure it is shelved correctly (check the items shelved before and after it). If this item is out of place, the results of the shelving sequence error checking could be skewed.

Offload inventory data from the scanner and **run Collection Processing every** day when you are actively performing inventory. This will ensure that the report of misshelved items is produced in a timely manner and that the inventory dates in the item records will be accurately recorded.

Checking shelf order is optional: The **Check Shelf Order** check box is available on the **Collection Processing** tab. This process checks for errors in the call number sequence. Other errors, like "Out of range," "Wrong Collection," Not in the database," etc., are always detected, so it is recommended that you print the report immediately so you can correct shelving errors as soon as possible.

When should you run Identify Missing Items? Before you run **Identify Missing Items**, you may want to wait until you have finished scanning a whole collection, unless it is a large one. However, be sure to offload scanner data, run **Collection Processing**, and print the "Inventory Shelving Sequence Errors" report every day during the inventory. For example, you might scan the first third of a medium sized collection on Monday and then download and run **Collection Processing** at the end of the day. Then do the second third of the collection on Wednesday and the final third on Friday. On Monday of the following week, run Identify Missing Items, entering the starting date of the previous Monday.

WARNING! You will have a problem if you run **Identify Missing Items** on a whole collection or call number range you have not completed scanning and running through **Collection Processing**: MANY items would be marked missing which are not actually missing! There is no recovery from this situation, except to finish scanning all the items in that collection or call number range, and then run **Collection Processing** and **Identify Missing Items** again.

8.3.2 Inventory Procedures

8.3.2.1 Step-by-Step Guide to the Inventory Process

This section lists in a single sequence all the steps in the inventory process. The steps include instructions for the running updates, as well as running the reports listing "Lost" or "Missing" items. For details on each step, refer to the following sections.

Steps in the Inventory process:

1. From the Library·**Solution** menu, select **L.S Reports**.

2. Log on and run the report "Inventory - Shelf Order for Holdings Code." This report produces a list of unique call numbers in a selected holdings code by call number type (LC, Dewey and Non-standard) for a particular branch/collection. The numbers appear in call number order. Print this report before you begin to scan barcodes of items on the shelf. The report provides an over view of all call number types and call numbers in the particular holdings code group you are working.

3. **Data Collection:** Start scanning the barcodes of items in the holdings code group you have chosen. (Later in the inventory procedure, you will need to know the **first call number** of the group you scanned and the **date** you scanned it. Because of this, you should keep a manual log of this information.)

4. You can scan as many barcodes as you want in a single session. However, if you plan to report the shelving errors (see step 13), you need to limit your scanning to roughly 500 items. If you scan more than 500 items, the "Inventory Shelving Errors" report will take **MUCH** longer to run.

5. Once you have scanned the last barcode in the collection (or the last barcode before you reach 500 items), record the last call number you scanned in your manual log. Later in the inventory procedure, you will need to know this call number.

6. (Applies ONLY to Percon Portable Scanners) To offload the scanner data to your workstation, connect the scanner to the computer and then go to the **Start** menu, choose **Library.Solution**, **Circulation Utilities**, and then select **Portable Scanner Offload**. A window will open, and you should see the following messages:

   – Communications port opened

   – Waiting for "upload.inv."

   Follow the instructions on the scanner to offload the data. When the offload is complete, the window will automatically close.

   Important note: Every time you run the **Portable Scanner Offload** process, the **upload.inv** file is downloaded. Thus, it will **overwrite** any previous version of the file that might exist on your hard drive. This file is located in the **C:\Program \ The Library Corporation\Library.Solution\Circ** directory.

   Tips: If you do not want the **upload.inv** file to be overwritten, follow the instructions in step 7.

7. To prevent the **upload.inv** file from being **overwritten:** From the Library•**Solution** menu, select **L.S. Inventory**. You will need to log on to the program. On the **Collection Processing** tab, click on the **Select Upload File** button. The **Open** window should have the **Circ** Folder in the **Look In** box. Single click on upload.inv to highlight it. Then right-click, and select **Rename**. Type in a new name for the file. (It can be the current date without punctuation, the call number range, or any name that will make sense to you.) Leave the extension as **.inv** so the file will show in the window, and press **Enter**. Then click on the file you just named to have it appear in the **File Name** box at the bottom of the window. Click **Open**. The file name should now appear next to the **Select Upload File:** box.

8. If you used a scanner to do the inventory, make sure the **Scanner File** is selected under **Upload File Type**.

9. In the **Section of library being inventoried**, select the correct **branch** and **coll**(ection) for the barcodes you have just scanned and offloaded.

10. Select the **Call Number Type** of the call numbers in the selected collection. (This information needs to be what is listed on the "Shelf Order for Holdings Code" report from Step 1. Refer to

the "Type" Column, which is the first column in the report: D=Dewey, L=LC, and X=Neither [non-standard].)

11. Type the first call number scanned in the **From:** box. You will need to type the call number exactly the way it appears in the **Shelf Order** field column in the "Shelf Order by Holdings Code" report from step 2. (This should match your manual log information.)

12. Type the last call number scanned in the **To:** box. Use the same instructions as in Step 11.

13. If you want to produce a report listing call number order errors in the section for which you are running inventory, select the **Check shelf order** check box. (If you do not select the check box, items out of sequence will be ignored, but items belonging in a different collection or different part of the collection will still be noted.)

14. Click **Process Inventory Data**.

15. When the process is completed, you may exit the **Inventory** program. From the Library·**Solution** menu, select **L.S Reports.** Log on and run the "Inventory Jobs List" report. This report gives the Holdings Code, the date the job was run, the beginning call number, the ending call number, and a "Job number." Run the "Inventory Shelving Sequence Errors" report. You will be prompted to enter the Job number. This report displays all items that are in the wrong collection, items from a different call number range, and barcodes that do not exist in the database. If you checked the "Check shelf order" option (in step 13 above), it will display items not shelved in their correct sequence.

16. Once you have completed running the **entire collection** through the Inventory process (Steps 1-14), go back into the Inventory program and click the **Identify Missing Items** tab.

17. On the **Identify Missing Items** tab, in the **Beginning Date of Inventory** box, enter the date you first started scanning the collection. (Refer to your manual log for the date.) You may enter the year as two digits; Library·**Solution** will automatically change it to a four-digit year.

18. In the **Section of library being inventoried**, select the correct **library** and **coll**(ection).

19. If you are running the "Identify Missing Items" process on the **whole** collection, under **Collection Options**, click on **Whole Collection**. Click **Run**, and skip Step 20.

20. If you are running the "Identify Missing Items" process on **part** of a collection, click on **Selected Call Number Range**, and enter the beginning and ending call number of the barcodes you scanned, referring to your manual log. **Click Run**.

21. When processing is completed, return to the Library·**Solution Reports** program, and run the "Inventory - Identify Missing Items Log" report. It will prompt you to enter the date/time you ran the inventory process, as well as the Holdings Code. The report will display missing items for that holdings code, with missing items arranged by location and collection. This is a log file only. It displays only items marked missing during the last run of "Identify Missing Items," as well as items that were In-Transit or Checked-Out when scanned during the inventory process.

22. If you are interested in a statistical count of all the items in an entire collection by Circulation Item Status, run the "Inventory Status Analysis" report.

23. **Hint:** If you wish to delete your old inventory scanner files for the collection you just finished, and before starting to inventory another collection, return to the Library·**Solution Inventor**y program. Under the **Collection Processing** tab, click on **Select Upload File**. The **Open** window will display a list of files and programs, and you should see the old inventory files you worked with earlier. You may delete these. To delete a file, highlight the file, click the right-mouse button, and click **Delete**. Repeat for each file you wish to remove. (You only need to retain inventory files (*.inv), while you are running inventory for that collection. You do not need to keep them after the whole collection is complete.)

24. After removing the old inventory files (optional), you can go to the **Delete Old Tasks** tab. ("Tasks" are temporary files that are built to facilitate the inventory process. Once you have finished inventory of a particular library and collection, you should delete the task records. This is NOT the same as deleting inventory data files, described in step 23.)

On the **Delete Old Tasks** window, the date window for deleting old tasks "on or before" defaults to the current date. Enter a different date in the past if you wish. Note that this process will **ONL**Y delete the inventory task records for the library location where you just ran the inventory process (that is, the library set for this station in **Circulation | Setup | Local Configuration | Station Options**).

25. Repeat Steps 1-24 for each holdings code in a library/collection.

8.3.2.2 Data Collection

An important step in inventory is to gather information about items on the shelves of the library, using a portable barcode scanner, such as the recommended Percon scanner.

To collect inventory data:

1. To begin, select a library, collection, and the beginning call number of the section to be inventoried.

   Before you begin, check the shelf position of the first item in the range (check the call number of the items before and after it on the shelf), to be sure it is shelved correctly. It is not necessary to read the call numbers on the rest of the items being scanned. The inventory process will check the shelf order and identify misshelved items.

   Record the library, collection, and beginning call number information in a manual log, since you will need it in later steps: **Collection Processing and Identify Missing Items**. (After you have completed scanning items for the day, also enter the ending call number in your log.)

2. Use a portable barcode scanner to scan the barcode numbers of items on the shelves of the selected collection, in the selected range of call numbers.

   Note: The capacity of any scanner (how many books can be inventoried at a time) depends on the available storage RAM in the scanner; Percon scanners can easily hold between 4000 and 5000 scanned barcodes. If you want to know the shelving errors, you will need to keep your limit to around 500 items, or else the report will take a long time to run.

3. After scanning an area of the shelves, offload the data to the hard drive of the workstation where you wish to run inventory processes. (See section 8.3.2.4 for details.)

4. After offloading the data, start the Library·**Solution Inventory** module and select the **Collection Processing** tab.

Note: Libraries can also gather inventory data by using TLC's Windows version of the **Server Down Circulation (SDC)** program on a workstation. However, since it is impractical to bring books to the computer for scanning, you could use a laptop computer equipped with a barcode scanner and work near the shelves.

8.3.2.3 Setting Up the Percon Scanner

Note: Skip this section if the TLC installers have already set up your portable scanner for you, or if you are using some other type of scanner.

To set up the Percon scanner:

1. Create a shortcut (in the Library.**Solution** group on the **Start** menu, or on the desktop of your workstation where you will offload data) to run **PTFER.EXE** from the **\Circ** directory.

   Your shortcut should look like this:

   C:\Program Files\The Library Corporation\Library.Solution\Circ\PTFER.EXE

   Name the shortcut: Offload Scanner Data.

   Note: If you do not have **PTFER.EXE** in the Circ folder indicated above, call TLC Support.

2. Click on the shortcut with the RIGHT mouse button and select **Properties** from the drop-down menu.

   Choose the **Shortcut** tab and then modify the shortcut command line to look like the following:

   "C:\Program Files\The Library Corporation\Library.Solution\Circ\PTFER.EXE" upload.inv -2rx

   Note: "Upload.inv" is the name of the output file from the offloading process, and "2rx" means: "use COM**2** serial port, **R**eceive the data, e**X**it from the PTFER program when the offload is complete." If you have attached your Percon scanner to a different COM port, substitute the appropriate number in the string.

To prevent overwriting, see the tips explained in step #7 in Step-by-Step Guide to the Inventory Process (section 8.3.2.1).

If the data offload was successful, the data is automatically cleared from the scanner.

5. After offloading the data file, start **L·S Inventory** (on the **Start** menu, select **Library·Solution**, then **L·S Inventory**). In the **Inventory** window, select the **Collection Processing** tab.

8.3.2.4 Offloading Data from Percon Scanner

After you have collected inventory data with the Percon portable barcode scanner, the next step is to offload the inventory data from the scanner to the hard drive of the workstation where you want to run Inventory processing.

The offload is performed outside the Library·**Solution** programs.

To offload data:

1. Run the **PTFER** program by clicking on the shortcut on the desktop called "Offload Scanner Data." (You can also run this from the **Start** menu: select **Library.Solution**, and then **Portable Scanner Offload**.)

2. Attach the portable scanner to the serial cable (which is attached to the COM port of your workstation).

3. Press the F4 button on the scanner to Offload Data.

4. Press F1 on the scanner to Begin Offload.

   The inventory data from the scanner will be copied to the **UPLOAD.INV** file in the following directory on the workstation's hard drive:

   C:\Program Files\The Library Corporation\Library.Solution\Circ.

   Notes: This process creates the **UPLOAD.INV** file each time, so it will overwrite any previous version of this file that might exist on your hard drive. Thus, you should make sure you have processed the previous scanner-load of data before offloading more.

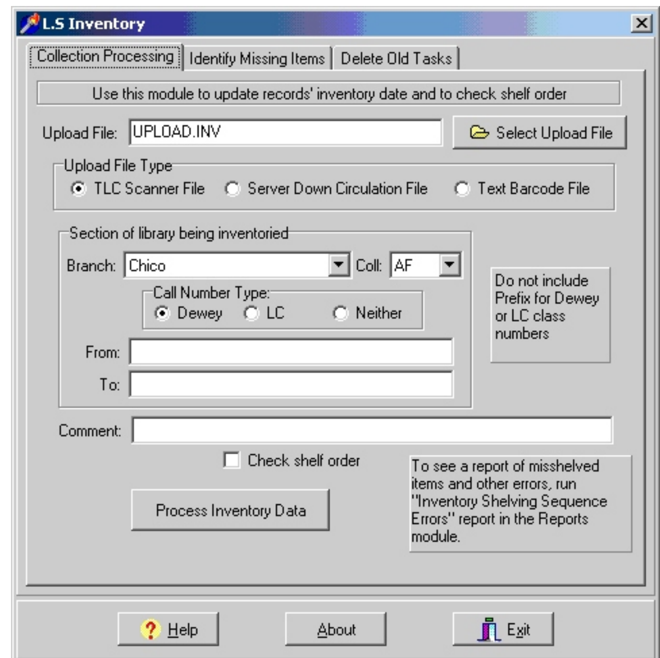

Figure 8-6. The Collection Processing tab

8.3.2.5 Collection Processing

Use the **Collection Processing** tab in **Inventory** (Figure 8-6) to load the current inventory data file to be processed, identify the relevant library, collection, call number type, and call number range of the inventoried items. **Collection Processing** compares the barcode file uploaded from the portable scanner to Circulation item data and updates each item's "date of last inventory" field. You must run this process on the data before missing items can be identified. Optionally, you can check for misshelved items and other shelving errors.

To run **Collection Processing**:

1. Run the preliminary report "Inventory - Shelf Order for Holdings Code" to produce a list of unique call numbers in your system. The report will also provide call number values you will need to enter in Steps 5 and 6 later in this procedure.

2. After offloading an inventory data file to the station where you wish to run Inventory processing, start **L·S Inventory** (on the **Start** menu, select **Library·Solution** and then **Inventory**). Select the **Collection Processing** tab.

3. In the **Upload File** text box, the file **UPLOAD.INV** is entered by default in the following directory: **\program files\the library corporation\library.solution\circ**. If you want to work with a different file, enter it here, or use the **Select Upload File** button to browse for and select the file and path.

4. Select the **Upload File Type: TLC Scanner** (output from Percon Scanner); **Server Down Circulation** (output from Server Down Circulation); **Text Barcode** (generic, carriage return delimited, text file)

5. From the **Branch** and **Collection** list boxes, select the library and collection being inventoried.

6. Select the Call Number Type: Dewey, LC, or neither (nonstandard call numbers like: **FIC Abcd** or **JE Seuss**). The Call Number Type is displayed under Type column of the "Shelf Order for Holdings Code" report. D=Dewey, L=LC, and X=Neither (non-standard).

Important! Be sure to select the correct call number type for the range of call numbers you are entering.

7. Enter the beginning and ending call numbers of the collection that was inventoried. These call numbers appear on the "Inventory - Shelf Order for Holdingscode" report. The call number you need to use is displayed on the **Shelf Order Field Column**.

8. **Check Shelf Order:** This OPTIONAL process checks shelf order and reports on misshelved items and other errors, for example, items shelved outside the range of specified call numbers, like oversize items. If you want to run shelf order, click the **Check Shelf Order** check box.

9. Click the **Process Inventory Data** button.

10. When the process has been completed, you can print a report listing misshelved items and other errors, as instructed on the lower right of the tab. In the Library·**Solution Reports** module, select the report "Inventory Shelving Errors."

11. To continue the inventory process, select the **Identify Missing Items** tab.

Note: Click the **Process Inventory Data** button

Additional information: When to Run Identify Missing Items: Be careful not to run **Identify Missing Items** on a complete collection or a specified call number range until after you have scanned all the items and run **Collection Processing** on all those items!

8.3.2.6 Identify Missing Items

Use the **Identify Missing Items** tab (Figure 8-7) in **Inventory** to identify items "missing" from the shelves. The program identifies any items within the specified collection and call number range that were neither inventoried nor checked in since the beginning date of the inventory. Then it marks those items with a status of "MS" (Circulation Item Status code for Missing).

If the process finds any items that are marked "Lost," "Checked Out," or "Missing," the **Item Status Codes** will not be changed, but the items will be included in the missing items error report: "Inventory - Identify Missing Items Log."

WARNING! You will have a problem if you run **Identify Missing Items** on a whole collection or call number range you have not completed scanning and running through **Collection Processing**: MANY items will be marked "MS" missing which are not actually missing! There is no recovery from this situation, except to finish scanning all the items in that collection or call number range, and then run **Collection Processing** and Identify **Missing Items** again.

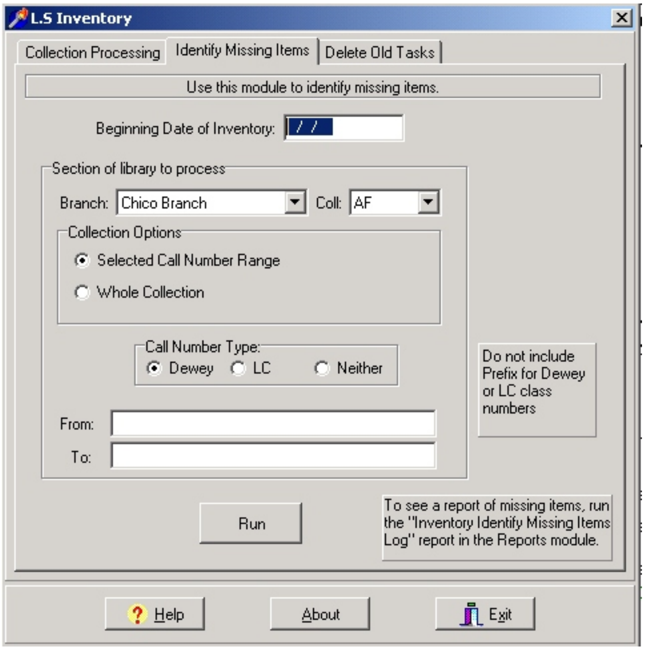

Figure 8-7. The Identify Missing Items tab

To identify missing items:

1. After you run **Collection Processing**, select the **Identify Missing Items** tab.

2. In the **Beginning Date of Inventory** box, enter the beginning date of the inventory. If you are working with more than one input file, enter the date of inventory for the first file. Enter the date in this format: mm/dd/yyyy (the system supplies the slashes < / >).

