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Lesson 1: Introduction

Keyboard and Mouse Conventions

Tab Key

The **TAB** key is used to move from field to field within a form. This key also is used to locate items within a list. At the top of the list, type the name, title, or item number, then press the **TAB** key.

Enter Key

Use the **ENTER** key to complete a form. It works the same as the **OK** button.

Escape Key

The **ESCAPE** key cancels the update of form and can be used just like the **CANCEL** button.

Mouse and Keyboard Options

To avoid using the mouse, select an option from the screen using the highlighted/underlined letter such as the "O" on the **OK** button), plus the **ALT** key for that option. Selecting the **ALT** key and the highlighted letter key performs the same function as clicking on that item with a mouse.

Cancel Key

Select the **CANCEL** button in Lib/Net to automatically cancel a recent update or change that made to a form.

Fields

Fields are spaces where the cursor can be used to record information. Right-click with the mouse on a field, and a table of options (typically) appears. Select one of the options and it automatically appears in the field.

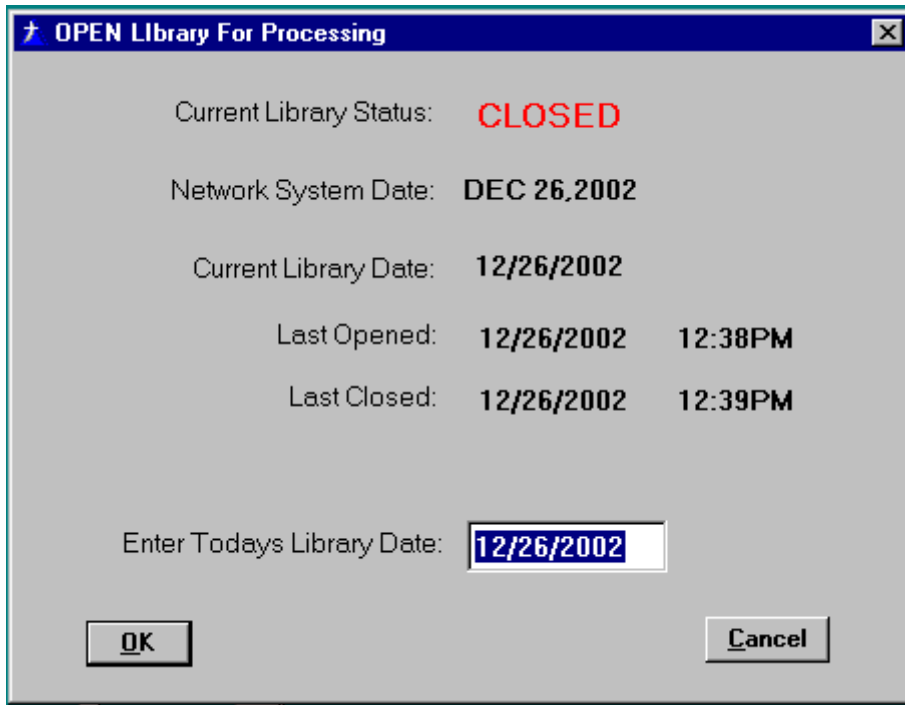
Buttons

Buttons are small, labeled rectangles located along the bottom, top, or sides of a LibNet screen. Select a button by using the mouse, or by pressing the **ALT** key and the highlighted letter.

Opening Procedure

NOTE: This procedure can be accomplished from any work station.

1. Look for the **Circ** icon at your computer's desktop screen.
2. Click twice on the icon and it will open the **Open Library for Processing** screen. This screen, shown below (Circless1-1), defaults to today's date.

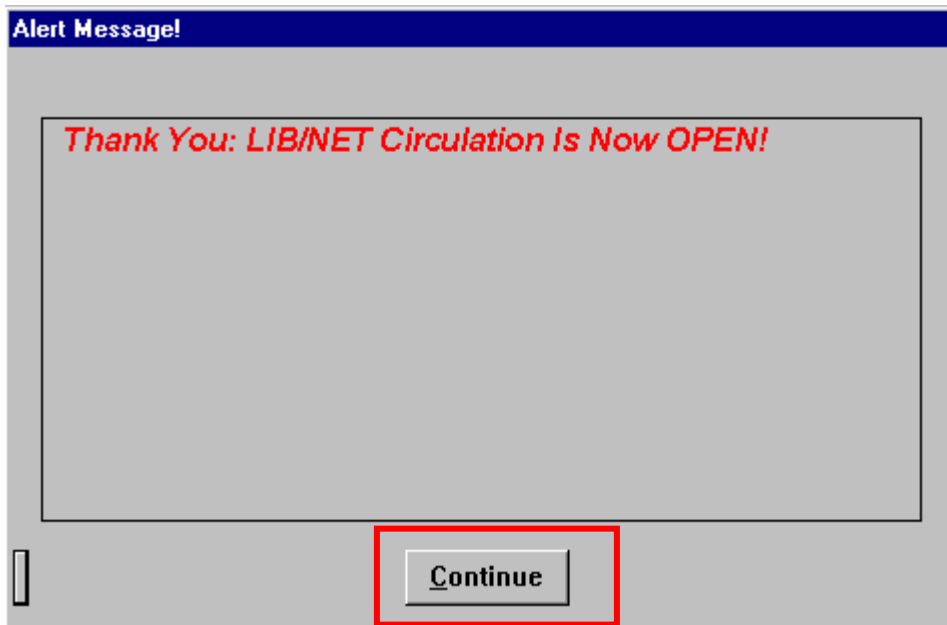


CIRCLESS1-1

NOTE: The opening procedure typically occurs only once each day and is automatically performed by the system as soon as the first person logs into the Circulation program for that day.

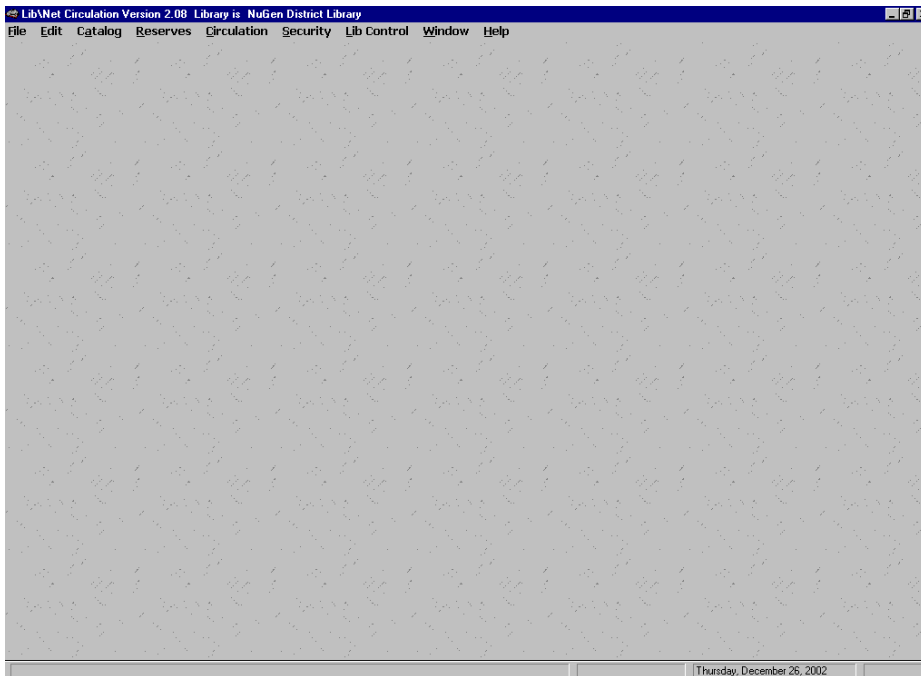
Select the **OK** button from the bottom of this screen to continue opening the library circulation system.

After selecting the **OK** button, an **Alert Message!** screen (see Circless1-2, below), appears.



CIRCLESS1-2

Select the **Continue** button (refer back to Circless1-2, above), and the system automatically opens the first **LibNet Circulation** screen (see Circless1-3, below).



CIRCLESS1-3

Exceptions to the Opening Procedure

Library Closed

This is prompted with a **Confirm?** message box that says the library calendar indicates that the library is **CLOSED** on this date. If the library is closed, but staff is working in Lib/Net anyway, select "Yes" to "Ignore". The library remains officially closed, but staff can still work, and fines/statistics will be calculated using the date when the library was last open.

If the system mistakenly shows that the library is **CLOSED** when it is not, go to the **Library Set-up** program and select **Library Calendar**. LibNet will open the current month's calendar. Use the mouse to click on today's date to remove the **CLOSED** designation. To set the calendar without using the mouse, use the **TAB** or **ARROW** keys to reach the date, then use the **SPACE BAR** on the computer screen to change the status from **CLOSED** to **OPEN**, or vice-versa. This calendar is used to establish due dates and to automatically calculate fines. It is essential to properly designate a day as **CLOSED** when the library is indeed closed.

Computer Not Properly Shut Down

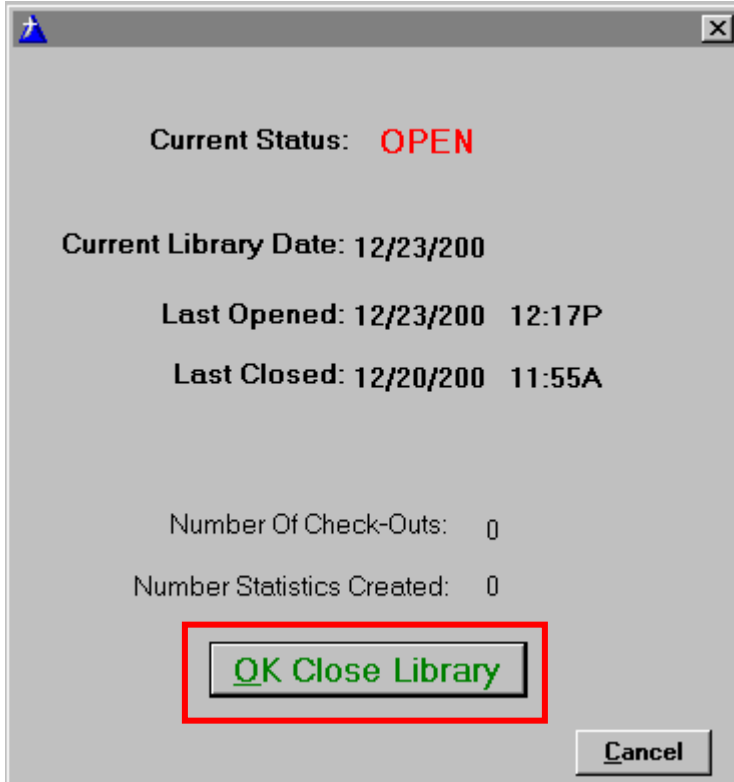
Another exception to the opening procedure could occur if the computer is not properly shut down. In this case, staff should **CLOSE** the library, then re-open it. Please refer to the Closing Procedure section in this lesson, which is explained on the following page.

Closing Procedure

NOTE: This procedure can be completed at any work station and should be done by the last person using the system.

At the main **LibNet Circulation** screen, select the **Lib Control** pulldown menu.

From the list of **LibNet** menu items, select **Close Library** and the **Current Status** screen will appear (see Circless1-4, below).

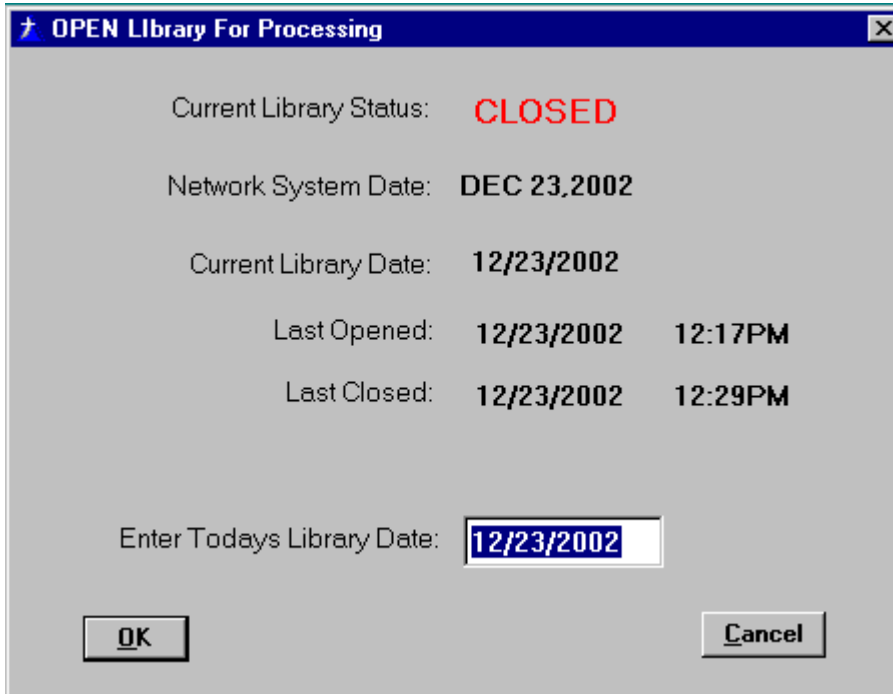


CIRCLESS1-4

At this screen (Circless1-4, above), which says the library is open, select the **OK Close Library** button.

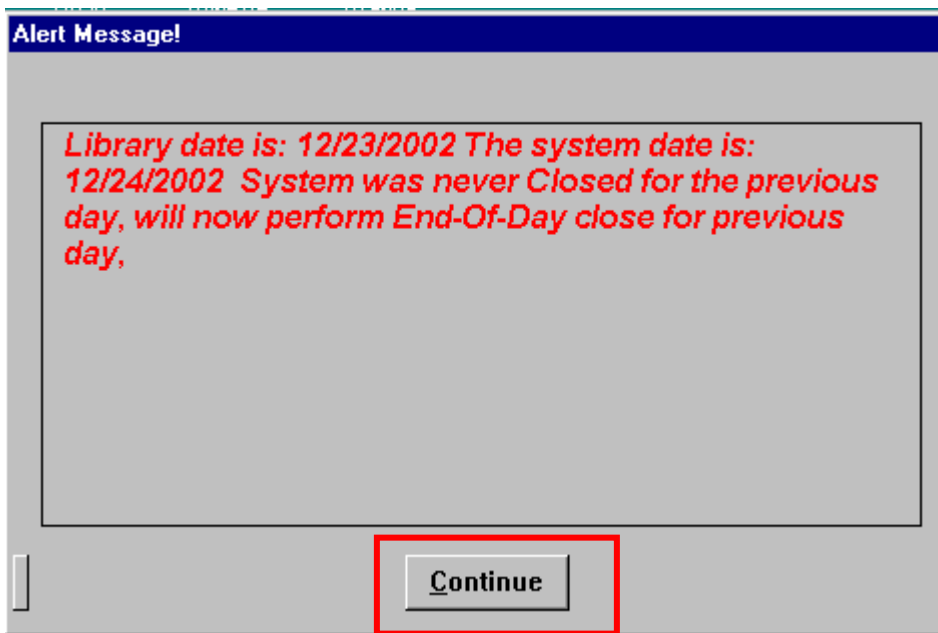
At this time, daily statistics are updated, then **LibNet** automatically logs out and returns the user to the main computer screen.

Under normal conditions, before a user opens the library, the following screen appears (Circless1-5, below).



CIRCLESS1-5

However, if the library has not been “closed” by anyone at night, when the Circulation program is opened the next day, the following **Alert Message!** screen appears (see Circless1-6, below). If this occurs, select the **Continue** button (refer back to Circless1-6, below), and the system prompts a user through the opening procedures, as described at the beginning of this lesson.



CIRCLESS1-6

Lesson 2: Patron Processing

LibNet Circulation Menu

The main LibNet Circulation screen offers the following pull-down menus (see Circless2-1, below):

- Check Ot
- Check In
- Browse Active Patrons
- Browse Patrons Flagged for Deletion
- Non Patron Financial Posting
- Non Patron Non-Barcoded Circulation

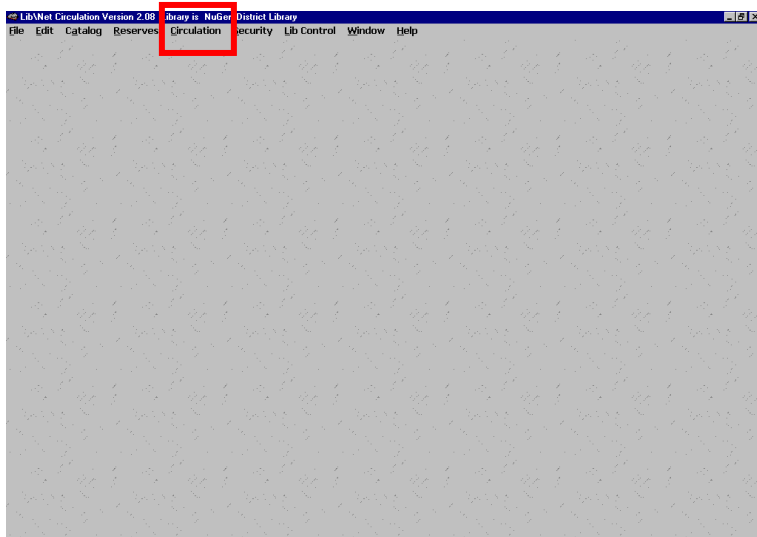
To access the pull-down menus at the main screen, use the mouse or hold the **ALT** key on the computer keyboard down, then select the highlighted letter for each menu item.

Examples

Single-click the mouse on the **Check Ot** entry on the **Circulation** pull-down menu

OR

Select the ALT key and letter “O” which is indicated by the system as the correct selection because the “O” is underlined on the menu (**Check Ot**)



CIRCLESS2-1

Entering a Patron's Information Into the Circulation System

The most convenient method for entering a new patron is to select **Check Out** from the Circulation menu. The PATRON CHECK-OUT screen appears (see Circless2-2, below), where:

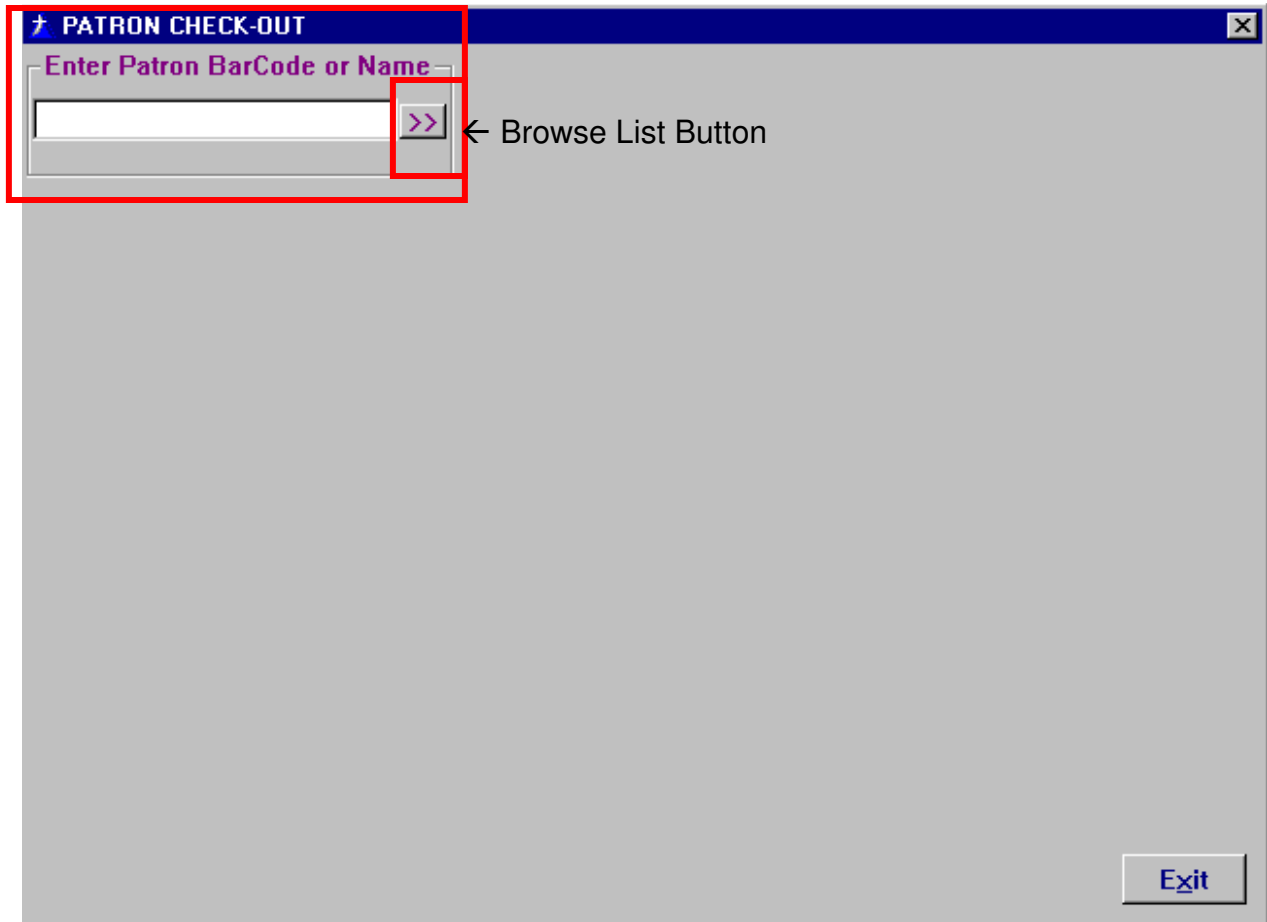
a patron's name (partial name accepted) can be typed into the box at the top of the screen

OR

a patron's barcode can be typed into the box at the top of the screen

OR

a user can click on the **Browse List** button located to the right of the **Patron BarCode or Name** box to search for a patron who already is in the system



CIRCLESS2-2

Next, the Browse the **Patron List** (or LB_PAT File) screen (see Circless2-3, below), appears.

At this screen (refer back to Circless2-3 again, below), click the mouse on the **Patron Name** tab at the top of the screen, or type "N" for **Name**.

Browse the LB_PAT File

Patron Name Patron Address Patron Barcode Patron Location

Name:

Barcode	Patron Name	Address	Active Phone#	Loc
9055278	*BOOK LAMINATING,	Workroom	** Unknown P	FR
9031774	*DUPLICATES, LIBRARY	TOP SHELF	** Unknown P	FR
9041385	*LIBRARY DISPLAYS,	** UNKNOWN ADDRESS **	(616)0 -	FR
9055476	*LIBRARY PROGRAMS,	630 Main St	(616)352-4671	FR
9024530	*REPAIR*	CIRC DESK BOX	** Unknown P	FR
9020108	*RESERVE SHELF*	20108 RESERVES	** Unknown P	FR
9020090	*UNREGISTERED, PATRON*	CIRC DESK	** Unknown P	FR
9068610	ABBETT, JOHN P	551 CORNING AVE	352-7214	FR
90247000060051	ABBETT, ROSEMARY L	551 CORNING	352-7214	FR
9024068	ABBEY, SUZANNE	500 MAIN ST	352-7713	FR
9023011	ABBOTT, SANDRA C	RT 1 BOX 261	882-4267	LAK
90247000060085	ABEL, CHERYL K	136 THOMAS	352-6143	GIL
9070814	ABRAITIS, SAUL	1399 ELM	(231)352-6198	CRY
9036609	ACAMS, SAM HA	518 KENT HILLS	** Unknown P	OT
9036039	ACKER, MARY B	536 E CRYSTAL DOWNS D	352-9575	LAK
9054719	ACKER, NAT	1280 TAQUAKA RD.	(616)0 -	FR
9054065	ACKERMAN, JULIA	2029 CRYSTAL DRIVE	352-6673	LAK
9034620	ACKERMAN, MARJORIE E	1433 CRYSTAL DR	352-4545	LAK
9037532	ACKERMAN, MARY E	6853 CRYSTAL DR	882-7773	BEN

Select Patron Add NEW Patron View / Change Patron Info.

Exit Help

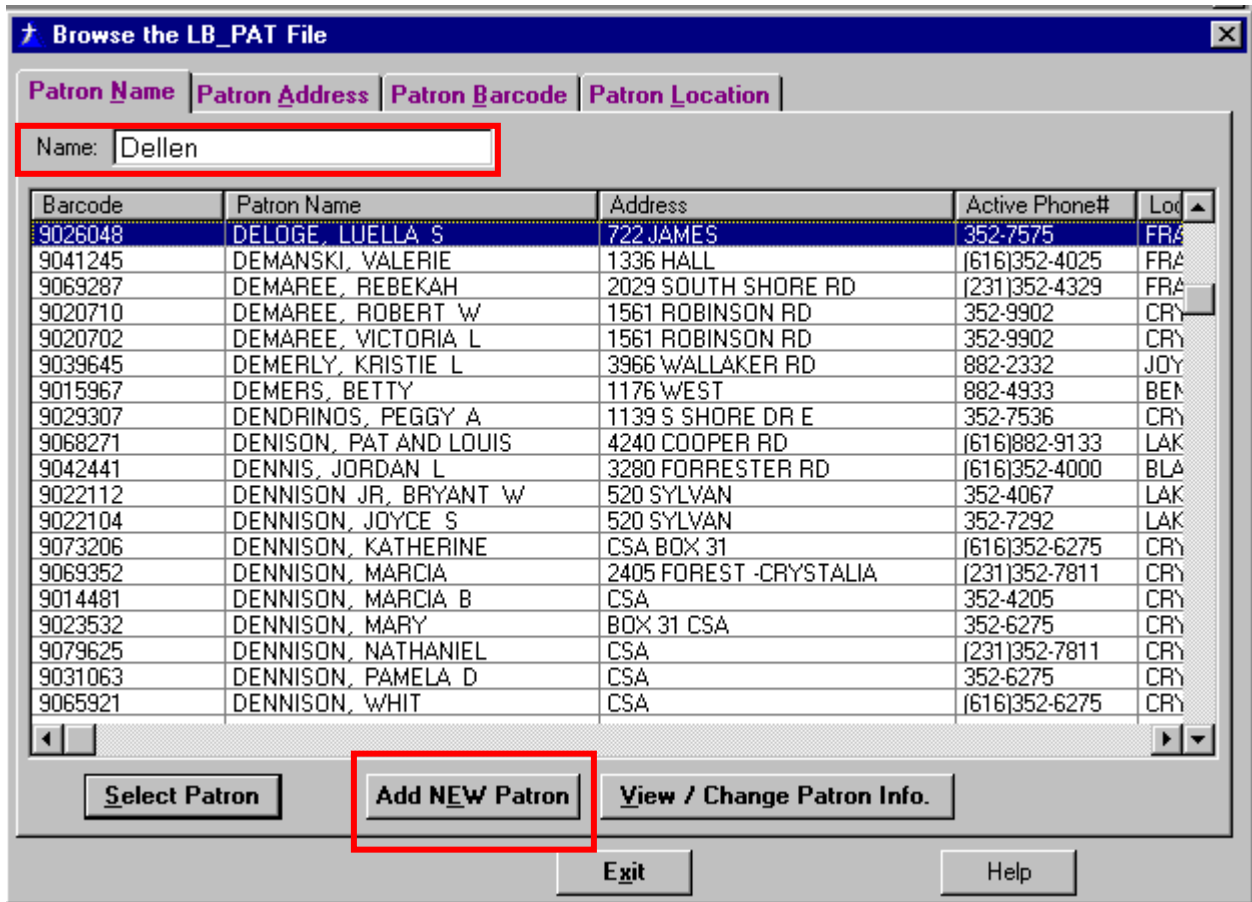
CIRCLESS2-3

Type the new patron's name into the small box near the top, left side of the screen.

