

# Circulation Module

## From the Common Tasks Panel

### 1 To Issue an Item

- Click on **CheckOut**
- In the **User ID** box scan or type in the barcode from the reader's ticket. Press return.
- Check that the user's name and details appear on the screen.
- In the **Item ID** box scan or type in the book barcode. Press return. (Repeat this process for further loans to this borrower)

NB The title of the book, the barcode number, date due and item type will appear in a grid on the screen. Any previous checkouts will also show up on the screen.

To issue to a new user click on the **Check Out to New User** button at the bottom of the screen and repeat the process as above.

NB If an item is already checked out to someone the system will alert you to this.

### 2 To Return an Item

- Click on **Check In**
- In the **Item ID** box scan or type in the book barcode. Press return or click on **Discharge Item**. The returned items will show up in a grid on the screen.

NB If the item is being held for another borrower the system will alert you that there is a **Hold** on the item.

### 3 Fine Free Discharge

This allows a borrower to return items without paying the fines due. The fines will remain on the record until they are cleared at a later date.

#### 4 To Renew Items

- Click on **Renew Current Items**
- Type in or scan in the borrower number
- All the items which are checked out will appear on the screen.
- Tick in the **Select All** box to renew all items or tick the exact items you wish to renew.
- Check the **Seen** box if the items are there. If not uncheck it. If the borrower has exceeded the unseen renewals there will be a message on the screen and the opportunity to over-ride if you wish.

NB If you click **Renew Item** this will only allow you to renew a **single** item by scanning or typing in the item barcode.

#### 5 To Bill a User

- Click on **Billing a User**.
- Type in or scan the borrower number.
- In the pull down menus below, select the reason for the bill e.g. Damaged Material. Then enter the amount of the bill.
- Then type in or scan the item barcode.
- Select **payment type**.
- Click **Bill User** tab at the bottom of the page. (Or click **Pay Now** if the person is paying then).
- Click **Bill Another User** to continue sending bills or click **Close** if finished.

#### 6 To Pay Bills

- Click on **Paying Bills**

- Click **User Search Helper** if the person does not have their card to bring up the user record. The items which have bills attached will be displayed on the screen now.
- In the **payment box** enter the amount being paid and in the payment type box enter the type of payment used e.g. credit card.
- The click **Pay Bills** tab at the bottom of the screen. If only part payment has been made the outstanding charges will remain on the user's record.
- Click **Close** (or click on **Make Payments for Another Borrower** if you are continuing to pay bills)

## 7 To search the catalogue within the Circulation module

- Click on **Item Search and Display**
- In the search box type in the item or title you want to look for. (Use the pull down menu in the Index box to select title, item ID, ISBN etc.)
- NB You can search by title, ISBN, author, call number etc. Make sure you select your own library name if you only want to check your own stock.

## 8 To check the status of an item within the Circulation module

- Click on Check Item Status
- Click on the Item Search helper at the top of the screen.
- Search for the item.
- This will tell you if the item is checked out or available.

## From The Users Panels

### 1 To search for and display a user record

- Click on **Display User**
- Either type in or scan the borrower's card number or click on the **User Search helper** at the top of the screen and search there. If you get a list of names select the name that you want and click **Display this User**
- Once you are into the user record click on the tabs to get summary information, address, see checkouts, holds, bills etc.

### 2 To add a borrower

- Click on **User Registration**
- At User ID scan in or type in the borrower number
- Choose the correct profile name e.g. OC Student or OC Staff
- Click OK.
- Use the tabs on the screen to fill in other details such as expiry date (**Privilege** tab) address, and category of borrower (**Demographics** tab). The **Extended information** tab allows you to add notes or comments to the record.
- If you change any of the details click on the appropriate tab, make the changes and click on the **Modify** tab at the bottom of the screen.
- Click **Register User** then click **Close** to finish or **Register Another User** to continue registering users.

### 3 To edit a borrower record

- Click on **Modify User**
- Either type in or scan the borrower's card number or click on the **User Search helper** at the top of the screen and search there.

- Make the necessary changes e.g. click on **Privilege** tab to change the user expiry date. Remember you may need an over-ride code for this.
- Then click **Modify** and **Close** if finished or click **Make More Changes**.
- To modify another user click **Modify Another User** and repeat the above process.

#### 4 To confirm a borrower address

- Click on **Confirm Address**
- Bring up the user record on screen. Check the address is correct or add an address.
- Click **Close**.

#### 5 To Extend a Borrower's Privileges

- Search for the user record
- Click on **Renew Privilege**.
- Check **Special** then use the Calendar Gadget to change the expiry date. You will need to also enter the over-ride code.
- Click **Extend Privilege**
- You can check this has been changed by displaying the borrower record and checking the Summary Information.