3. Under S**ection of Library to Process**, select the **Branch** and **Collection** from the choice lists. Then select the **Call Number Type**: Dewey, LC, or neither (nonstandard call numbers like: **FIC Abcd** or **JE Seuss**). You can obtain the correct type by checking the "Shelf Order for Holdings Code" report and finding the letter listed under the **Type** column (first column). D=Dewey, L=LC, and X=Neither (non-standard)

Important! Be sure to select the correct call number type for the range of call numbers you are entering.

4. If you are running "Identify Missing Items" on the whole collection, click **Whole Collection.** Otherwise, click on **Selected Call Number Range**. In the **From** and **To** boxes, enter the beginning and ending call numbers. You can get these numbers from the "Inventory - Shelf Order for Holdings Code" report, under the "Shelf Order field" column.

5. Click the **Run** button.

6. After the process has been completed, you can print a report of missing items, as instructed on the lower right of the tab. In the Library·**Solution Reports** module, select the report " Inventory - Missing Items Log." Several other reports offer more specific missing and lost item tabulation.

8.3.2.7 Delete Old Tasks

Use the **Delete Old Tasks** tab (Figure 8-8) in **Inventory** after you have finished running inventory reports.

"Tasks" are temporary files that are built to facilitate the inventory process. Once you have finished inventory of a particular library and collection, you should delete the task records.

The **Delete Old Tasks** process deletes older inventory task records (up to a specified date) that have been inserted into various database tables. This does not delete the **upload.inv** file or any other kinds of inventory-specific files.

Note: This process is library-specific: it **ONLY** deletes old inventory tasks for the specific library that is currently configured for this station in the Circulation Setup.

To **Delete Old Tasks**:

1. Run **Inventory** and click on the **Delete Old Tasks** tab.

2. In the **Delete Old Inventory Tasks on or before** box, today's date is entered by default. If you leave the date as is, the records that will be removed will be ones created on or before the current date. You may want to use another date in the past to remove old tasks produced before a certain date. This retains the task records created after the date you enter and the current date.

3. Click on the **Delete** button.

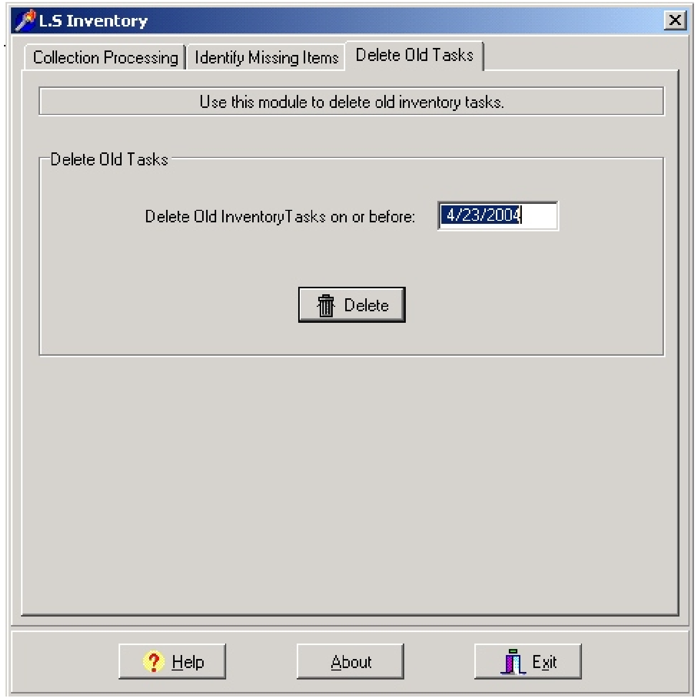

Figure 8-8. The Delete Old Tasks tab

8.3.2.8 Inventory Reports

Several reports are available and necessary for successful inventory processing. **Before you do Inventory processing**, you should run the following preliminary report:

- "Inventory -- Shelf Order for Holdingscode": This will produce a list of all unique call numbers for a particular location/collection (holdings code), as well as list the call numbers in the format in which the system will "see" them. Print this report before you begin scanning. When you begin to scan the collection, you may want to note on the "Shelf Order by Holdingscode" report the call number at which you began scanning, as well as the barcode number, and then note the call number and barcode where you stopped scanning. You will enter call number information from this report into the call number **From** and **To** boxes on the **Collection Processing** tab, before you begin processing inventory data.

As a result of Inventory processing, a number of reports are available in the Library·**Solution Reports** module:

- "Inventory Jobs List": Run this report whether or not the **Check shelf order** box in **Collection Processing** was checked, since the report will still print items that were found that were not supposed to be in the section scanned. This report lists the Holdings Code, the date, the beginning call number, and the ending call number with a Job number. You will need to enter this job number when you run the "Inventory Shelving Errors" report. You should run this "Inventory Jobs List" before you run the "Inventory Shelving Errors" report.
- "Inventory Shelving Sequence Errors": **Important Note:** Run the "Inventory Jobs List" before you run the shelving errors report. The "Inventory Shelving Errors" report is available for all inventory jobs, but if you did not select the **Check shelf order** check box in Collection Processing, this report will only display the items that should not have been shelved in the section scanned. When you start the report, you will need to enter the "job number" from the **Inventory Jobs List** report (above).

  An item shelved out of sequence is identified in the report by a "locator" item, that is, the call number of the item just before it that is shelved correctly. (The locator item is identified in the shelving report as "Item Following"; the misshelved item is listed just below it as "Misshelved." A description of the shelving problem follows, like "Range," which means this item was not supposed to be in the section scanned.) Take the list to the shelves immediately and move misshelved items to the correct locations, before someone moves or checks out the locator items.

The following reports are available as a result of running the process on the Inventory **Identify Missing Items** tab:

- "Inventory Missing Items Log": You will need to enter the last date/time you ran the process, as well as the holdings code. This report displays missing items for the site where you just ran inventory with the holdings code arranged by location and collection. This is a log file only. It displays only items marked "missing" during the last run of "Identify Missing Items." It also lists items scanned during the inventory process with a status of In-Transit or Checked Out. This report contains items marked missing in the most recent inventory process.
- "Missing Items in a HoldingsCode": This report lists all items marked "missing" in a collection, regardless of when the items were so marked
- "Lost Items by Location": The listing shows items marked as lost for one location (library).
- "Inventory Status Analysis": This report gives statistical counts of all items in the entire collection by Circulation Item Status, sorted by the status and the date the status was applied.

8.3.3 Reference Information about How Inventory Works

System administrators may want more information about how inventory works. For items inventoried in the specified library/collection and call number range, the process goes through the following series of steps:

In Collection Processing:

The user inputs a file of barcode numbers (upload.inv) collected by scanning items on the shelf, and then identifies the library, collection, call number type, and the range of call numbers inventoried.

In the processing of each item, the item record that matches each barcode number is updated with the date the item was scanned for inventory purposes. (The input file contains the actual date that each item was scanned; this is not necessarily the beginning date of the current inventory, which the user must enter later in the process of identifying missing items.)

If the user elects the **Check Shelf Order** option, the program checks the shelving order of the items scanned and creates an error log for items that are misshelved.

The user opens the Library·**Solution Reports** module, and runs the "Inventory Job List" to obtain a list of the Holdings Code, the date, the beginning call number, the ending call number, and a Job number. The user will be prompted for the Job number when running the "Inventory Shelving Errors," which can be printed to report missing items.

In Identify Missing Items:

The user enters the beginning date of inventory, the library, collection, call number type, and the range of call numbers inventoried.

The program identifies any items within the specified call number range that were neither inventoried nor checked in since the beginning date of the inventory. Then it marks those items with a status of "MS" (Circulation Item Status code for Missing).

You should print the "Identify Missing Items" report through the Reports module immediately after running the Identify Missing Items step.

This report will list missing items and also alert you to any items found that need special attention. For example, if the process found any items that were already marked "Lost," "Checked Out," or "Missing," the items will be included in the report.

The user can print other reports related to missing and lost Items. The **Inventory Missing Items Lo**g displays missing items for the site where you just ran inventory with the holdings code arranged by location and collection. The user may also run "Missing Items in a Holdings Code," "Lost Items by Branch," and "Inventory Status Analysis" (listing statistical counts of all items in the entire collection by circulation status).

HOW does the program determine that an item is "missing"?

The program first checks to see whether or not the item is supposed to be on the shelf; this is determined by checking the current **Circulation Item Status** for each item.

Possible item statuses are:

- **I** = On the shelf
- **CO** = Checked out
- **S** = Being reshelved
- **T** = In transit between libraries
- **HD** = Item is an "arrived" hold (item waiting for borrower to check it out)
- **L** = Lost item (status assigned to individual item by staff)
- **MS** = Missing: this status (without any modifier code) is assigned only by the Inventory process

If the item's status is anything other than "on the shelf," the Inventory process will consider the item to be accounted for, and it will be ignored in the rest of the Inventory process.

Next, if the program "thinks" the item is on the shelf, it next checks to see if the item was inventoried or checked in since the beginning date of the current inventory, by doing the following:

- If the current inventory date (the actual date the item was scanned) is later than or equal to the date last inventoried, the system assumes the item is accounted for.
- Next, if the "beginning date" of the inventory is earlier than the date the item was inventoried, the program compares the date last checked in to the beginning date.
- If the date last checked in is later than or equal to the beginning date, the Inventory process will consider the item to be accounted for, and it will be ignored in the rest of the process.
- If these conditions are NOT met for any item, the program will change the item's Item Status Code to "MS" for Missing and add the items to the "Inventory Missing Items" report.

Then the Library·**Solution PAC** will display the shelf status as "Not Available" (or whatever local message a library has configured).

8.4 L.S Outreach Manager

Outreach Services is a part of Library·**Solution** used to manage services for borrowers who cannot visit the library, and/or who do not have computer access to the library catalog themselves.

The **Outreach Services** program allows the Circulation staff to:

- Keep track of an individual borrower's loan history and preferences.
- View and edit the borrower's Outreach settings, such as delivery frequency, last profile edit information, and customizable fields to gather data as desired.
- Display the date when the borrower expects his/her next delivery.
- Set the borrower's selections to a "delivered" status.
- Display what items the borrower currently has checked out, or what items the borrower has on hold to be delivered.

The **Outreach Services** staff uses the Library•**Solution PAC** to:

- Save search settings, creating shortcuts that can be used for performing repetitious searches.
- Place holds on items selected for the Outreach borrower.

8.4.1 Getting Started

To Get Started Using Outreach Services In Circulation:

You need to perform the following steps before you begin using Outreach Services.

1. **Establish a Patron Type in Circulation, for Outreach Services Patrons -** A current Patron Type can be modified to allow Outreach Services, or a new Patron Type can be established. You may have as many Patron Types designated as Outreach Types as you need.

2. **Configure the Outreach User PAC**. **-** This requires the address of the PAC that will be used for Outreach Patrons. Go to **Setup | Outreach User PAC Setup** and enter the IP or URL of your PAC.

3. **Establish Outreach Fields** - Outreach Fields displayed on the **Patron Record: Outreach Services** tab, are customizable. These fields can be used to display information as desired. For example, you can create notes to alert the staff and/or delivery person of special circumstances affecting the delivery, or of other needs that must be accommodated. Go to **Setup | Types and Codes | Outreach Fields** to establish new fields that can be used in all Outreach borrower records. Click here for more information.

4. **Ensure that Outreach Services Patron Records have a PIN assigned to the Patron. -** The PIN is used as the password to access the PAC, when the **Setup New Prefs** button is pressed on the **Patron Record, Outreach Services** tab. When the browser connects to the PAC, a logon error will display if there is not a PIN established for the patron.

To Start Outreach Manager

1. Select Start | Library.Solution | Circulation Utilities | L.S Outreach Manager.

2. A database log-in screen will prompt you for your **User Name** and **Password**. Fill in the log in information and click **OK**.

3. The **Outreach Services** screen will appear.

8.4.2 Outreach Services Process Flow

Typical Outreach Process

1. An Outreach Patron Type record has been established via the **Setup** menu, **Types and Codes | Patron Type** option. Select the Outreach Services field (so that it is checkmarked). Enter a borrower record and assign a Patron Type that has Outreach privileges turned on. In the borrower record, record the preferences for delivery period, minimum / maximum number of titles to be delivered each period, and associate specific PAC saved searches with the patron.

2. Titles related to the borrower's preferences are located and placed on Hold, via PAC saved searches.

   Note: Once Outreach borrowers have been established, and PAC searches are starting to be saved, and made available to Outreach, the list of Saved Searches will build in the Outreach Saved Searches display. These searches are available to be added to other Outreach Patrons Saved Searches list.

3. As titles are placed on hold for the Outreach borrower, the **Status** on the Outreach Services screen will display **Partially Processed**. When the number of held titles for this borrower matches or exceeds the "minimum" number of titles indicated in the Request Count column, the status will change to **Processed**.

To view the borrower's current Holds, select the borrower name from the list of Patrons in the **Outreach Manager** module (Figure 8-9) and click the **Review** button. A web browser window will open and connect you to the **Patron Review** screen.

4. On the "Next Delivery" date, the library should select the Patron name on the Outreach Services screen, to view the list of held titles in the lower portion of the display. In Circulation, these titles should be Checked Out to the borrower. The **Status** will now display **Due**.

5. After delivery of the titles, click the **Delivered** button, and the **Next Delivery** date will now display. The process now starts over at step 2 above.

8.4.3 Using the Outreach Services Display

Display the Outreach Services screen (Figure 8-9) by selecting the L.S Outreach Manager on the Library•Solution | Circulation Utilities menu. The upper portion of the screen displays the list of Outreach Patrons with active or pending loans, their current status, the next delivery date, and the minimum / maximum number of titles the borrower desires to receive on each delivery.

In the lower portion of the display, information about each title currently checked out, by the selected borrower on the list, will be displayed, including **Item ID**, **Title**, **Status**, and **Due** date.

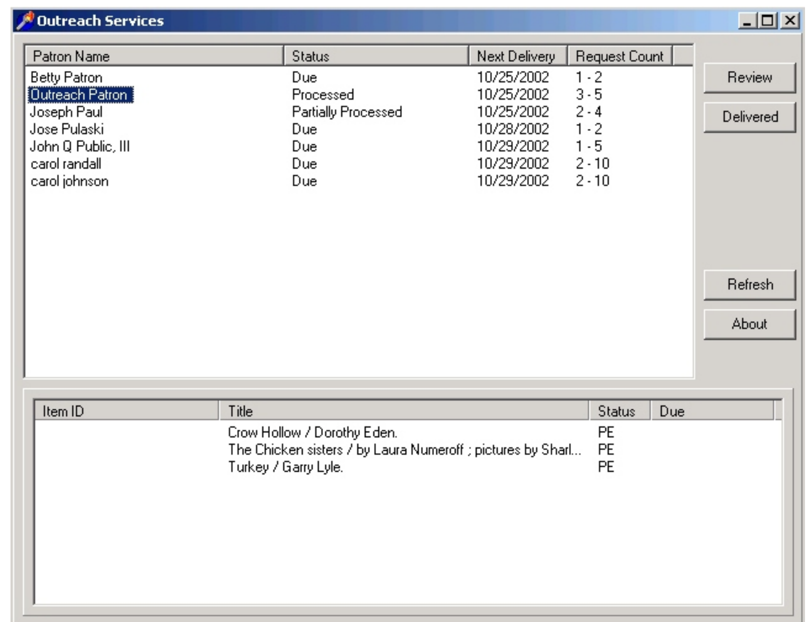

Figure 8-9. The Outreach Services window

Using the Display

1. The main portion of the screen displays:

- **Patron Name:** In the top portion of the window, click on a Patron Name to view the currently pending, or checked out items by that borrower which will display in the lower portion of the window.

- **Status:**
  - **Partially Processed** - Borrower has a title on hold, but has not accumulated the designated minimum number of titles.
  - **Processed** - Borrower's number of holds have met or exceeded the minimum number of desired hold titles.
  - **Due** - Borrower's titles have been delivered, and await the Next Delivery date displayed.
- **Next Delivery:** Date of the next delivery to the selected borrower.
- **Request Count:** Indicates the configured minimum / maximum number of titles configured for the selected borrower.

2. On the right side of the display, there are four buttons:

- **Review:** Pressing the **Review** button will open a web browser and take you to the pre-configured PAC address. Use the Circulation Patron Record information to login. The browser will display a review of the borrower's current PAC account information, including Holds and Saved Searches.
- **Delivered:** Pressing the **Delivered** button updates the borrower record to show that the requested items were delivered to the borrower. The **Next Delivery** date display is updated to indicate the next delivery date scheduled for the borrower. The delivery frequency can be set from 1 to 999 days.
- **Refresh:** The screen will be updated to reflect transactions that have occurred to the user's account since the record was accessed.
- **About:** Displays the **Outreach Services Module** version information.

8.5 L.S Route Configuration (for Used Bookings and Rotating Items)

Library systems with multiple locations may have regular courier routes established for delivery of items among member libraries. In Library·**Solution** you can easily configure these routes for delivery of booked items. Libraries can be added or removed from a defined route, and the order of libraries in a route can be changed. New route names can be assigned and old routes can be deleted. The daily schedule for delivery/pickup for a selected route can be configured by the route calendar.

When you place a booking, you should specify that the courier method should be used for delivery of a selected booked item. Select the "SYS_COURIER" Shipping Type code when you place or edit the booking. **Note:** If your primary delivery method is by courier, then set the default delivery method in Bookings to SYS_COURIER.

To use the Route Configuration Utility:

1. From the Library·**Solution Start** menu, select **Circulation Utilities | Route Configuration**. In the **Database Login** window, type a user name and password, and click **OK** (or press **Enter**). The **Route Configuration** window will be displayed (Figure 8-10).

2. **New route:** To add a new route, click the **New Route** button. The **New Route** entry window (Figure 8-11) will appear. Type a name for the route; use only letters and numbers, up to a maximum of 20 characters (no punctuation marks, no spaces).