Refer to the example below where "Dellen" has been typed into the box (Circless2-4).

Once the name has been typed, press **ENTER** on the computer keyboard so that the system will search for this name.

The system either leads directly to the name typed in, or to a name nearest in spelling. In the example below (Circless2-4), because the name "Dellen" has not been put into the circulation system yet, the closest name available, "DeLoge," appears instead. This means that the name "Dellen" must be added.



CIRCLESS2-4

NOTE: To browse through the patron list in the screen above, use the **UP** and **DOWN** arrows on the computer keyboard.

To continue the process of adding a new patron to the circulation system, select the **Add NEW Patron** button from the bottom the screen (refer to Circless2-4 again, above).

A blank patron master form (see below) screen, titled **Adding a LB_PAT Record**, appears (see Circless2-5, below).

Adding a LB_PAT Record

General | Address | Classification | Statistics | Trap Message | Balance By Library | Barcode History

Barcode: Assign New Barcode

Regular Patron
Patron Status: Active To Be Deleted

Last Name: <F3
First Name:
Middle Name:
In Care of Name: <F3

Active Address: **Traverse City MI 496840000**
231 000-0000

Gender: Female Male Unknown Pin:
Date of Birth: Social Security:
Driver License:
Patron Location: <F3 >>

First Registered: 12/24/2002 at Lib: 1
Last Renewed: <SetDate

\$Due:

Produce Card Mailer: Yes No 9687474

CIRCLESS2-5

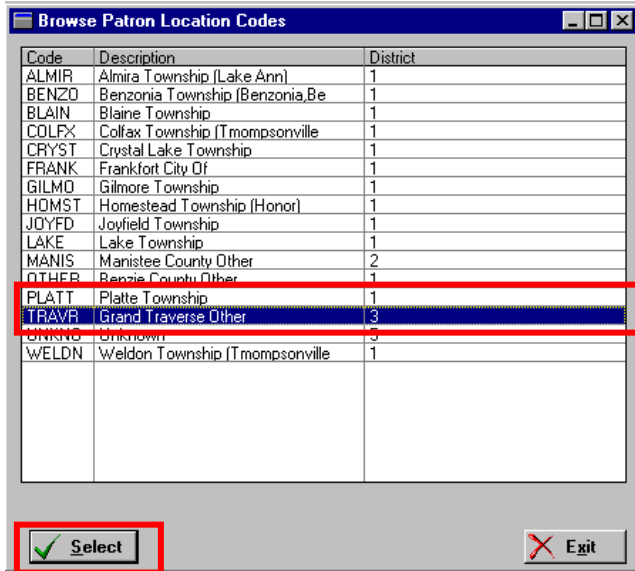
Using the patron's completed library application, or using **the next available barcode number**, enter or scan the patron's bar code into the box at the top left of the screen (see Circless2-6, below).

Using the **TAB** key on the computer keyboard, along with the tabs located across the top of the **Adding a LB_PAT Record** screen (such as "General", "Address", "Trap Message," etc.) enter all of the patron's information, completing each pertinent field on the patron form (see Circless2-6, below).

CIRCLESS2-6

NOTE: Any field with a >> button next to it (refer to Circless 2-6 above, where the >> button is to the right of the Patron Location field) indicates that the field contains a "lookup" code. Press the >> button to pop open a list for selecting the code to be looked up.

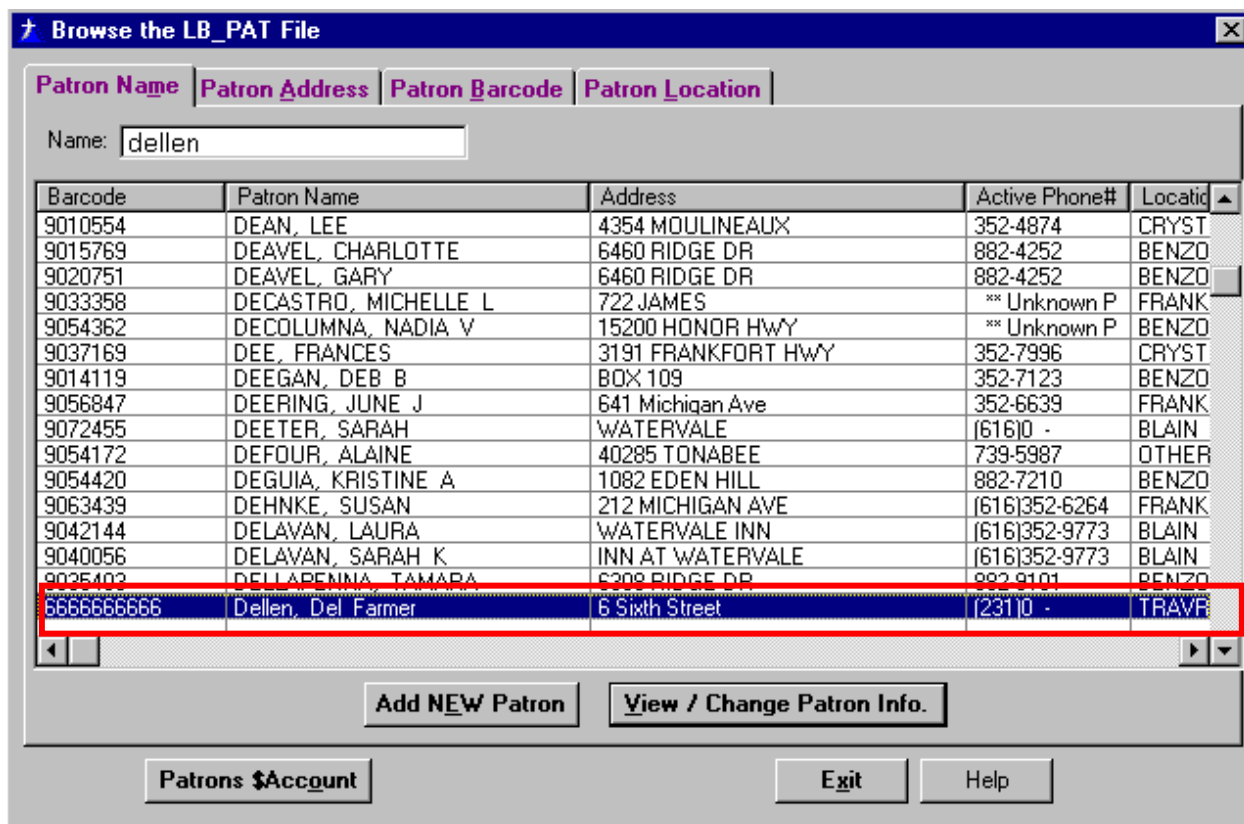
Select the **OK** button at the bottom of the screen (refer back to Circless2-6 on the previous page) to go to the **Browse Patron Location Codes** screen (see Circless2-7, below).



CIRCLESS2-7

In this case, the code **TRAVR** (refer to Circless2-7, above) was selected for “Grand Traverse Other.”

Use the **Select** button (refer again to Circless2-7) to add this new location to the patron’s form or profile, then the **Browse the LB_Pat File** screen will appear again. However, this time, the patron’s name and barcode **are** included in the records shown (see Circless2-8, below).



CIRCLESS2-8

Now, the circulation system has automatically created an account and all related records for the new patron, Del Farmer Dellen (refer to the highlighted record again in Circless2-8).

Trap Message Button-Patron Master Form

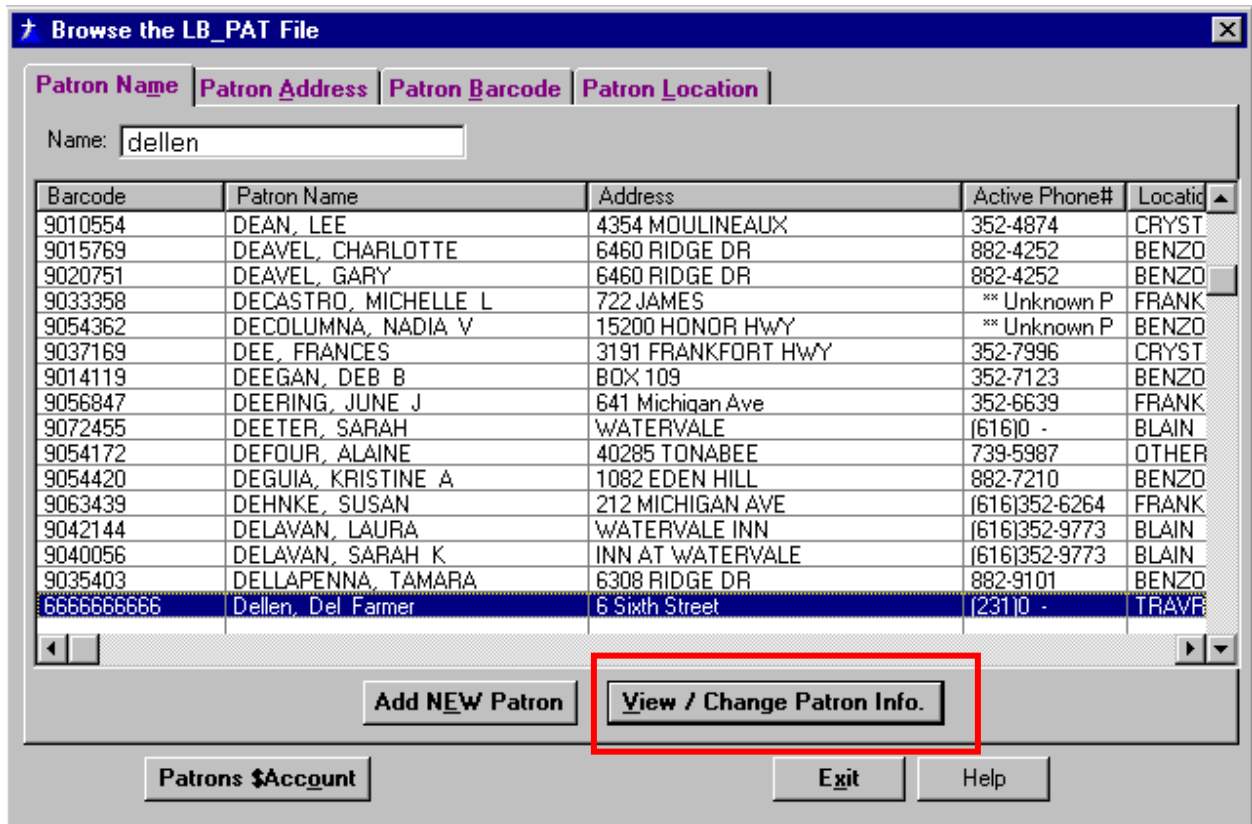
Staff might occasionally find the need to include a message in the Circulation system about a patron or his or her account that can be viewed by other library employees. Such a message can be included in the patron’s record, using the **Trap Message** tab at the top of the **Changing a LB_PAT Record** screen.

Examples of “trap” messages include:

- a patron promises to return an item by a certain date
- a patron returns a cassette book without including the tape
- an overdue notice has been returned by mail, unopened, therefore the patron’s record must be updated with this information (“not a valid address”)

To enter a trap message, use the system’s “trap message center,” accessed by selecting the name of the patron at the **Browse the LB_Pat File** screen (see Circless2-9, below).

Either select the patron’s name, highlight it, and click twice on it to access the patron’s record (in this case, the patron’s name is “Dellen” again), or select the patron’s name, highlight it, and select **View/Change Patron Info.** button at the bottom of the **Browse the LB_Pat File** screen (Circless2-9 again, below).



CIRCLESS2-9

The **Changing a LB_PAT Record** screen (see Circless10, below) appears.

NOTE: This screen may also be accessed by selecting the Circulation menu from the opening circulation system screen, then selecting the **Browse Active Patrons** entry.

Changing a LB_PAT Record

General | **Address** | **Classification** | **Statistics** | **Trap Message** | **Balance By Library** | **Barcode History**

Barcode: 6666666666 Assign New Barcode

Regular Patron
Patron Status: Active To Be Deleted

Last Name: Dellen <F3>
First Name: Del
Middle Name: Farmer
In Care of Name: <F3>

First Registered: 12/24/2002 at Lib: 1
Last Renewed: 12/24/2002 <SetDate>

\$Due:

Active
Address: 6 Sixth Street
Traverse City MI 496860000
231 000-0000

Gender: Female Male Unknown Pin: <F3>

Date of Birth: 6/06/2006 Social Security: 666-66-0666
Driver License: <F3>

Patron Location: TRAVR <F3> >> Grand Traverse Other Produce Card Mailer: Yes No 9687475 1

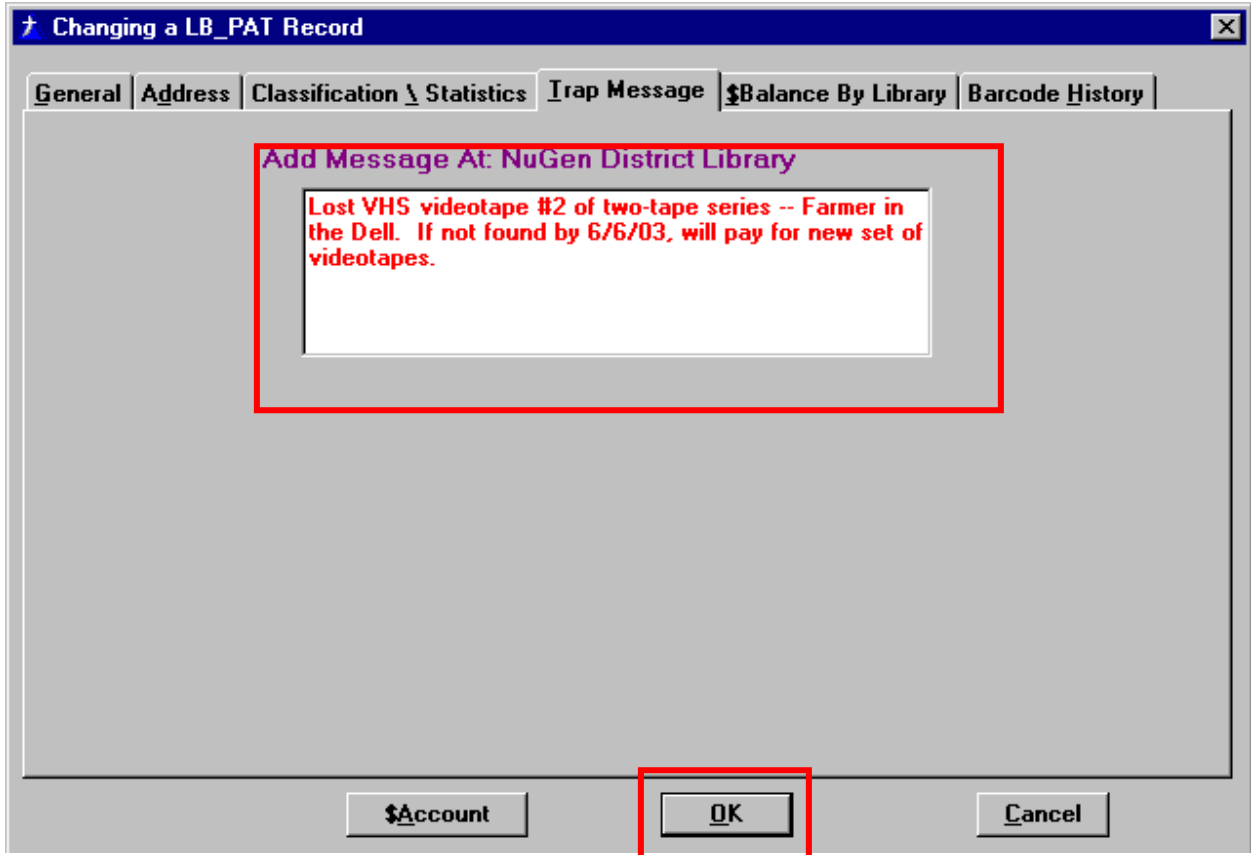
Account **OK** **Cancel**

CIRCLESS2-10

Select the **Trap Message** tab at the top of the screen (refer to Circless2-10, again, above).

The **Changing a LB_PAT Record/“Add Message At . . .[name of library]”** screen appears (see Circless2-11, below).

Type a message into the box on this screen, then select the **OK** button at the bottom of the screen to save the message into the patron’s record (see Circless2-11, below, again).

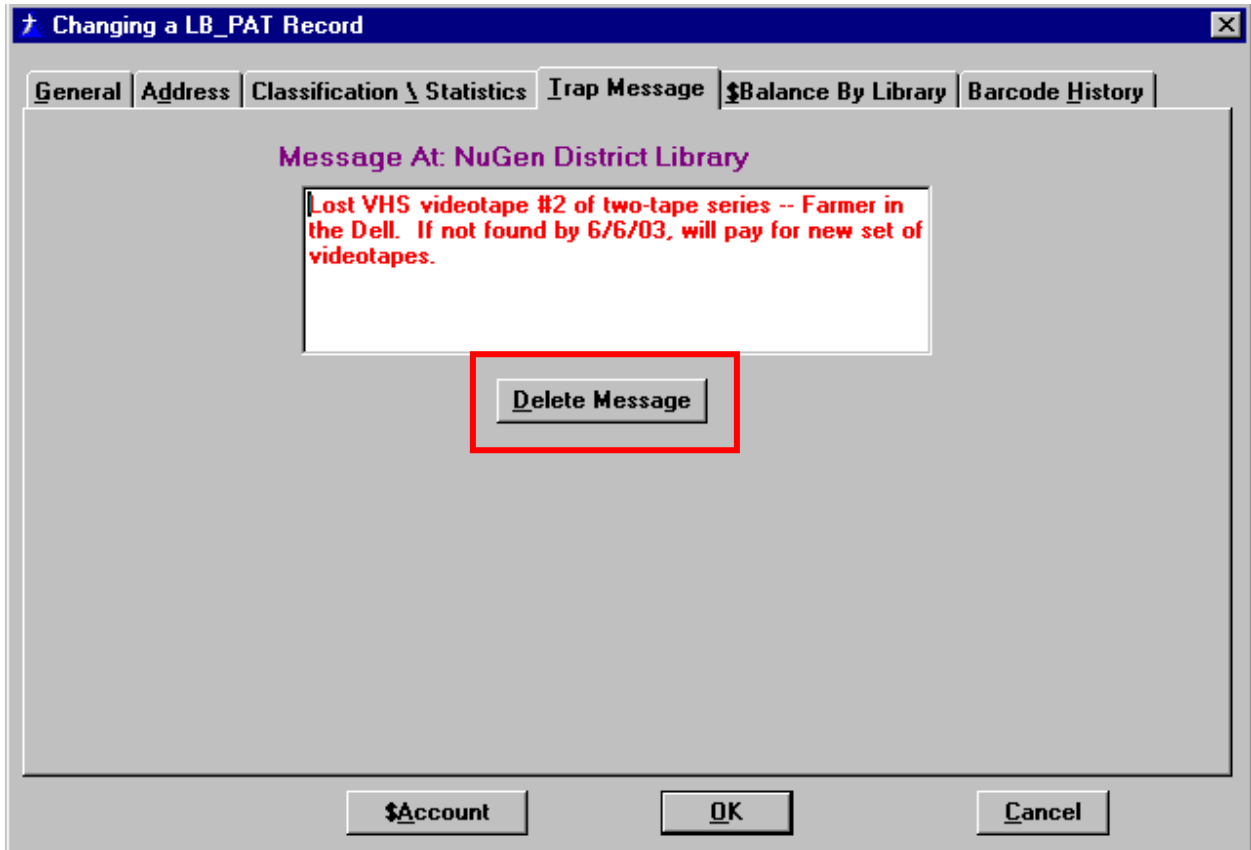


CIRCLESS2-11

After a trap message has been entered into a patron’s record, it will come up with that patron’s record, whenever accessed by library staff, until it is deleted from the system.

When a trap message no longer is valid, select the **Trap Message** tab at the top of the **Changing a LB_PAT Record** screen again (refer to Circless2-12, below).

Then, select the **Delete Message** button directly below the message on the **Changing a LB_PAT Record** screen (see Circless2-12, below). This action deletes the message from the record.



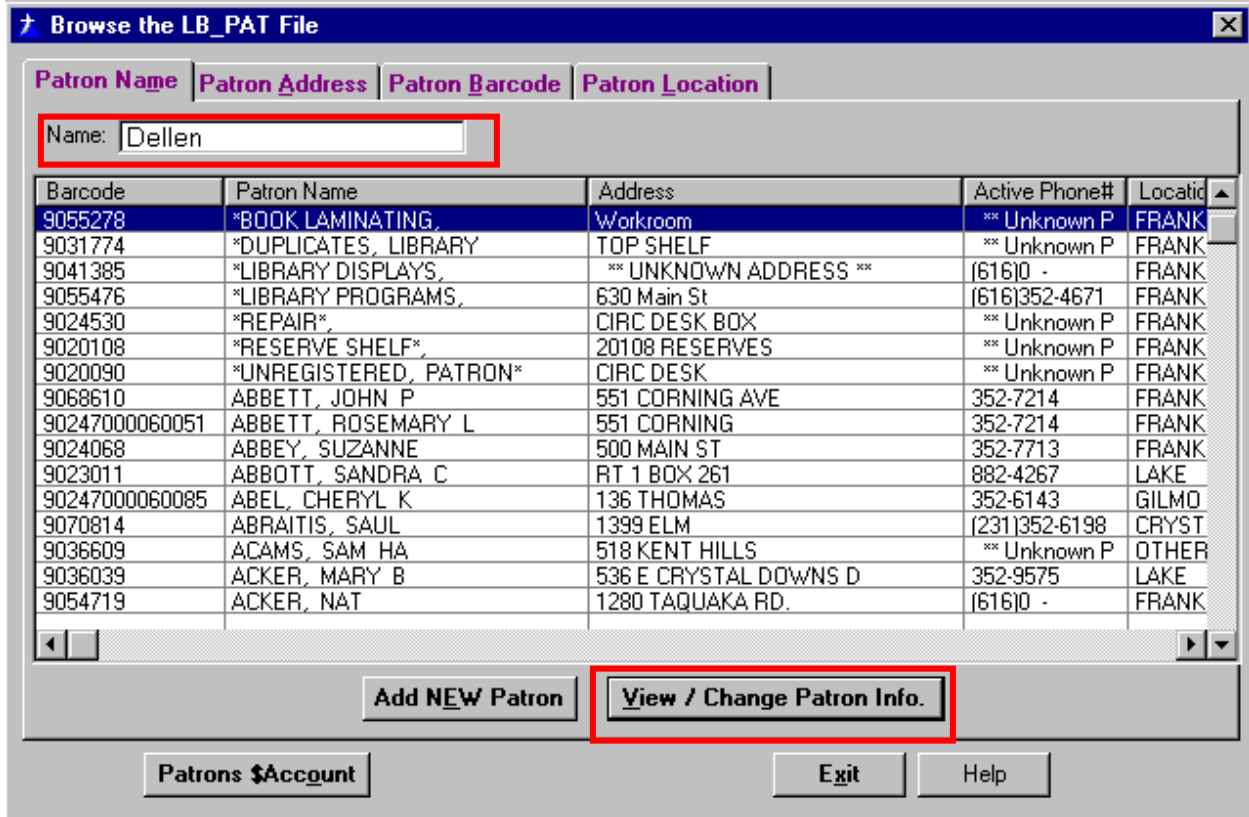
CIRCLESS2-12

Changing a Barcode to Replace Lost Library Card

When a patron has lost his or her library card, it is necessary to change that patron's barcode in the LibNet system.

To do so, first select the **Browse By Patron Name** menu item from the **Circulation** menu at the top of the opening **Circulation** screen.

The **Browse the LB_PAT File** screen appears (see Circless2-13, below).



CIRCLESS 2-13

Type the patron's name into the **Name** box at the top of the screen, and select the **ENTER** key from the computer keyboard (see Circless2-13, above again).

Next, select the **View/Change Patron Info.** button at the bottom of the screen (see Circless2-13 again, above).

The **Changing a LB_PAT Record** screen with the patron's information appears (see Circless2-14, below).

Changing a LB_PAT Record

General | **Address** | Classification \ Statistics | Trap Message | \$Balance By Library | Barcode History

Barcode: 6666666666 Assign New Barcode

Regular Patron
 Patron Status: Active To Be Deleted

Last Name: Dellen <F3>
 First Name: Del
 Middle Name: Farmer
 In Care of Name: <F3>
 \$Due:

Active
 Address: 6 Sixth Street
 Traverse City MI 496860000
 231 000-0000

Gender: Female Male Unknown Pin:

Date of Birth: 6/06/2006 Social Security: 666-66-0666

Driver License:

Patron Location: TRAVR <F3> >> Grand Traverse Other Produce Card Mailer: Yes No 9687475 1

\$Account OK Cancel

CIRCLESS 2-14

Click the mouse on the **Assign New Barcode** box to the right of the current Barcode (refer back to Circless2-14, above), and the **Barcode** box will be emptied (see Circless2-15, below).

Changing a LB_PAT Record

General | Address | **Classification \ Statistics** | Trap Message | \$Balance By Library | Barcode History

Barcode: Assign New Barcode

Regular Patron
 Patron Status: Active To Be Deleted

Last Name: Dellen <F3>
 First Name: Del
 Middle Name: Farmer
 In Care of Name: <F3>
 \$Due:

Active
 Address: 6 Sixth Street
 Traverse City MI 496860000
 231 000-0000

Gender: Female Male Unknown Pin:

Date of Birth: 6/06/2006 Social Security: 666-66-0666

Driver License:

Patron Location: TRAVR <F3> >> Grand Traverse Other Produce Card Mailer: Yes No 9687475 1

\$Account OK Cancel

CIRCLESS2-15

LibNet Circulation Manual

After the system deactivates the patron's current bar code, the blank field is ready for a new bar code entry. Type or scan the next available bar code number from one of the library registration forms or from a new library card (see Circless2-16, below) into that field.