#### 6 To Suspend a User

- Click on **Suspend User**
- Search for the user record
- Select reason for suspension e.g. Long Overdue
- Select the amount of time the suspension will last

- Identify the item
- Click on **Suspend User** tab at the bottom of the screen
- Either click **Close** or **Suspend Another User** to continue.
- To **Unsuspend** a user search for the user record and click **Unsuspend User**

## 7 To Delete a Borrower

- Search for the user record
- Click on **Delete Borrower Record** – the system will tell you the borrower has been removed
- Click **Remove Another User to continue** or **Close**

## From the Items Panel

### 1 To Edit an Item Barcode

- Click on **Change Item ID**.
- Search for the item then click on the **Change ID** tab at the bottom of the screen.
- Type in or scan in the new barcode number.
- Click **Modify** tab at the bottom of the screen.
- Click **Close** or **Change Another Item ID** if making more changes.

### 2 To Mark an Item Missing

- Search for the item by barcode number.

- Click on **Mark Item Missing** tab at the bottom of the screen
- Click **Close**.

(You can cross check this by doing a search for the barcode number. When the record comes up on the screen click on Call No/Item tab and the current location should show up as MISSING.

### **3 To Mark an Item as Lost**

- Search for the item
- Click **Mark Item Lost**
- Click **Mark Item Lost** tab at bottom of page then click **Close**

(NB If there are fines attached to the Lost Item you will have to deal with these before it can be marked as LOST, either by billing user, clicking Pay Now or cancelling the payment. Lost status will only be removed when item is discharged)

## **From the Holds Panel**

### **1 To request/recall a book**

- Click on **Place Hold**
- Find the borrower record for the person placing the request.
- Then search for the details of the item being requested.
- The screen prompts you to check that the correct location is shown as the pick-up library and gives you the option to choose an expiry date for the request by clicking on the Calendar Gadget.

- Specify whether the hold is a **Copy** or **Title** level.
- You can also specify on this screen if you wish to **recall** the item or not by clicking in the appropriate radio buttons.
- You can also choose to make this request first in the queue.
- Now click on the **Place Hold** tab at the bottom of the screen and click **Close** or click **Place Hold for Another User** if continuing.

NB The system will not allow you to place a hold on a book which is currently on the shelf.

## 2 To see a borrower's requests

- Find the borrower record
- Click on Display User Holds. The holds will display on the screen.

## 3 To modify a user's request

- Find the borrower record
- Click on **Modify User Holds**. The holds will display on the screen.
- Make the necessary change then click **Modify** tab at the bottom of the screen then **Close** or **Modify Another User's Holds** if continuing.

## 4 To Remove Requests from a Borrower record

Click on **Remove User Hold**.

Check the item to be removed.

Click on **Remove Hold** and **Close** or **Remove Holds for Another User** if continuing.

## 5 To find out if a titles/items have been requested

- Find the title information then click on **Display Title Holds**.
- This will tell you who has requested the title, when the request was placed and where it is to be collected. It will also tell you the status of the request
- You can also do a similar search to find if a specific item has been requested.

- Click on **Display Item Holds**
- Search for the item and then click on **Display This Item's Holds**

## 6 To make changes to requested items

- Search for the item
- Click on **Modify Holds for Item**
- Make sure you check the item to be modified.
- You can change pickup location , expiry date of the request or the decision to allow a recall or not here.
- Make the necessary changes and then click **Modify** tab at the bottom of the screen then **Close**.

## 7 To cancel a request

- Search for the item
- Click **Remove Item Hold**
- Check the item request to be cancelled
- Click **Remove Hold** and then click **Close** or **Remove Holds for Another Item** if continuing

NB Each function has a selection of helpers (icons) at the top of the screen

## From the Special Panel

### 1 If a user claims to have returned a book but it is not in the library

- Go into the borrower record.
- Click on **User Claims Return**
- Beside each item issued to the borrower there is a calendar Gadget which will allow you to set the date they claimed the book was returned. The borrower record will now be updated to this effect and when check out another item to the borrower this will show up.
- Click **Mark Items Claimed Returned**

## 2 **If a User has a Lost Card**

- Go into the borrower record.
- Click on **User Lost card**
- When the borrower information is on screen you can click **Assign New Card**. You will need to enter the new card details before continuing.
- When you now search for the borrower the record will have **Notes** (in red) when you click on that it will give you details of the previous lost card.
- The previous and current borrower IDs will both show up in the Checkout screen when you next issue an item.

## 3 **How to Modify the Due Date**

- Search for the borrower record.
- Click on **Modify Due Date**
- Search for the borrower record and when you have that on the screen and either **Select All** or check the specific items which have to be modified.
- Use the **Calendar Gadget** to select a specific date. Click **OK**.
- Click **Modify User Due Dates** tab at the bottom of the screen and click **Close** or Click **Modify Another User's Due Dates** if continuing.

## 4 **How to Discharge Bookdrop Items**

- Click on **Discharging Bookdrop Item**
- Today's date will appear at the top of the screen but you can change this by clicking on the Calendar Gadget and selecting the actual date of return.

- Then scan in or type in the barcode to return the book.
- Click **Discharge Item** tab at bottom of the screen.
- Click **Close**