   To add a library to the route, highlight it in the **Branches** list on the left and drag it to the **Stations and Order** box on the right, or click the **Add** button. To view a list of libraries that have not yet been assigned to any route, click the **Unassigned Branches** button.

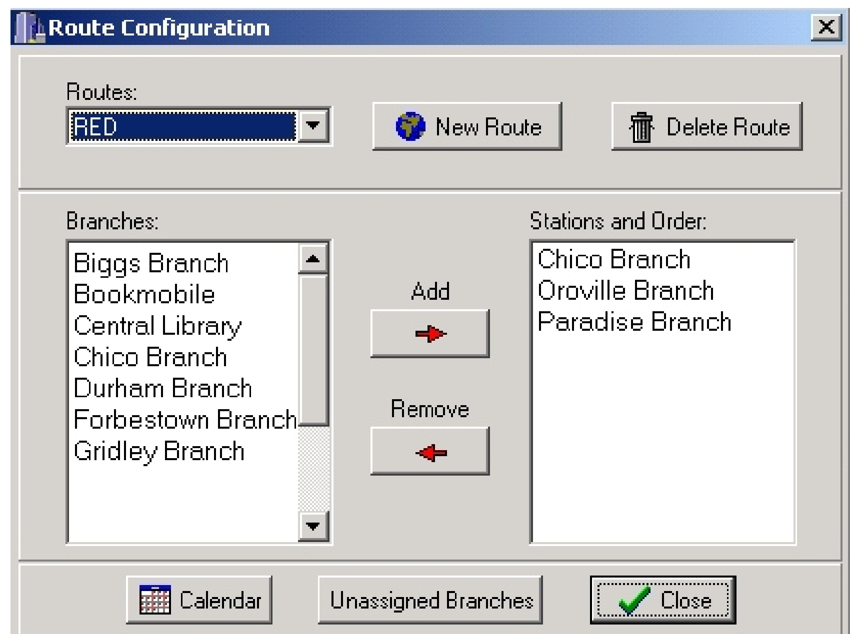

Figure 8-10. The Route Configuration window

Continue adding all the libraries on this delivery route. To change the route order, in the righthand window click and hold on a library name and drag it to the desired location in the list.

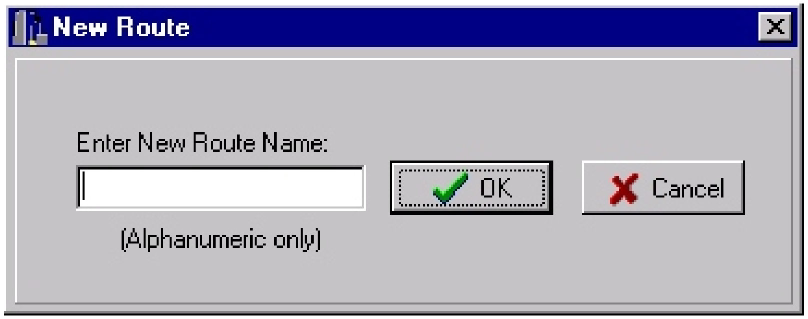

Figure 8-11. The New Route window

Tips: If a booking delivery route begins and ends at the same library, be sure to place that library at the top and bottom of the route list. For other types of route configurations, call TLC Support for guidelines.

3. **Edit route:** To edit an existing route, select it from the drop down **Routes** box at the upper left. The **Stations and Order** box on the right lists the libraries included in the selected route. To change the route order, click and hold a library and drag it up or down. To remove a library from the route, highlight it and click the **Remove** button, or simply drag it back to the **Branches** box. To add a library, highlight it in the **Branches** list and drag it to the **Stations** and **Order** box, or click the **Add** button.

4. **Delete route:** To delete an existing route completely, select it from the drop down **Routes** box at the upper left, and then click the **Delete Route** button.

   Caution! The following message will be displayed. "Deleting a route can cause serious harm to future Bookings. Are you sure you want to delete this route?" Select **Yes** or **No**.

5. **Calendar:** (Only applicable for use with Bookings) To define the day(s) of the week that a selected route is scheduled to be run, select the **Calendar** button at lower left. Double-click on the dates that ARE delivery dates.

8.6 Vendor Editor

The **Vendor Editor** allows you to enter and maintain information about vendors from whom your organization has purchased equipment or other types of items. In Circulation, you can link the vendor to selected items, or enter the vendor in the item's repair history. Most libraries use these features to track the vendor and repair conditions of equipment, such as videocassette recorders, loaned out in bookings. In the Library•**Serial** module, use vendor information to record subscription information and to print letters for claims or returns.

Note: The **Vendor Editor** is a separate program from the Library·**Booking**, Library•**Serial**, and **Circulatio**n modules, and it can be used by all three modules. Run the Vendor Editor from your **Library·Solution | Circulation Utilities** menu.

To use the Vendor Editor:

1. On the **Start** menu, select **Library·Solution | Circulation Utilities | Vendor Editor**. Login with your User Name and Password. The **Vendor Editor** window will be displayed (Figure 8-12).

2. To view existing vendors, click the right or left arrows in the **Code:** entry line. You can search for vendors by name or code by using the **Search | Find by Name** or **Find by Code** options on the drow down menu.

   If you edit an existing vendor, click the **Save** button to save the changes. To delete a vendor, use the **File | Delete Vendor** option.

3. To add a new Vendor, use the **File | New Vendor** option and enter the **Distributor Code** and **Distributor Name** in the **New Vendor** window. Click **OK** to save the information.

4. To exit the Vendor Editor, click the **File | Close** option.

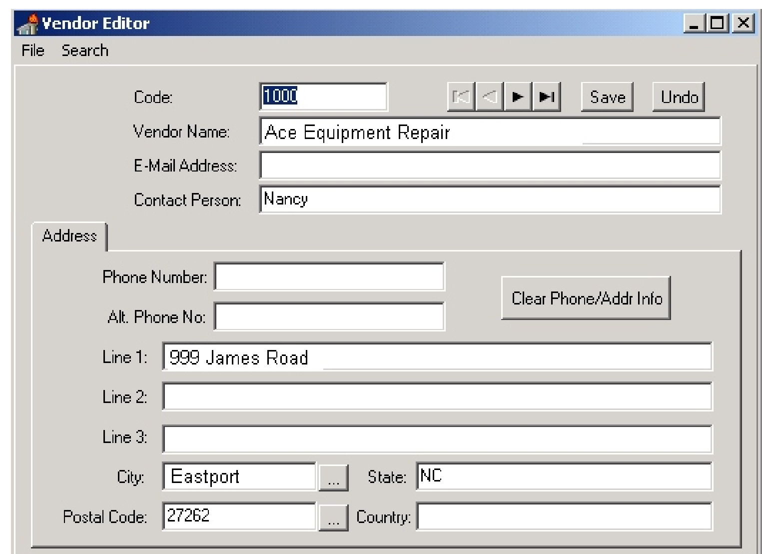

Figure 8-12. the Vendor Editor window

8.7 Debt Collection Module

TLC partners with Unique Management Services, Inc. (UMS), of Jeffersonville, IN, to implement an automated debt collection system which helps our customers recover overdue materials and fines. The debt collection system monitors the fines and other charges accumulated by borrowers and, when specified thresholds are exceeded, the borrower's information is provided to UMS.

- The thresholds are based on a minimum monetary amount and time period.
- Collection fees can be applied when a borrower's information is submitted to UMS.
- The collection fee can include a fixed amount, a percentage of the balance owed, or a combination of the two.
- Patron Types and specific borrowers can be excluded from submission.

The debt collection module can be configured to run for the entire library system or for specific libraries in an automatic or manual mode of operation.

If you have elected to use the Debt Collection module, use the **Debt Collection Setup** and the **Security Setup** options on the **Setup** menu to establish system and library configurations, and to set security features for the Debt Collection module. See section 3.5.6 for setup information. If you have questions contact TLC Support for additional information.

Note: To use this module you will first need to establish a contract with Unique Management Services, Inc. You can contact Unique Manages Services at the following:

- Toll-free Telephone: 800-879-5453
- Electronic Mail: info@unique-mgmt.com
- World Wide Web: http://www.unique-mgmt.com/aboutus/index.html
- U.S. Mail or Courier Service: Unique Managment Services Inc., 119 East Maple St., Jeffersonville, IN. 47130

Reports

The module generates three different reports: **Submission**, **Update**, and **Sync Reports**.

The **Submission Report** provides UMS with the borrower's contact information and the amount owed in fines, charges, and fees. The **Submission Report** can be issued automatically or manually.

If the module is running in **Automatic Mode**, the **Submission Report** will be created and sent to UMS on a regularly scheduled basis and will require no user input. If the module is running in **Manual Mode**, you will need to send reports when required. To access the **Submission Report** manually, select the **Debt Collection** item from the **Utilities** menu and choose the **Submission Report** item. (This menu item requires **Supervisor** rights to access it.) The **Debt Collection Submission Report** form will be displayed as shown in Figure 8-13.

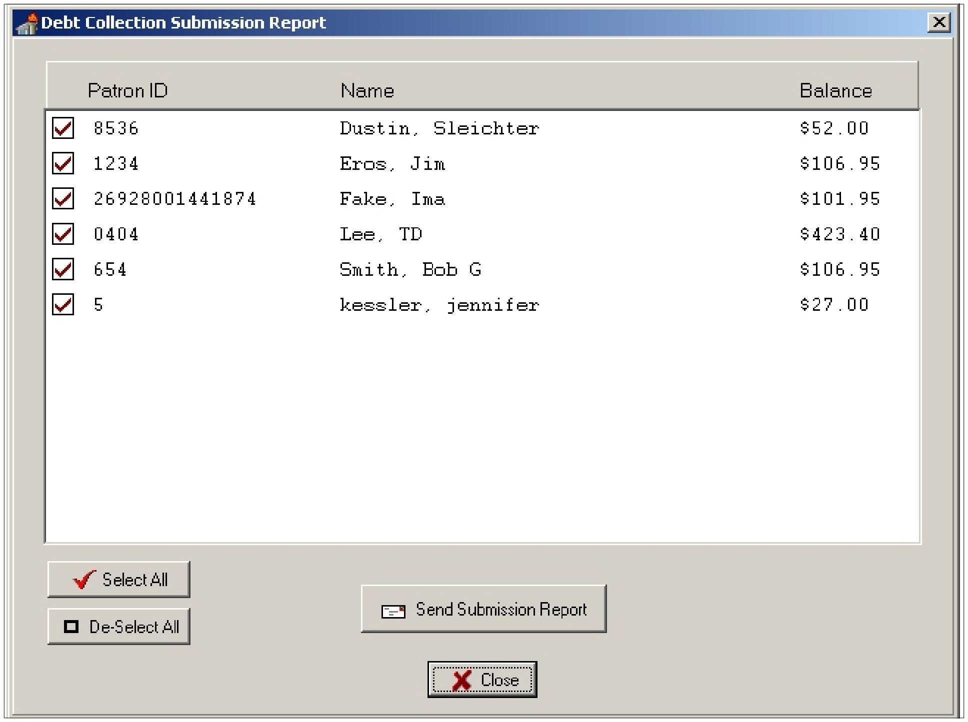

Figure 8-13. The Debt Collection Submission Report

This form displays the **Patron ID**, **Name**, and **Balance** owed of all borrowers who meet the criteria for submission to the collection agency (Borrowers who have already been submitted are NOT included on this list). The **Balance** includes the **Collection Fee**. The list is ordered alphabetically by borrower name. To the left of the **Patron ID** is a check box. If the box is checked, the borrower will be included in the **Submission Report**. If the box is not checked, the borrower will be excluded. The boxes can be checked/un-checked by single clicking the box or anywhere on the row for that borrower.

The *Select All* and **De-Select All** buttons at the bottom of the screen will select or de-select all check boxes.

Use the **Send Submission Report** button to send the Submission Report via email to UMS. When this button is clicked, a message box will display to ensure that you want to send the report. If you click the **Yes**, the email will be transmitted. A message box will inform you that the email has been sent. Click OK button on the second message box. (The **Close** button closes the form without sending the report.)

The **Update Report** gives UMS information on changes to the borrower's account, including amounts paid, waived, and added as well as replacement costs waived when materials are returned. The Update Report is issued automatically on a scheduled basis.

The **Update Reports** are handled in an **Automatic** mode, independently of the mode used by the operating system. The **Update Reports** require no user input.

The **Sync Report** lists all borrowers whose information has been submitted to UMS and their present balance. This information is used by UMS to ensure their that records are in sync with the library's records. The Sync Report is issued manually when requested by UMS. All three reports are transmitted via e-mail

From time to time, UMS may request a **Sync Report**. To send it, select the **Debt Collection** item from the **Utilities** menu and choose the **Sync Report** option. This menu item requires **Supervisor** rights to access it. A message box will display to verify that you want to send the report. If you click **Yes**, the email will be transmitted. A second message box will display, informing you that the report has been sent.

Appendix

1.0 Quick Reference

Authority Control

Authors that are added to on-the-fly Circulation records are not authority-controlled by default in most Library•**Solution** databases. They cannot be searched in the PAC or cataloging. (If you are not sure what authority control option was selected for your library when the initial database was built, administrators should contact TLC Support.

To apply authority control on uncontrolled authors:

1. Catalogers can frequently run a Library·**Solution** report to create a list of Circulation on-the-fly records. Run the **Reports** module from the Library·**Solution Start** menu, and select the following report: **Titles-Items in a control number range.rpt**

   When you enter the beginning and ending control numbers to be included in the report, be sure to type the control number prefix specified for your Circulation on-the-fly records. The default value is "otf"; follow this with a beginning (or ending) number. Onscreen instructions explain how to find all "otf" records.

2. Print the report if desired, or view the list onscreen.

3. Run the Cataloging module. Search for each title or control number. Correct the author's name, if necessary (in the 1XX field). If you are not sure what form of the name is correct, do an **Authority Record** type search by Author, to locate and view the authority record.

4. Save each bibliographic record. As part of the save process, the author entry is authority controlled unless **Saved Controlled** on the **Verify** menu is checked.

Blocks

To override an Enter Override Password block and allow the transaction:

1. Follow the instructions in the **Enter Override Password** window: type the **Override** or **Supervisor** password. (Whenever the Override password is required, you may use the Supervisor password instead. The reverse is not true.)

2. Select the **Try** button, or press **Enter**.

To exit the Enter Override Password block and deny the transaction:

If you do not wish to override the block, select **Cancel** in the **Enter Override Password** window.

To review or remove block conditions:

If block messages are presented in a **Check Out Unsuccessful** window, you can review block conditions and possibly remove them before attempting to check out or renew items.

1. In the **Check Out Unsuccessful** window, click **OK**, or press **Enter** to exit the window.

2. To get more information, click the message in the **Blocks** display on the **Patron Transactions** tab. The relevant tab or dialog box will open, so you can view information or take appropriate action to remove the block condition. For example, if you click the **Fine Balance** block message, the borrower's **Charges** tab opens, detailing the outstanding fines/fees.

3. If possible, make the appropriate changes (extend the card expiration date, change the **Patron Status** code, accept or waive charges, etc.). Save the change.

4. Try the checkout or other transaction again.

Branch Setup

To complete the Branch Setup:

1. Click **Setup** on the title bar at upper left of the Circulation window.

2. On the **Setup** menu, click **Branch Setup**.

3. The **Enter Supervisor Password** window may appear (if you are not logged in to the database as an administrator user). Type the **Supervisor Password** if requested. Click **Try**, or press **Enter**.

   Note: If you do not know the default Supervisor Password, first try simply pressing **Enter** to bypass the security window. If this works, it means no passwords have been defined yet.

4. The **Branch Level (System) Configuration** window will open. The options are grouped on four tabs: Security, Defaults, Fines/Overdues, and Misc.

5. After you make changes or additions, click **OK**.

   Note to supervisors: If you wish to define the setup for another library by working at this station, go to **Setup | Local Configuration | Station Options**. Change the library. **Caution!** After making configuration changes, be sure to change the **Station Options** setting back to this library!

Calendar

The calendar setup affects date and time due for checked out items in the following manner: items checked out for a period of days (or hours or minutes) will be due only on open days (or hours or minutes). The calendar also affects overdue fines calculation according to the settings in the field **Fines Calculated By** in the Circulation "rules."

To set up the Daily Calendar:

1. Select the **Setup** menu. Then select **Calendar Configuration** and **Daily Calendar**. The **Calendar for Current Branch** window appears.

2. Select a month/year: Use the **Next Month** or **Previous Month** buttons to display the month of the year you want.

3. Select a day: To change the default for a particular day, click on the day, or use the arrow keys to move among the days. The selected day will be highlighted. **Default** or **Overridden** at upper right will show whether the settings already established for the selected day have been overridden or if they are the **Weekly Calendar** defaults. To change Overridden settings quickly to the default, select **Set to Weekly Default**.

4. Library is open on this day: If the library is open on this day, a check mark will appear in the check box beside this option. If the library should be set to closed, click on the check box to clear it. You can also press the spacebar to enter or clear the check mark. If closed, the text boxes beside **Library Opens** and **Library Closes** (below) will not be available for entry.

5. Time library opens: Enter the time the library opens on this day.

6. Time library closes: Enter the time the library closes. If the closing time is after midnight, enter the time, and then select the check box beside **The Next Day**.

7. Save the changes for a day: After changing the setting for a day, select the **Save Date Info** button.

8. Change other days: If there are other days you want to change in this month, select another day, and follow the steps above.

9. If you want to change a date back to the **Weekly Calendar** default, simply select the button for **Set to Weekly Defaults**. Be sure to **Save Date Info** for each day you change. Repeat in this month and other months until all necessary changes have been made.

10. After making all changes, close the setup window by selecting the **Close** button.

To set up the Weekly Calendar:

1. Select the **Setup** menu. Then select **Calendar Configuration**, and then **Weekly Calendar**. The **Weekly Calendar Defaults** for this Branch window appears.

2. Select a day. Select the round button beside the first day you want to define or change.

3. **Library is normally open on this day of the week:** If the library is normally open on this day, select the check box beside "Library is normally open on this day of the week"; a check mark will be displayed. If the library is closed, click the box to clear it. You can also press the spacebar to enter or clear the check mark.

4. **Time library opens:** Enter the time the library opens on this day. Type the time like this: 9:00 am or 10:00 pm (type am or pm in lower or upper case).

5. **Time library closes:** Enter the time the library closes. If the closing time is after midnight, enter the time, and then select the check box beside **The Next Day**.