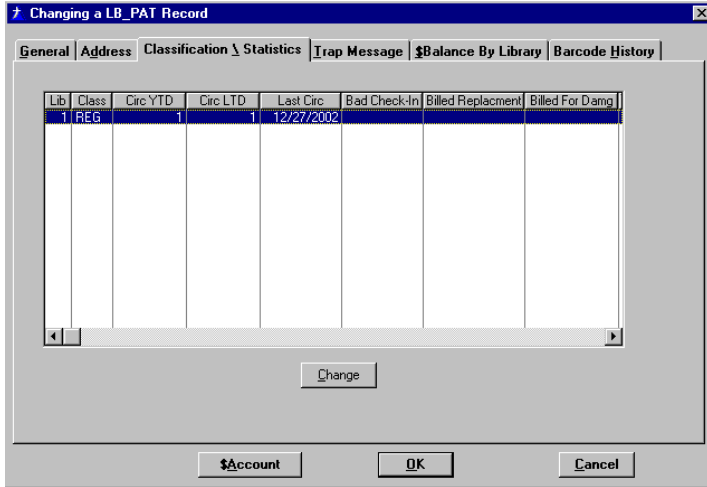
The screenshot shows a software window titled "Changing a LB_PAT Record". It has several tabs: "General", "Address", "Classification", "Statistics", "Trap Message", "Balance By Library", and "Barcode History". The "Barcode" field is highlighted with a red box and contains the number "6767676767". There is a checkbox labeled "Assign New Barcode" which is currently unchecked. The "Regular Patron" section shows "Patron Status" with "Active" selected. Other fields include "Last Name: Dellen", "First Name: Del", "Middle Name: Farmer", "In Care of Name:", "Date of Birth: 6/06/2006", "Social Security: 666-66-0666", "Patron Location: TRAVR", and "Produce Card Mailer: No". The "OK" button at the bottom is highlighted with a red box.

CIRCLESS2-16

Click on the **OK** button at the bottom of the screen (refer to Circless2-16 again, above) to activate the barcode change.

Changing a Patron's Classification/Reviewing Statistics

To review the usage statistics for a patron and to change a patron's classification, select the **Classification\Statistics** tab from the top of the **Changing a LB_PAT Record** screen (refer back to Circless2-16 above), and that screen will appear (see Circless2-17, below).



CIRCLESS2-17

Reviewing a Patron's Barcode History

To review the barcode history for a patron, select the **Barcode History** tab from the top of the **Changing a LB_PAT Record** screen (see Circless2-16, below).

The screenshot shows the 'Changing a LB_PAT Record' window with the 'Barcode History' tab highlighted in red. The window contains various fields for patron information, including name, address, date of birth, and social security number. The 'Barcode History' tab is currently selected, but the history table is not yet visible.

CIRCLESS2-16

The barcode history screen appears (see Circless2-17, below).

The screenshot shows the 'Barcode History' tab selected. A table displays the barcode history for the patron. The table has four columns: Barcode, Date Replaced, Time, and Staff. One row of data is visible.

Barcode	Date Replaced	Time	Staff
6666666666	12/26/2002	12:18PM	

CIRCLESS2-17

NOTE: A patron's barcode history also includes his or her driver's license number -- if the account has been set up to use the patron's license in addition to his or her library card.

LibNet Circulation Manual

Once activated, the LibNet system can be set (library option) to automatically charge a new card to this patron's account (see Circless2-19, below).

Browse the LB_PAT File

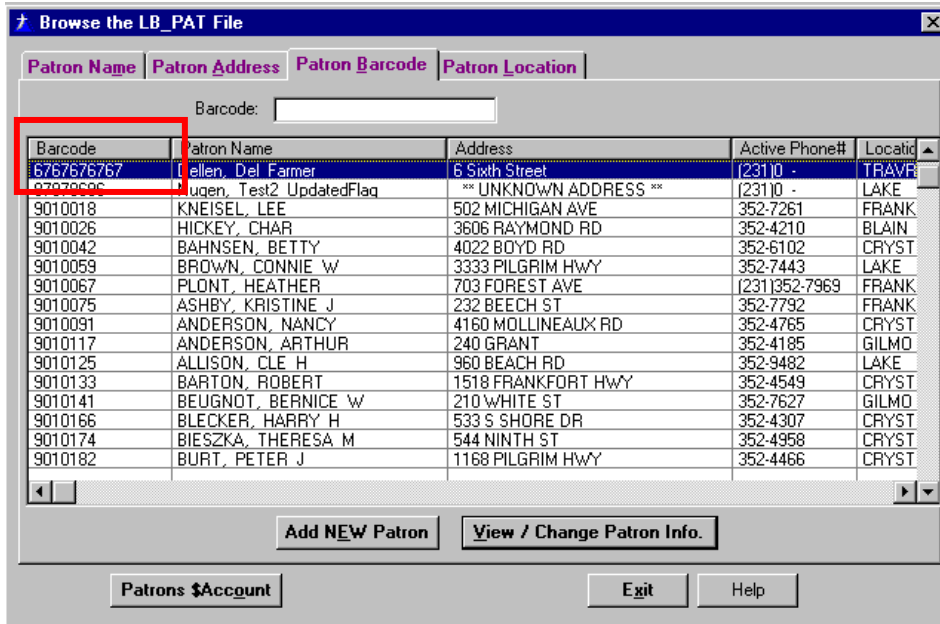
Patron Name Patron Address Patron Barcode Patron Location

Barcode:

Barcode	Patron Name	Address	Active Phone#	Locatio
6767676767	Dallen, Del Farmer	6 Sixth Street	(231)0 -	TRAVR
87978696	Nugen, Test2_UpdatedFlag	** UNKNOWN ADDRESS **	(231)0 -	LAKE
9010018	KNEISEL, LEE	502 MICHIGAN AVE	352-7261	FRANK
9010026	HICKEY, CHAR	3606 RAYMOND RD	352-4210	BLAIN
9010042	BAHNSEN, BETTY	4022 BOYD RD	352-6102	CRYST
9010059	BROWN, CONNIE W	3333 PILGRIM HWY	352-7443	LAKE
9010067	PLONT, HEATHER	703 FOREST AVE	(231)352-7969	FRANK
9010075	ASHBY, KRISTINE J	232 BEECH ST	352-7792	FRANK
9010091	ANDERSON, NANCY	4160 MOLLINEAUX RD	352-4765	CRYST
9010117	ANDERSON, ARTHUR	240 GRANT	352-4185	GILMO
9010125	ALLISON, CLE H	960 BEACH RD	352-9482	LAKE
9010133	BARTON, ROBERT	1518 FRANKFORT HWY	352-4549	CRYST
9010141	BEUGNOT, BERNICE W	210 WHITE ST	352-7627	GILMO
9010166	BLECKER, HARRY H	533 S SHORE DR	352-4307	CRYST
9010174	BIESZKA, THERESA M	544 NINTH ST	352-4958	CRYST
9010182	BURT, PETER J	1168 PILGRIM HWY	352-4466	CRYST

CIRCLESS2-19

The resulting bar code change is shown below in Circless2-20.



CIRCLESS2-20

Lesson 3: Checking Out Items

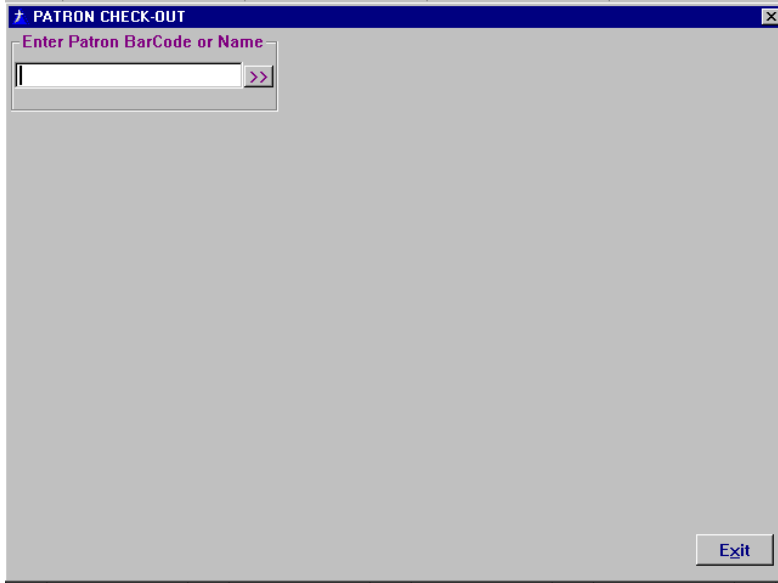
To begin the item checkout process, select the **Circulation** pull-down menu from the main **LibNet Circulation** screen (see Circless3-1a, below).



CIRCLESS3-1a


Select **Check Out** from this menu.

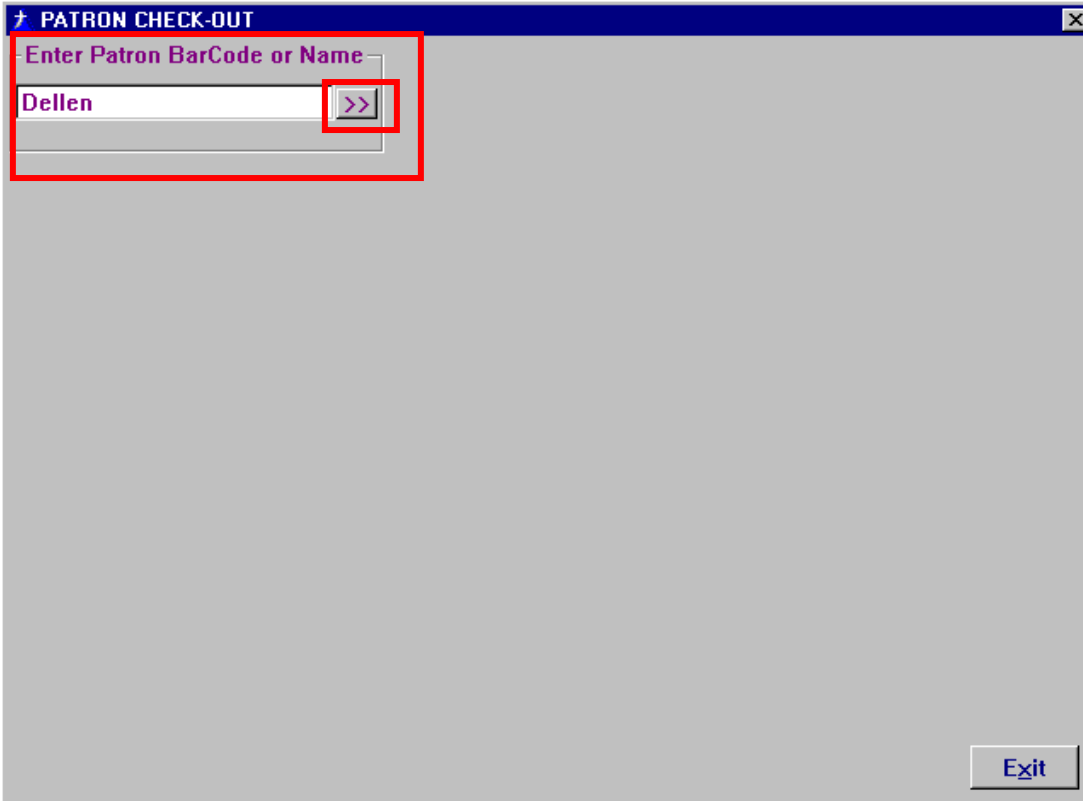
The first **PATRON CHECK OUT** screen appears (see Circless3-1, below).



CIRCLESS3-1

Scan or type the patron's bar code or type his or her name -- last name first, then first name -- into the **Enter Patron BarCode or Name** box at the top of the screen (see Circless3-2, below).

Or, click the mouse on the **Browse List** button , located to the right of the **Patron BarCode or Name** box (refer back to Circless3-2, below).

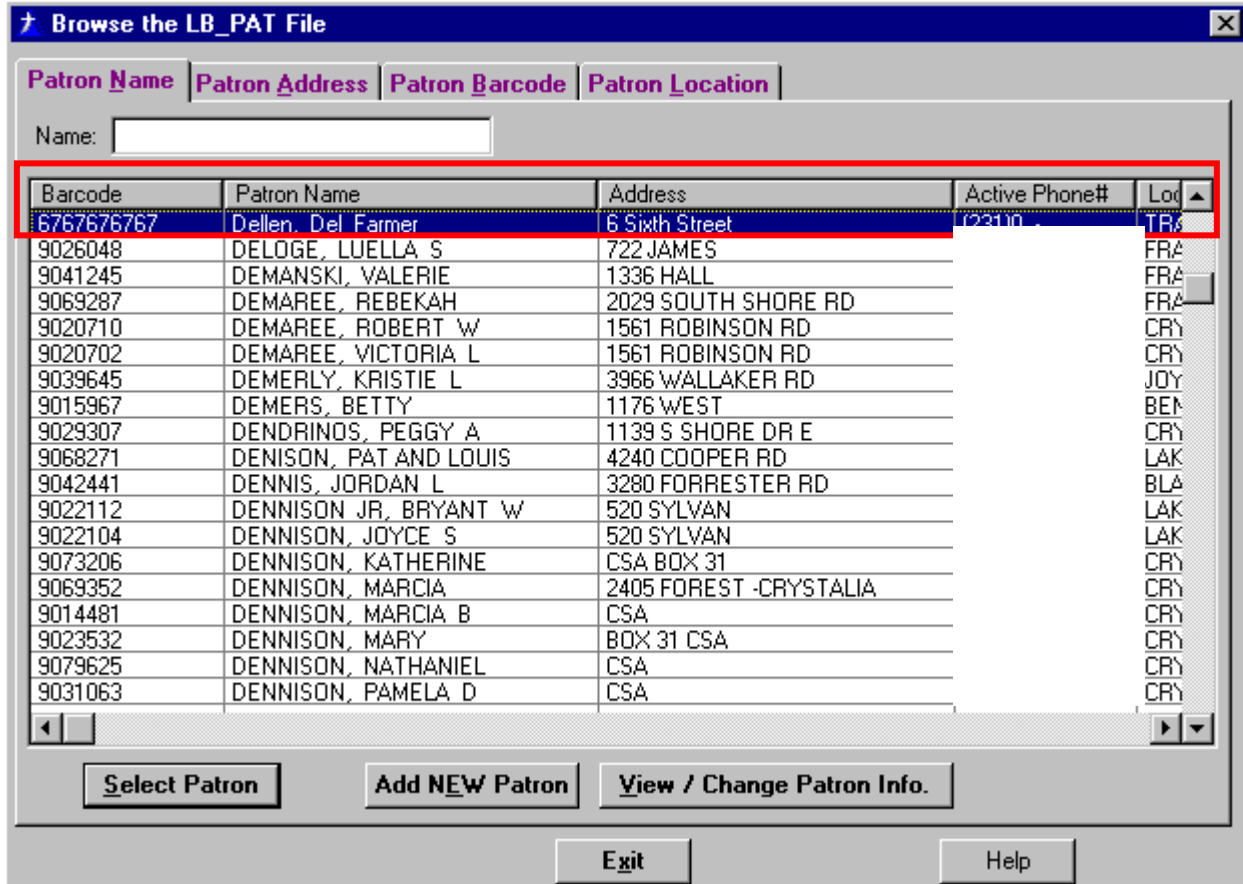


CIRCLESS3-2

IMPORTANT NOTE: If a patron's name or barcode is NOT entered into the **Enter Patron BarCode or Name** box and the field is left blank, the system will "re-select" the patron's name for which checkout was just completed. This function can be helpful if that patron requires further assistance, because staff does not have to scan the card or search for that patron's name in the system again.

The **Browse the LB_PAT File** screen appears (see Circless3-3, below) where a patron's record can be searched for by name.

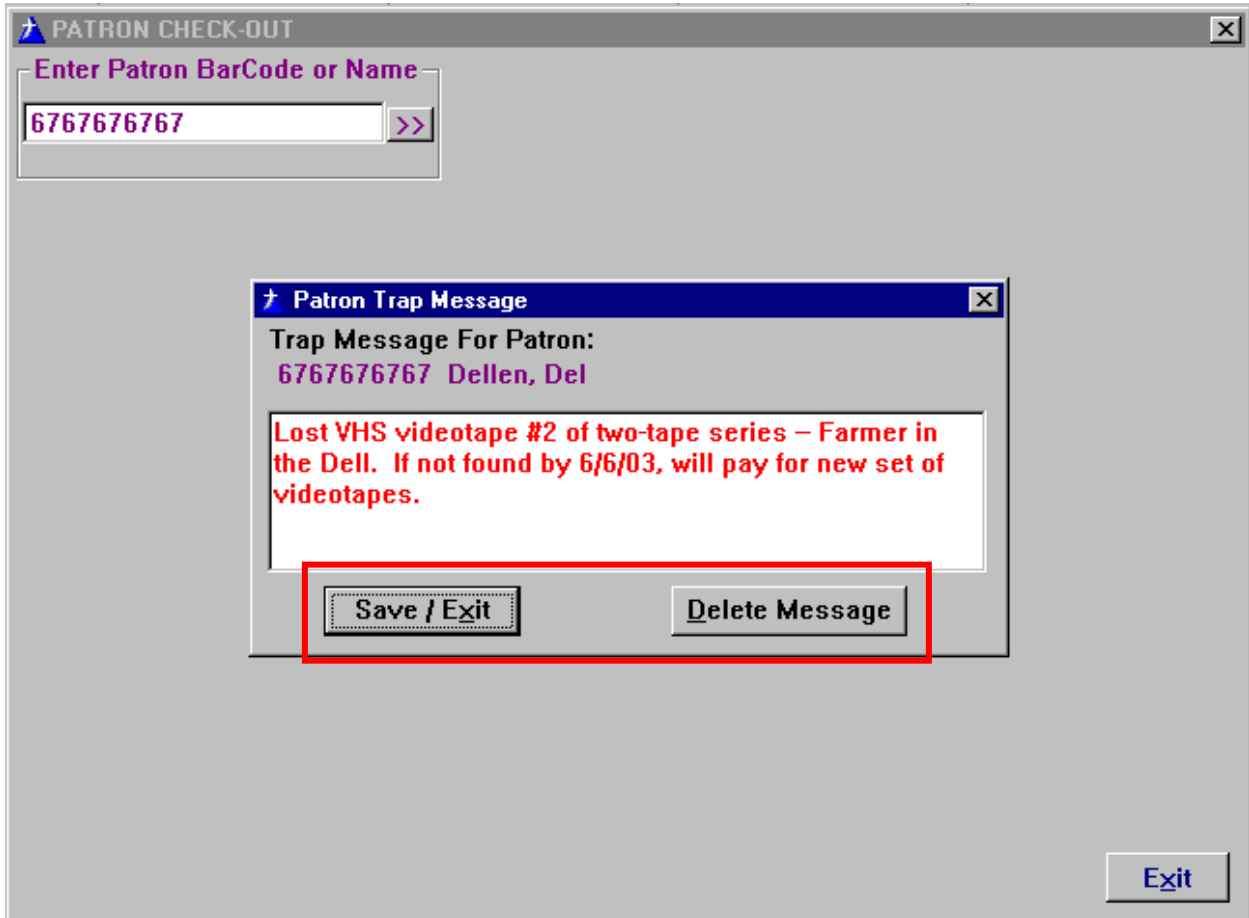
At the **Browse the LB_PAT File** screen, click the mouse twice on the selected patron, or choose the **Select Patron** button, or select the **Enter** key on the computer keyboard. In the case of the example below, the patron is Del Farmer Dellen (see Circless3-3, below).



CIRCLESS3-3

If the search by patron's name function is used, then the system prompts with a list of patrons to be browsed, such as the one shown in Circless3-3, above. If a barcode is entered, the system goes directly to the **Patron Check-out** screen (refer to Circless3-4, on the next page).

The **PATRON CHECK-OUT** screen appears next, with the patron's barcode and any trap messages pertinent to that patron's record (see Circless3-4, below). At this point, the system gives the user the option to **update or delete** the patron's trap message.



CIRCLESS3-4

For the purposes of this lesson, the trap message continues to be saved using the **Save/Exit** button (refer back to Circless3-4, above).

The patron checkout process proceeds to the next **Patron Check Out** screen (see Circless3-5, below).

PATRON CHECK-OUT

Regular Patron 12/26/02 **OUT**

6767676767
Del Dellen

6 Sixth Street
Traverse City MI 496860000
231

NOTE:
Items
Total Out: 0

Enter Item Barcode

Items Checked Out **Spl Due** \$Bal:

Due Date	R	Status	Description

Renewal **Item** **In Circ** **\$Account** **Bill For Repl.** **Not BarCoded** **Print**

All **Reserves** **Patron Mst** **Cancel Item** **Item Rec.** **Next Patron** **Exit**

CIRCLESS3-5

At this main **Patron Check-Out** screen, a user can view all of the items already checked out by the patron. In this case, patron Del Dellen does not have any items checked out from this library.

NOTE: If any items are overdue, the "In Circ" list automatically appears at this screen.

For the purposes of the following example, patron Del Dellen will check out the book, *Aliens from Space*. The barcode for this book is shown on the **PATRON CHECK-OUT** screen below in the **Enter Item Barcode** box (see Circless3-6, below). To continue checking out the book, type or scan the barcode into this space, then press the **ENTER** key on the computer keyboard to complete the checkout process.

PATRON CHECK-OUT

Regular Patron 12/27/02 **OUT**
 6767676767
 Del Dellen
 6 Sixth Street
 Traverse City MI 496860000
 231
 Total Out: 0

Enter Item Barcode
 80024730

Items Checked Out **Spl Due** **\$Bal:**

Due Date	R	Status	Description

Renewal
 Item **In Circ** **\$Account** **Bill For Repl.** **Not BarCoded** **Print**
All **Reserves** **Patron Mst** **Cancel Item** **Item Rec.** **Next Patron** **Exit**

Circless3-6

In this situation, an **Exception Message** (see Circless3-7, below) has been issued.

Exception Message

Number of ADULT Checked Out Exceeds Limit.
 Allow Check Out?

OK **Cancel**

CIRCLESS3-7

Select **OK** or **Cancel** in response to this message (see Circless3-7, above), and continue on.

NOTE: Selecting the **Cancel** button (refer back to Circless3-7, above), will bypass the checkout process, so the item would not be checked out.

LibNet Circulation Manual

For the purposes of this example, the **OK** button was selected, so the check-out process continues, resulting in the item *Aliens from Space* listed as a checked out item on the patron's (Dell Dellen's) record (see Circless 3-8, below).

The screenshot shows a window titled "PATRON CHECK-OUT". At the top right, there is a close button (X). The window contains the following information:

- Regular Patron** 12/27/02
- 6767676767
- Del Dellen
- 6 Sixth Street
- Traverse City MI 496860000
- 231
- OUT**
- ADULT 1
- Total Out: 1

On the left, there is a field "Enter Item Barcode" with the value "80024730".

Below the barcode field, there is a table titled "Items Checked Out". The table has columns for "Due Date", "R", "Status", and "Description". One row is highlighted with a red border:

Due Date	R	Status	Description
1/10/03			80024730 Aliens from space ;

At the bottom of the window, there is a "Renewal" section with several buttons: "Item", "All", "In Circ", "Reserves", "\$Account", "Patron Mst", "Bill For Repl", "Cancel Item", "Not BarCoded", "Item Rec.", "Next Patron", "Print", and "Exit".

CIRCLESS3-8

Check-Out Screen Buttons -- Introduction

NOTE: Many of the circulation desk tasks can be performed using the LibNet **Check Out** screens/buttons, including:

- renew items
- review items on reserve
- check out items
- cancel checkout (check item back in)
- receive and record patron payments
- receive and record payment for lost items
- replace a patron's lost card
- access information about a particular item checked out
- set special due dates
- access a list of items already checked out for each patron
- bill patron for lost items
- post counts of non-barcoded items for statistics
- print checkout and account receipts

All of the function buttons for circulation tasks described at the beginning of this lesson are found at the bottom of the main **Patron Check-Out** screen (see Circless 3-0, below).

The screenshot shows a window titled "PATRON CHECK-OUT". At the top right, it displays "Regular Patron" with a date "12/27/02" and a button labeled "OUT". Below this, the patron's ID "6767676767" and name "Del Dellen" are shown. The address "6 Sixth Street, Traverse City MI 496860000, 231" is listed. To the right, it says "ADULT 1" and "Total Out: 1". On the left, there is a field labeled "Enter Item Barcode" with an empty input box. Below the patron information is a table titled "Items Checked Out" with columns for "Due Date", "R", "Status", and "Description". The table is currently empty. At the bottom of the screen, there is a row of buttons: "Renewal Item", "In Circ", "\$Account", "Bill For Repl.", "Not BarCoded", "Print", "All", "Reserves", "Patron Mst", "Cancel Item", "Item Rec.", "Next Patron", and "Exit". A red box highlights this row of buttons.

CIRCLESS3-0

Renewal Buttons

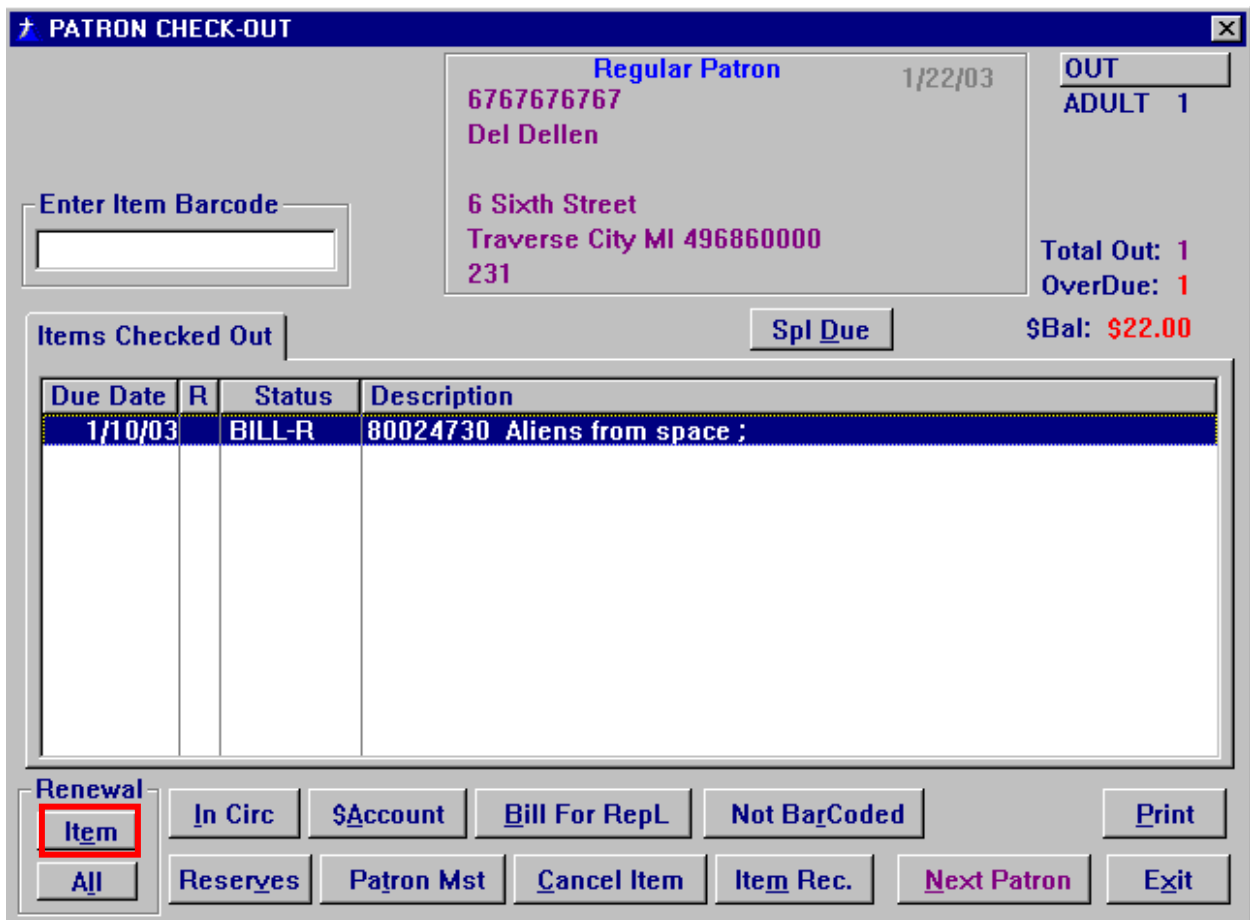
Under the **Renewal** heading near the bottom of the **PATRON CHECK-OUT** screen are two buttons, **Item** and **All** (see Circless3-9, below).



CIRCLESS 3-9

Use the **Item** button to renew an individual item highlighted with the cursor or mouse. It is used to renew a single item. Highlight the particular item with the cursor/mouse, and click the mouse on the **Item** button. The system automatically inserts a new due date, and adds one to the “times renewed” counter for the item selected.

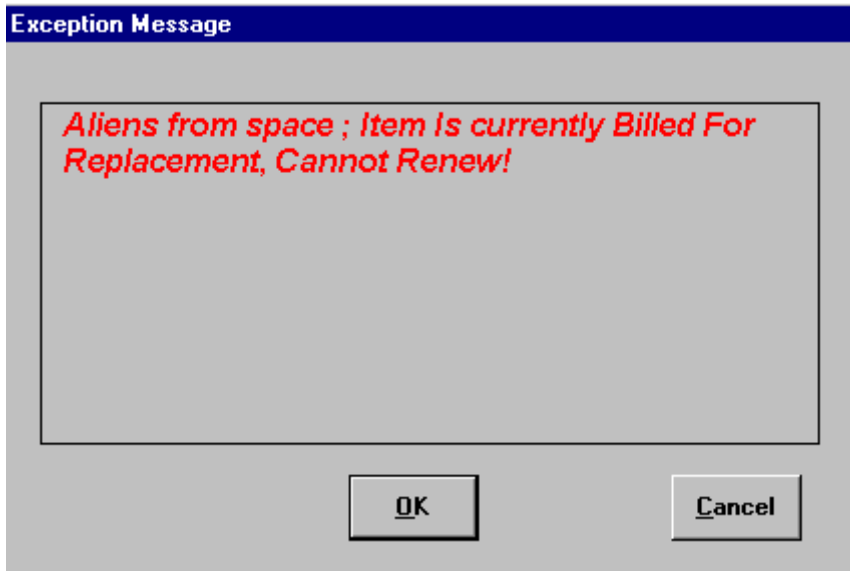
For instance, in the example below (Circless3-10), the item *Aliens from Space* has been highlighted.



CIRCLESS3-10

When the **Renew Item** button is selected for *Aliens from Space* on Del Dellen's patron record, an **Exception Message** appears (see Circless3-11, below).

The message displayed in Circless3-11, below, has been issued because this particular item already was billed to the patron, so it cannot be renewed. **Exception Messages** only are issued when an item cannot be renewed.



CIRCLESS3-11.

Select the **All** button under the **Renewal** heading to renew **all** of the items already checked out to a particular patron. Every item that the patron already has checked out will be updated, renewed, and will receive a new due date from the system.

If items are not up for renewal, on reserve for someone else, etc., the system prompts the user with a "decision" window.

In Circ Button

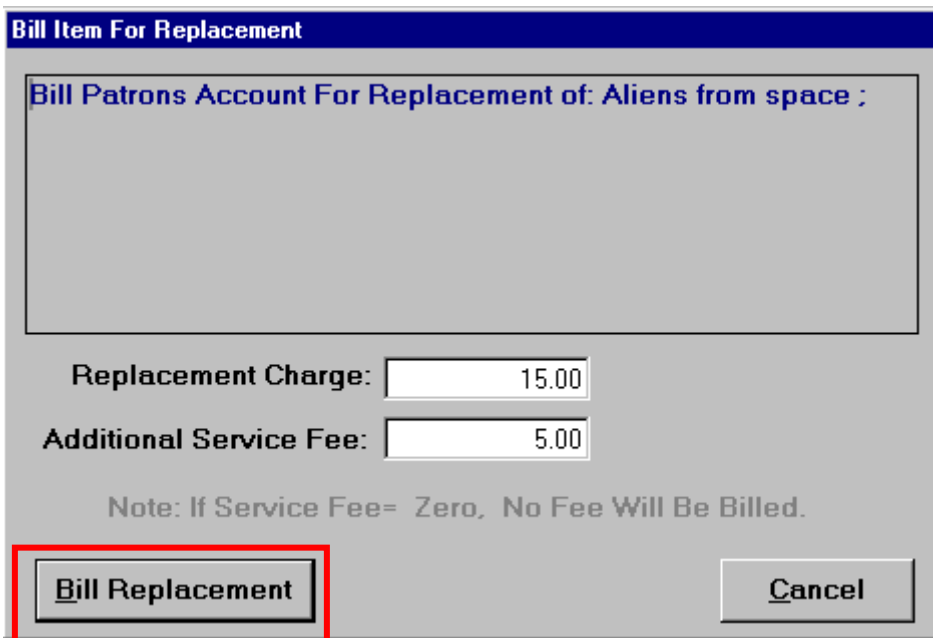
The **In Circ** button (see Circless3-9a, below) is used to display a list of items the patron already has checked out.

If one of the patron's checked out items has been lost, use this button to access the **Bill Item For Replacement** screen. Highlight the lost item title and select the **Bill for Rept.** button.

The **Bill Replacement** screen (see Circless3-9k, below) appears, where the replacement cost and service fee usually are prompted. Use this screen and its functions to bill for replacement of the item through the patron's account.



CIRCLESS3-9a



CIRCLESS3-9k

NOTE: Amounts can be overridden before selecting the **Bill Replacement** button (refer to Circless3-9k, above).

Bill for Rept. Button

On the **PATRON CHECK-OUT** screen, highlight the record with the cursor, then select the **Bill for Rept.** (bill for replacement) button (see Circless3-9j, below) to access the **Bill Replacement** screen (used to change the billing status of an item when it has been lost). In the case of the example below (Circless3-9j), the item titled *Aliens from Space* is highlighted, because the user wants to change its billing status.

However, this item already is marked as billed for replacement (BILL-R), so the **Bill For Rept.** key will not take the user any further. Instead, a “decision” window or **Exception Message** appears to notify the user about the item’s status (see Circless3-18, below).

The screenshot shows the 'PATRON CHECK-OUT' window. At the top, it displays 'Regular Patron' with ID '6767676767' and name 'Del Dellen'. Below this is the address: '6 Sixth Street, Traverse City MI 496860000, 231'. To the right, it shows 'OUT ADULT 1' and '1/22/03'. A 'Total Out: 1' and 'OverDue: 1' are also visible. Below the patron info is a table titled 'Items Checked Out' with columns 'Due Date', 'R', 'Status', and 'Description'. One item is listed: '1/10/03', 'R', 'BILL-R', '80024730 Aliens from space ;'. At the bottom, there are several buttons: 'Renewal Item', 'In Circ', '\$Account', 'Bill For Repl' (highlighted with a red box), 'Not BarCoded', 'Print', 'All', 'Reserves', 'Patron Mst', 'Cancel Item', 'Item Rec.', 'Next Patron', and 'Exit'. The '\$Bal: \$22.00' is shown at the bottom right.

CIRCLESS3-9j

The screenshot shows an 'Exception Message' dialog box. The text inside reads 'Item Already Billed For Replacement!' in red, with 'Halt:' in red above it. At the bottom, there are two buttons: 'OK' and 'Cancel'.

CIRCLESS3-18

Reserves Button

The **Reserves** button (see Circless3-9b, below) is used to access the **Items on Reserve** screen (see Circless3-9c, below), which features a list of items reserved for this patron. The reserves are listed in alphabetical order, by title.

The **Type** column indicates the type of reserve, such as:

- regular (from the library's local collection)
- incoming inter-library loan (from another library)
- union (from a member library that shares the library's "union" system)
- Web (from the Web or Internet catalog)



CIRCLESS3-9b

Status Column

The **Status** column on the left of this screen (Circless3-9c, below) shows **Ready** if the patron in question has been notified that the item he or she awaits is on the shelf.

The letter **N** in the **Status** column indicates that a reserve is new, has not been looked at yet, and that the patron has not been notified.

Blank status indicates that the item has not been returned or located by the library yet, and the patron has not been notified.

Items on Reserve

6767676767 Dellen, Del

231

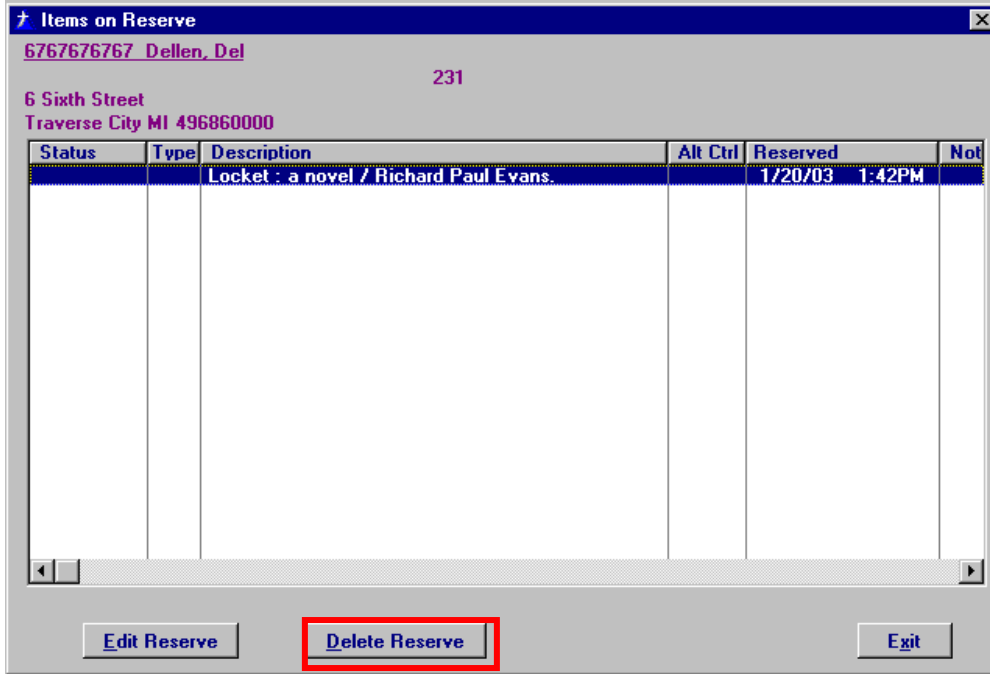
6 Sixth Street
Traverse City MI 496860000

Status	Type	Description	Alt Ctrl	Reserved	Not
		Locket : a novel / Richard Paul Evans.		1/20/03 1:42PM	

CIRCLESS3-9c

Delete Reserve Button

To delete a reserved item, first highlight the title on the **Items on Reserve** screen with the cursor/mouse, then select the **Delete Reserve** button (see Circless3-9d, below).



CIRCLESS3-9d

The **Deleting a LB_RSV Record** screen appears (Circless3-9e, below).

Deleting a LB_RSV Record

General | ILL Shipping \ Cancellation Notice

Reserve Type: **Local** Status: **N**

Title / Author.....
Locket: a novel / Richard Paul Evans.
Evans, Richard Paul

By Specific BarCode: **80242050**

Reserved To Patron.....
6767676767 Dellen, Del (231)

Reserved: 1/20/2003 1:42 PM Priority: 1/20/2003 1:42 PM Cancel On: 2/14/2003

Patron Notification Method
 No
 Reg "Land" Mail
 Telephoned

Notified: Note:

Pick Up At: >>

Show Holdings **OK** Cancel Help

CIRCLESS3-9e

Then, select the **OK** button (see Circless3-9e, above) at the bottom of the **Deleting a LB_RSV Record** screen to delete the item, and the reserved item is removed from the patron's reserve list.

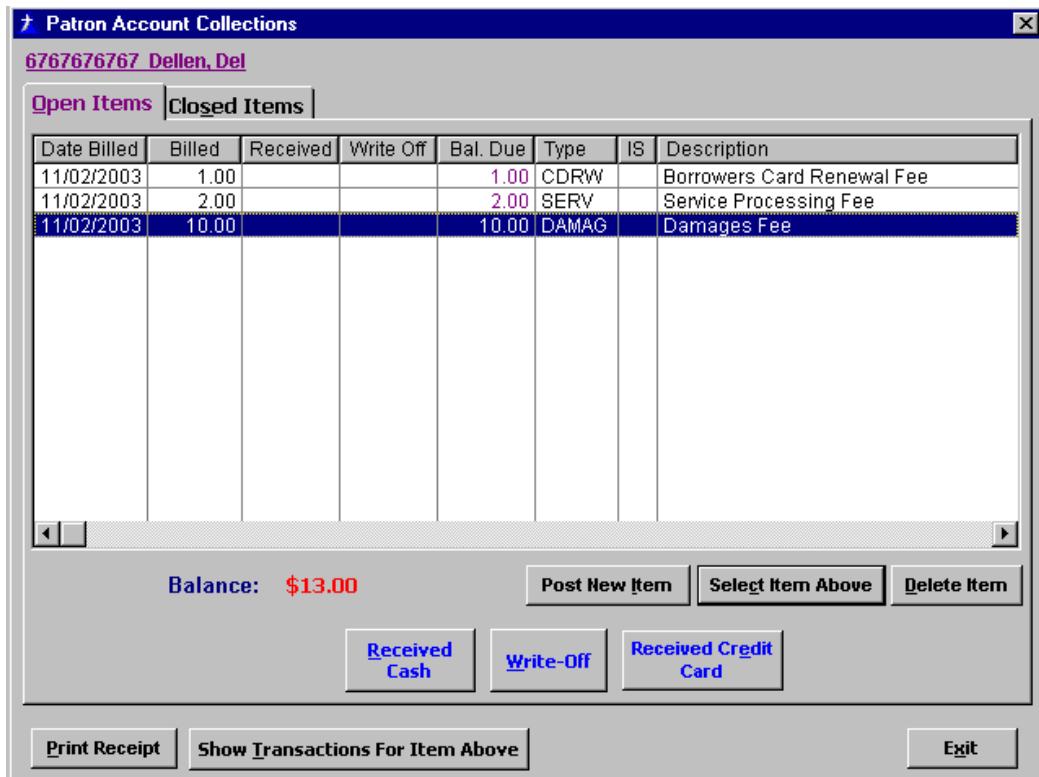
\$Account Button

To access a patron's account and collections/billing history from the **PATRON CHECK OUT** screen, select the **\$Account** button (see Circless3-9, below).



CIRCLESS3-9f

The **Patron Account Collections** screen (see Circless3-9g, below) appears. Use this screen to check on overdue fines and account balances.



CIRCLESS3-9g

At the **Patron Account Collections** screen (see Circless3-9g, above), a user can:

- post a new item to a patron's account (Post New Item button)
- delete an item from a patron's account (Delete Item button)
- receive a payment from a patron (Received Cash button or Received Credit Card button)
- write off a payment off for a patron (Write-Off button)
- print a receipt for payment for a patron's account (Print Receipt button)
- look at all of the previous transactions for a particular item associated with a particular patron (Show Transactions for Item Above button)

NOTE: The functions for each Patron Account Collections screen button are covered, in depth, in Lesson 5: Financials of this LibNet *Circulation Manual*.

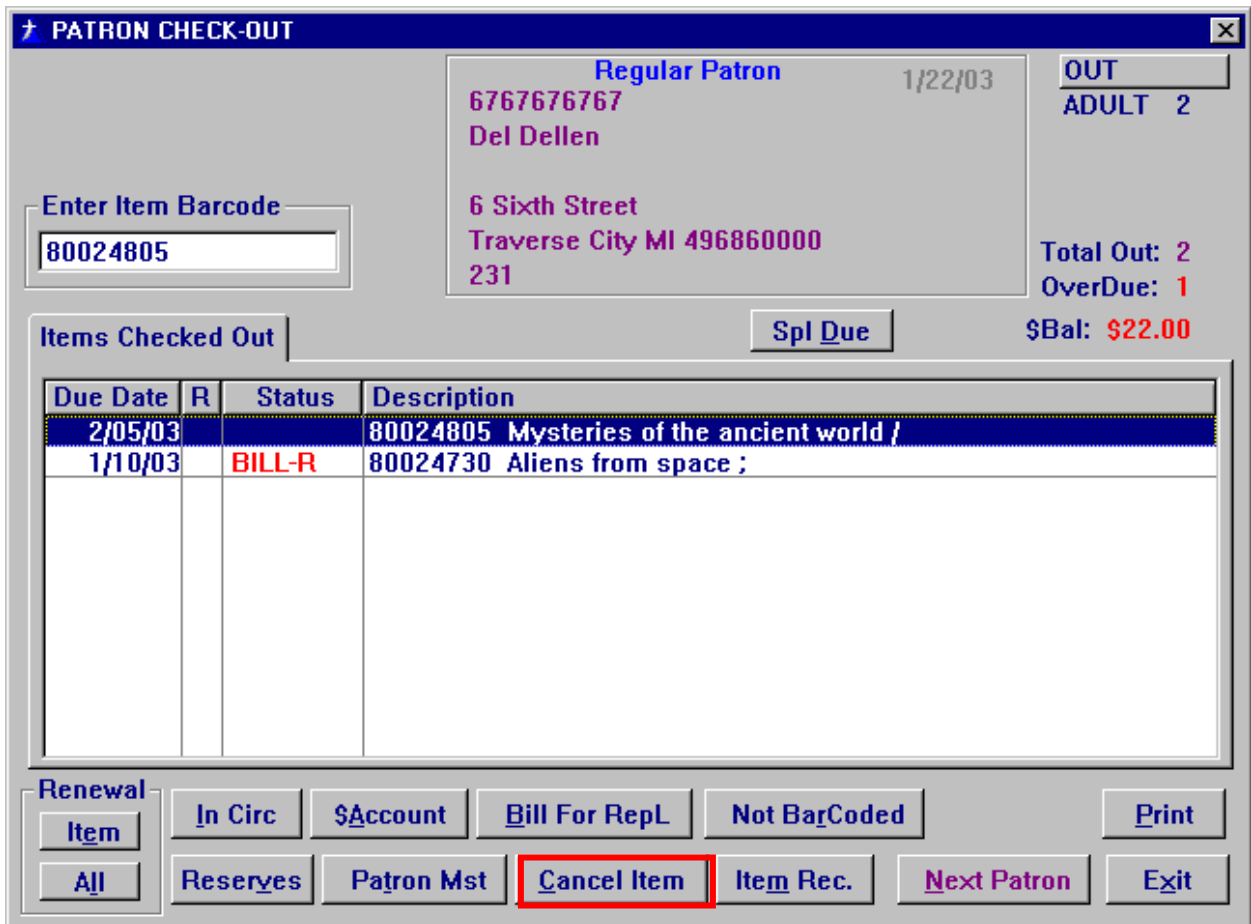
Cancel Item Button

The **Cancel Item** button on the **PATRON CHECK-OUT** screen (see Circless3-9m and Circless3-12, below) is intended to help a user easily check in an item from that particular (**PATRON CHECK-OUT**) screen.



CIRCLESS3-9m

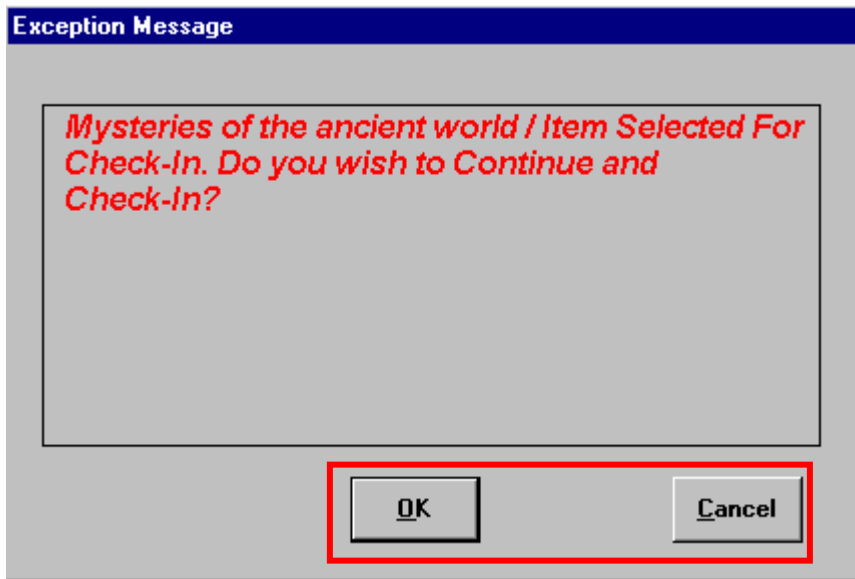
First, select the item title that you wish to check back in. In the case of the example below (Circless3-12), the title is *Mysteries of the Ancient World*. Then, select the **Cancel Item** button from the bottom of the **Patron Check-Out** screen (see Circless3-12, below).



CIRCLESS3-12

An **Exception Message** (see Circless3-13, below) asking whether the user wishes to continue with the check-in process appears.

Select **OK** and the title is deleted from the list of titles found on the previous **PATRON CHECK-OUT** screen (refer back to Circless3-12). Select **Cancel**, and the check-out process will proceed.



CIRCLESS3-13

Patron Mst Button

The **Patron Mst** (patron “master”) button (see Circless3-9h, below) conveniently takes a user to the **Changing a LB_PAT Record** screen (see Circless3-9i, below) where a patron’s master record can be changed.

This button is included to easily access a patron’s record from the **PATRON CHECK OUT** screen, to quickly reach and update his or her record, validate the accuracy of a his or her record, or renew his or her account, if necessary.



CIRCLESS3-9h

CIRCLESS3-9i

NOTE: When opening a patron’s account to check out an item, if the account is flagged for renewal, the system automatically displays the window above (Circless3-9i) for review and renewal.

Not BarCoded Button

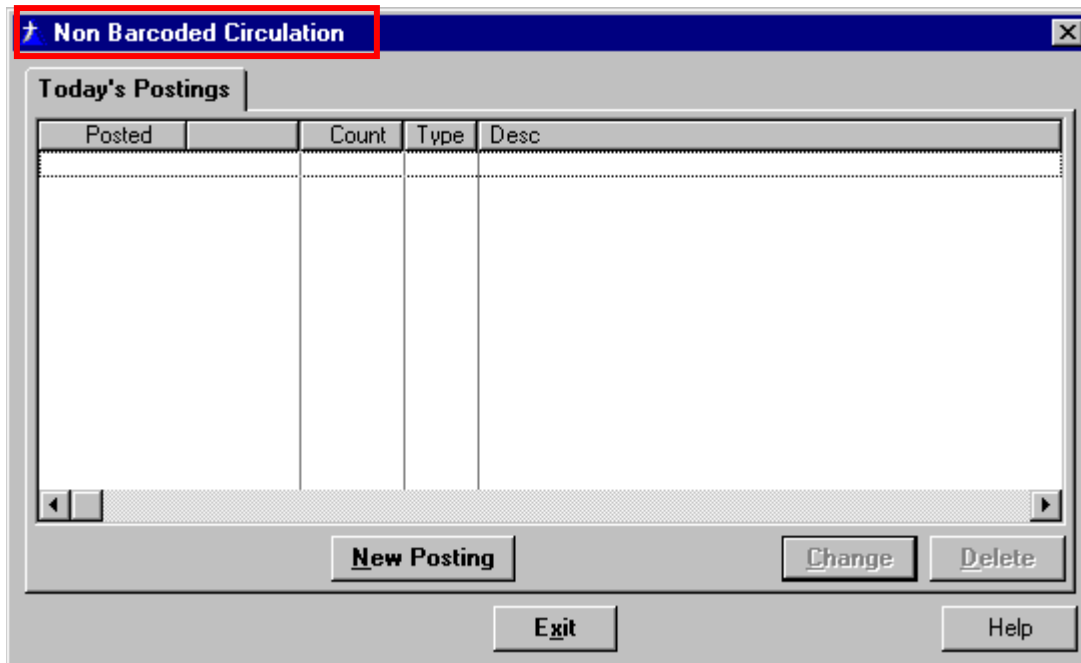
Because many libraries circulate materials that are not barcoded (such as magazines), the **Not BarCoded** button (see Circless3-9n, below) is included on the **PATRON CHECK-OUT** screen to record statistics for the number of items circulated by type.



CIRCLESS3-9n

Select the **Not BarCoded** button and the **Non Barcoded Circulation** screen (Circless3-9o, below) appears.

Use this screen to post non-barcoded items, and to track the type and number of items a patron takes out from the library. The number is tracked and the materials are counted as being “in circulation” for the pertinent patron, but materials are not actually check in or checked out to the patron. The materials are simply being recorded and counted in the system.