6. **Save this weekday:** Select the **Save This Weekday** button.

7. Select the next day of the week, and follow the steps above.

8. After making all necessary changes, close the setup window by selecting the **Close** button.

Cash Drawer

To configure the Cash Drawer:

1. Select **Setup** on the title bar at upper left of the Circulation window. Select **Local Configuration**, and then select **Cash Drawer**. The **Cash Drawer Setup** window appears.

2. If you do not have a cash drawer, leave the **Cash Drawer COM Port** default selection at "None." If you do have a drawer attached, select the correct COM port from the drop-down list (COM 1, 2, 3, or 4).

3. The **Control Character in Hex** is the signal sent to the cash drawer to open. The default ("07" which corresponds to key combination Ctrl + G) is the setting for the APG cash drawer.

4. The **Allow Cash Drawer to Open Without Payment** field allows supervisors at each library to set more security on when the cash drawer can be opened.

   The initial setting for the check box is unchecked. This setting provides more security for access to the cash drawer. If the box is unchecked, this means that the cash drawer will open only if a payment is made (for a selected borrower on the F2 **Charges** tab). When Circulation staff enter an amount and select the **Balloon Pay/Waive** or **Individual Pay/Waive** button on that tab (whatever is appropriate to this payment), the cash drawer will open automatically.

   When the box is checked, the **Open** button is available on the F2 **Charges** tab for a selected borrower, and the **Cash Drawer** item is available on the main Circulation menu. Circulation staff at this station can open the drawer by selecting either option, even if no payment is made.

5. To save changes, click the **OK** button.

Charge Types

To set up new Charge Types:

1. Select **Setup** from the menu bar at the upper left of the Circulation window. Select **Types and Codes**, and then **Charge Types**.

2. To view a list of default and other existing **Charge Type** codes, click the down arrow beside the **Charge Type** list box. Select a code to view its **Description**.

3. To add a code, type the code in the **Charge Type** text box. Press **Tab** or click in the **Description** text box, and type a meaning for the code. Then click the **Add New** button.

4. When you have finished adding or editing, click **Done**.

See also Fines

Check In Items

To check in items:

1. Click the **Check In/In House Use** tab, or press the F3 key.

2. For **Mode**, click **Check In** (usually the default mode).

3. Optional: Before you continue checking in the item, you can select one or more of these options:

- **Suppress Messages:** To turn off the display of overdue fines, or "already checked in" messages, select the check box beside **Suppress Messages**. Select the type of message(s) you wish to suppress.

- **Override Check In Date/Time:** If you wish to enter a different check in date or time, select the check box beside **Override Check In Date/Time.** Enter the date.

  Note: The override check in date and time boxes will be invisible if the option is not turned on. If it is turned on, the background in these boxes will be red to alert you that the override is in effect.

- **Special Status check in:** You can check in an item with a special **Item Status**, for example: lost, missing, borrower claimed the item was never checked out, or borrower claimed the item was already returned. To do this, select the **Special Status** button before you enter information about the item to check in. When you click this button, the text on the button turns red. (Click the left mouse button to check in only one item with **Special Status**, or right-click the button to have the **Special Status** mode stay active for multiple checkins.)

  If a hold is placed for an available item (either through the PAC or CIRC) that item is put into a "T" (in-transit) ststus and a message is generated directing staff to retrieve the item and either forward it to the pickup location or check it in and place it on the holds shelf for pickup. If the staff person cannot locate the item to fill the hold, she should return to a Circ station and inform the system that the item could not be located by checking in that itemwith a special status of "Missing -- Staff action." Click on the **Special Status** button on the **Check In (F3)** screen and type the barcode number of the requested item in the item search box and click the **Check In** button. If the item has been checked out by another borrower since the message was created, the program will ask, "Were you looking for this item because a system message requested it to fill a hold?" and you should answer by clicking the **Yes** button (or simply type the "y" key). You will then see a message like the following: "This item was checked out after it was selected for a hold. The hold has been redirected to another branch or changed to a pending status" with an **OK** button to clear the screen. Or, if the item is simply missing and no one else has checked it out, you will be given the option of marking the item with a status of "MS" and the system will then either select another item to fill that hold, or reset the hold's status to "PE" (pending) so that it will be in the queue for the next available copy. If the requested item is the only one in the system that could have filled the hold, and you have just marked it missing, then the system will present you with some options for notifying the borrower.

If you check out an item with an HD status to a borrower other than the person who held the title, an Arrived Hold Override form will display. Select the original borrower from the list and click the Change Status to PE button. The Hold Replacement form will display. Select the "System Selects Item fo Fill Hold" option and click OK. You will be advised to retrieve the second copy of the item and check it in. This can now be checked out to the original borrower.

4. To continue with the check in, in the **Item** text box, scan the barcode number or type the **Item ID** number. You can also search by title. Click the **Check In** button, or press **Enter**.

5. If you searched by title, in the **Title Lookup** window, select the title you want to check in.

6. If there are multiple items for this title, the **Items Associated with Title** window will be displayed. Select the correct item and click **OK**, or press **Enter**.

7. During check in: Several kinds of messages may be displayed during the checkin process:

- **Special Status window:** If you selected the **Special Status** button, the **Special Item Handlin**g window opens. Select the Item **Status** you want to assign to the checked-in item.
- **Lost Item Charges:** If an item was Checked in as Lost, and later the item is found and is checked in the Outstanding Charges dialog will open. If the borrower made previous payments for the lost item, a Lost Item Charge Payments dialog will display a list of all payments made.

- **Overdue:** If the item was overdue, this message will appear: "There is an overdue fine on this item for <Patron name / ID>. Would you like to charge it? Click **Yes** to charge the fine, **No** to check in the item with no fine, or **Cancel** to not check in the item at all.
- **To Override Arrived Holds:** When attempting to check in an item with Special Status (in response to a system message directing you to retrieve an item for a hold, but the item is not on the shelf) and that item has been checked out to another borrower (someone had to do an override to create this situation), you will see a **Check-In Clarification** message, "Were you looking for this item because a system message requested it to fill a hold?" Answer **Yes** to this message -- the system has already selected another copy to fill the original hold request, or changed the request to a "Pending" status so it will be filled with the next available copy.
- **Delete OTF (on-the-fly) item?** A special option can be configured in the **Branch Setup**, so that a message will appear when you are checking in Circulation on-the-fly records. The message is: "Do you want to delete this item from the system?" If you answer **Yes**, and if this is the last item for this title, another message asks "Do you want to delete the title record?" Select **Yes** or **No**.
- If you attempt to checkout an item that has an "HD" ststus (the system has that item on the holds shelf ready to be picked up by another borrower), you will see an **Arrived Hold Override** form. To keep the original requestor in the holds queue, select the row associated with that borrower, click on the **Change Status** button, and choose **Change Status to PE** button. You will have the option of selecting another copy to fill the original request, or letting the system do that for you. If you are checking out the "HD" item to another family member who is picking up the item on behalf of the original requestor, select the original requestor in the list of "HD" holds, and choose the **Cancel Hold** button to remove that person from the holds queue.
- **Relocate Item message:** This window appears when items are "arrived" holds, or if they have a "T" Item Status (in-transit) and may need to be transferred to another location. If an item needs to be sent to a different library, the **Relocate Item** window includes a **Print** button to allow the user to print a copy of the **Relocation Item** message. The slip can be inserted in the item to accompany it to the specified location.

8. A display of items just checked in appears on the lower part of the **Check In** tab. The list includes: Item ID (usually barcode number), title, date and time the item was due, and borrower name. The list includes the last fifty (50) items checked in during today's work session. You can perform item or borrower inquiries by selecting the **Item Inquire** or **Patron Inquire** buttons.

To check in items with special Item Status:

1. Click the **Check In/In House Use** tab, or press **F3**.

2. For **Mode**, click **Check In** (already selected as the default mode).

3. Before you enter information about the item to check in, select the **Special Status** button. The method of selecting will determine whether or not the button stays turned ON for multiple checkins.

   Tip: If you want to check in only one item with special status, click the left mouse button. The text on the button turns red, and the Special Status mode will be cleared after you check in the item.

   If you want the **Special Status** mode to remain in effect for multiple checkins, click the right mouse button. (If you rest the mouse over the button, a "hint" appears: "Right-click to lock Special Status button ON.") To turn off the lock, left-click the button, or click the Check In or In House Use mode button.

4. Search for the title or item to be checked in and select the correct item.

5. The **Special Item Handling** window appears. The codes available in the list depend on the item's **Item Status** code at the time of the checkin. For example, different Special Status codes are displayed if the item was overdue (code "OD") instead of on hold ("HD").

   To select a condition, click that line, and click **OK** (or press the **DOWN** or **UP ARROW** to highlight a status, and then click **OK** or press **Enter)**.

6. If you selected **I: Damaged**, the **Damaged Item Check In Selection** dialog will display three choices. Click the desired option button and then click Continue. Note: Damaged items will go to a 'T' status until checked in. Any pending holds on the damaged item will not be filled until it is checked back in.

   Select one of the following:

- This item should not be allowed to circulate at this time - When you click Continue a **Relocate Item** dialog will appear advising you to move the item as described in the notice. Print the notice and insert in the book if needed. Click **OK**
- This item has minor damage and can still be used - Click **Continue**.
- Cancel this check in operation - Clicking **Continue** returns you to F3 tab.

If you selected the first option, the following sequence will occur to send the item to repair, and when repaired to return the item to circulation.

When the item is returned from repair and checked in you will be asked if you wish to return the item to circulating status. Click Yes if appropriate.

If there is a condition note, you will asked if you want to edit or delete the note.

7. Now the **Edit Item Condition** window opens, so you can enter an optional note about the physical condition of the damaged item. If you have added information, save changes by clicking the Update Condition button, otherwise click Don't Change.

8. Then a special charges/fine window opens (New Patron Fine for Item), allowing you to enter an optional charge. Also enter a descriptive comment, a Charge Type Code (code "D" for "damaged" appears by default), and the amount. Click the Charge Fine button to save (or Don't Charge to cancel).

   If the item was checked out and you selected one of the L: Lost options, the fine charge window opens with a default Charge Type Code "L"; enter an optional charge and other information, and click Charge Fine.

9. If the item status was previously "Lost", the Adjust Claims dialog will ask: Should the claims counter be adjusted for this claim? Selecting **Yes** will decrement the **Items Lost** counter on the borrower's record. Respond **Yes** or **No** as desired.

10. The item is checked in, its Item Status code is changed. Depending on how you selected the Special Status button, it changes back to black (inactive), or stays red (active) for another checkin.

To override checkin date/time:

1. Select the **Check In/In House Use** tab, or press the F3 key.

2. For **Mode**, select **Check In** or **In House Use**.

3. If you wish to enter a different check in date or time, select the check box beside **Override Check In Date/Time**. The override date and time boxes will become available. The background in these boxes is red to alert you that the override is in effect.

4. Enter the date in this format: **mm/dd/yyyy**. For example, for **March 23, 1997**, type: **03/23/199**7 (slashes are supplied by the system).

5. If time is relevant, type the time, using 2 digits for 1-9, like: 09:30. The default is "AM"; to change, type "pm" or "PM". [The override time feature is not yet available.] The override date and time are effective on all transactions until you select this option again to clear the check box. If the check box is cleared, no override is used even if a date/time are present.

6. In the **Item** text box, scan the barcode number or type the number. You can also search by title. Click the **Check In** button, or press **Enter**.

To suppress checkin messages:

1. Select the **Check In/In House Use** tab, or press the F3 key.

2. For **Mode**, select **Check In** or **In House Use**.

3. If you wish to suppress check in messages, select the check box beside **Suppress Messages**.

4. The **Suppressed Messages** check boxes appear. Select the check box beside one or more choices: **Fines** or **Already In**. Your selections remain in effect on future checkins, until you clear a check box or clear the overall **Suppress Messages** check box.

5. Begin to check in items. In the **Item** text box, scan the barcode number or type the number. You can also search by title. Click the **Check In** button, or press **Enter.**

These types of messages can be suppressed:

- **Fines:** Notification that an overdue fine was charged to the borrower.
- **Already In:** Item was already checked in and should be shelved in this library.

The following types of check in messages cannot be suppressed:

- **Relocate Item messages:** Item is an "arrived" hold or has a "T" Item Status (in transit) and needs to be transferred to another library.
- **Recall messages:** If items have been recalled, the recall message will be displayed when the items are checked in.
- **Item was previously "lost":** If an item with a "lost" Item Status happens to be checked in, a message will alert you of the previous lost status.
- **Item has multiple parts:** If an item with "multiple parts" is checked in, a message will alert you to check for those parts.

Note: Only items with an "in-transit" (T) or "checked out" (CO) status can be recalled. If a recalled item is checked in as damaged, the item will be assigned to the Repair Shop designation first. when the item is returned to circulation the recall will take effect.

Check Out

New in Circulation v3.3: If there is a condition note in the Condition field for a title on the Item / Tile Info <F4> Bibliographic tab, and the Show check box is checked, the Condition note will display during checkout.

To check out items to a borrower:

1. Select the **Patron Transactions** tab, or press **F2**.

2. In the **Patron** text box, scan the borrower barcode label, or type the **Patron ID**, **Alternate ID**, or name.

   After a borrower has been found or if you have entered a new borrower record, information about the borrower appears on the upper part of the window. The blinking cursor will wait at the **Enter Item** text box, ready for you to check out an item.

   Note: If a Patron ID (barcode) is entered to the Enter Item (Check Out) field and the Check Out button is clicked, Circulation will load that Patron's record.

3. Change due date/time (optional): If you need to override the default due date or time, click the "calendar" button [**Change Due Date** button], before you enter information about the item or title to be checked out.

4. **Statistics-Only Check Outs** (optional): If you would like to check out a number of uncataloged, unbarcoded items, select the **Stats-only Check Out** button. The **Statistics-Only Check Out** box will appear. Select a collection, enter the number of items, and select the **Check Out** button, or press **Enter**.

5. Normal checkout: In the **Enter Item** box, scan or type the **Item ID** (barcode number) of the item, or type the control number, the title, or first word(s) of the title. If you type the barcode number or control number, you must type the whole number, including any prefix characters or leading spaces in the control number (no truncation).

   Then click **Check Out** or press **Enter**.

6. If you scanned or typed the Item ID (barcode number), the item will be checked out immediately, unless there are blocks on the borrower.

   Note: If the item is already checked out to another borrower a message will display asking if you want to check-in item from existing patron and check-out to new patron. Clicking **Yes** will result in a "renewal."

7. **Blocks:** If there are blocks on this borrower, a block message may appear in a window labeled **Enter Override Password**. Type the password, and click **Try** or press **Enter**.

   Other types of blocks, such as an expired card, appear in a simple message window. Click **OK** or press **Enter** to exit the window, and then see the **Blocks** area of the **Patron Transactions** tab for more information.

   The check out might be blocked if the item happens to be an "arrived" hold for another borrower. Staff with the proper security can override the hold and check it out to this borrower.

   Rental charge: If the item being checked out is in a holdings code that has an optional rental charge configured, a message box will display, asking if you wish to charge the rental fee. Choose **Yes** to charge, **No** to check out the item with no charge, or **Cancel** to cancel the checkout. The rental fee will appear on the borrower's **Charges** tab.

8. If the check out was successful, the checked out item(s) for this borrower will be displayed in the **Items Out** tab on the lower portion of the **Patron Transactions** tab.

9. If a printer has been configured for date due slips, a slip will be printed when the item is checked out.

To check out multiple uncataloged items:

1. Go to the **Patron Transactions** tab, find the borrower who wishes to check out items, and then select the **Stats-only Check Out** button. The **Statistics-Only Check Out** window will be displayed.

2. Select a collection code from the list on the left. In the **Quantity** box, type the number of items to be checked out.

3. Select **Check Out** or press **Enter**. The items will be included in Circulation Statistics, but individual items are not tracked for overdues, etc.

To override the due date (and time):

1. Select the **Patron Transactions** tab, or press F2. Either before or after you enter information in the **Patron** field, but before you search for the item/title to be checked out, click the **[Change Due Date]** button. This is the **Calendar** button located to the right of the **Check Out** button.

2. The **Enter Override Password** block window may appear (depending on your "Security Level" setup in Security). If the **Override** password opens, it asks you to "Enter password to override due date for next check out." Type the password. (If no passwords have been set up in the **Branch Setup**, simply press **Enter**.) If the override window does not appear, go to step 3 below.

3. The **Please Choose a Date** (change due date) window will be displayed.

- **Date:** Type the override due date, like this: **mmddyyyy**. For example, for **February 7, 1998**, type: **02/07/1998**. (Do not type the slash characters **/**.) Click **OK,** or press **Enter**.
- **Change due time (optional):** To change the due time in addition to the date, click the check box before **Time**. Enter a time, including "am" or "pm" (upper or lowercase).
- **Leave override date/time turned on (optional):** If you want the override due date to remain in effect for more than one check out, click in the check box beside the message: "Leave on until turned off." If you do not check this box, the override due date will affect only the next checkout. As soon as you have entered and saved the override due date, you will see this message displayed above the **Check Out** button: **Date Overridden**.
- **To turn off the override due date:** Click the calendar button again, or click anywhere in the **Date Overridden** message. (Remember, if you did not check the "Leave on..." box, the override due date will affect only one checkout.)

Note: The **Station Options** field **Override Due Date Stays On** allows the override due date to remain on, for checkouts at this station, even if another borrower is selected on the F2 tab.

4. Continue with the checkout by entering item or title information.

To Override Arrived Holds:

During check out, an item might be blocked from check out if it is an "arrived" hold for another borrower. The block automatically displays one of the message boxes below. Several options are available.

- If the operator intentionally, or mistakenly, uses a copy to satisfy a hold for a title that is on hold for another borrower, the transaction will be permitted. The barcode information will be adjusted in the database to reflect the transaction. A new Arrived Hold slip will be generated for the borrower whose copy was taken, reflecting an available item (barcode).
- If the operator is overriding an item level hold, the "override" form title in Library•Solution Circulation displays "Item being checked out is an Item Specific Arrived Hold for the borrower listed below," and only one borrower will be listed on the form.
- For title level holds the "override" form title will still display "Item being checked out is an Arrived Hold for one of the borrowers listed below," and the list will include all borrowers at that library who have an Arrived Hold for that title.
- If a shelved title level hold item is checked out to another borrower and you attempt a Special Status check in of the item, a Check-In Clarification message will display saying : "Were you looking for this item because a system message requested it to fill a hold?" If you click Yes the system will attempt to find another copy of the item to fill the hold or change the hold's status to PE. Also a message will be generated advising you to retrieve another copy and check it in.
- If you check out an item with an HD status to a borrower other than the person who held the title, an Arrived Hold Override form will display. Select the original borrower from the list and click the Change Status to PE button. The Hold Replacement form will display. Select the "System Selects Item fo Fill Hold" option and click OK. You will be advised to retrieve the second copy of the item and check it in. This can now be checked out to the original borrower.