CIRCLESS3-9o

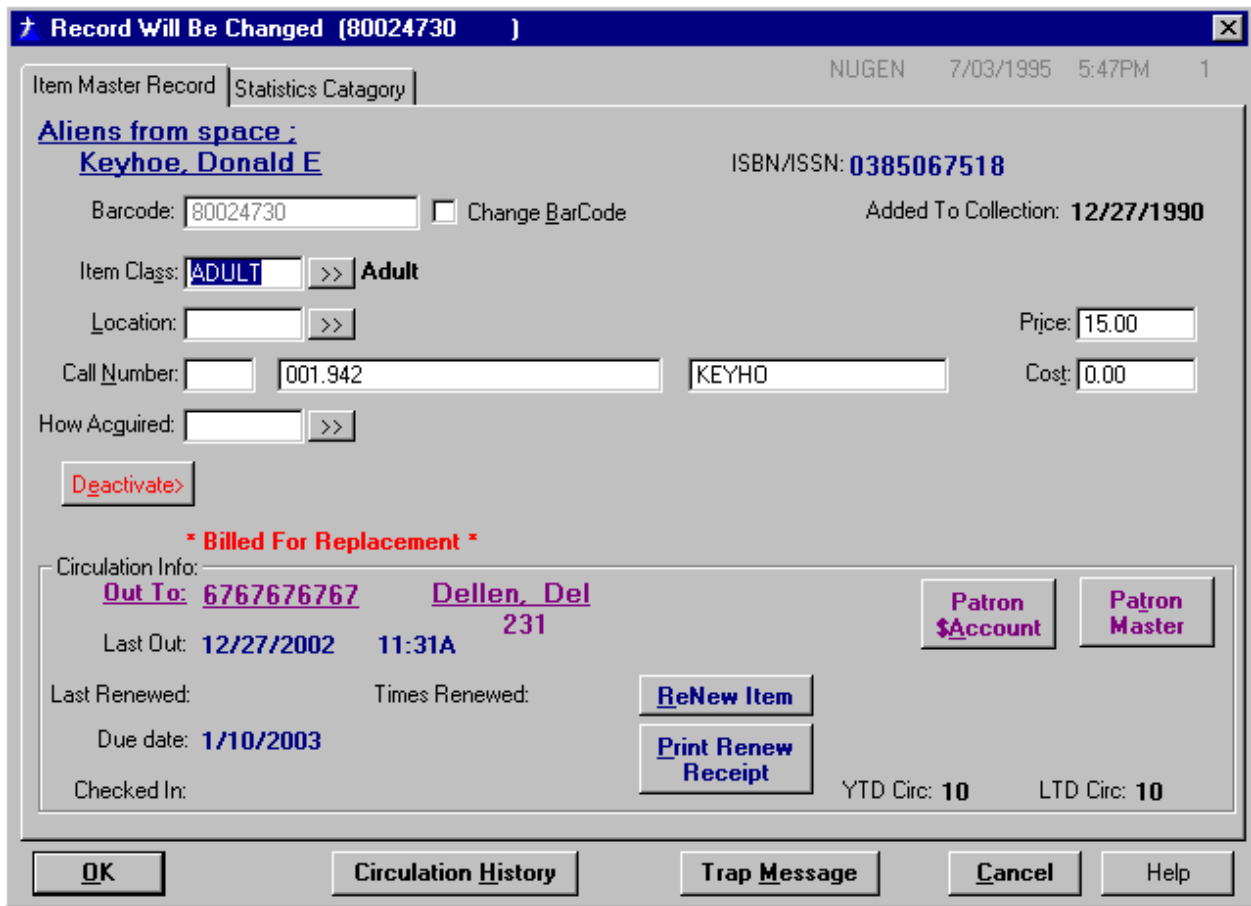
Item Rec. Button

The **Item Rec.** (item received) button shows item detail, if necessary (see Circless3-9p, below).

Select the **Item Rec.** button and the “item detail” (**Record Will Be Changed**) screen appears (see Circless3-9q, below). At this screen, the user can view or change the record manually.



CIRCLESS3-9p



CIRCLESS3-9q

Next Patron Button

Use the **Next Patron** button on the **PATRON CHECK-OUT** button to select another patron for checkout (see Circless3-14, below).

PATRON CHECK-OUT

Regular Patron 1/23/03 **OUT**
 6767676767
 Del Dellen
 6 Sixth Street
 Traverse City MI 496860000
 231

Enter Item Barcode
 80022759

Total Out: 2
 OverDue: 1
 \$Bal: \$22.00

Items Checked Out **Spl Due**

Due Date	R	Status	Description
2/06/03			80022759 Eagle has landed /

Renewal
 In Circ \$Account Bill For Repl. Not BarCoded Print
 All Reserves Patron Mst Cancel Item Item Rec. **Next Patron** Exit

CIRCLESS3-14

The **Next Patron** button brings up a new version of the **PATRON CHECK OUT** screen (see Circless3-15, below).

PATRON CHECK-OUT

Enter Patron BarCode or Name
 >>

Exit

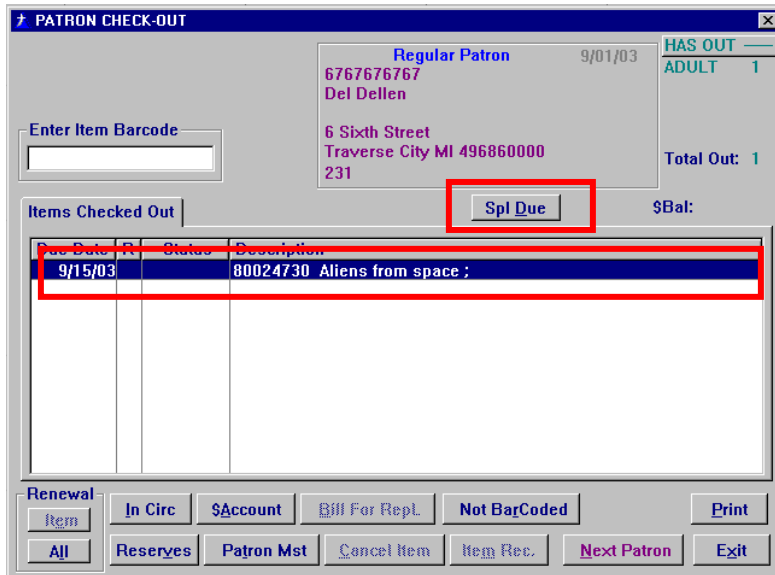
CIRCLESS3-15

Spl Due Button

To establish a “**special**” due date for a checked out item (a due date that is off-cycle), highlight the title of the item with the cursor, then select the **Spl Due** (special due) button near the center of the **PATRON CHECK OUT** screen (see Circless3-14a, below).

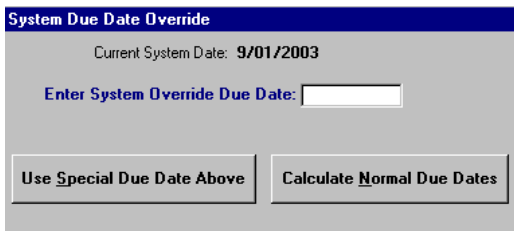
Some examples of when the **Spl Due** feature would be used are:

- a patron is going on vacation and wishes to extend his or her due date for an additional week
- a patron is ill and unable to return an item on the due date



CIRCLESS3-14a

A **System Due Date Override** box appears (see Circless3-14b, below).



CIRCLESS3-14b

In the space next to the words, **Enter System Override Due Date**, type the new due date, then select the **Use Special Due Date Above** button (see Circless3-14c, below). In this instance, the new date, 10/3/2003 was typed in to replace the original due date of 9/15/03.

System Due Date Override

Current System Date: 9/01/2003

Enter System Override Due Date: 10/03/2003

Use Special Due Date Above Calculate Normal Due Dates

CIRCLESS3-14c

Print Button

The **Print** button on the **PATRON CHECK-OUT** screen (see Circless3-16, below) leads to the **Receipt Print Options** screen, which offers several options for printing a patron's record.

PATRON CHECK-OUT

Regular Patron 1/23/03
6767676767
Del Dellen
6 Sixth Street
Traverse City MI 496860000
231

OUT
ADULT 2

Total Out: 2
OverDue: 1

Enter Item Barcode

Items Checked Out Spl Due \$Bal: \$22.00

Due Date	R	Status	Description
2/06/03			80022759 Eagle has landed /
1/10/03		BILL-R	80024730 Aliens from space ;

Renewal
Item

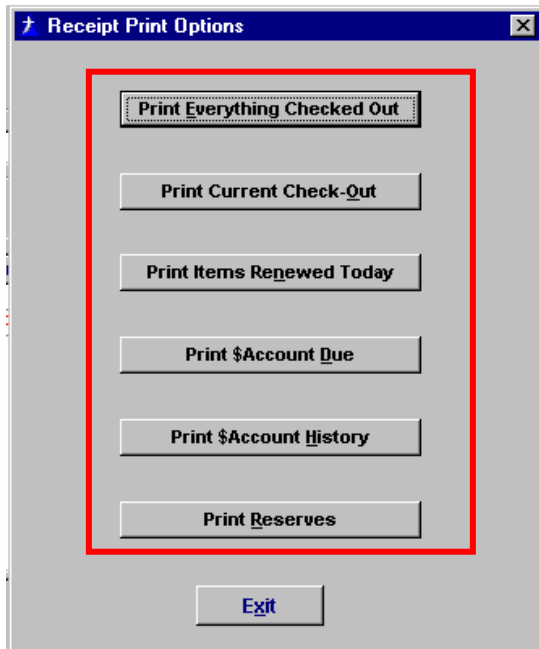
All In Circ \$Account Bill For Repl Not BarCoded **Print**

All Reserves Patron Mst Cancel Item Item Rec. Next Patron Exit

CIRCLESS3-16

From the **Receipt Print Options** screen (see Circless3-17, below), a user can print the following information for a specific patron:

- everything the patron has checked out
- the patron's item(s) to be checked out today
- items renewed today by the patron
- a patron's accounts due
- a patron's account history
- a patron's reserved items



CIRCLESS3-17

Exit Button

The **Exit** button at the bottom of the **PATRON CHECK-OUT** screen (see Circless3-16, below) is used to exit from this screen. It leads back to the main LibNet Circulation screen.

PATRON CHECK-OUT

Regular Patron 1/23/03
 6767676767
 Del Dellen

6 Sixth Street
 Traverse City MI 496860000
 231

OUT
 ADULT 2

Total Out: 2
 OverDue: 1

Enter Item Barcode

Items Checked Out Spl Due \$Bal: \$22.00

Due Date	R	Status	Description
2/06/03			80022759 Eagle has landed /
1/10/03		BILL-R	80024730 Aliens from space ;

Renewal Item In Circ \$Account Bill For Repl Not BarCoded Print

All Reserves Patron Mst Cancel Item Item Rec. Next Patron Exit

CIRCLESS3-16

Lesson 4: Checking In Items

Check-in Procedure

An item is “checked in” to the library system when it is returned by a patron. Following are instructions for checking in items using the **Check-In** screen.

LibNet Circulation Version 2.08 Librarian NuGen District Library

File Edit Catalog Reserves Circulation Security Lib Control Window Help

CIRCLESS4-1

From the main Lib/Net Circulation screen select the **Circulation** pull-down menu (Circless4-1, above). From that menu, select the second item, which is **Check In**. This brings up the **ITEM CHECK-IN** screen (see Circless4-2, below).

ITEM CHECK-IN

Item Check-In Processing Today: 1/21/2003

Last Scanned: 80250145 Bermuda Triangle /

Was Out To: 6767676767 Del Dellen

Scan Barcode: 80250145 Set Drop Box

Exception	Completed Items...
	80250145 Bermuda Triangle / 6767676767 Del Dellen

In Circ Pending Reserves \$Account Patron Master Exit

CIRCLESS4-2

Scan the item barcode or type the item barcode into the **Scan Barcode** box on the **ITEM CHECK-IN** screen (see Circless4-2, above) to complete the check-in procedure. The system automatically records the item number, the title, the account number of the patron returning the item, and the patron's name on the screen.

If the barcode is typed in, then use the **Enter** key on the computer keyboard to complete the check-in process.

As items are checked in, each item description is added to the list of completed items; the most recent item is at the top of the list.

Other Buttons on the ITEM CHECK-IN Screen

The buttons at the bottom of the screen, **In Circ**, **Pending Reserves**, **\$Account**, and **Patron Master**, will access additional patron information for the selected item featured on the checked-in list above (see Circless4-2a, below). Select any item on the list, then use one of the buttons to access patron information for that item.

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ITEM CHECK-IN

Item Check-In Processing Today: 1/21/2003

Last Scanned: 80250145 Bermuda Triangle /

Was Out To: 6767676767 Del Dellen

Scan Barcode: 80250145 Set Drop Box

Exception	Completed Items...
	80250145 Bermuda Triangle / 6767676767 Del Dellen

In Circ Pending Reserves \$Account Patron Master Exit

CIRCLESS4-2a

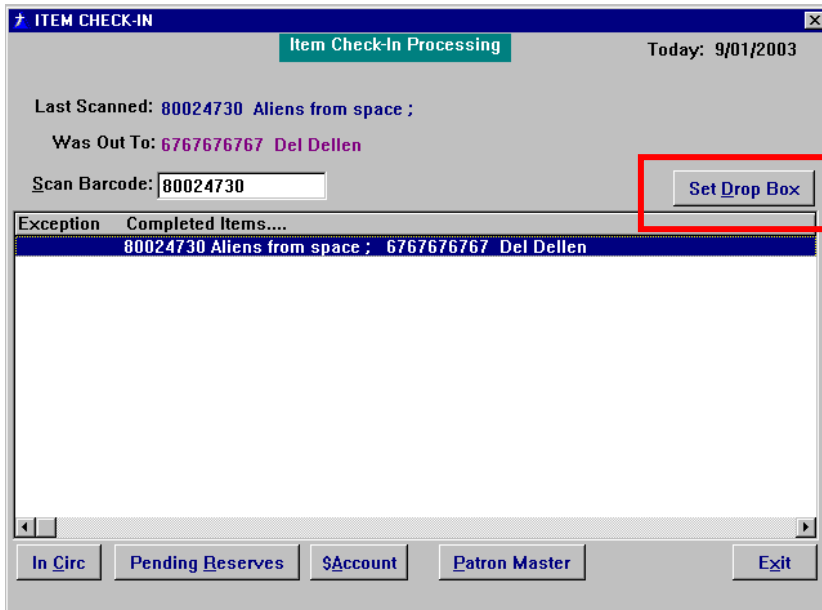
Set Drop Box Button (for Items Returned to the Library Drop Box)

Another important feature that may be used for check-in is the **Set Drop Box** button on the right of the **ITEM CHECK-IN** screen (see Circless4-2a, below). This function allows a user to override today's library date for a patron who is checking in an item via the library "drop box."

For instance, some libraries consider an item to be overdue if it is not returned by the time that library closes for the day, while other libraries offer a "grace period" for days or times that the library is closed.

For libraries that offer a grace period, the **Set Drop Box** button is used to "roll back" the library date before checking in all of the items left in the drop box during the previous evening, or during a Sunday or holiday. This prevents the patron from being fined for returning an item after-hours.

NOTE: Once the drop box date has been altered, staff can "reset" the library date back to normal, or allow the system to do so automatically when the check-in procedure is "closed", then "reopened".



CIRCLESS4-2a

First, select the title that is being checked in with the cursor, then select the **Set Drop Box** button (see Circless4-2a, above).

A **Drop Box System Date Override** box appears (see Circless4-2b, below).

CIRCLESS4-2b

As shown in Circless4-2b, above, the current override date is August 31, 2003. However, because the library was closed on August 31, 2003, let's assume it is necessary to override that date and replace it with August 30, 2003.

CIRCLESS4-2c

Type the new date into the space next to the words, "Enter System Override Date," then select the **Use Drop Box Date Above** key (see Circless4-2c, above). Now, the date is changed from August 31 to August 30, 2003, and the check-in date for the books from the drop box now will be August 30, 2003.

NOTE: When the drop box date is being used, a **RED** flag bar is shown on the check-in screen (see Circless4-2d, below).

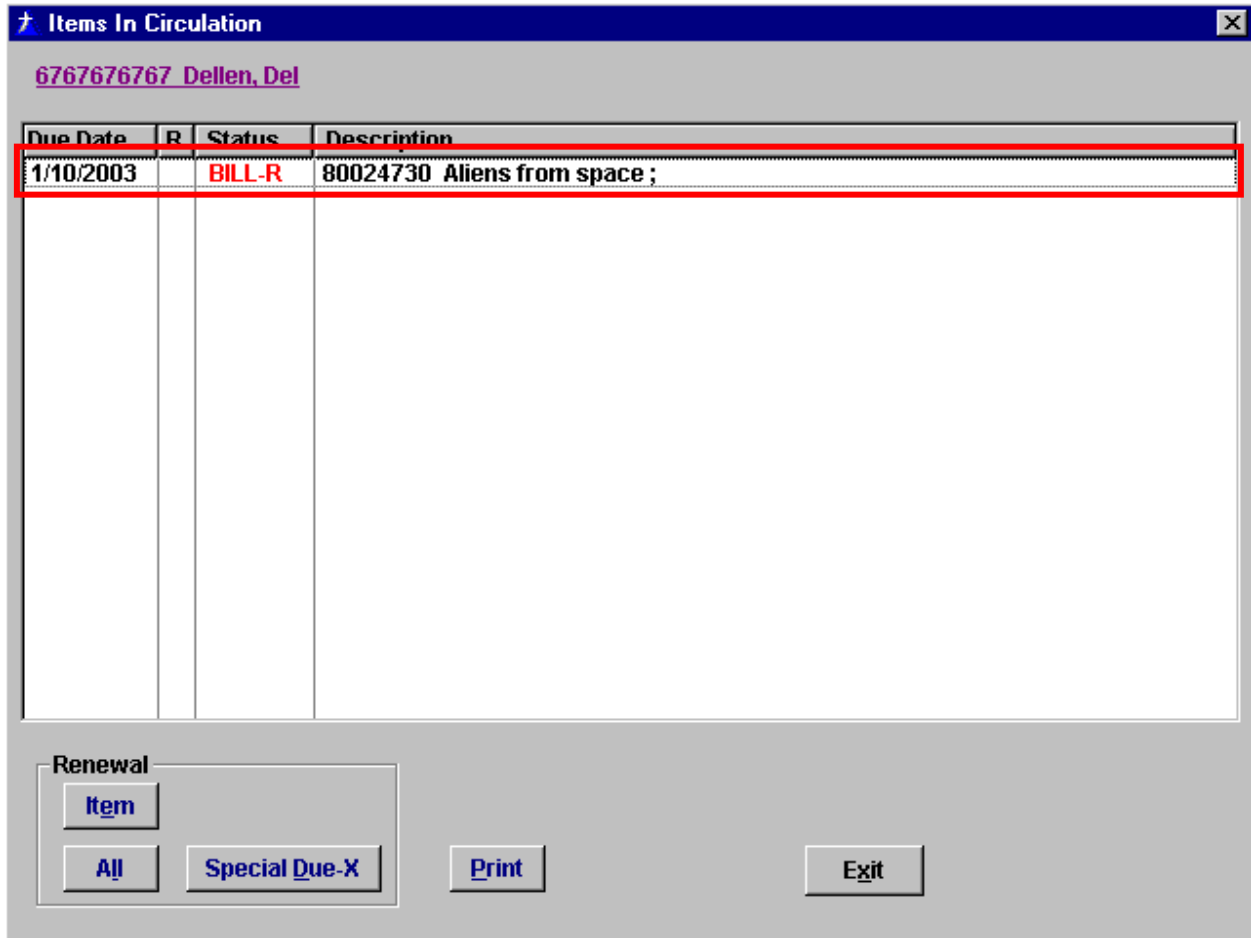
In Circ Button

When a patron checks in a book, select the **In Circ** button (see Circless4-3, below) to display a list of materials still checked out to that patron. This information appears on the **Items In Circulation** screen (see Circless4-4, below).

In the case of the example shown below in Circless4-4, the patron is Del Dellen, and he still has the book *Aliens from Space* checked out. He is being billed for this book, though, because he lost it (note the **BILL-R** status on his record below).



CIRCLESS4-3



CIRCLESS4-4

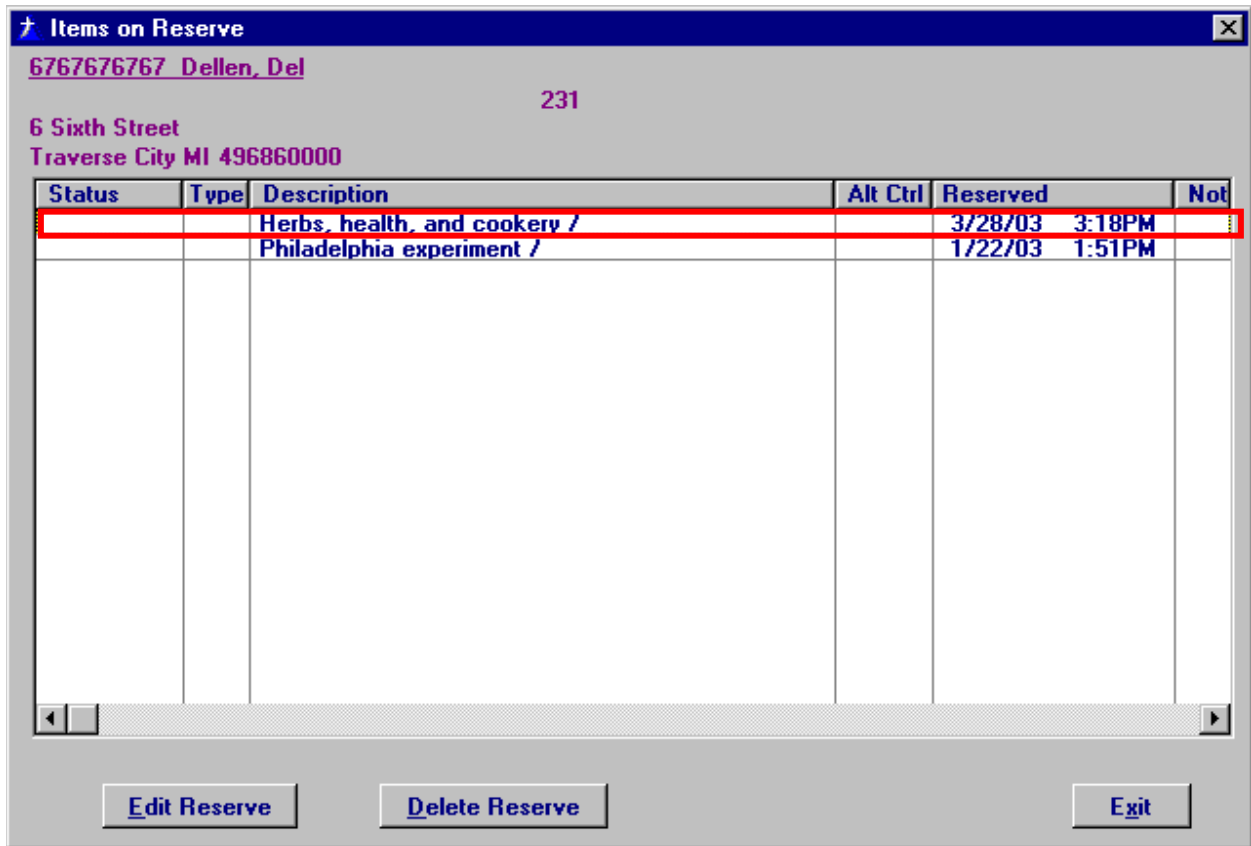
Pending Reserves Button

When the system notifies a system user during the check-in procedure that a book is reserved for another patron, it is the user's cue to set the item aside for reserve processing.

The **Pending Reserves** button (refer to Circless4-3, below) is used to view all reserves for a patron, and to complete the process for placing a reserved book on the shelf for that patron. To process the reserve immediately, use the mouse to highlight the book on reserve – in the case of the example below for patron Dell Dellen (see Circless4-5, below), the reserved book is the *Herbs, health, and cookery*.



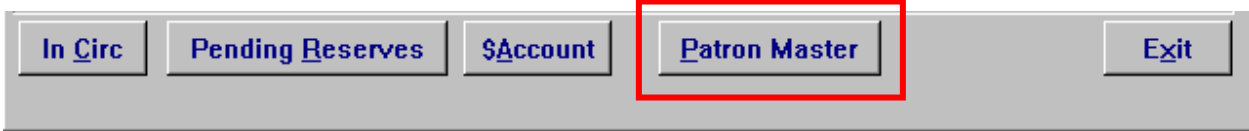
CIRCLESS4-3



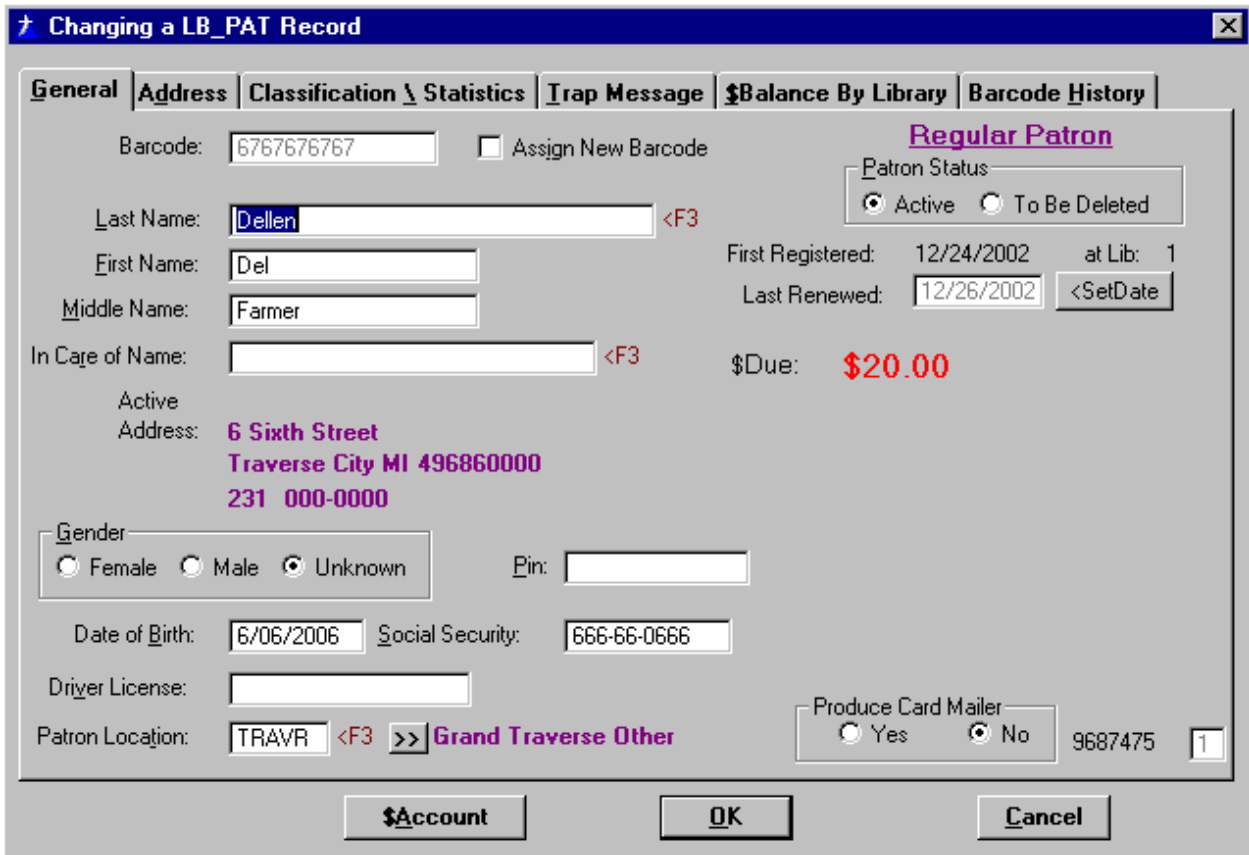
CIRCLESS4-5

Patron Master Button

The **Patron Master** button can be used to change an address, issue a new library card when one is lost, etc. because it accesses the “patron master form” (**Changing a LB_PAT Record** screen) who is in the system for the patron who is associated with the selected item.