Follow the instruction in the message boxes during this process, which provide more information about the current hold and possible actions.

When overriding an arrived hold item and checking it out to a different borrower, you can choose to cancel the hold, change the status to pending ("PE"), or cancel the attempted checkout.

The operator may need to enter the Supervisor password, depending on their current Circulation security rights.

To inquire about a checked out item:

1. Click the **Patron Transactions** tab, or press the F2 key. Access the borrower.

2. When the borrower's information is displayed, click the **Items Out** tab. (Usually, the tab is already open.)

3. Select the item for which you want to see more information. Then click the **Inquire** button. This takes you to the complete **Item/Title Record**, displayed on the **Item/Title Information** tab. You can also press the **F9** key and search for the item.

Circulation Rules

To set up or modify Circulation Rules:

1. To set up or change the Circulation Rules for a Patron Type, select **Setup | Types and Codes**, and that **Patron Type**.

2. Select the holdings code for which you wish to modify the checkout rules. To view the list of holdings codes, click the down arrow beside the field, or click the right or left arrow buttons further to the right of the field. These buttons access the first code in the list, the previous, next, or the last code. A description of the holdings code is displayed.

3. Press the **Tab** key to move to the rule field to be changed, or click the field you want. Make any necessary changes.

4. **Important!** Before you select another holdings code to view or edit, save the changes you have made by selecting the **Save Rules** button.

5. If you wish to copy the set of rules (for the Patron Type checking out this Holdings Code) to another Holdings Code, select the **Copy** button. Select the next **Holdings Code**, and then select **Paste**. Then select **Save Rules**.

6. After you have finished making all changes, select **Done**.

Course Codes

To set up Course Codes for Reserve Items

1. Select the **Setup** menu, **Types and Codes**, and then select **Course Codes**. The **Course Codes** dialog appears.

2. To view a list of existing codes (if any), click the down arrow to the right of the **Course** edit box. Select a code to view its **Description**.

3. To add a new code, type the code, up to a maximum of 20 characters. As soon as you start typing a previously unknown code, the **Add New** button becomes available, and the message **New Type Code** is displayed in red at the right.

4. After typing the code, press the **Tab** key to move to **Description**, or click in that field. Enter a description for the Course, up to 250 characters (a brief description is recommended).

5. If you edited the **Description** of a current code, select **Save**. If you added a new code and description, select **Add New** to save it. If you wish to delete a code, select **Delete**.

   To exit the setup after saving, or to exit without saving changes, select **Done**.

Delete Records

Here are some important guidelines about deletions:

- You can delete any title record by deleting the MARC record in the Cataloging module.
- You can delete item records (barcoded items) for any title, in either Circulation or Cataloging (except for serial items checked in through the Library•**Serial** module).
- As a safeguard, the system will not allow deletions from within any module if items are checked out or if an item is an "arrived" hold (ready for check out by the borrower who placed the hold).
- In the Circulation module, the only records the system allows you to delete completely (meaning delete title and item information) are on-the-fly ("OTF") records. These are identified by the message in red text at the upper right of the F4 tab: This is a Circulation Record.

  Delete OTF on Check In? The Branch Setup (Defaults tab) includes an optional field: "Delete OTF on Check-in." If this check box is checked, a prompt appears during Check In that allows you to delete on-the-fly items and titles automatically.
- In non-on-the-fly records, information in the bibliographic information fields on the F4 tab is displayed in gray. The only action you can take in Circulation would be to delete item records or change barcode numbers or holdings information. Otherwise, the bibliographic information in those records must be edited in the Cataloging module.
- If you attempt to delete in Circulation any items that were checked in and barcoded through the Library•**Serial** module, the following message appears: "You must delete this holding through the Library•**Serial** module by 'Returning' it."
- **Caution:** Records deleted in Circulation cannot be recovered. They are NOT saved to the deleted records file configured in the Cataloging Utilities (if a deleted records file is configured, then records deleted through Cataloging are saved to that file)) or to the system-wide deleted records archive.

To delete item or title record:

1. Select the **Item/Title Information** tab, or press F4.

2. Scan the barcode label, or type the title, the Item ID (barcode number), or the control number. Click **Search** or press **Enter**. Select the title from the **Title Lookup** window, and click **OK** or press **Enter**. Title Information fields are displayed on the upper part of the screen, and Item Information appears on the lower area.

3. To delete item (barcode) record: In the **Items Information** area, click the drop-down arrow beside the **Item ID** text box to display a list of barcode numbers. Select a barcode number. Then click the **Bibliographic** tab. Click the **Delete** button at lower right. A message will ask you to confirm the deletion. Click **Yes** to delete.

4. To delete title record (the complete record, including all copies and volumes): In the **Title Information** area, click the **Delete** button. (This button is available only if the record is one that was added to Circulation "on-the-fly.") If the button is not available, you will need to go to the Cataloging module to delete the record. A message will ask you to confirm the deletion: "You are about to delete edited title and ALL its items. Is that what you want to do?" Click **Yes** to delete.

Department Codes

To set up Department Codes for Reserve Items:

1. Select the **Setup** menu, **Types and Codes**, and then select **Department Codes**. The **Department Codes** window appears.

2. To view a list of existing codes (if any), click the down arrow to the right of the **Department** edit box. Select a code to view its **Description**.

3. To add a new code, type the code, up to a maximum of 20 characters. As soon as you start typing a previously unknown code, the **Add New** button becomes available, and the message **New Type Code** is displayed in red at the right.

4. After typing the code, press the **Tab** key to move to **Description**, or click in that field. Enter a description for the department, up to 250 characters (a brief description is recommended).

5. If you edited the **Description** of a current code, select **Save**. If you added a new code and description, select **Add New** to save it. If you wish to delete a code, select **Delete**.

To exit the setup after saving, or to exit without saving changes, select **Done**.

Fines

To calculate fine (before checkin):

1. Click the **Patron Transactions** tab, or press the F2 key. Access the borrower. When the borrower's information is displayed, click the **Items Out** tab. (Usually, the tab is already open.)

2. Select the item for which you wish to calculate the possible fine. You can calculate the total fines for multiple items, if the items are listed together in the list. To select items, drag the mouse down the list to highlight the ones you want.

3. Click the **Calculate Fine** button on the lower part of the **Items Out** tab. If you selected only one item, a message window reports that if you check in the item immediately, the amount of the fine would be "$[stated amount]." If you selected more than one item, the message is: "[Number] of the [total number] of items you selected would result in an additional fine for this borrower. The total fine would be $[amount]."

To change the Overdue Fine Amnesty Period:

1. Under the **Setup** menu, click on **Types and Codes**. Then select **Patron Types**.

2. Click the arrow beside **Patron Type** to see a list of current borrower types.

3. Click on the first borrower type for which you will change **Max. Fine Balance**. The borrower type will be highlighted.

4. Select the check box beside **Max. Fine Balance**. A check mark will appear in the box.

5. Click in the textbox at far right. Press the Backspace key to clear the current value. If the value you set is not **$0**, press the number **0**.

6. Click **Save** on the right side of the screen.

7. Click **Done** on the right side of the screen.

8. Repeat steps 1-7, for each **Patron Type** that you want to be included in the "no fines" collection setup.

Reset values after amnesty period: When the amnesty period is over, you will need to reset the **Max. Fine Balance** back to the original values. Follow the steps as above, except you will type the original value in step **6** instead of **0**.

To view and handle Charges:

1. Select the **Patron Transactions** tab or press F2. Access the borrower. When the borrower's information is displayed, select the **Charges** tab.

   All Charges for Current Patron appear in a list box on the left. When you first access a borrower's **Charges** tab, the cursor rests in the **Patron's Branch Balance** (or **Patron's Total Balance**) box on the lower left, with the total amount the borrower owes is already entered and is highlighted. (The type of balance shown depends on the **Pay Local Fines Only** selection in the **Branch Setup**.)

   This allows the operator to accept full payment by simply clicking on the **Balloon/Pay Waive** button (without entering any amount at all). If the borrower wants to pay less than the full amount, the user can overtype the amount already in the box, and then click the button.

2. You can accept payment or waive payment on total charges due (either at this library or for any library, depending on the configuration). In the **Amount to Enter** or **Amount to Waive** field, type the amount, type the decimal if the amount is not a whole dollar, cents, if any (dollar sign not necessary), for example: **5.25**

   Then click the **Balloon Pay/Waive** button. If you are waiving, enter the password if requested.

   Tip: If you want to waive part or all of a fee, be sure to reduce the total in the **Amount to Tender** box by that amount.

3. Payment or waive a single charge: Select a charge from the **All Charges** list on the left. On the right, detailed information will appear for the selected (highlighted) charge. You can change or

add the **Comment** or change the **Charge Type** code for a selected charge. To save, select **Update**.

To accept payment or waive payment on a single charge, drag the mouse from right to left (or double-click) in either the **Tender** or **Waive** field. Enter the amount to be paid or waived. Then select **Individual Pay/Waive**. If you are waiving, enter the password if requested.

4. **New Charge:** To add a new charge to the borrower's account, select the **New Charge** button.

Holds

To place hold request for title or item:

1. Select the **Patron Transactions** tab, or press the F2 key. Access the borrower. When the borrower's information is displayed, select the **Holds** tab.

2. Select the **Place** button. The **Define New Hold Basics** window appears.

3. In the **Define New Hold Basics** window, change the defaults (if necessary) for **Hold Expiration Date** and **Holds Priority** for this borrower. If you would like for the arrived hold item (item with Holds Status **AR**) to be sent to a different library than the one displayed for pickup, click the down arrow in the list box to the right of **Send to Branch**, and select a library. Click **OK**. The **Define Title Specifics** window appears.

4. In the **Define Title Specifics** window, in the **Select Title** text box, enter information about the title or item you want to place on hold. Click the **Pick** button or press **Enter**.

5. Select the title you want from the **Title Lookup Window**.

6. The system checks to see if the borrower is allowed to check out items of the selected title (based on the Patron Type and the circulation "rules" for the Holdings Codes of the items).

   If borrower is not qualified to check out any of the items, a **Holds Advisory** message warns: "There are not any items for this title that can be circulated to this borrower type." Click **OK** to exit the message. For more information, you can then view the "Allowed" column on the **Holds Branches** and **Items** tabs. Select **Exit** to leave the **Define Title Specifics** window without continuing with the hold.

   If borrower is qualified to check out only some of the items, a **Holds Advisory** message warns: "Some copies of this title are not allowed to be circulated to this borrower type." Click **OK**. View the "allowed" columns for more information. Save the hold anyway if you want to continue. When an eligible item becomes available or if it is already on the shelf, it will satisfy the hold.

7. The selected title and its control number will be displayed on the upper portion of the **Define Title Specifics** window. If the title is available on the shelf in this library (even if the borrower is not qualified to check it out), a message will be displayed: "Selection criteria presently includes items which are available [on the shelf]. Place the hold anyway?" Do one of the following:

- Select **No**. If borrower is qualified to check out items of this title, suggest going to the shelf and find the available item for checkout.
- Select **Yes**. The system will display a **Relocate Item** window to remind you to retrieve the item from the shelf and place it on the "arrived" hold shelf for this borrower. If multiple items are available, the system will select one. The message is also retained and can be viewed later in the **Messaging** menu.

8. **Limit hold to library or item:** If you would like to limit the hold to items at a specified library or limit to a particular item (barcode number), use the **Branch** or **Item** limiting tabs at the bottom of the **Define Title Specifics** window. (The **Item** limiting tab includes individual call numbers.) Whether or not you limit the hold, click **Save** on the **Define Title Specifics** window.

9. If you then make any changes in the **Selected Holds** fields, click the **Save Hold Info** button. The hold(s) placed for this borrower will be listed in the **Patron Holds** box on the left side of the **Holds** tab.

To access the Holds Queue:

1. Select the **Item/Title Information** tab, or press F4. In the **Item/Title** entry field, scan a barcode label, or type the title or barcode number of the item of interest.

2. Select the **Holds** button (on the right center of the tab). The **Holds Queue** window will be displayed. Select a borrower (click the borrower line to highlight it). The information about that borrower/hold is displayed in the center of the window, with several command buttons below it.

   Messages displayed in red will alert you if the title is part of a multiple title hold or if the hold has been limited by library or item. If the hold has not been limited, the message is: "This hold was set to include any item of this title, regardless of branch."

3. To change the borrower's priority on a hold, enter a new priority number (1 = highest priority, 10 = lowest priority) in the text box beside the **Set New Priority** button, and then click the button. The position of this borrower in the queue display will be changed. If you do not need to make any other changes, you can exit the window by clicking the **Close** button.

4. To edit a hold, select the borrower from the list. Then click the **Edit This Hold** button. This will take you directly to the **Holds** tab on the **Patron Transactions** tab.

5. To cancel a hold, select a borrower from the list on the **Queue**, and then click the **Cancel This Hold** button. A message will ask if you are sure you wish to delete the selected hold. Click **OK** or press **Enter**.

6. To exit the Queue, click the **Close** button.

To edit, delete, or cancel holds via Patron Transactions tab:

1. Select the **Patron Transactions** tab or press F2. Access the borrower, and select the **Holds** tab. Select the title or item on hold that you wish to edit or cancel. View the **Item/Title Info F4** information by double-clicking the title on the Holds list.

2. In the **Selected Hold** area in the center of the **Holds** tab, information is grouped in several areas. Select the field or option you wish to change. If the data in certain fields is displayed in gray, you cannot edit those fields. If you make changes, select the **Save Hold Info** button.

3. To cancel a hold: Select the hold from the **Patron Holds** area on the left, and then select the **Cancel** button on the lower left. (You cannot use the **Delete** button to cancel a hold; it is used only to delete one item of a multiple title hold.) A message will ask you to confirm that you wish to cancel.

4. Multiple title holds: If the hold is a multiple title hold, you can delete one or more (but not all) of the individual titles or items. Select the hold from the **Patron Holds** area on the left, select the item in the **Definition of Hold** area on the right, and then select the **Delete** button. If you try to delete the last remaining item, a message warns that you cannot delete the last item. Instead, use the **Cancel** button to cancel the complete hold. (See step 3 above.)

To view and work with Holds Shelf items:

1. On the **Utilities** menu select **Holds Shelf**. A list of all titles currently on the "arrived" holds shelf appears in the **Arrived Holds Shelf** window. The list includes Title, Item ID (barcode number), Patron name, number of Days on Shelf, and number of PE (pending) holds.

2. To remove or reassign an item to another borrower, select the item by clicking it in the **Title** column. Then select a button on the lower part of the window to **Cancel Hold** or **Change Status to PE**. The buttons have the same security features as for other checkout overrides, and access depends on the current user's security rights.

   Instead of using the buttons, users can right-click on an item in the **Title** column, and a popup menu containing the options **Cancel Hold** and **Change Status to PE** will appear. Select from the menu.

   Cancel an arrived hold: If you choose this button, a confirmation box will appear, asking you to confirm that you want to cancel the item. Then a **Relocate Item** box will pop up, telling you what to do with the item. This is followed by another box reminding you to notify the borrower that the hold has been cancelled.

   Change a hold to PE (pending) status from AR (arrived): When you do this, the item will become available for another borrower. A new form will display, asking you to enter a new priority for the hold. The default will be "1" plus whatever the original priority may have been. For example, if the priority was "5," the new priority will be "6." You can enter only "1" through "10" in the edit box.

   If you click **Cancel** here, no change will be made to the hold. If you click **OK**, the hold will be changed to the **PE** status, and the next borrower in the holds queue will be assigned the item. A **Relocate Item** box will appear telling you where to send the item, followed by a box telling you to notify the original borrower of the status change.

To limit a hold:

1. Follow the initial steps for placing a title or item on hold.

2. When the title you want is displayed at the top of the **Define Title Specifics** window, click the **Branches** or the **Items** tab on the lower portion of the screen.

   Branch limiting: To limit the hold to items circulated by a particular library, click the **Branches** tab. Then click the **Toggle Branch** button (or double-click on "Limit to" on the line where the desired library is listed). This will change the "Yes" or "No" display in "Limit to."

   Item limiting: To limit the hold to a particular item (copy or volume), click the **Items** tab. All items for this title are listed, including the call number for each item. Then click the **Toggle Item** button (or double-click on "Limit to" on the line where the desired item is listed). This will change the "Yes" or "No" display in "Limit to."

   Hint: Use item limiting only when it is necessary to find a particular item, for example, if a borrower needs to see volume 3 of a multi-volume work.

   Notes on limiting: The "Available" column on both tabs indicates item shelf status availability: "Yes" or "No. If a hold has been limited, the specific library or item ID is shown in the **Definition of Hold** box on the right of the Holds tab. If you view the **Holds Queue**, a message (in red in center of window) will state whether or not the hold has been limited.

   To clear all limits: Click on the **Clear All Limits** button.

3. Whether or not you limit the hold, click **Save** on the **Define Title Specifics** window.

   If a hold has been limited, this information will also be displayed on the **Holds Queue** for the title/item.

   Note: Another way to limit is to edit the hold after it has been saved. To do this, go to the selected borrower's Holds, select the title or "description," and then click the **Limit Title** button.

To sort items in the Arrived Holds Shelf list:

The default sorting of items in the list is descending order by [number of] Days on Shelf. Users can reorder the list by another category by clicking on that column. Click once for ascending order, and click again for descending order. For example, to see the list arranged alphabetically by title, click the **Titles** column once.

Item Fields

To set up Item Fields:

1. Select the **Setup** menu, **Types and Codes**, and then **Item Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) set up for that field.

   When you open the setup window, the first **Item Field** is displayed by default. To view other **Field Names**, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** columns on the lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

3. To insert a new field, select the **New Code** button. In the **Define New Item User Field** box, enter a **New Field Name**. To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for **Coded** or **Strict**.

   If you make any changes in the field name or type of coding, select the **Post** (check mark) button on the upper toolbar.

   Note: You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended. Since capitalization matters for sorting, field names should be entered consistently, i.e. either all capitals or all mixed case.

4. To insert a code for a selected field, select the **Insert** button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar.

Note: The system will not allow you to delete a field or code if any item currently includes the field and a code.

To view or enter Item Field data:

1. On the **Item/Title Info** tab F4 search for and select a title, and then select an item in the Item ID drop-down list.

2. Select the **Item Fields** tab. If any **Item Fields** have been set up, the fields are listed under **Field** on the left. If codes or data have been entered for a field for this item, this will be displayed in the **Value** column.

3. To enter data, select a field. Then click in the **Value** area. If codes have been defined for this field, a drop-down list will appear. Select a value.

Item/Title Records

To access item/title records on Item/Title Information tab:

1. On the main Circulation window, click the **Item/Title Information** tab, or press F4.

2. Scan the barcode label, or type a title, the Item ID (barcode number), ISBN, OR the control number. Type the director code prefix **\c** followed by the call number to search by call number. If you type the information, click Search or press **Enter**.

   Important - 13 digit ISBN: In Circulation v3.3 ISBN searches must be entered as either a 10 or 13 digit ISBN. Searches with any other amount of characters entered will fail.

   If the title you want is not found in the **Title Lookup** window, click the **New Title** button to add a new title "on-the-fly."

3. The **Item/Title Information** tab is divided into two main sections: **Title Information** at the top and **Items Information** on the lower portion of the tab. If the **Title Information** fields are available for editing, and you make changes, click the **Save** button.

4. Holds information: To review, change, or cancel holds for this title, select the **Holds** queue button.

5. Select an item: For more information about an item for this title, click the drop-down arrow beside the **Item ID** text box to display a list of barcode numbers. Select a barcode number. The Item Information area on the lower part of the window includes four information sub-tabs: Circulation, Bibliographic, Vendor, and Item Fields (item-specific fields).

To search for an item or title:

1. On the main Circulation window, click one of the three main tabs.

2. In the appropriate text box (**Enter Item, Item**, or **Item/Title**, depending on the particular data entry screen), do one of the following:

- Scan the barcode label with the barcode reader.
- Type the barcode number of the item or the control number. Type the whole number, including any leading spaces or prefix characters of the control number (no truncation). Click **Search**, or press **Enter**.
- Type the title or first word(s) of the title. Click **Search**, or press **Enter**.
- Type the ISBN. Click **Search**, or press **Enter**. **Note:** In Circulation v3.3 you must use a 10- or 13-digit ISBN.
- Type the MARC record control number (exactly as found in field 001). Click **Search**, or press **Enter**.

To search by call number, first type the Local Call Number Director Code prefix **\c,** in the entry box, and then immediately following the prefix type the call number in the entry box, typing at least up to the cutter portion. Click **Read**, or press **Enter**.

3. Search results:

Note: On any title lookup results screen press the Details button to view a full display of the item information.

The display of search results will vary, depending on what is found:

- **Not found:** If the title or item is not found, a message appears: "No title starting with those characters was found [or: No item or record was found]. Would you like to add one?" Click **Yes** or **No.**
- **Same or similar title:** If the title or similar titles are found, they are listed in the **Title Lookup** window. The window lists the title, the "Circ.Coll." code (holdings code for circulating or owning Branch and Collection), and the Material Type (book, projected media, etc.).
- If more that one copy of the title is found in different collections, or if the title is found in more than one library, "MULTI" is displayed.)

- Title search results will display the actual holdings code (instead of MULTI) whenever there are multiple copies all in the same holdings code.
- If the title is "bound with" another, "BOUND" appears.
- **No items at Local Branch:** The **Title Lookup** results display all titles that match the search, but if the **Local Titles Only** option is selected in **Local Configuration | Station Options**, and the local library does not own or circulate any of the items, "NO ITEMS" appears.

  Select a title from the list, or scroll down or up the list to locate other similar titles.

- **No matching titles found:** If the title you want is not listed in the **Title Lookup** window, you can add a new title from this window by clicking the New Title button. (You can add a new item to an existing title by clicking the **New Item** button.)
- **Only one item found:** If there is only one item (copy or volume) for a selected title, the title information is displayed immediately, or the current transaction, such as checkout, is completed.
- **Multiple items found** (in searches on F2 and F3 tabs): If there are multiple items for this title, select it in the **Title Lookup** window to display a window listing **Items Associated with Title**. This window includes Item ID (barcode number), Call Number, Circ. Coll. (holdings code for circulating library/collection, volume and copy numbers, and Item Status. Select the item of interest.

4. Continue with the current transaction.

Notices

Printed **Overdue Notices** require two steps:

1. Generate Overdues, and

2. Run an overdue notices report. (There are several formats available.)

If your system is configured to deliver some overdue notices by e-mail or by telephone, you should still plan to run an overdue notice report (because some borrowers may not have e-mail addresses or phone numbers.)

To generate overdue notice data:

1. Go to the Windows **Start** menu and select **Library·Solution | Circulation Utilities**, **Generate Overdues**.

2. On the **Database Login** window, type the password. Click **OK**, or press **Enter**.

3. On the **L·S Compile Overdue Notice Data** window, select the library or select the **Process All Locations** checkbox to generate overdues for all libraries. To see the library list, click the down arrow in the **Branch** text box.

4. If necessary, modify the **Message to Patron** to be printed on the notices. **Note:** The message size is limited to 250 characters.

5. To begin compiling notice data, click the **Start** button. A "please wait" message tells you that the process may take some time. Remember, you can use the Windows **Alt**+**Tab** key combination to return to another application to continue working, if you wish.

6. After the data has been compiled, the wait message disappears and a **Process Complete** window displays, indicating the number of notices created. Click **OK** to clear this message.

7. Run and print notices: Now you will need to run the notices and then print them. To do this, go to the **Start** menu and select **Library·Solution | Reports** and select the overdue notice report in the proper envelope format.

Caution: Run and print notices as soon as you have generated the notice data. If you should happen to compile again before printing the notices that were compiled last time, the first batch of notices would be lost. (Each time you compile, the setup counter of the number of notices is incremented.)

To run and print notices or reports:

1. Go to the **Start** menu and select **Library·Solution**, and then **L·S Reports**.

   Note: If you are producing overdue notices, be sure to generate the notice data first by using the **L·S Generate Overdues** utility.

2. The **ReportSmith RS_RunTime** window will open. Select the **File** menu and then **Open**, or click the open folder button on the tool bar.

   Tip: If this is the first time you have tried to access reports on this station, use the Windows directory aids in the **File: Open** dialog to go to the **Reports** directory. (Click the down arrow beside **Look In**, or click the **Up One Level** folder icon.) Select the following directory:

   \program files\the library corporation\library.solution\reports

   Note: All of the following instructions refer to options in the **ReportSmith RS_RunTime** module.

3. On the **Open Report** window, select the filename for the report you wish to run and print. For example, for overdue notices, select the "notices.rpt" file. To select, double-click the filename, or click once and then press **Enter** or click the **Open** button.

4. **Logon:** If this is the first report in this work session, type the password in the **Get Connection Data** dialog. Click **OK** or press **Enter**. **Note:** Passwords are case-sensitive.

5. **Date range:** You may need to enter a starting date and time and an ending date and time.

6. Select library: If this is a library-specific report, or if you are running overdue notices, select a library in the **Branch** window. Click **OK** or press **Enter.**

7. The formatted report or overdue notices will be run and displayed. It may take a few moments to run some reports. (In overdue notices, if there were no notices due to be printed, the following message may appear: "No rows were found.")

8. **Printing:** To print the report or notices, on the **ReportSmith RS_RunTime** window, select the **File** menu and then **Print**. This opens the Windows **Print** window. Be sure to select a local or network printer appropriate for printing notices and reports. If you select the **Print** button in the tool bar instead of **Print** from the **File** menu, the reports/notices will print to the default printer.

   Note: The notices will print on 8 1/2 x 11" sheets, one sheet per borrower. If a borrower has more items overdue than will print on one sheet, the items will overflow to a second sheet.

9. **Save as:** You can optionally save the reports file in another format or with another filename. Use the **File** menu, **Save as** command.

10. When you have finished printing, close the report window.

    To exit RS_RunTime, select **File**, **Exit**.

Outreach Fields

To get started Using Outreach Services in Circulation:

After **Outreach Services** have been installed in your Circulation system, you need to perform the following steps before you begin using Outreach Services.

1. **Establish a Patron Type in Circulation, for Outreach Services Patrons. -** A current **Patron Type** can be modified to allow Outreach Services, or a new Patron Type can be established. You may have as many Patron Types designated as Outreach Types as you need.

2. **Configure the Outreach User PAC. -** This requires the address of the PAC that will be used for Outreach Patrons. Go to **Setup | Outreach User PAC Setup** and enter the IP or URL to your PAC. (**Note:** Do not enter http://)

3. **Establish Outreach Fields. - Outreach Fields** displayed on the **Patron Record | Outreach Services** tab are customizable. These fields can be used to display information as desired. For example, you can create notes to alert the staff and/or delivery person of special circumstances affecting the delivery, or of other needs that must be accommodated. Go to **Setup | Types** and **Codes | Outreach Fields** to establish new fields that can be used in all Outreach borrower records.

4. **Ensure that Outreach Services Patron Records have a PIN assigned to the Patron.** - The PIN is used as the password to access the PAC, when the **Setup New Prefs** button is pressed on the **Patron Record**, **Outreaches Services** tab. When the browser connects to the PAC, a logon error will display if there is not a PIN established for the borrower.

To Start Outreach Manager:

1. Click the Windows **Start** button and select the **Library.Solution | Circulation Utilities | L.S. Outreach Manager** option.

2. A database log in screen will prompt you for your **User Name** and **Password**. Fill in the log in information and click **OK**.

3. The **Outreach Services** screen will appear.

To set up Outreach Fields in Circulation:

1. In Circulation, select the **Setup** menu, **Types and Codes**, and then **Outreach Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) for that field.

   The first field is displayed by default. To view the **Field Name** of any user field previously entered, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** fields on the lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

3. To insert a new field, select the **New Code** button. In the **Define New Outreach User Field** box, enter a **Field Name**. (Suggestion: Enter name in all UPPER CASE, since case affects the sorting of names in the saved list.)

   To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for Coded, Strict, or Statistics. If you make any changes in the field name or type of coding, select the **Post** (check mark) button on the upper toolbar.

   Note: You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended.

4. To insert a code for a selected field, select the **Insert** button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar.

Note: The system will not allow you to delete a field or code if any borrower record currently includes the field or code.

To Change a Displayed Field to a Different Selection:

1. Select the **Patron Transactions** tab, or press F2. Open the desired **Patron Record**.

2. Select the **Patron Record** tab, and then select the **Outreach Services** tab.

3. In the **Additional Data** display, the names of the currently configured **Outreach Fields** appear in the **Field** column on the left, and the selected values in the **Value** column on the right. To display a **Value,** click in the **Value** column to the right of the desired field.

   If the field can contain only codes, the **Value** column will be highlighted, as shown in the example below. To display the possible values in a coded field, click the down arrow on the right, and select a code. (If no codes are visible, none have been established in the Patron Fields setup.)

   In fields that do not require codes, simply type the text.

4. To see other configured **Outreach Fields** up or down in the list, use the scroll bar on the right.

5. After making the desired changes, click the **Save** button.

Outreach PAC Server

To set, or change, the Outreach PAC Server address:

1. Click **Setup** on the title bar at upper left of the Circulation window.

2. On the **Setup** menu, click **Outreach User PAC Setup**.

3. The **Outreach User PAC Setup** window will appear. If this is a first-time setup, the box for the Outreach PAC Server address will be empty. Type either the IP or URL (*without* the http://) and click **OK**. If an address was previously set, clear the current contents and then type the new address. Then click **OK**.

   Note: The Outreach PAC Server is the same as your library's PAC, e.g., catalog.library.org. If you are unsure of the address, the information should be provided by your administrator.

PAC

To Save a Search for Outreach borrowers

1. In **Outreach Services**, click the **Setup New Prefs** button on the **Outreach Services** subtab, under the **Patron Transactions, Patron Record** tabs.

2. A web browser will open and connect you to the PAC. You will be automatically logged on, and the current **Patron Information** will be displayed.

3. Press the **Search** button.

4. Perform a search using the desired options and term(s).

5. When the results set is returned, press the **Save Search** button. The **Search Saver** window will open.

6. Click in the **Search Name/Title** box, and type a name for the saved search, as you want it to appear on your list. The **Borrower ID/Alternate ID** should already be filled in with the necessary information from the **Patron Record**.

7. Click in the **Description** box, and type a brief description of the search.

8. Verify that the **Make Available in Outreach** box is checked. If not, click in the box and a checkmark should appear. Press the **Save** button. You will be advised if the save is successful. Click **Close Window**.

9. Press the **Patron Review** button. Scroll down the borrower information screen to view the **Saved Searches** list.

   Note: This **Saved Search** will now be made available on the **Outreach Saved Searches** list, when it is viewed by staff.

Patron Delete Utility

WARNING: Once borrower records are deleted, they cannot be recovered. Be sure to run a system backup BEFORE using this utility.

To run and use the Patron Delete Utility:

1. Go to the Windows **Explorer** and find the **PatDelete.exe** program (in the **...\circ** folder with the Library•**Solution Circulation** program). Double-click the file.

2. In the **Login** window, you must login with the User Name "SYSTEM_ADMIN" and enter the correct Password. After login, the **Patron Delete Utility** window appears.

3. First, you can choose to limit by **Patron Type** which borrower records will be deleted. If you click in the check box next to **By Patron Type**, select at least one **Type** from the list box. Select more than one type at a time by holding down the **Ctrl** key while clicking on each **Patron Type** you want. (If the box is cleared, the deletion process will not consider **Patron Types**.)

4. Next, under Date Control click the desired option button and enter an expiration date in the date entry box.

   The choices are:

   – **Delete Patrons with Expiration Date on or Before** [date]

   – **Delete Patrons Based on Date of Last Activity** [date]

   Note: As a safety precaution, the default Expiration Date is 01/01/1900, in case a user runs the program and clicks the **Delete** button accidentally.

5. In the **Branch Selection** area, you can choose to delete borrower records for a selected Branch, or select **System Wide** (meaning borrower records with the selected Patron Types at all libraries). If you choose **By Branch**, select a library by clicking on the down arrow and selecting a library from the list. (**Note:** Branch refers to the **Issuing Branch** field in each borrower's record.) If you choose **System Wide**, a beep will sound, and a red warning message appears

next to the **System Wide** button: "Warning: This setting deletes [borrower records] from all branches."

6. **Under Blocked Deletion** click the check box to enable the "Do Not Delete When Block Status is Set" option. When this box is checked, any borrower with blocked status will not be deleted. However, if the box is not checked the blocked borrowers will be deleted.

7. After selecting the options you want, click the **Delete** button. A message window displays information about what will be deleted, for example: "This will DELETE all patrons of type(s): 'XXX' with Expiration Dates on or before: [date]. FOR THE ENTIRE SYSTEM [or for specified Branch]. The error log will be overwritten if any errors are detected."

   If you want to cancel the deletion process now, click the **Cancel** button on the lower portion of the **Deletion Information** box. This will redisplay the main form, and no borrower records will be deleted. If you click **OK** instead of **Cancel**, the program will begin deleting borrower records.

8. When all the borrower records marked for deletion have been run through the program, a message appears, for example: "16 patrons were deleted." To close the message box, click **OK**.

   If some eligible borrower records were not deleted, the message may look like this example: "472 borrowers were deleted. 56 borrowers were not deleted. Do you wish to view the error log?" Click **Yes** to view the log. The log text, displayed in **Notepad**, includes borrower IDs (barcodes), borrower names, and a message: "Patron cannot have items out or active."

Patron Fields

To set up Patron Fields:

1. Select the **Setup** menu, **Types and Codes**, and then **Patron Fields**.

2. The entry window is divided into two parts. On the upper half is the **Field Name**, and just under that the setup for the type of data to be entered in the field (codes or free text). On the lower half are the codes (if any) for that field. The first field is displayed by default. To view the **Field Name** of any user field previously entered, use the first four buttons on the upper toolbar to look for the First (first field), Prior, Next, or Last field

   When a **Field Name** is displayed, view the codes (if any) for that field in the **Value** and **Description** fields on the lower part of the window. Use the lower toolbar to find the First, Prior, Next, or Last codes for the selected field.

3. To insert a new field, select the **New Code** button. In the **Define New Patron User Field** box, shown below, enter a **Field Name**. (**Suggestion:** Enter name in all UPPER CASE, since case affects the sorting of names in the saved list.)

   To determine the type of entries allowed for this field and how the information can be used, select appropriate check boxes for Coded, Strict, or Statistics.

   If you make any changes in the field name or type of coding, select the **Post** (check mark) button on the upper toolbar.

   Note: You can enter up to 250 characters for each field name and code, but for easier viewing, a lower number is recommended.

4. To insert a code for a selected field, select the Insert button on the lower toolbar. To delete a code, select **Delete**.

5. If you add a code or make any change or deletion, select the **Post** button on the lower toolbar.

   Note: The system will not allow you to delete a field or code if any borrower record currently includes the field or code.

Patron Records

To access a patron record:

1. Select the **Patron Transactions** tab, or press the F2 key. The cursor waits in the **Patron** text box.

2. To search for a borrower, do one of the following:

   – Scan barcode label with the barcode reader.

   – Type the **Patron ID** (in most libraries, this is a barcode number) or the **Alternate ID**. Type the whole number (no truncation).

   – Type the **Search Code** to search by Zip Code, mailing address, telephone number, city, Patron ID, Name, Alternate ID, or email address. Type the code followed by the search term. (For example, to search by Zip Code: type \zNNNN.) Then click **Read** or press **Enter**.

   – Type the borrower's name or part of the name. After typing, click **Read** or press **Enter**.

   If the name or similar names were found: **The Patron Name Lookup** window displays a list of borrowers matching your search criteria. The list displays Patron ID (barcode number), borrower name (including any suffix, such as "Jr."), Patron Type code, and borrower status. Select the name you want, and click **OK**, or press **Enter**.

   If the list includes similar names, you can view extra information about any borrower in the list. Select a name and click on the **Details** button. The **Quick Patron Info** window will display more information, including the borrower's "hot" status ("Blocked" or "Good").

   If the borrower you want is not listed in the **Patron Name Lookup** window, you can add a new borrower. Select the **Add New** button.

   If the number or name you searched by is not found, a message asks if you wish to add a new borrower. Click **Yes** or **No**. Add the new borrower record.

3. After a borrower has been found or if you have entered a new borrower, information about the borrower appears on the upper part of the window. The blinking cursor will wait at the **Enter Item** text box, ready for you to check out an item.