CIRCLESS4-3



CIRCLESS4-7

Variations on Checking In Items from a Patron's Account

Checking In an Item Reserved for Another Patron

When a reserved item is checked in, a window appears with the message, "Title is on reserve, please set aside." To process this reserve immediately, select the reserved item title from the list with the mouse, then select the **Pending Title Reserve** button at the bottom of the screen. The system brings up a list of reserves for that title and shows the oldest reserve first.

Select the first reserve and select the **Change** button at the bottom of the screen to view the Reserve Master screen. To the right of the word, "Notify" in red letters, select "phone", "mail", or "e-mail", depending on how the patron will be notified that his or her book is in.

On that same line, further to the right of the screen, select the **Pick up location** field, and a list of all of the reserve pick-up locations in that particular library appears. Select one of the locations, then select **OK**. Then, the system automatically changes the reserve status to "S", which means that the book is now on the shelf again.

Checking In an Item with an Attached Fine

When an item is checked in and that item has a fine attached to it, the system automatically calculates the fine and posts it to the patron's account. When that patron checks out materials, the system automatically alerts the user to the fact that the patron in question owes a fine. If the patron would like to pay the fine immediately, select **Item** from the list, then select the **\$Account** button, and this will bring up the patron's account.

Checking In an Interlibrary Loan Item

Interlibrary loan items typically are specially marked so that they can be intercepted during the check-in process, and then returned to the appropriate employee who will return the item to the library from which it was loaned. The system automatically alerts a user about the fact that the item is on loan from another (inter-) library.

NOTE: Interlibrary loan items must be manually keyed in with a special item numbers that begin with **ILL**.

\$Account Button

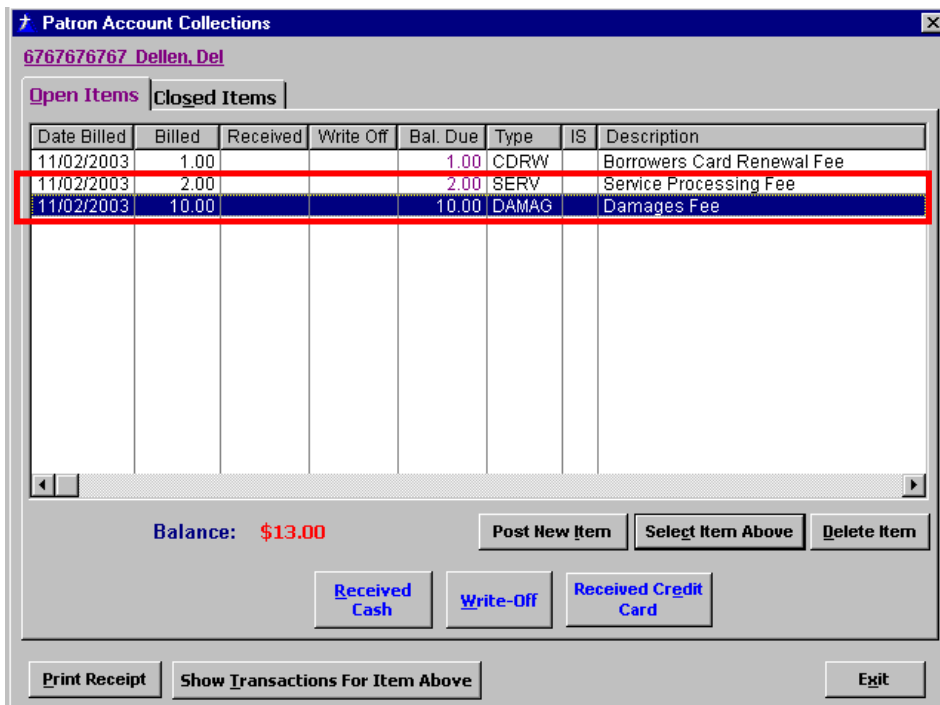
The **\$Account** button (see Circless4-8, below) allows a user to access the account of a patron associated with an item selected from the **Patron Account Collections** screen (see Circless4-9, below).

For instance, a patron walks into the library with a damaged book and asks what he or she owes for it. To collect that fine, which was just posted during the check-in process for that book, select the **\$Account** button from the bottom of the **ITEM CHECK-IN** screen (Circless4-8, below).



CIRCLESS4-8

This brings up the **Patron Account Collections** screen (see Circless4-9, below).



CIRCLESS4-9

At the **Patron Account Collections** screen (see Circless4-9, above), a user can:

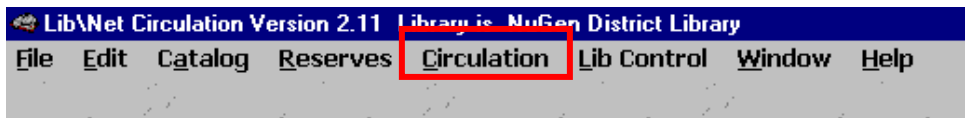
- post a new item to a patron's account (Post New Item button)
- delete an item from a patron's account (Delete Item button)
- receive a payment from a patron (Received Cash button or Received Credit Card button)
- write off a payment off for a patron (Write-Off button)
- print a receipt for payment for a patron's account (Print Receipt button)
- look at all of the previous transactions for a particular item associated with a particular patron (Show Transactions for Item Above button)

NOTE: The functions for each Patron Account Collections screen button are covered, in depth, in Lesson 5: Financials of this LibNet *Circulation Manual*.

Lesson 5: Financials

Library staff can access a patron's financial records in a variety of ways – through the **PATRON CHECK-OUT** screen, the **ITEM CHECK-IN** screen, the **Browse Active Patrons (Browse the LB_PAT File)** screen and, if the item is checked out, through the **Item Record** form screen.

To process financials for a patron, go to the **Circulation** pulldown menu at the opening **LibNet** screen (see Circless5-1, below).



CIRCLESS5-1

The Circulation pulldown menu offers these selections:

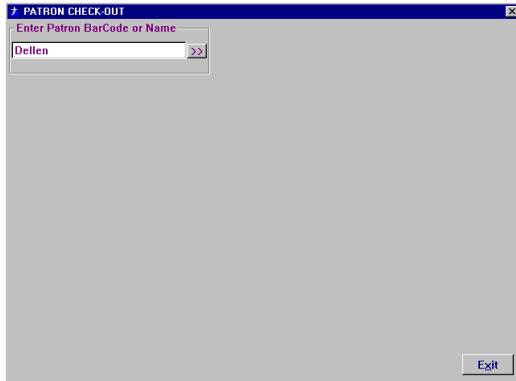
- Check Ot
- Check In
- Browse Active Patrons
- Browse Patrons Flagged for Deletion
- Non Patron Financial Posting
- Non Patron Non-Barcoded Circulation

NOTE: In the following section, for demonstration purposes, a patron's financial records are accessed through the **CHECK-OUT** screen.

Select **Check Ot** from the **Circulation** pulldown menu.

The **PATRON CHECK-OUT** screen appears, where a user can scan or type a patron's barcode or type a patron's name in the box (see Circless5-2, below). In this case, the name "Dellen" has been typed into the **Enter Patron Barcode or Name** box.

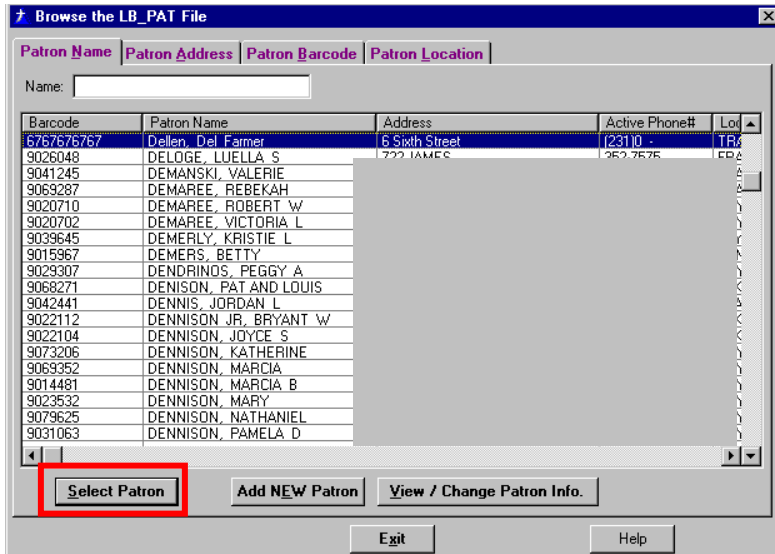
LibNet Circulation Manual



CIRCLESS5-2

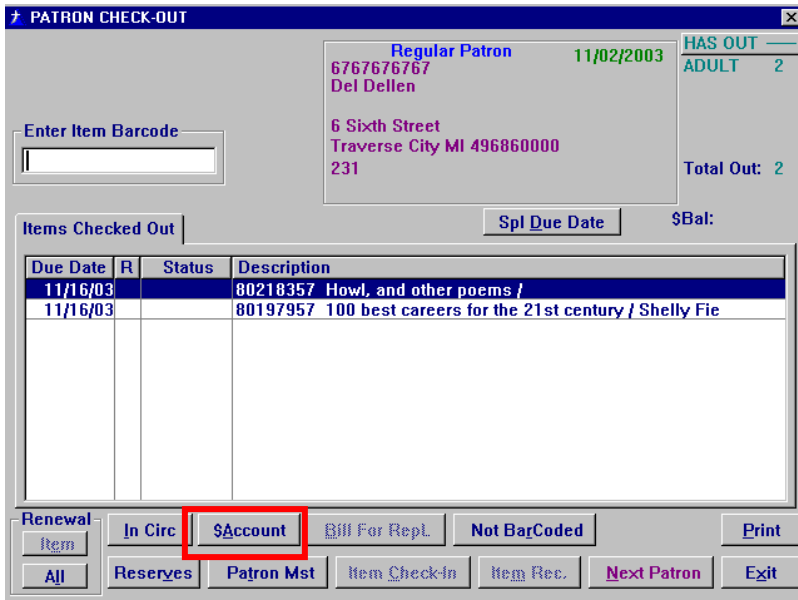
Select the **Enter** key on the computer keyboard to process the search for the patron.

The **Browse the LB_PAT File** screen appears (see Circless5-3, below).



CIRCLESS5-3

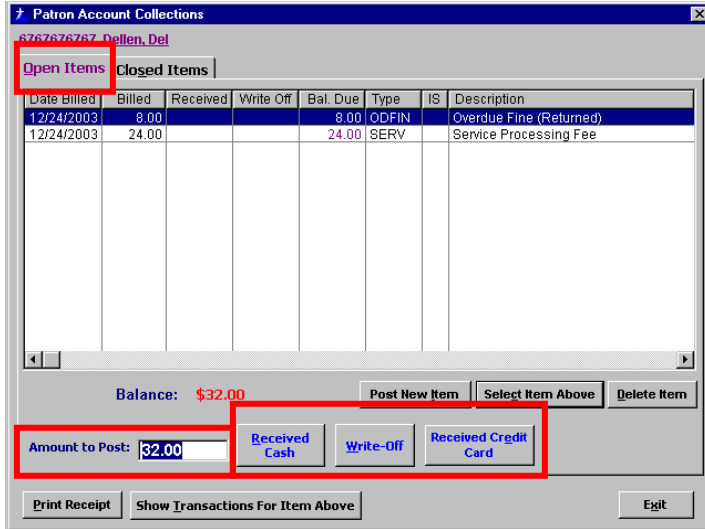
At the **Browse the LB_PAT File** screen (shown above), once the patron's name is highlighted with the cursor, choose the **Select Patron** button near the bottom (refer back to Circless5-3, above), and the **PATRON CHECK-OUT** screen appears (see Circless5-4, below).



CIRCLESS5-4

At the bottom of the **PATRON CHECK-OUT** screen, select the **\$Account** button at the bottom to access Del Dellen's library financial accounts (refer back to Circless5-4, above).

The **Patron Account Collections** screen appears (see Circless5-5, below), showing Mr. Dellen's accounts. The system lists detailed items showing specific amounts due. By default, it also automatically prompts the user with the total amount due. In the case of Circless5-5 above, that amount is \$24.35 in the **Balance** field on the bottom left side of the **Patron Account Collections** screen.



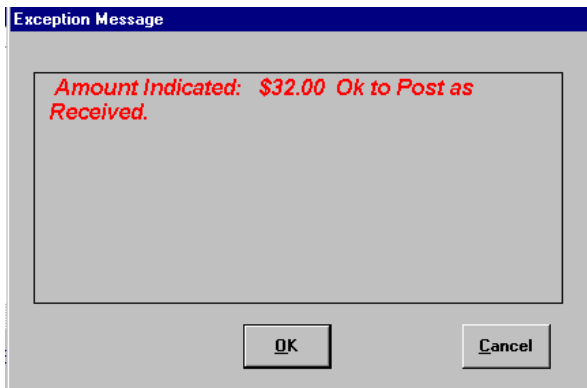
CIRCLESS5-5

IMPORTANT: The **Patron Account Collections** screen is staff's point of entry for receiving and posting monies from patrons for financial transactions posted to their accounts. When necessary, this screen also is used when writing off charges or when forcing bills to collection for damaged, lost, missing, and unreturned items.

After monies are received or an amount is entered for write-off, select the appropriate button to post the transaction. The options are (refer back to Circless5-5, above):

- Received Cash (patron pays cash)
- Write-Off (library writes off charges)
- Received Credit Card (patron pays with credit card)

In this case, the **Received Cash** button was selected (refer back to Circless5-5). Then, an **Exception Message** box verifying the amount to be posted appears (see Circless5-5a, below).

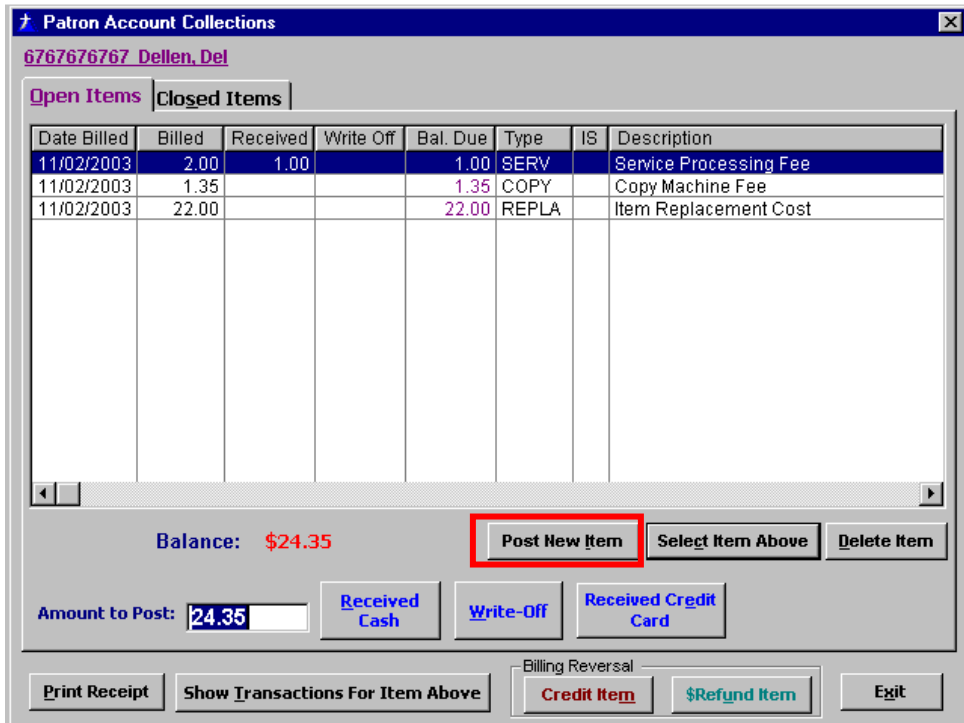


CIRCLESS5-5a

Charging a Miscellaneous Fee to a Patron's Account

To manually post a miscellaneous fee/charge for a service (other than overdue item charges, damages, or billing for replacement) to a patron's account, select the **Post New Item** button (see Circless5-6, below) at the **Patron Account Collections** screen.

NOTE: Overdue item charges, damage charges, and bill-for-replacement costs are posted elsewhere in the Circulation system or are posted automatically.



CIRCLESS5-6

The **Adding a LB_PAC Record** screen appears (see Circless5-7, below).

Adding a LB_PAC Record

Lib Code: 1 Open Clos: 0 Updated: 0
6767676767 Del Dellen


Trans Date: 12/22/2003 Finl Code: [] >>
Trans Type: M Units: 1 x 0.00 (Price)
Date Out: Tot Billed: []
Date Due: Tot Received: []
Date Checked In: Tot Wrt-Off: []
Date Last Notice: Note: []
Total Notices: 0 Balance Due: []

Enter Amount to Post: [] Received Cash Write-Off Received Credit Card

OK Update Record

Force Item To Collections Cancel

CIRCLESS5-7

At this screen, place the cursor on the arrow  to the right of the **Finl Code** box (refer back to Circless5-7, above).

The **Financial Codes** screen appears, featuring a list of service codes to use for posting (see Circless5-7a, below).

Code	Description	Amount	Service Charge
CDRW	Borrowers Card Renewal	1.00	0.00
COPY	Copy Machine Fee	0.15	0.00
CREDIT	Credit On Account	0.00	0.00
DAMAG	Damages Fee	5.00	0.00
DONAT	Patron Donations	0.00	0.00
FAX	Fax Usage Fee	1.00	0.00
NONDS	Non District Usage Fee	200.00	0.00
NPFEE	Notice Processing Fee	0.00	0.00
ODFIN	Overdue Fine (Returned)	0.00	0.00
ODFRW	Overdue Fine (Renewed)	0.00	0.00
REFND	Cash Refund to Patron	0.00	0.00
REPCD	Replacement Card Fee	1.00	0.00
REPLA	Item Replacement Cost	0.00	5.00
SERV	Service Processing Fee	2.00	0.00

CIRCLESS5-7a

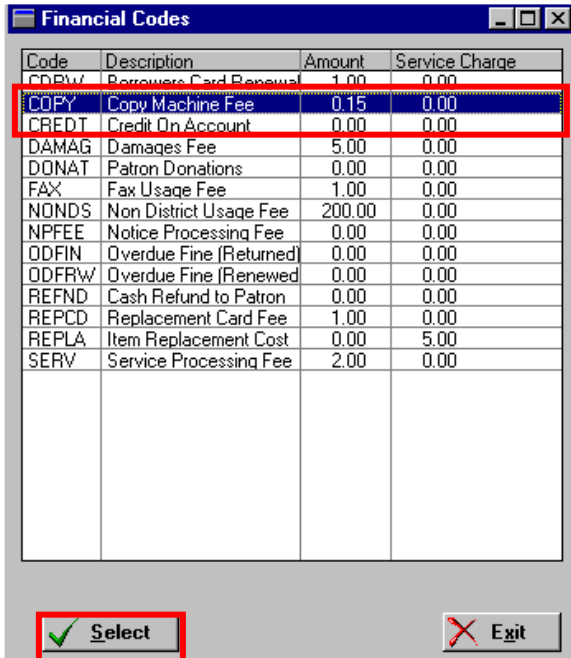
The code choices on the **Financial Codes** screen are:

CDRW	Borrowers Card Renewal
COPY	Copy Machine Fee
CREDIT	Credit On Account
DAMAG	Damages Fee
DONAT	Patron Donations
FAX	Fax Usage Fee
NONDS	Non District Usage Fee
NPFEE	Notice Processing Fee
ODFIN	Overdue Fine (Returned)
ODFRW	Overdue Fine (Renewed)
REFND	Cash Refund to Patron
REPCD	Replacement Card Fee
REPLA	Item Replacement Cost
SERV	Service Processing Fee

The library services/charges reflected by these codes range from fax machine to copy machine use, and from replacing a lost library card to refunds. The system already has assigned costs to each service, and calculates all final charges for the user based on these costs.

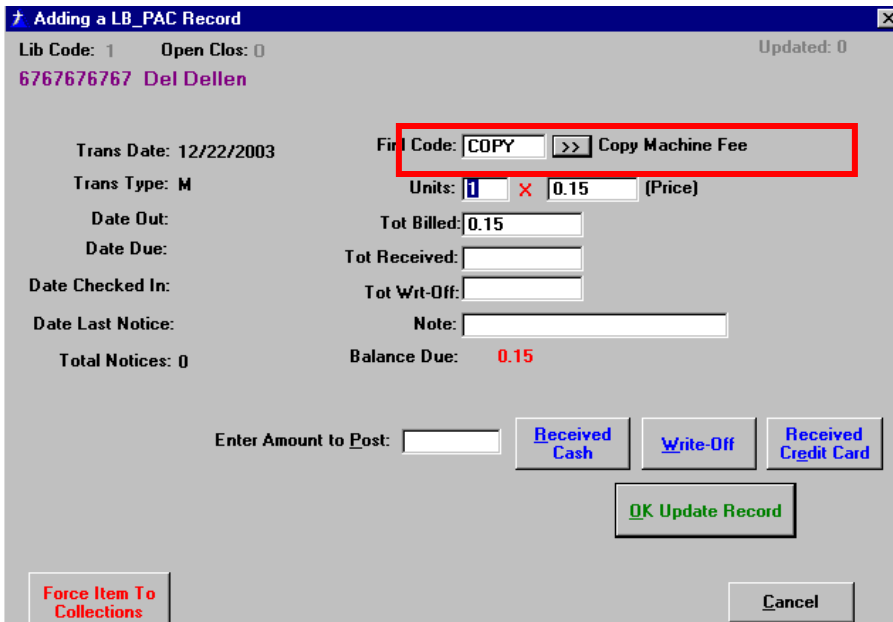
NOTE: The system allows a library to add other financial codes to the **Financial Codes** screen/table, as needed.

At the **Financial Codes** screen, highlight the correct service code (in this case, **Copy Machine Fee** for photocopying is highlighted on Circless5-7b, below), then choose the **Select** key with the mouse.



CIRCLESS5-7b

Now, the **Adding a LB_PAC Record** screen reappears with that (**COPY**) code in place (see Circless5-7c, below).



CIRCLESS5-7c

Adding a LB_PAC Record

Lib Code: 1 Open Clos: 0 Updated: 0
6767676767 Del Dellen

Trans Date: 12/22/2003
Trans Type: M
Date Out:
Date Due:
Date Checked In:
Date Last Notice:
Total Notices: 0

Finl Code: COPY >> Copy Machine Fee
Units: 1 x 0.15 (Price)
Tot Billed: 0.15
Tot Received:
Tot Wit-Off:
Note:
Balance Due: 0.15

Enter Amount to Post: Received Cash Write-Off Received Credit Card
OK Update Record
Force Item To Collections Cancel

CIRCLESS5-7d

At the **Adding a LB_PAC Record** screen (Circless5-7d, above), enter the number of units for the current transaction in the **Units** field. For example, as shown in Circless5-7d above, only 1 photocopy was made, so there is just 1 unit for which to be charged. The single unit (for 1 copy) is multiplied by .15 cents per unit, totaling .15 cents owed by Patron Dellen.

After typing in the number of units, select the **OK Update Record** button at the bottom right side of the screen (refer back to Circless5-7d, above).

The system records the charge on the **Patron Account Collections** screen, which automatically reappears (see Circless5-7e, below).

The screenshot shows a window titled "Patron Account Collections" for patron "676767677 Dellen, Del". It features two tabs: "Open Items" (selected) and "Closed Items". Below the tabs is a table with the following data:

Date Billed	Billed	Received	Write Off	Bal. Due	Type	Description
12/22/2003	0.15			0.15	COPY	Copy Machine Fee
11/02/2003	2.00	1.00		1.00	SERV	Service Processing Fee
11/02/2003	1.35			1.35	COPY	Copy Machine Fee
11/02/2003	22.00			22.00	REPLA	Item Replacement Cost

Below the table, the "Balance" is shown as \$24.50. There are several buttons: "Post New Item", "Select Item Above", "Delete Item", "Amount to Post:" (with an input field), "Received Cash", "Write-Off", "Received Credit Card", "Print Receipt", "Show Transactions For Item Above", and "Exit".

CIRCLESS5-7e

NOTE: Recording a charge in the system, as described above, **is not the same as receiving payment** from a patron for a charge. Recording a charge simply means that the charge is included on the patron's account as shown above in Circless5-7e. Receiving payment for charges is covered later in this lesson.

Posting a Payment to a Patron's Account

There are two ways to post payments:

1. at the **Patron Account Collections** screen by overriding the amount in the **Amount to Post** box (see Circless5-7f, below)

The screenshot shows the 'Patron Account Collections' window for patron 676767677, Dellen, Del. It features a table with columns: Date Billed, Billed, Received, Write Off, Bal. Due, Type, IS, and Description. The table contains four rows of data. Below the table, the balance is shown as \$24.50. There are buttons for 'Post New Item', 'Select Item Above', and 'Delete Item'. At the bottom, there is an 'Amount to Post' field set to 24.50, and buttons for 'Received Cash', 'Write-Off', and 'Received Credit Card'. Other buttons include 'Print Receipt', 'Show Transactions For Item Above', and 'Exit'.

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/22/2003	0.15			0.15	COPY		Copy Machine Fee
11/02/2003	2.00	1.00			SERV		Service Processing Fee
11/02/2003	1.35			1.35	COPY		Copy Machine Fee
11/02/2003	22.00			22.00	REPLA		Item Replacement Cost

CIRCLESS5-7f

2. choose the **Select Item Above** button on the **Patron Account Collections** screen (see Circless5-7g, below, left) to access the **Changing a LB_PAC Record** screen (see Circless5-7h, below, right)

This screenshot is identical to the previous one, but the 'Select Item Above' button is highlighted with a red box. Additionally, the row for the 'Service Processing Fee' (dated 11/02/2003) is also highlighted with a red box in the table.