   You could also select one of the **Patron Transactions** subtabs to perform some other activity or edit the Patron Record.

   Note: If you do not take any action within one minute, the cursor moves to the **Patron** entry box. After one more minute of inactivity, the borrower will be cleared from the display. This "time-out" ensures that you do not check out an item to the wrong borrower.

To enter or edit a patron address:

1. Select the **Patron Transactions** tab, or press F2. Search for the patron.

2. Select the **Patron Record** tab, and then select the **Address** tab.

3. Enter or edit any desired information.

   – **City, State, Zip:** Use the "speed fill" button beside **City** or **Zip** to make entering City, State, ZIP and (optionally) County information faster and more accurate. Type part of the city name, or ALL of the postal code (ZIP), and then press **Enter** (or click the speed-fill button). A pop-up **City Wizard** window appears, showing the other related fields. If your city has already been entered, simply press **Enter** again to fill in all the address fields in the borrower's record at once. If your library has set up a Patron Field named "County," the county information in this borrower's record will also be updated when the record is saved. If this city has not yet been added to the wizard list, click the **Add New** button in the **City Wizard** window, and click **OK**.

   – **Address Correction Requested:** If you want to be alerted to check the address of this borrower, select this check box. This will cause a message in blue, **Address**, to be displayed prominently on the F2 tab any time you search for this borrower. The message will remind staff to update the borrower's address and other contact information.

– **Organization:** A borrower record can be linked to an "organization" (or any kind of name or label you want to be printed on notices, labels, letters, etc.). When a borrower is linked to an organization, the "organization" name is printed between the borrower's name and the first street line of the name and address block on notices, labels, letters, etc. Click the "speed fill" button to the right of **Organization** to look up and select an organization for this borrower record or to add a new organization to the list. To remove the link between a borrower and an organization, select the "remove organization" button.

– **Copy Address:** Use this button Figure A-1, (lower left of the **Address** tab) to copy the address from one borrower's record to another. Click the button to display the **Copy Address** window (Figure A-1). After making changes, click the **Save** button in this dialog.

4. To save changes or entries, be sure to click the **Save** button before you leave this tab, or your changes will be lost.

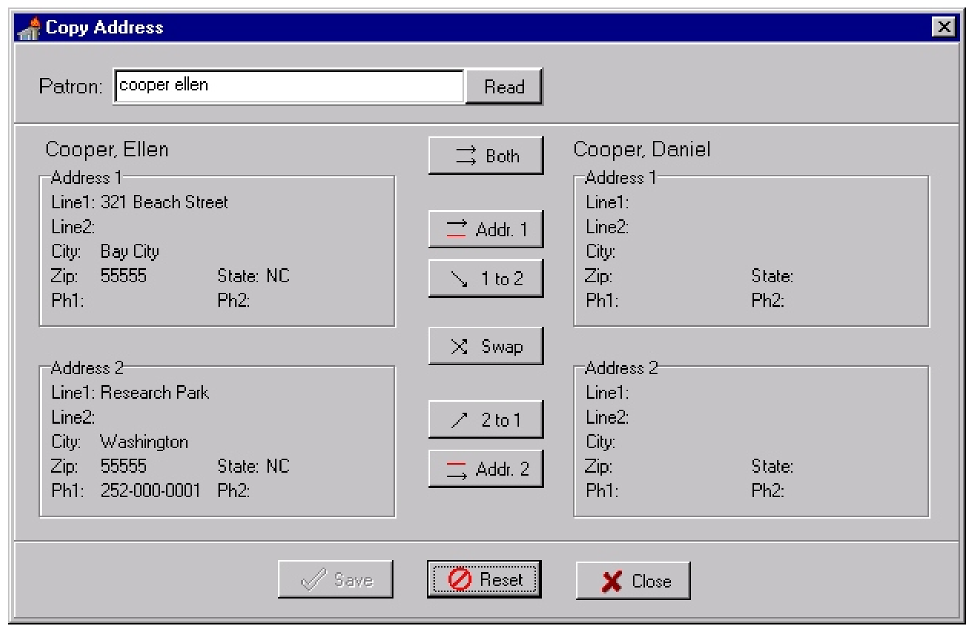

Figure A-1. The Copy Address window

To add a new patron record:

1. Select the **Patron Transactions** tab, or press the F2 key.

2. In the **Patron** text box, type the borrower's last name. Click **Read** or press **Enter**. If the name is not found, a message window appears: "No name starting with those characters was found. Would you like to add a new patron?" Click **Yes**.

   If similar borrower names were found in the search, the **Patron Name Lookup** window will appear. If the borrower you want is not listed, then click the **Add Patron** button.

3. The **Add New Patron** window appears. To move among fields, use **Tab** or click on another field.

4. To save the new borrower record, click **OK**.

To enter or edit Basic Info in a patron record:

1. Select the **Patron Transactions** tab, or press F2. Search for the borrower.

2. Select the **Patron Record** tab, and then select **Basic Info**. Enter or edit any relevant information, including the Patron ID and optional Alternate ID. For example, in the **Hot Status** field you could change a borrower's status from "Good" to "Blocked," thus blocking the borrower's access to all activities in Circulation and Library·**Booking**.

   Tips: When you add or modify a date, be sure to enter the year as 4 digits. To expand the **Comment** edit box for easier data entry, click in the field or press **Tab** to move the cursor into it. Type up to 250 characters. To contract the box, click in any other fields or **Tab** out.

   If you want the borrower **Comment** display on the upper part of the F2 tab to display in red, go to the **Station Options** settings (in **Setup | Local Configuration**) and click check box beside the field **Color Comment Field**.

3. To save changes or new records, select the **Save** button.

4. To delete a borrower record, click the **Delete** button. If the borrower has any current active transactions, the deletion will not be allowed. (Circulation users must be qualified by supervisors to delete borrower records. Permission is given in **Security Setup | Patron Screen Delete**.)

Shortcut: If the **Blocks** area on a borrower's **Patron Transactions** tab shows a **Card Expired** or **Block Status** message or an **Almost Expired** warning, you can easily renew the borrower's registration or change the status. Click once on the block message, and the **Patron Record: Basic Info** tab will appear. Edit the necessary information. Click **Save**.

To change the Patron Search Configuration:

Note: You must have supervisory access rights to do this.

1. In the **Patron** entry box, enter information to search for a borrower. Then click the **Cfg.** [Patron Search Configuration] button, which appears just to the right of the **Patron** entry field.

2. The default configuration is to search Patron ID, Alternate ID, and borrower name, in that order. This is indicated by the green check marks beside Patron ID and Alternate ID, and by the ✓ in the check box beside **Search Name**. To change any setting, click on that option. This changes the green check mark into a red "x", or it clears the Search Name check box. To reverse the order of searching Patron ID and Alternate ID, click one, hold down the left mouse button, and drag the selection up (or down).

   Note: The borrower name is always searched last and when nothing else is found.

3. After making changes in the configuration, click **OK** to save, or **Cancel** if you do not wish to save changes.

4. Click **Read** or press **Enter** to begin the search for the borrower.

Patron Types

To add or modify Patron Types:

1. Select the **Setup** menu, then **Types and Codes**, and then **Patron Types**.

2. To view existing **Patron Type** codes, select the down arrow beside **Patron Type**. To change the entries about an existing type, select that type, and then go to step 5 below.

3. To add a new **Patron Type**, type the new code in the **Patron Type** field. If another code is already displayed, click the field to highlight it, and then type the new code. Codes can consist of letters and/or numbers, up to a maximum of 10 characters (but do not use spaces). As soon as you type a new code, a message appears to the right in red: "New Patron Type." Also, the **NEW** button on the right becomes "available."

4. If this **Patron Type** will be used for **Outreach Services** borrowers, click in the checkbox under the **Patron Type** field label.

5. Press the **Tab** key to move the cursor to **Informative Description**, and type a description.

6. Use **Tab** to move from field to field. Enter any other needed information. The only required fields are Patron Type, Description, and Hold Priority (if in doubt, enter "5" as default). Some fields have check boxes to the left of the field, for example, **Max Fine Balance**. To use a field with a check box, select the check box (check mark appears), and then enter a value in the text box. Please note that even if a value appears in the text box, the field is not active unless the check mark appears.

7. To save a new **Patron Type**, select the **NEW** button. If you modify an existing type, select **SAVE**. To delete a Patron Type code, select **DELETE**.

   Caution: The system will not permit you to delete a Patron Type when there are borrower records using that Patron Type code.

8. You can now set the circulation rules for this Patron Type. Circulation rules are set in the lower portion of the window.

Printing Setup

To configure the local printer:

1. Select **Setup** on the title bar at upper left of the Circulation window. Select **Local Configuration**. Select **Printing Setup**.

2. In the **Slips Printer** field, select a printer that has been configured for the workstation. Click the drop-down arrow to view a list of configured printers, and select the printer.

3. In the **Printer type** field, click the drop-down list to choose either **Single Sheet** or **Continuous Feed**. For slips printers or dot matrix printers that use a continuous feed of paper, select **Continuous Feed**. For a single sheet printer, for example, a laser printer, choose **Single Sheet**. The **Single Sheet** selection ensures that a form feed command will be issued after each print job to clear the sheet from the printer.

4. Click the check box beside each type of slip you wish to print at this station:

   - **Check Out Slips (date due slips):** When this is selected, checkout slips are printed when items are checked out. If you selected **Continuous Feed** for the **Printer Type**, and you want to print a separate slip for each checked out item, also select the Separate **Check Out Slips** check box. (The separate slip option is not available when **Single Sheet** is selected; this setting automatically prints a separate sheet for each checked out item.)
   - **Payment Receipts:** To print a receipt automatically for any payment received, select this check box. Please note that even if this option is turned off, you can still print a receipt or multiple receipts on demand. To do this, use the **Receipt** button on the **Charges** tab.
   - **Patron Inquiry Slips:** If you want to allow Circulation staff to print information about a selected borrower, select this check box (so a check mark appears). To print a borrower slip, staff will search for the borrower on the F2 tab, select the **Patron Record | Basic Info** tab, and then click the **Print Patron Info** button.
   - **Holds Slips:** When this is selected, a slip is printed automatically when you check in an item that is on hold. The slip includes information about an "arrived" hold, including borrower name and phone number.

5. **Number of line feeds after a slip:** Enter the number of blank lines you want the printer to feed after printing each slip. The default is 4 lines.

6. If you want to test the print setup, click the **Print Test** button before you leave this window.

7. To save changes, click **OK**, or press **Enter**. To exit without saving, select **Cancel**.

Re-Login

To re-login to Circulation:

1. On the **Utilities** menu, select **Re-Login**. The **Database Login** window will be displayed.

2. Enter a different **User Name** and **Password**.

3. Click **OK**.

Recalls

To "trap" a previously checked out item when it is checked in, use the Recall feature.

To recall an item through the Utilities menu:

1. Select the **Utilities** menu, and then select **Recall Item**

2. In the text box, scan or type the **Item ID** (barcode number) of the item, or type the title or first word(s) of the title. Then click **Pick Item** or press **Enter**. Select the title or item you want. The **Recall Item** window will then display the **Item ID**.

3. In the **Reason for Recall** box, type the message to be displayed when the item is checked in. If you need to correct the message before saving, select the **Clear Box**.

4. To complete the recall, select **Save and Exit** or **Exit without Saving**. If an item is on the shelf (not checked out), a message will be displayed: "Item is available and cannot be recalled."

5. When the item is checked in, the recall message will be displayed in the Item **Has Been Recalled** window. To exit the window, click **OK**.

To find out if an item has been recalled:

Follow the first two steps above. If the item has been recalled, the **Date of Recall** box will display that date. If the item has not been recalled, the **Date of Recall** box will be blank or may display "Was not previously recalled.

Renewals

To renew an item or items:

1. Click the **Patron Transactions** tab, or press the F2 key. Access the borrower. When the borrower's information is displayed, click the **Items Out** tab. (Usually, the tab is already open.)

2. Select the item you wish to renew. You can renew more than one item at the same time, if the items are above or below each other on the list. To renew multiple items, drag the mouse down the list to highlight the ones you want. If there is a rental fee associated with an item, aA message asking if you wish to charge the rental fee will now be asked during renewal. (The **Rental Charge Renewal** fields must be set by administrators in the System Configuration **Holdings Code Setup**.) Then click the **Renew** button on the lower part of the **Items Out** tab.

3. Special conditions: Any of the following item or borrower conditions may affect a renewal. Take appropriate action if necessary.

   – **Overdue items:** If you attempt to renew an overdue item that will have an overdue fine charged, a message window will appear, giving you the option to continue with the renewal or to cancel the renewal.

   – **Items on hold:** If you attempt to renew an item that is on hold for another borrower, a message window will appear: "There are holds on this item." You can allow the renewal by entering the supervisor password. Follow the instructions in the message window.

   – **Blocks:** If there are blocks on this borrower, a block message may appear in a window labeled **Enter Override Password**. Type the password, and click **Try** or press **Enter**.

   Other types of blocks, such as an expired card warning, appear in an information window. Click **OK** or press **Enter** to exit the window, and then click the relevant message in the **Blocks** area of the **Patron Transactions** tab. If possible, you can remove the block by taking appropriate action, such as waiving charges or extending the card expiration date.

Repair History

To add repair notes:

1. On the **Utilities** menu, select **Item Repair History**. Search for a title or item in the **Lookup Item** field.

2. When an item is selected, click **Add**. The **Add New Repair** window is displayed. Enter the following information:

   - **Date of Repair:** Today's date is entered by default. Change if necessary.
   - **Repaired by Patron:** Optional: Search for and select a borrower.
   - **Repaired by Vendor:** Optional: Select a vendor from the drop-down list.
   - **Back-in-Service:** Today's date is entered by default. Change if necessary.
   - **Result:** Select from the drop-down list: Fixed; Replaced; Temporarily Out-of-service; Permanently Out-of-service.
   - **Comment:** Enter an optional free-text comment. **Suggestion:** mention name of the repairing vendor or borrower here, so this can be viewed in the future in the **View Repairs** window.
   - **Repair Cost:** Enter an amount, if any.

3. To save, click **OK**.

Reserves

To place items on reserve:

1. Click the **Patron Transactions** tab or press F2. Access the borrower (usually an instructor) who wishes to place the items on reserve.

2. When the borrower's information is displayed, click the **Reserves** tab. The **Reserves** tab expands to reveal a larger display. (To reduce the **Reserves** tab display and return to the normal **Patron Transactions** tab, you can simply press **F2**, click on the **Patron Transactions** tab, or click any other tab.)

3. Click the **Place** button on the lower part of the **Reserves** tab.

4. The **Place Item on Reserve** window appears. Enter the following information:

   – **Department:** Click the down arrow beside the **Department** field. Select a **Department** code.

   – **Course:** Click the down arrow beside the **Course** field. Select a **Course** code.

   – **Expiration date:** Enter a date that you want the reserve for this group of items to expire. Today's date is entered as a default.

   – **Find Item:** In the **Find Item** text box, enter information about the item you want to place on reserve. Search by title or item number or by scanning the barcode label for an item in hand. If you type the information, select the **Find Item** button or press **Enter** to begin the search. You must select a specific item to be placed on reserve (you cannot place title-level reserves).

   After you select an item, item information will be displayed (title, Item ID, call number, copy and volume information).

   – **Selecting Branch and Collection:** Select the Branch and Collection codes that you want to control the checkout policies, PAC displays, and Circulation checkin messages (display of shelving location) for this item. (Remember, library/collection codes are based on interpretations of the holdings codes. To add new holdings codes for reserve shelving locations or edit existing code setups, run the Library.**Solution System Configuration** and select **Setup | Holdings Codes**.)

By default, the current library name will be displayed in the **Owning Branch** field. To select another library, click the down arrow to display the list, and select. (The current library is the one selected in **Setup | Local Configuration | Station Options**.) In the **Collection** field, the first collection code (alphabetically) for the selected library will be displayed.

Hint: You can quickly locate the collection you want by typing the first letter of the collection code. For example, to find "REF," type "R"-- then press the Down or Up arrow keys to scroll through the list from there (or press Right arrow to go down, Left arrow to go up). If you type a different letter, this reveals another part of the list (codes beginning with that letter).

5. **Save:** To save the reserve, click the **Add** button.

6. **Add another item to a Department/Course group:** Click on (highlight) the **Department/Course** line or any item already on reserve in that group. Select the **Place** button. The **Department**, **Course**, and expiration date already specified will be displayed. Find an item, and then select the **Branch** and **Collection** codes. Select **Add** to save.

7. **Add another Department/Course group of reserves:** Click on the name of the borrower (instructor) in the **Reserves** display. Select the **Add** button. Follow the instructions in step 4 above.

To edit a reserve via the F2 tab:

1. Click the **Patron Transactions** tab or press F2. Access the borrower who placed the items on reserve.

2. When the borrower's information is displayed, click the **Reserves** tab. To view all details about the reserves, you may need to double-click the yellow folder icons.

3. To edit **Department Code**, **Course Code**, or expiration date of a group of items on reserves, highlight that line and then select the **Edit** button. The **Edit Reserve Information** window is

displayed. Edit the **Department** or **Course** code, or adjust the expiration date. To save, select the **Update** button.

4. To change the checkout rules for an item on reserve, select the item, and then the **Edit** button. (If you select a title, a message reminds you to select a **Department/Course** line or an item line instead.) The **Edit Reserve Item** window is displayed. Change the **Branch** or **Collection** codes if necessary. To save, select the **Update** button.

To view or edit reserves via the Reserves Tools menu:

1. On the Circulation menu select **Reserves Tools**, and then select **View Reserves**. The **View Reserves** window will be opened.

2. To view the reserves for this library only, click the check box beside **Show Current Branch's Reserves Only** (at upper left). To reorder the elements in the display, for example, to arrange the list by title, simply click on that column.

3. To edit a reserve, double-click the **Instructor** column. This takes you to the **Reserves** tab of that instructor (borrower) on the Patron Transactions tab.

4. To close the display, click the **Close** button.

To remove items from reserve:

1. On the Circulation menu select **Reserves Tools,** and then select **Remove Reserve Items**.

2. Scan the barcode label, or type the barcode number. If you type the number, press **Enter** or select the **Take Off Reserve** button. A message will inform you that the removal was successful. Then a **Relocate Item** window will remind you to reshelve the item in its correct location, transfer it to another library, or place it on the holds shelf, as appropriate.

3. To remove another item, simply scan or type the number.

4. When you have finished removing items from reserve, exit the dialog by selecting the **OK** button.

Rotating Items

To create a Rotating Items

1. Create the following Item Fields in Circulation.

   GRID - The "grid" is the set of libraries the item(s) will rotate through.