CIRCLESS5-7g

The screenshot shows the 'Changing a LB_PAC Record' window. It displays transaction details for the selected item. Fields include: Trans Date (11/02/2003), Finl Code (SERV - Service Processing Fee), Trans Type (M), Units (1), Price (2.00), Date Out, Date Due, Date Checked In, Date Last Notice, Total Notices (0), and Balance Due (1.00). There are buttons for 'Received Cash', 'Write-Off', 'Received Credit Card', 'OK Update Record', 'Force Item To Collections', and 'Cancel'.

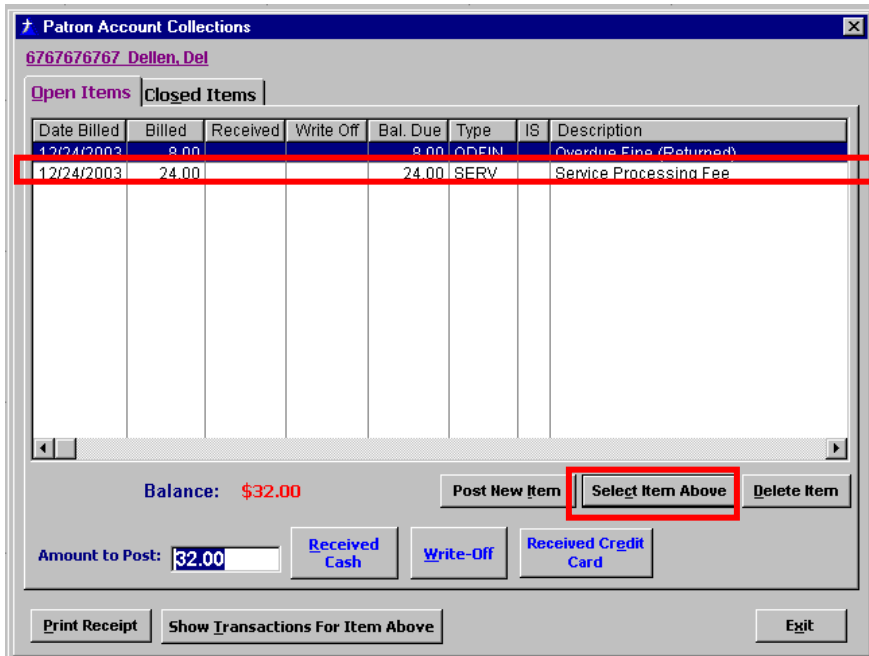
CIRCLESS5-7h

This lesson covers both methods.

Receiving Payment for an Individual/Particular Charge

In some cases, a patron might decide to pay for a particular open item such as a lost book, or for a photocopying charge incurred during his or her previous visit to the library.

Before a patron pays for existing charges on his or her account, a user should verify the amount owed by checking that person's account first. All open or unpaid items are shown on each patron's own **Patron Account Collections** screen, such as on Del Dellen's account shown below in Circless5-7i.



CIRCLESS5-7i

At this screen, library staff can receive payment from a patron for an individual charge, such as photocopying, or for the entire amount owed for all charges.

Receiving a Partial Payment

To receive payment for an individual charge, highlight that charge with the cursor, as shown above in Circless5-7i where **SERV** (for service charge) has been highlighted, then choose the **Select Item Above** button on the bottom, right side of the screen.

Next, the **Changing a LB_PAC Record** screen appears (see Circless5-7j, below).

Although the system automatically defaults to posting the total amount owed by a patron in the **Amount to Post** box on the bottom left side of the **Patron Account Collections** screen (refer back to Circless5-7i, above), where the total amount owed by Del Dellen for this **SERV** (service charge) item is posted as \$24.00, a user can override that amount.

In the **Enter Amount to Post** box, type in the amount to be paid that day by the patron (see Circless5-7j, below), which in this case is \$1.00.

CIRCLESS5-7j

After the total amount to be paid by the patron has been typed into the **Enter Amount to Post** field on the **Changing a LB_PAC Record** screen, select the **Received Cash** button to prompt the system to process the payment of \$1.00 (see Circless5-7j again, above).

Notice that the **Balance Due** now shows \$23.00 instead of \$24.00, and the **Received Cash** button has disappeared from the **Changing a LB_PAC Record** screen (see Circless5-7k, below).

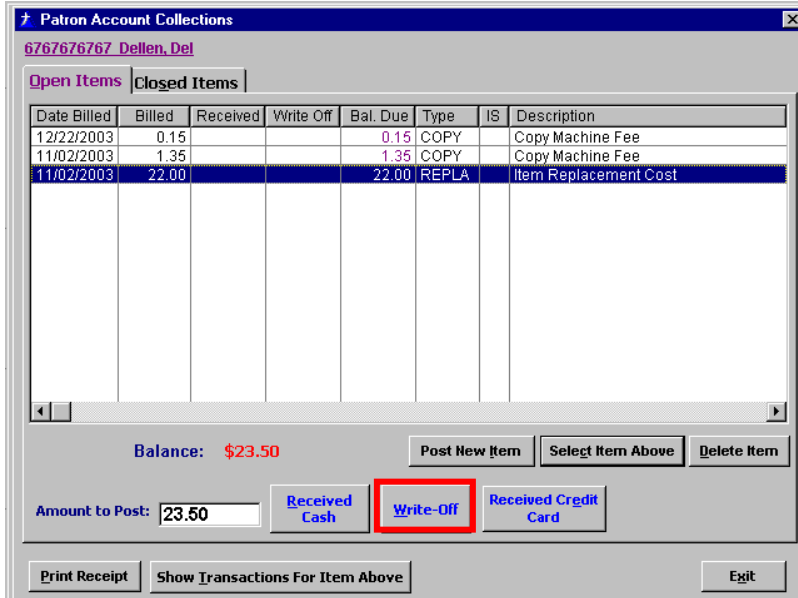
CIRCLESS5-7k

Next, select the **OK Update Record** button to process the payment (refer back to Circless5-7k, above), and the **Patron Account Collections** screen reappears with \$1.00 now shown in the **Received** column, and \$23.00 now shown in the **Bal. Due** column (see Circless5-7l, below). Additionally, the balance shown now is \$1.00 less than before Mr. Dellen's partial payment.

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/24/2003	24.00	1.00		23.00	SERV		Service Processing Fee

Write-Offs

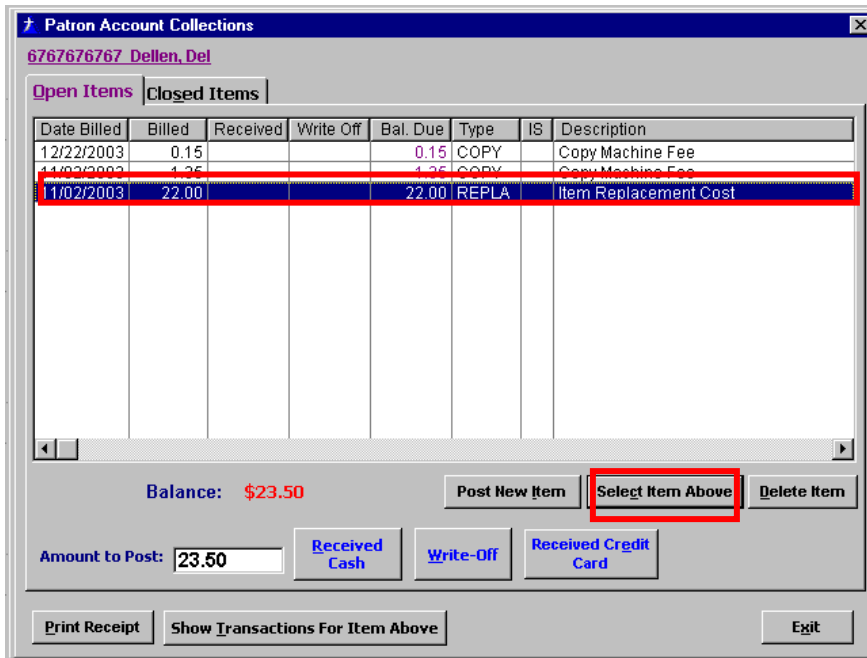
If a charge is to be written off, a user selects the **Write-Off** button on the **Patron Account Collections** screen, rather than either of the **Received** buttons (refer back to Circless5-7n, above).



CIRCLESS5-7n

Credit Card Payments

A patron also may use his or her credit card to pay for library charges. To process a credit card payment, access the **Patron Account Collections** screen again (see Circless5-8, below).



CIRCLESS5-8

Select the item for which the patron will pay – in the instance of the example below in Circless5-8, the **REPLA** or replacement fee of \$22.00 has been selected.

Patron Account Collections
67676767 Dellen, Del

Open Items | Closed Items

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/22/2003	0.15			0.15	COPY		Copy Machine Fee
11/02/2003	1.33			1.33	COPY		Copy Machine Fee
11/02/2003	22.00			22.00	REPLA		Item Replacement Cost

Balance: \$23.50

Post New Item | **Select Item Above** | Delete Item

Amount to Post: 23.50 | Received Cash | Write-Off | Received Credit Card

Print Receipt | Show Transactions For Item Above | Exit

CIRCLESS5-8

Choose the **Select Item Above** button (refer back to Circless5-8, above), and the **Changing a LB_PAC Record** screen appears (see Circless5-8a, below). At this screen, enter the amount to post (\$22.00) in the **Enter Amount to Post** box, then select the **Received Credit Card** button to the right of the **Post** box (see Circless5-8a, below).

Changing a LB_PAC Record
Lib Code: 1 Open Clos: 0 Updated: 1
67676767 Del Dellen

Trans Date: 11/02/2003 Finl Code: REPLA >> Item Replacement Cost

Trans Type: M Units: 1 x 0.00 (Price)

Date Out: Tot Billed: 22.00

Date Due: Tot Received:

Date Checked In: Tot Wrt-Off:

Date Last Notice: Note:

Total Notices: 0 Balance Due: 22.00

Enter Amount to Post: 22.00 | Received Cash | Write-Off | **Received Credit Card**

OK Update Record

Force Item To Collections | Cancel

CIRCLESS5-8a

The **Changing a LB-PAC Record** screen reappears (Circless5-8b, below), but the **Received Credit Card** button disappears from this screen, indicating that the charge has been processed in the system.

CIRCLESS5-8b

Now, select the **OK Update Record** button (refer back to the Circless5-8b, above), and the patron’s record will be updated and the charge removed (see Circless5-8c, below).

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/22/2003	0.15			0.15	COPY		Copy Machine Fee
11/02/2003	1.35			1.35	COPY		Copy Machine Fee

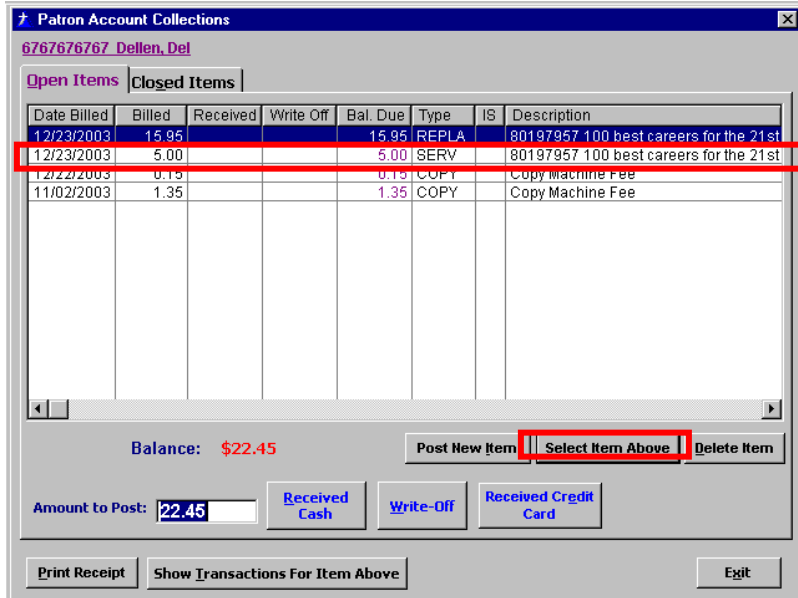
CIRCLESS5-8c

NOTE: As an alternative method, library staff could, if it chooses, simply override the amount in the **Amount to Post** box with the amount of the overdue fine, and process the credit card payment from the **Patron Account Collections** screen, rather than processing the payment by accessing the **Changing a LB_PAC Record** screen.

Collections

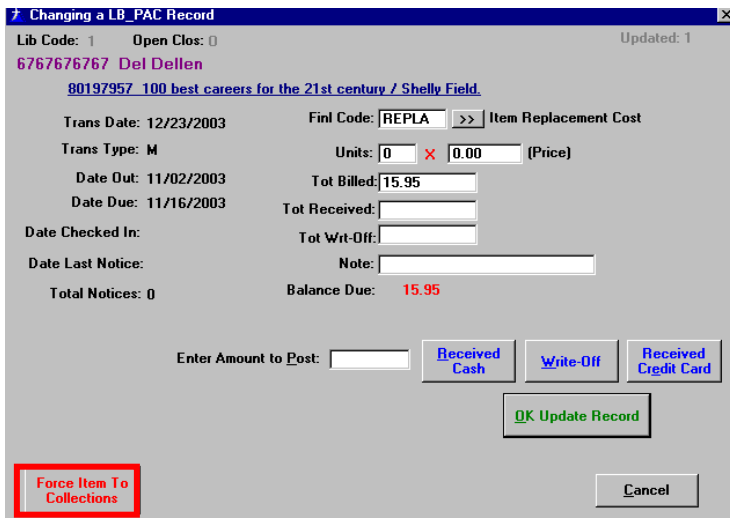
NOTE: The collections subsystem of the Circulation system is optional. This section only applies if your library uses the collections subsystem.

If an item has been billed for time and time again with no payment from the patron, staff might determine that the charge should be sent to collections. In the case of the example below (see Circless5-9, below), the cost of a book for which Mr. Dellen has been repeatedly billed, *100 Best Careers for the 21st Century*, now will be forced to collections.



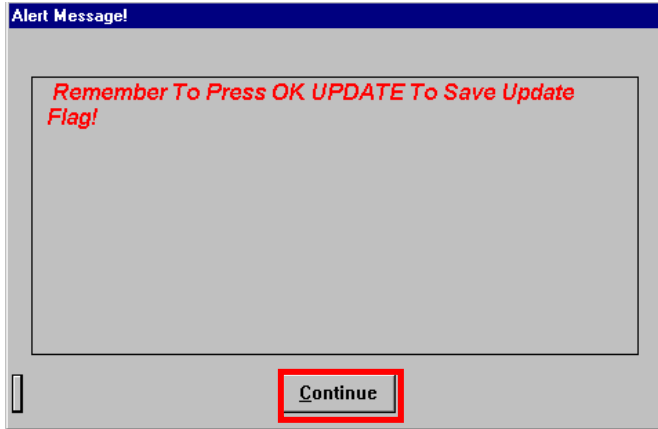
CIRCLESS5-9

At the **Patron Account Collections** screen (Circless5-9, above), with the cursor, highlight the item that will go to collections, then choose the **Select Item Above** button. The **Changing a LB_PAC Record** screen appears (see Circless5-9a, below). At this screen, select the **Force Item to Collections** button on the bottom left side.



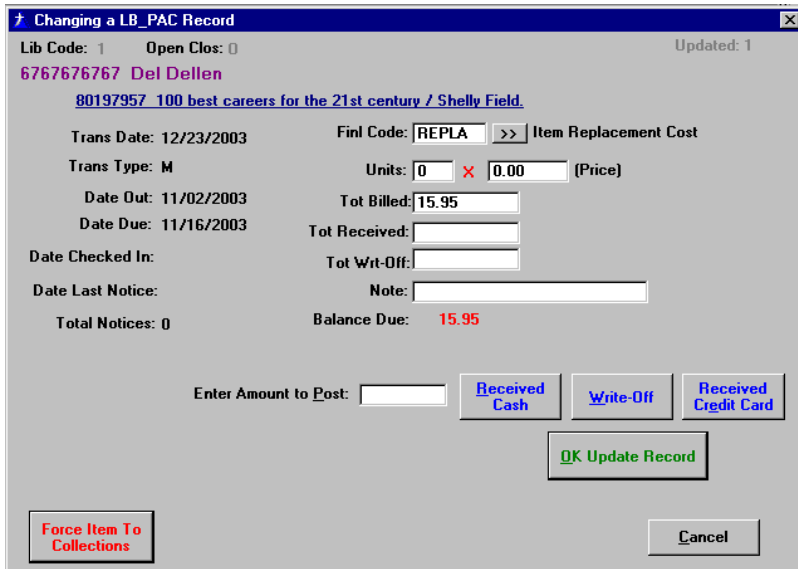
CIRCLESS5-9a

An **Alert Message!** box appears (see Circless5-9b, below) with a reminder for the user to be sure to select the **OK Update Record** button to update the system so that it knows to force a particular item to collections.



CIRCLESS5-9b

Select **Continue** on the **Alert Message** screen (refer back to Circless5-9b, above), and the system returns to the **Changing a LB_PAC Record** screen (see Circless5-9c, below).



CIRCLESS5-9c

Select the **OK Update Record** button at the bottom right side of this screen (refer back to Circless5-9c, above), and the system will be updated with the collections information, although this change is not immediately visible on the screen.

To ensure that the item has been forced to collections, refer back to the **Account Patron Collections** screen (see Circless5-9d, below), and again highlight the item that has been forced to collections (*100 Best Careers for the 21st Century*). Next, choose the **Select Item Above** button.

Patron Account Collections
67676767 Dellen, Del

Open Items | Closed Items

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003	15.95			15.95	REPLA		80197957 100 best careers for the 21st
12/23/2003	5.00			5.00	SERV		80197957 100 best careers for the 21st
12/22/2003	0.15			0.15	COPY		Copy Machine Fee
11/02/2003	1.35			1.35	COPY		Copy Machine Fee

Balance: \$22.45

Buttons: Post New Item, Select Item Above, Delete Item, Amount to Post, Received Cash, Write-Off, Received Credit Card, Print Receipt, Show Transactions For Item Above, Exit

CIRCLESS5-9d

The **Changing a LB-PAC Record** screen appears again, only this time, the **Force Item to Collections** button has been replaced with a **Cancel Force to Collections** button, indicating that the item cost indeed now is in collections.

Changing a LB_PAC Record

Lib Code: 1 Open Clos: 0 Updated: 1
67676767 Del Dellen
80197957 100 best careers for the 21st century / Shelly Field.

Trans Date: 12/23/2003 Finl Code: REPLA >> Item Replacement Cost
Trans Type: M Units: 0 x 0.00 (Price)
Date Out: 11/02/2003 Tot Billed: 15.95
Date Due: 11/16/2003 Tot Received:
Date Checked In: Tot Wrt-Off:
Date Last Notice: Note: |
Total Notices: 0 Balance Due: 15.95

Enter Amount to Post:
Buttons: Received Cash, Write-Off, Received Credit Card, OK Update Record, Cancel Force To Collections, Cancel

CIRCLESS5-9e

Receiving Partial Payment, Applicable to All Charges

A patron might also decide to pay all or a portion of what he or she owes for library services/charges.

Example: Del Dellen comes to the library and wishes to pay \$5.00 cash on his account of open items, so library staff opens his **Patron Account Collections** record (see Circless5-10, below).

The screenshot shows the 'Patron Account Collections' window for patron '67676767 Dellen, Del'. It features two tabs: 'Open Items' and 'Closed Items'. The 'Open Items' tab is active, displaying a table with the following data:

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003	15.95			15.95	REPLA		80197957 100 best careers for the 21st
12/23/2003	5.00			5.00	SERV		80197957 100 best careers for the 21st
12/22/2003	0.15			0.15	COPY		Copy Machine Fee
11/02/2003	1.35			1.35	COPY		Copy Machine Fee

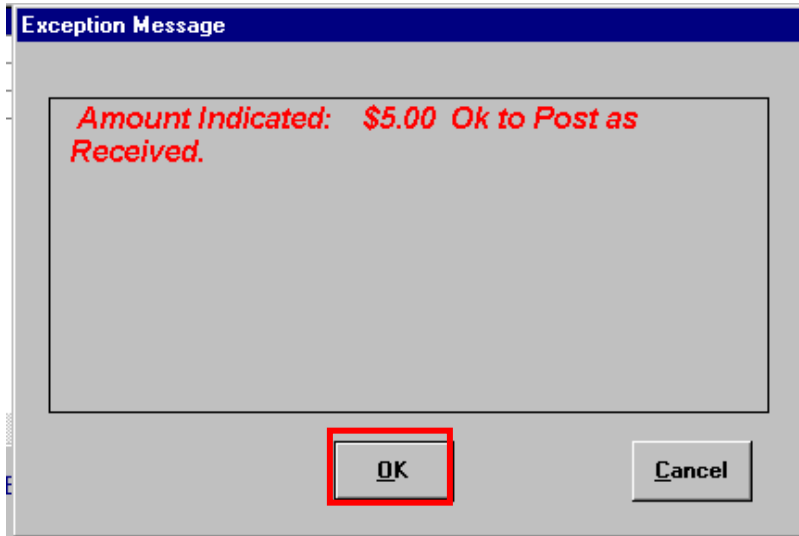
Below the table, the 'Balance' is shown as \$22.45. There are buttons for 'Post New Item', 'Select Item Above', and 'Delete Item'. The 'Amount to Post' field contains '22.45'. To the right of this field are buttons for 'Received Cash', 'Write-Off', and 'Received Credit Card'. At the bottom, there are buttons for 'Print Receipt', 'Show Transactions For Item Above', and 'Exit'.

CIRCLESS5-10

Library staff overrides the \$22.45 system default total amount due by entering \$5.00 instead in the **Enter Amount to Post** field (refer to Circless5-10a, below). Staff then clicks the mouse on the **Received Cash** button to the right of the **Amount to Post** field.

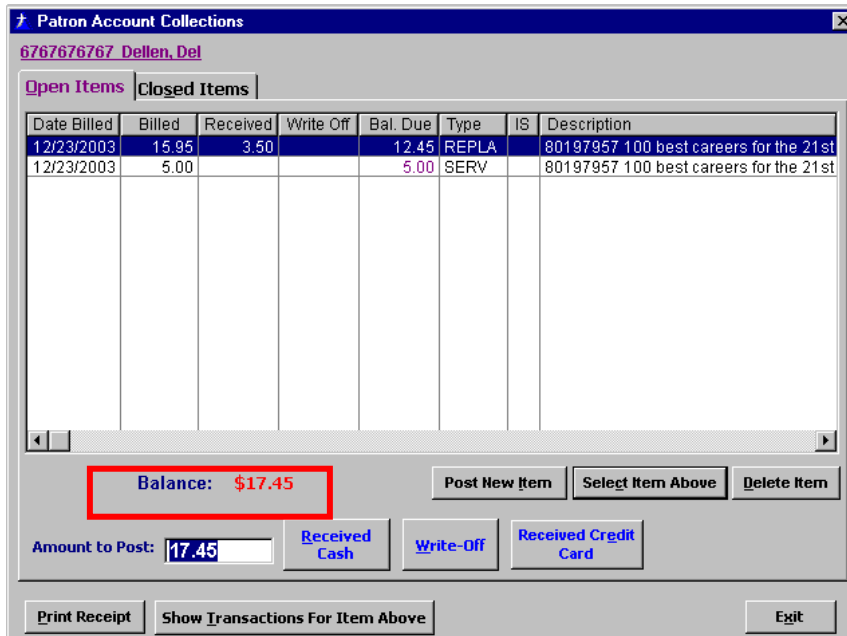
This screenshot is identical to the previous one, but with the 'Amount to Post' field now containing '5.00'. The 'Received Cash' button is highlighted with a red box, indicating it has been selected by the user.

The following **Message** screen appears (see Circless5-10b, below), confirming the amount to be received and posted.



CIRCLESS5-10b

After selecting **OK** on the message screen to post the payment (refer back to Circless5-10b, above), the **Patron Account Collections** screen reappears with the updated amount owed (now \$17.45 rather than \$22.45), next to the word **Balance**, and in the **Enter Amount to Post** field (see Circless5-10c, below).

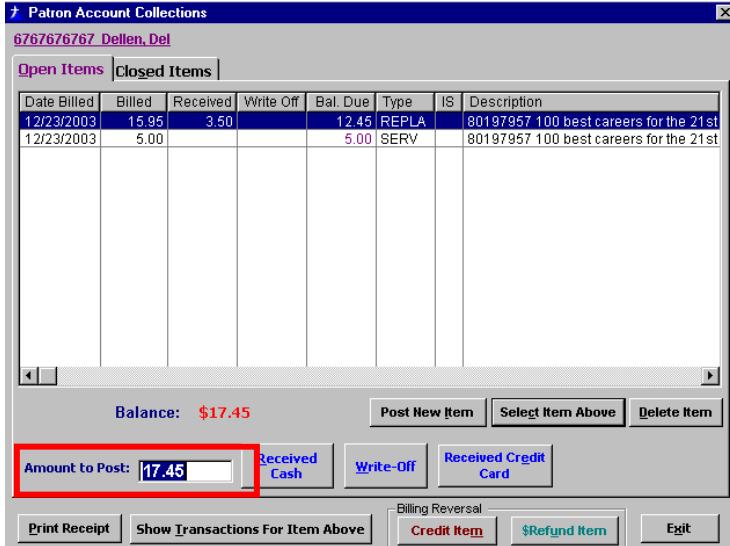


CIRCLESS5-10c

NOTE: Amounts are applied to items until they are paid, in order, from the oldest to the newest date.

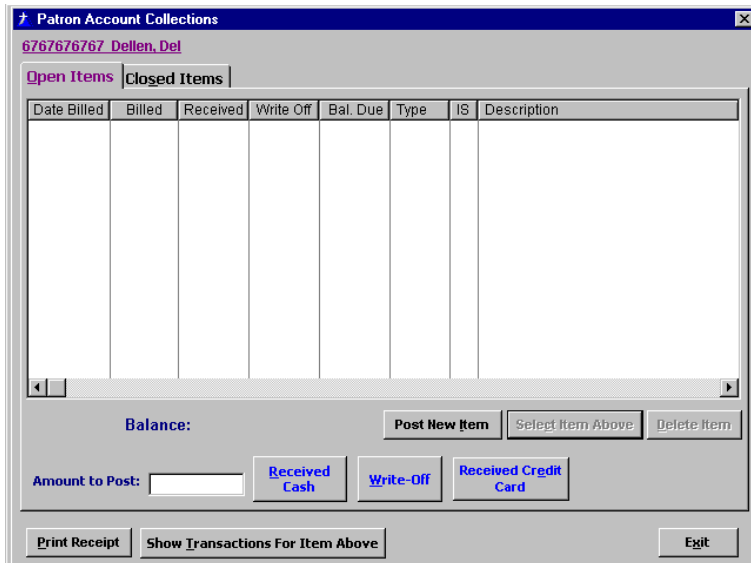
Receiving Payment for All Charges

To receive payment for all charges, refer to the total or “batch” posting, which automatically has been recorded at the bottom, left side of the **Patron Account Collections** screen in the **Enter Amount to Post** field (see Circless5-11, below). The total amount owed also is listed in red next to the word “Balance”, above the **Enter Amount to Post** field.