   BEGIN - This setting is the library number of the library which will get the item first, beginning the rotation.

   LOOPS - The number of times the times the item is to rotate through the grid.

2. In the **Route Configuration Utility** (**Library.Solution | Circulation Utilities | L.S Route Config**), create **Routes** for each grid, defining the sequence of rotation among the libraries in the grid.

3. Using **L.S System Configuration**, create the new circulation holdings codes (for each location) that have been designated for the rotating collection.

   Important: The "short description" in the **Holdings** code must be the same for all locations.

4. In Circulation, set the **Rotating Collections Period**. This sets the number of days that items, in ANY grid, will stay in the indicated Circulation Collection.

5. In Circulation, on the **Item / Title Info** F4 tab, **Item Fields** sub-tab, call up each item to be included in the rotating collection and:

   – Set the **BEGIN** item field to the library number of the beginning library/collection in the appropriate grid.

   – Set the **GRID** item field to the appropriate grid name.

   – Set the **LOOPS** item field to the number of times the item should rotate through the grid.

– Set the "circulating" collection to the holdings code you have created for the rotating collection

6. When complete, send each copy to the appropriate branch(es).

Security Setup

To complete Circulation Security Setup for any user qualified to access Circulation (Circulation Users and Circulation Administrators):

1. First, administrators may wish to check the System Configuration. (Start the configuration from the **Start** menu.) Login, using system or Circulation administrator default login information. Then select **Setup** and **Users**. Then select **Create** (for new users) or **Edit/Remove** (for existing users). Set up User Names, individual Passwords, and access privileges ("Circulation Roles") for users of Circulation.

   Important! Any user who needs access to Circulation Security Setup must be assigned the Circulation Role of "Circulation Administrator."

2. In Circulation, select **Setup** from the menu, and then select **Security Setup**. On the **Security Configuration** display, click the down arrow beside the **User Name** box, shown in the example below, to display a list of Circulation users or administrators (as authorized in the L·S System Configuration). Select a user.

3. The activities available for security setup are arranged on five tabs in the **Security Configuration** window. Administrators (as authorized in the System Configuration) can view or change setups for any user. For details about the setups, click on the subtabs: General, Basic Functionality, Menu Function, Patron Screen, Bibliographic Page

4. After reviewing or changing options on the five tabs, save by selecting the **Post** button, or cancel the changes by selecting **Cancel**.

5. To make any changes effective, you must re-login. Select **Re-Login** on the **Utilities** menu in Circulation.

Station options

To set Station Options:

1. Select **Setup** on the title bar at upper left of the Circulation window. Select **Local Configuration**, and then select **Station Options**.

2. Click the drop-down arrow to the right of the Branch where this station is located field. Select the library where this station is located. (Once the library has been identified correctly on this station, there should be no need to change it.)

3. The **Station Settings** area includes two fields with check boxes

   – **Override Due Date Stays On:** Click this check box if you want an override due date to remain turned on during Check Out, even when multiple borrowers are checking out materials.

   – **Color Comment Field:** Click this box to display a check mark, if you want **Patron Record Comments** displayed in red text on the F2 tab. (Add a Comment to a selected borrower's record on the **Patron Record: Basic Info.** tab.)

4. The **Station Level Searches** area includes three check boxes, detailed below, that allow you to limit borrower or title search results to borrowers or items at this library, or view all borrowers or titles/items at all libraries. You can choose to view your library's barcode items first in the items list on the F4 display.

   Local Patrons Only: Supervisors at each station can configure the default for the borrower search hit list: to include local borrowers only (meaning this library is their "home" library) or all borrowers. This option is unchecked by default, meaning all borrowers will be displayed. (The **All Branches** or **Local Branch** buttons will still be available in the borrower search hit lists to allow expanding or limiting the display.)

   Local Titles Only: Supervisors at each station can choose to configure the title/item search hit list to include detailed item information for the local library only, or all libraries.

If enabled (check box is checked), **Local Titles Only** is a security feature designed to prevent libraries from editing other libraries' holdings. Users can still see ALL titles in the database (but the "NO ITEMS" display will appear beside titles belonging to other libraries) and can add on-the-fly copies of their own to those titles.

Local Barcodes First: Check this box if you want your branch's items (barcode numbers) for a selected title to be listed first in the drop-down list beside the Item ID field. (This field is not available, if the **Local Titles Only** check box is checked.)

5. To save **Station Options** changes, select **OK**, or press **Enter**. To exit without saving, select **Exit**.

Titles

To add a new title:

1. Go to any of the three main tabs where you can search for items/titles. For example, you can add an item on the **Patron Transactions** tab, during checkout.

2. Search by typing the title or first few words of the title. You will see one of two types of displays:

   – If similar titles are found, they will be listed in the **Title Lookup** window. You can add a new title from this window by clicking the **New Title** button.

   – If the first few characters you typed were not found in the title search, a message appears: "No title starting with those characters was found. Would you like to add one?"

3. Click **Yes,** or press **Enter**. If you do not wish to add a title, click **No** or press **Esc**. If you selected **Yes** or **New Title**, the **On-The-Fly Item Entry** window appears. To view a list of possible material formats, select: **Material Types**.

4. **Item Information:** After entering all title information (bibliographic information) on the upper part of the window, enter information about an item. The only required fields are **Owning Branch** and **Barcode number** (Item ID).

   Selecting Branch and Collection: By default, the current library name will be displayed in the Owning Branch field. (The current library is the one selected in **Setup | Local Configuration | Station Options**.) In the **Collection** field, the first collection code (alphabetically) for this library will be displayed. You can quickly locate the collection you want by typing the first letter of the collection code. For example, to find "REF," type "R" then press the **Down** or **Up** arrow keys to scroll through the list from there (or press **Right** arrow to go down, Left arrow to go up). If you type a different letter, this reveals another part of the list (codes beginning with that letter).

5. After entering or selecting all needed information, save the record.

   Note: Different **Save** buttons may appear, depending first on whether a new item is owned by your library (as set in **Setup | Local Configuration | Station Setup**) and on whether the new title or item was added while you were working on the F2, F3, or F4 tabs. To cancel the add, click **Cancel** instead. The following message will be displayed at the upper right corner identifying this as an on-the-fly record: **Circulation Record**.

To add a new item to an existing title:

1. On any of the three main tabs where you can search for items/titles, search by typing the title you want, or the first few words of the title. Similar titles will be listed in the **Title Lookup** window. Highlight the title you want (do NOT press **Enter**), and then click the New Item button. The **On-The-Fly Item Entry** window will be displayed with the title information (bibliographic) already displayed on the upper part of the window.

   Tip: If you search on the F4 tab and find the relevant title, you can easily add a new item (barcode), by clicking on the **New** button on **Circulation** tab (lower left). This displays the on-the-fly form.

2. Add item information (barcode number, etc.) to the **On-The-Fly Item Entry** form in the **Item Information** area.

3. To save the new item record, click the appropriate **Save** button. To cancel the add, click **Cancel** instead.

To change the Title Search Configuration:

Note: Yo must have supervisory access righrs to do this.

1. Before you enter information to search for an item or title, click the **Cfg.** [Title Search Configuration] button, which appears just to the right of the item/title entry field.

2. The default configuration is to search Item ID, Control Number, ISBN, and then Title, in that order. This is indicated by the green check marks beside Item ID, Control Number, and ISBN, and by the ✓ in the check box beside Search Title.

   To change any setting, click that option. This changes the green check mark into a red "x."

To change the order of searching Item ID, Control Number, or ISBN, click one, hold down the left mouse button, and drag the selection up (or down).

Note: The title is always searched last and when nothing else is found. For example, if you enter an Item ID that is not found in the database, a display of all titles will be shown in the **Title Lookup** window.

3. After making changes, click **OK** to save, or **Cancel** if you do not wish to save changes.

Transfers

To transfer items:

1. Select **Utilities** on the title bar at upper left of the Circulation window, or press the key combination **ALT** + **U**.

2. Select **Item Transfers**. The **Item Reassignment** window will be displayed.

3. On the **Single Assignment** tab, select an option in the **Reassign specified items to** area:

   – **Owning branch/collection:** to transfer items back to the original location.

   – **Specified branch:** to transfer items to a selected library.

   – **Specified branch/collection:** to transfer items to a specified library and collection.

4. In the **New Location** area, click the down arrow to select a library and a collection, if relevant. **Note:** You cannot use this utility to place items on reserve.

5. **Specify item:** In the edit box in the center of the window, scan the barcode number of an item to be transferred. You can also type the title, the barcode number, or the control number of the item to be reassigned. If you type data, press **Enter** or click the **Reassign** button. To configure an item/title search, click the **Cfg.** button. [The **Item Transfers** option "Upload File" of barcode numbers has not yet been implemented.]

6. Continue entering other items to be transferred. The **Item Transfers** process changes the Item Status code of an item to "T" (in transit).

7. When you are finished, click **Quit**. Place the items in a designated location for transport to other branch(es).

8. When items are received at the other library, check in each item. This action changes the Item Status code "T" to the appropriate code.

Uncataloged Collection Codes

Use the **Uncataloged Collections** command to establish codes for any groups of items you wish to check out for statistics only. For example, many libraries have paperback collections that are not cataloged or barcoded. It is not necessary to add the Circulation "rules" or configure displays in the System Configuration, since Uncataloged Collections codes are not real holdings codes.

To set up Uncataloged Collection codes:

1. Select **Setup** from the menu bar at upper left of the Circulation window. Select **Types and Code**s and then **Uncataloged Collections**. The **Uncataloged Collections** setup window appears. The name of the current library is displayed, that is, the library currently selected in: **Setup | Local Configuration | Station Options**.

2. Type a new collection code (up to 20 characters). The **Add New** button becomes available. Tab to the **Description** field and type a description.

3. To save a new code, click **Add New**. If you are modifying an existing code's description, click **Save**.

Vendors

To link an item to (or remove link from) a Vendor:

1. On the **Item/Title** Info tab (F4) search for and select a title, and then select an item in the **Item ID** drop-down list.

2. Select the **Vendor** tab. Select the **Link To Vendor** button.

3. In the **Search for Vendor** window, shown below, search for the vendor by name or code. Select a vendor and click **OK**. The vendor's code number and name will appear on the left side of the Vendor tab.

4. To remove the link, select the **Remove Link** button.

2.0 Rotating Collections and Item Transfers

Introduction

There are two methods available for moving items among libraries: **Rotating Collections** and **Item Transfers: Batch Reassignment**. The two methods are very different from each other. You should carefully read about each method before choosing the one that best meets your library's needs.

The **Rotating Collections** method allows individual items to move in a preset pattern, based on the options set up for it. The **Batch Reassignment** function is used to move the entire contents of a collection, on demand, from one library to another. The first method is described below, the second method is described in chapter 5, section 5.2.2 of this manual.

Using Rotating Collections, you decide the items to be included, the sequence and timing of the library rotation, how many times the item travels through the rotation, and the number of days that an item will stay in the indicated Circulating Collection.

You must also decide on a unique holdings code for Rotating Collection items. The holdings code must consist of your standard prefix, and the designated Rotating Collection code. For example: ACPLTRAV, where ACPL is the prefix, and TRAV is the code for the rotating collection.

Once these details are defined in Library•**Circulation**, the circulation record of each item to be included in the rotating collection, must be edited to reflect those settings. Then the items are distributed to the appropriate branch(es) to begin circulating.

Once the collection has begun rotation, an on-demand report can be regularly generated, listing the items that need to be gathered and rotated to other libraries. You can determine how often this needs to be done based on your staffing needs, and volume of circulation.

Rotating Items

The **Rotating Collections** function of Library•**Circulation** allows you to organize the process of circulating shared items throughout your library libraries.

Before you set up Rotating Items you need to decide:

- Which libraries will be grouped together for item rotation (GRIDS)
- The library rotation sequence (ROUTE) within the grid
- How many grids you will use, and a naming convention for the grids
- The number of days that each item will remain at each library (Rotating Collections Period)
- The items that you wish to rotate
- Be sure that EVERY library in a grid has a collection whose short description matches a short description in all other libraries in the grid.

To Create Rotating Items

1. Create the following **Item Fields** in Circulation.
   - **GRID** - The "grid" is the set of libraries the item(s) will rotate through.
   - **BEGIN** - This setting is the library number of the library which will get the item first, beginning the rotation.
   - **LOOPS** - The number of times the times the item is to rotate through the grid.
2. In the **Route Configuration Utility** (**Library.Solution | Circulation Utilities | L.S Route Config.**), create **Routes** for each grid, defining the sequence of rotation among the libraries in the grid.

3. Rotating Items can be "placed in" any existing holdings code, or you may create a special holdings code for these items.

   Important: The "short description" in the Holdings code **must** be the same for all locations.

4. In Circulation, set the **Setup\Branch Setup\Misc. Collection Rotation**. This sets the number of days that items, in ANY grid, will stay in the indicated Circulation Collection at this location. (Do this for All locations that are in a grid.)

5. In Circulation, on the **Item / Title Info F4** tab, **Item Fields** sub-tab, call up each item to be included in the rotating collection and:

   – Set the BEGIN item field to the library number of the beginning library/collection in the appropriate grid.

   – Set the GRID item field to the appropriate grid name.

   – Set the LOOPS item field to the number of times the item should rotate through the grid.

   – Set the "circulating" collection to the holdings code desired. **Note:** Rotating Items ONLY works through the Circulation holdings code, so even if the item is already set to the proper holdings code as "Owning" holdings code, you will still need to check the "Circulating" check box and click on the **Save** button,

6. When complete, send each copy to the appropriate branch(es).

Rotating the Collection

The rotation process is accomplished through a scheduled job on your database server. If this job was not established by the TLC installer, you will have to contact TLC Support to set up the job for your system. You must decide when and how often this job should run. You might want the job to run every night, or only run weekly, during the night. Your choice should be based on the availability of staff to physically handle the items needing to move.

The job examines all items which are associated with a GRID, that are currently active (they actually have a Circulating Holdingscode associated with them), to see if the item has been in its Circulating Holdingscode longer than the configured **Collections Rotation** period.

The items which are ready to be moved are recorded in the log file, which is printed by running the report, **Rotating Collections - Items to be moved**. Run this report the day after the job is scheduled. Use this report to gather the items to be moved to another location, and prepare them for transport.

Some items may appear on the report with notations of "Item needs to be reviewed" or "Item beginning branch not valid". These must be reviewed for proper settings.

Note: Items with a Current Circulation Status other than 'T' will probably not be located on the shelf. If the item is currently checked out, when it is eventually checked in, the operator will be alerted to forward the item to the appropriate location (determined earlier by the scheduled rotation job).

3.0 Changes to Server Down Circulation in v3.3

A major change has been made to the Server Down program for Library•**Solution** v3.3. Those who are now using Version 3.3 of Library•**Solution** have a different program than those libraries that are still using older versions. The graphic interface has not changed, but the program now uses a database structure to store transaction data instead of using the UPLOAD.SD text file to store transactions.

Server Down Circulation is now started by clicking an SDC shortcut you place on your desktop, or by clicking **Start | Library.Solution | Circulation Utilities | Server Down Circ**.

You can run SDC on any PC-compatible computer loaded with Windows 95/98/2000/NT or XP,. and that has a keyboard wedge type scanner. Use the Library•**Solution** Installation disc to install the Circulation client on the computer you wish to use. It is best if the computer can be attached to your network, but if not, you can copy the data file that it creates to a disk and transfer it to another workstation that IS on the network to process your transactions.

In Circulation version 3.3 the **Server Down Circ Recovery** utility has been eliminated. The Server Down Circulation interface now contains menu options to perform the uploading and posting of transactions generated during the use of the **Server Down Circulation**.

This change means that you must use the Library?Solution client installation disc to load the SDC utility on your bookmobile, or other remote processing computers. If your remote computer(s) can not be connected to the network for processing transactions directly, you will need to read the instructions for transferring data to a networked computer in the Bookmobile instructions below.

The SDC transactions are saved to a database file named **TRANSACTIONS.DBF** on the hard drive of the workstation you are using for SDC in the same folder as the SDC program (See above). When you post the SDC data to your database two log files are produced; these files can be found in the folder where the SDC program is stored.

Bookmobile Operations in Circulation v3.3

Bookmobile stops' checkouts will be identified by the logged in user name in the database. When the bookmobile is unable to keep its published schedule for any reason, it may be necessary to adjust the due dates on all items still checked out from the bookmobile, for the stops that were affected by the interruption of the schedule.

The program BMDateChg.exe that is installed in the Circ folder on every Circulation station since v3.0.0.01 can be used to adjust the due dates for bookmobile items for selected "stops" that were due on a specific date when the bookmobile did not keep its regular schedule. You can adjust the dates for multiple "stops", providing that the date and interval period for all selected stops is the same.

This process extends the loans to the next expected stop date and avoids charging patrons overdue fines for those items. This method can also be used in tracking checkout/checkin statistical information by logged in user name, and does NOT ONLY apply to using Server Down on a bookmobile, but also works equally well when running Circulation wirelessly on the bookmobile. In either case, the library must create new user names (with Circ_user rights), and then be sure to login to Circulation (or set the user name in Server Down) using the appropriate user name for EACH STOP on the bookmobile route. If stops are added you will need to add new user names.

If your library is using the full Circulation module on your bookmobile (running with a wireless connection or other “live” connection to the database), then all you need to do is create different login names for each "stop" on the bookmobile route. The operator must login appropriately at each stop. This will allow the database to know from which "stop" every item was checked out.

Important! Since SDC was designed for use when there is a problem with the server, you should become familiar with the procedure before an emergency situation occurs. With it, your staff will be able to continue checking materials in and out of the library with no delay.

Server Down Circulation process

1. When you use the Server Down Circulation utility, you normally perform the following steps

    - **Warning -** Check the date and time set on the station. Confirm that every station running SDC is set to the same date and time.
    - Start and set up Server Down Circulation. To start SDC click the desktop shortcut or click **Start Library.Solution | Circulation Utilities | Server Down Circulation**.
    - Check Out Items

2. When your server is restored, or for any other reason that you have been using SDC to record transactions and are now ready to upload the transactions, do the following:

    - All stations upload their transactions to the server using the **Utilities** menu, **Sync Transactions** option. The next step **MUST** be performed for the transactions to be posted to the database.
    - When all stations have uploaded their transactions an Administrative user initiates the **Finalize Transactions** process which posts the transactions to the database.

Index

Quick Reference