CIRCLESS5-11

To record a payment in the entire amount for all charges rendered -- in this case \$17.45 -- select one of the **Received** buttons (either **Received Cash** or **Received Credit Card**) to the right of the **Enter Amount to Post** field (refer back to Circless 5-11, above). When the entire amount has been paid, all items are removed as open items from the account (see Circless5-5-11a, below).



CIRCLESS5-11a

NOTE: The **Post as a Write-Off** function (see button on Circless5-7h, above) works the same as the **Post as Received** function in that it can be used for a “batch” posting for all charges.

Handling “Credit on Account”

Creating a Credit

After choosing a patron in the system (in this case, Del Dellen), at the patron’s **Patron Account Collection** screen, select the **Open Items** tab at the top, left side of the screen to view that patron’s list of open items in the system (see Circless5-12, below).

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003	10.00			10.00	FAX		Fax Usage Fee
12/23/2003	1.05			1.05	COPY		Copy Machine Fee
12/23/2003	30.00			30.00	DAMAG		Damages Fee

Balance: \$41.05

Amount to Post: 41.05

CIRCLESS5-12

Next, in the **Amount to Post** field (bottom left of the **Patron Account Collections** screen (see Circless5-12a, below), type in the amount that the patron will pay.

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003	10.00			10.00	FAX		Fax Usage Fee
12/23/2003	1.05			1.05	COPY		Copy Machine Fee
12/23/2003	30.00			30.00	DAMAG		Damages Fee

Balance: \$41.05

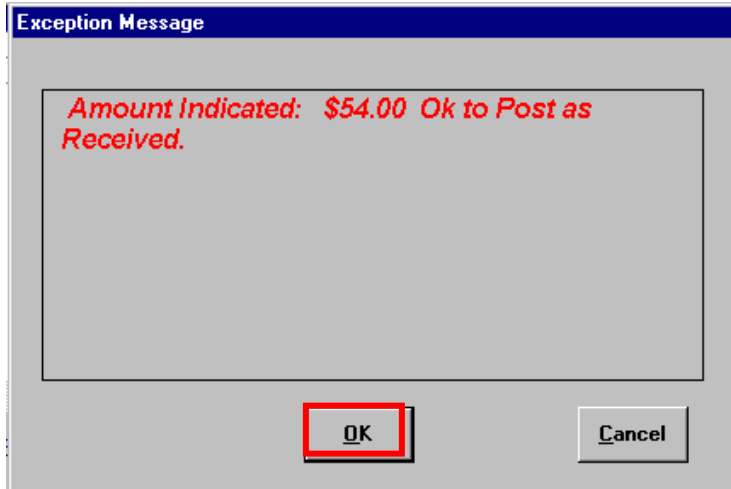
Amount to Post: 54.00

CIRCLESS5-12a

When the amount paid by the patron is more than the “total due” amount currently entered on the account (see the \$54.00 amount on Circless5-12a, above), once one of **Received** (**Received Cash** or **Received Credit Card**) buttons has been selected, the system automatically notifies the user that the amount entered is more than what was due.

For instance, assume that a patron owes \$41.05, as shown in Circless5-12 and 5-12a on the previous page, but he pays \$54.00 instead, telling the librarian to credit the rest to his account.

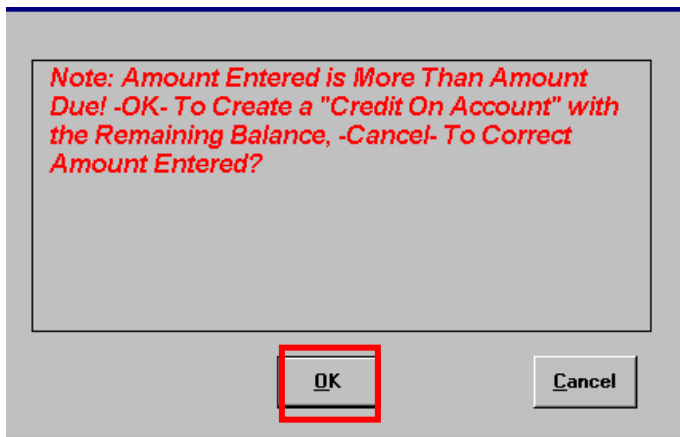
The user types the different amount, \$54.00, in the **Amount to Post** field (see Circless5-12a, below), then in an **Exception Message**, the system automatically asks if the librarian/user if the amount is "**Ok to Post as Received**" (see Circless5-12b, below).



CIRCLESS5-12b

If the user selects the **OK** button on the **Exception Message** (refer back to Circless5-12b, above) a second **Exception Message** appears (see Circless5-12c, below).

This message says: "*Amount Entered is More Than Amount Due! -OK- To Create a "Credit on Account" with the Remaining Balance, -Cancel- To Correct Amount Entered?*".



CIRCLESS5-12c

Select the **OK** button (refer back to Circless5-12c, above) to create a credit.

The **Patron Account Collections** screen reappears (see Circless5-12d, below).

Notice that under the **Open Items** tab, there is a \$12.95 credit in the **Received** column. Also, \$12.95 is listed in the **Bal. Due** column.

Notice that under the **Description** column, the words "Credit On Account" now appear (refer back to Circless5-12d, below).

Patron Account Collections

67676767 Dellen, Del

Open Items | Closed Items

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003		12.95		-12.95	CREDIT		Credit On Account

Balance:

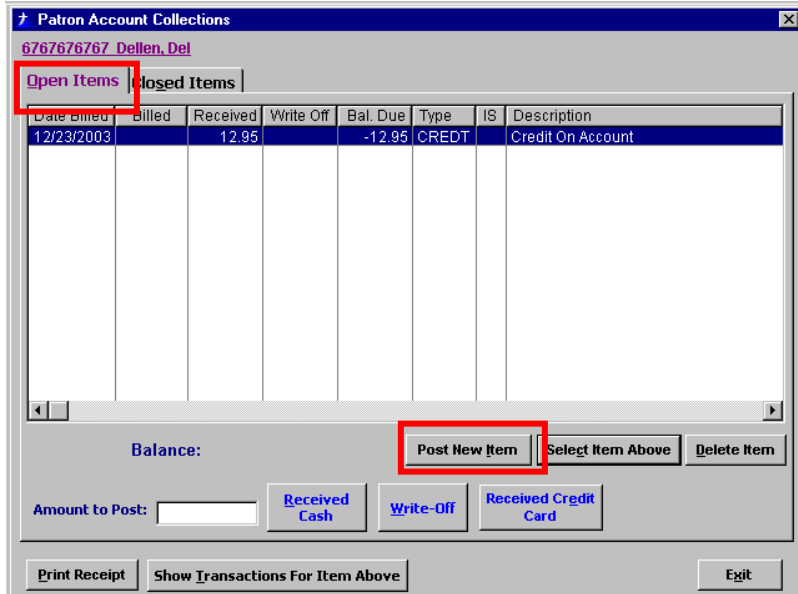
Amount to Post:

CIRCLESS5-12d

Creating a Credit When There Is No Balance Due

In the event that a patron has no balance due, a credit still can be created on that person's account. An example of why this action might be required is when a patron has lost an item, paid for it, and the item turns up. Perhaps the item turns up in the library's drop box because someone else found it and returned it. Then, the library would credit the account of the patron who originally lost, then paid for it.

In such an instance, to credit a patron's account, first start by making sure that the **Open Items** tab is selected at the top, left side of the **Patron Account** collections screen (see Circless5-12e, below).




CIRCLESS5-12e

Next, select the **Post New Item** button near the bottom, right side of this screen (refer back to Circless5-12e, above).

The **Adding a LB_PAC Record** screen, which also might be referred to as a “new item form,” appears (see Circless5-12e, below).

CIRCLESS5-12e

On this form, select the arrow  to the right of the **Finl Code** field and select **CREDIT** for “Credit on Account” from the pulldown list of **Financial Codes** that appears (see Circless5-12f, below). Then, choose the **Select** button from the bottom of the screen (refer back to Circless5-12f, below).

Code	Description	Amount	Service Charge
CDRW	Borrowers Card Renewal	1.00	0.00
CDRY	Copy Machine Fee	0.15	0.00
CREDIT	Credit On Account	0.00	0.00
DAMAG	Damages Fee	5.00	0.00
DONAT	Patron Donations	0.00	0.00
FAX	Fax Usage Fee	1.00	0.00
NONDS	Non District Usage Fee	200.00	0.00
NPFEE	Notice Processing Fee	0.00	0.00
ODFIN	Overdue Fine (Returned)	0.00	0.00
ODFRW	Overdue Fine (Renewed)	0.00	0.00
REFND	Cash Refund to Patron	0.00	0.00
REPCD	Replacement Card Fee	1.00	0.00
REPLA	Item Replacement Cost	0.00	5.00
SERV	Service Processing Fee	2.00	0.00

CIRCLESS5-12f

The “new item record form” reappears (see Circless5-12g, below). On this form, enter the amount in the **Enter Amount to Post** field. In the example below, the amount to post is \$12. Then, select one of the **Received (Cash or Credit Card)** buttons to the right of this field (refer back to Circless5-12g, below).

The screenshot shows a window titled "Adding a LB_PAC Record". At the top, it displays "Lib Code: 1" and "Open Clos: 0" on the left, and "Updated: 0" on the right. Below this is the item number "67676767" and the name "Del Dellen".

The main area contains several fields:

- Trans Date:** 12/23/2003
- Finl Code:** CREDIT >> Credit On Account (highlighted with a red box)
- Trans Type:** M
- Units:** X (Price)
- Date Out:** (empty)
- Tot Billed:** (empty)
- Date Due:** (empty)
- Tot Received:** (empty)
- Date Checked In:** (empty)
- Tot Wrt-Off:** (empty)
- Date Last Notice:** (empty)
- Note:** (empty)
- Total Notices:** 0
- Balance Due:** (empty)

At the bottom, there is an "Enter Amount to Post" field containing "12.00" (highlighted with a red box). To its right are two buttons: "Received Cash" (highlighted with a red box) and "Received Credit Card". Below these is a green "OK Update Record" button. At the bottom left is a red "Force Item To Collections" button, and at the bottom right is a "Cancel" button.

CIRCLESS5-12g

The amount now appears in the **Tot Received** field as 12.00, and next to **Balance Due** as – 12.00 (a negative amount) (see Circless5-12h, below). Select the **OK Update Record** button at the bottom, right of the screen (refer back to Circless5-12h, below).

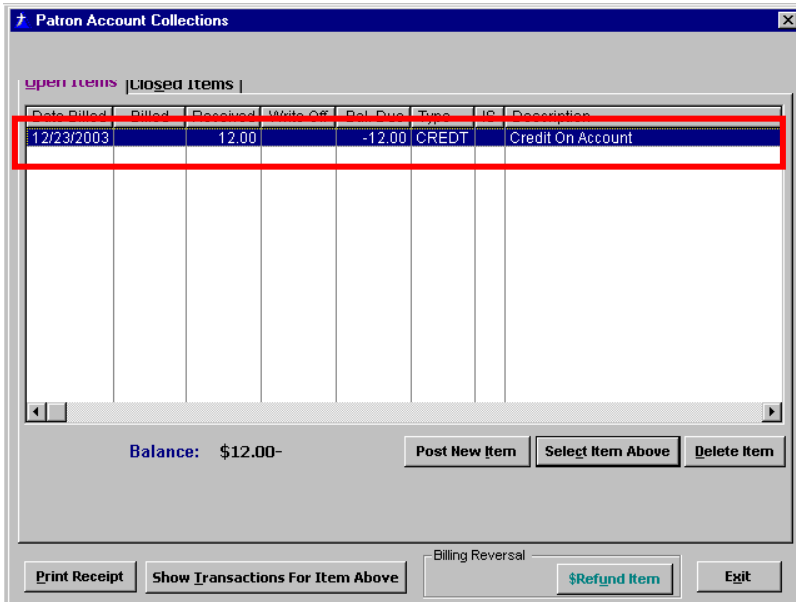
This screenshot shows the same window as the previous one, but with updated values:

- Tot Received:** 12.00 (highlighted with a red box)
- Balance Due:** -12.00 (highlighted with a red box)

The "Enter Amount to Post" field is now empty. The "Received Cash" button is no longer highlighted. The "OK Update Record" button is now highlighted with a red box. All other fields and buttons remain the same as in the previous screenshot.

CIRCLESS5-12h

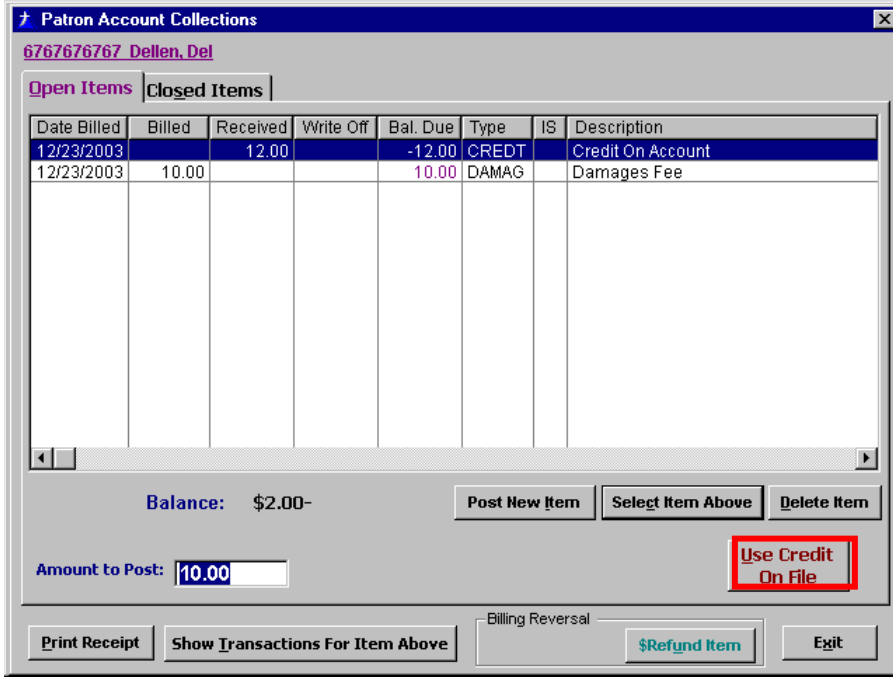
The updated **Patron Account Collection** screen appears with the credit shown as 12.00 in the **Received** column and **-\$12.00** under the **Bal. Due** column (see Circless5-12i, below).



CIRCLESS5-12i

Using Credits to Pay for Items, and Granting Credit Refunds

When a credit exists on a patron's account, a **Use Credit On File** button appears on the bottom right side of the **Patron Account Collections** screen (see Circless5-13, below).



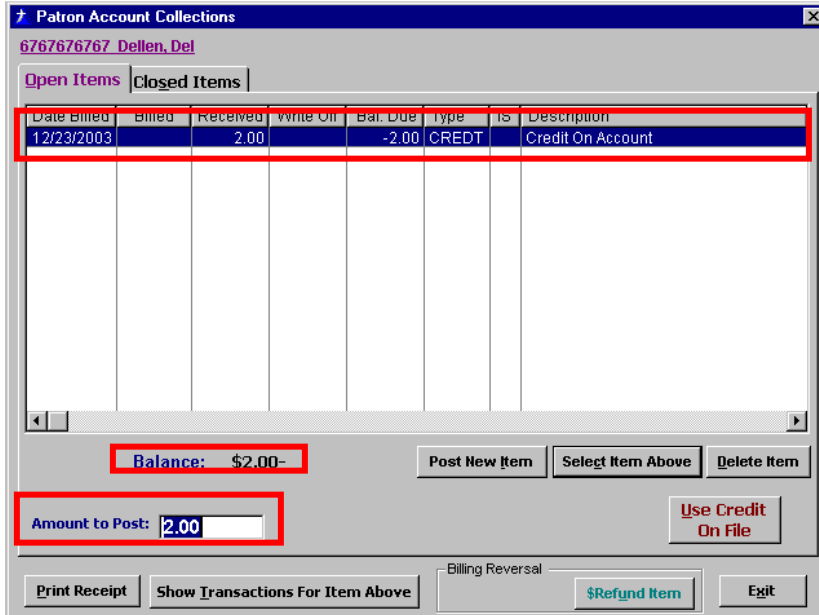
CIRCLESS5-13

To use credit on a patron's account to pay for an item, highlight the item for which the patron wishes to pay, then select the **Use Credit On File** button to use the credit to pay for the outstanding, "open" item (in the example below, Circless5-13a, the open item is **DAMAG** or a Damages Fee of \$10).



CIRCLESS5-13a

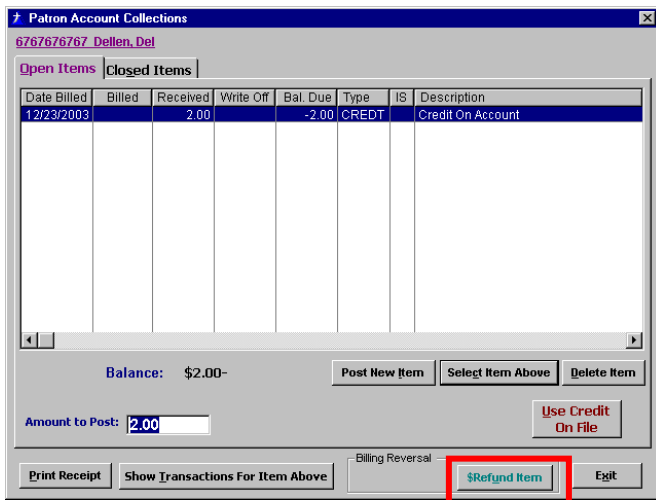
Once the credit has been used, the amount of the **CREDIT** transaction will be deleted from the screen completely (if it was the same as what was owed), or the amount of the credit will be adjusted, if different from who is owed. Note how on Circless5-13b, below, the credit amount on the **Patron Account Collections** screen was adjusted in both the **Balance** area and the **Amount to Post** box from a \$12 credit to a \$2 credit.



CIRCLESS5-13b

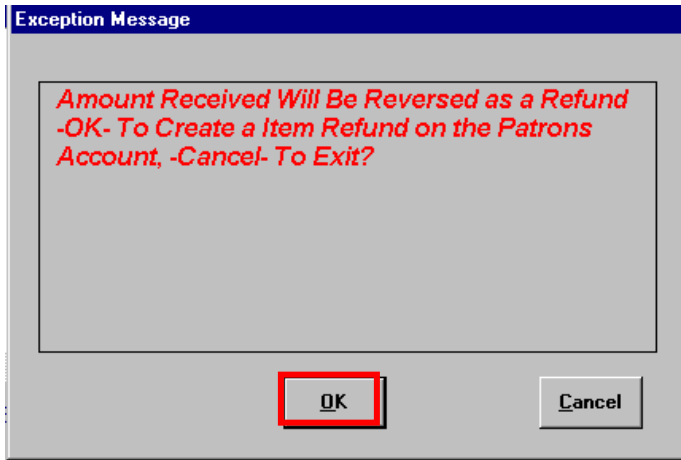
NOTE: The system does not automatically use a credit amount to pay for fees owed. The system **must be told** by a user to apply to credit. Always do this by selecting the **Use Credit On File** button.

To refund a credit (give cash back) to a patron, highlight the item or **CREDIT** to be refunded, and select the **Refund Item** key at the bottom, right of the **Patron Account Collections** screen (see Circless5-13c, below). The amount will be refunded and the item is removed from this screen.



CIRCLESS5-13c

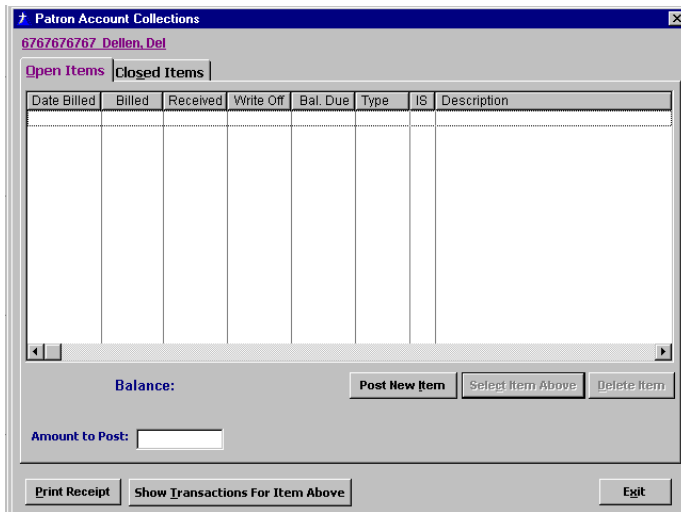
An **Exception Message** appears, stating: “Amount Received Will Be Reversed as a Refund -OK- To Create a Item Refund on the Patrons Account, -Cancel- to Exit?” (see Circless5-13d, below).



CIRCLESS5-13d

Select **OK** to continue processing the refund (refer back to Circless5-13d, above).

Return to Del Dellen’s **Patron Account Collections** screen (see Circless5-13e, below) and the credit is gone, having been successfully refunded.



CIRCLESS5-13e

Billing Patrons

Billing for Replacement

From the list of items checked out that are shown on an individual's **PATRON CHECK-OUT** screen (see Circless5-14, below), select the item for which the patron is to be billed.

In the case of the example below for Del Dellen, shown below in Circless5-14, the book *Howl, and Other Poems*, has been selected.

The screenshot shows a window titled "PATRON CHECK-OUT". At the top right, it displays "Regular Patron" with ID "6767676767", name "Del Dellen", and date "12/23/2003". Below this is the address: "6 Sixth Street, Traverse City MI 496860000, 231". On the right side, it shows "HAS OUT ADULT 1" and "Total Out: 1 OverDue: 1". There is an input field for "Enter Item Barcode". Below that is a table titled "Items Checked Out" with columns "Due Date", "R", "Status", and "Description". One row is highlighted in red: "11/16/03", "R", "*OVRDUE*", "80218357 Howl, and other poems /". At the bottom, there is a row of buttons: "Renewal Item", "In Circ", "\$Account", "Bill For Repl." (highlighted with a red box), "Not BarCoded", "Print", "All", "Reserves", "Patron Mst", "Item Check-In", "Item Rec.", "Next Patron", and "Exit".

CIRCLESS5-14

Let's assume that the overdue item *Howl, and Other Poems* has been declared lost.

With this in mind, select the **Bill for Rept.** button at the bottom of the screen (refer back to Circless5-14, above).

The **Bill Item for Replacement** screen appears for this particular item (see Circless5-14a, below). Note that the replacement charge assigned by the system is \$5.95 and the **Additional Service Fee** is \$5.

NOTE: Library service fees are optional and can be established by staff in the Codes file.

CIRCLESS5-14a

Select the **Bill Replacement** button on the lower left side of the screen (refer back to Circless5-14a, above) to generate the bill. The **PATRON CHECK-OUT** screen automatically reappears (see Circless5-14b, below), showing that the system automatically has changed the status of the book from **OVRDUE** to **BILL-R** (see Circless5-8c, above). The fees now successfully are posted to the patron's account.

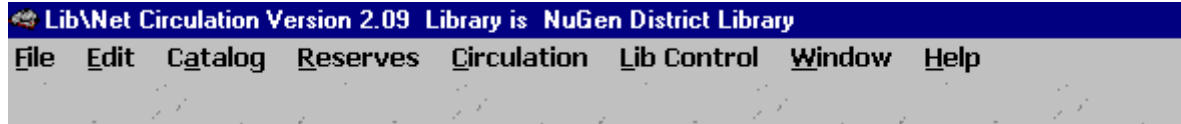
CIRCLESS5-14b

NOTE: If the patron pays for these charges immediately, complete the above procedure, then select the **\$Account** button from the bottom of the patron's **CHECK-OUT** screen. Select the item to be paid, or use the **Post As Received** function if the patron wishes to pay all account charges.

Billing for a Damaged Item

When a patron returns an item that has been damaged, the library bills the patron for damage fees to recover repairs. Damage fees are posted to the patron's account.

If the damage charge is outstanding, when that patron checks out a book, a message box containing the charges owed will appear for this particular patron if the dollar amount exceeds the library's limit.



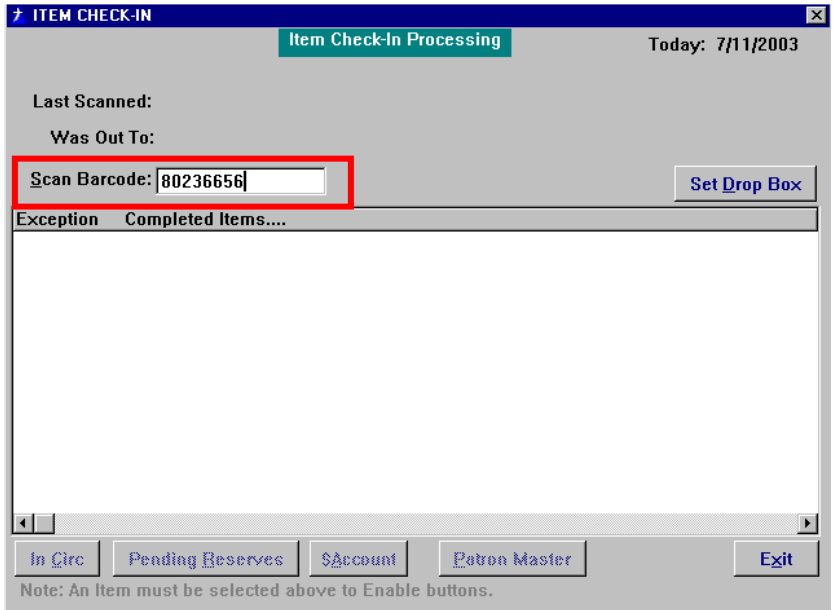
CIRCLESS5-15

When a patron returns a damaged item, the item first must be checked in. To check in the item, access the **Circulation** pulldown menu (see Circless5-15, above) at the opening **LibNet** screen, and select **Check In** from that menu. The **ITEM CHECK-IN** screen appears (see Circless5-15a, below).



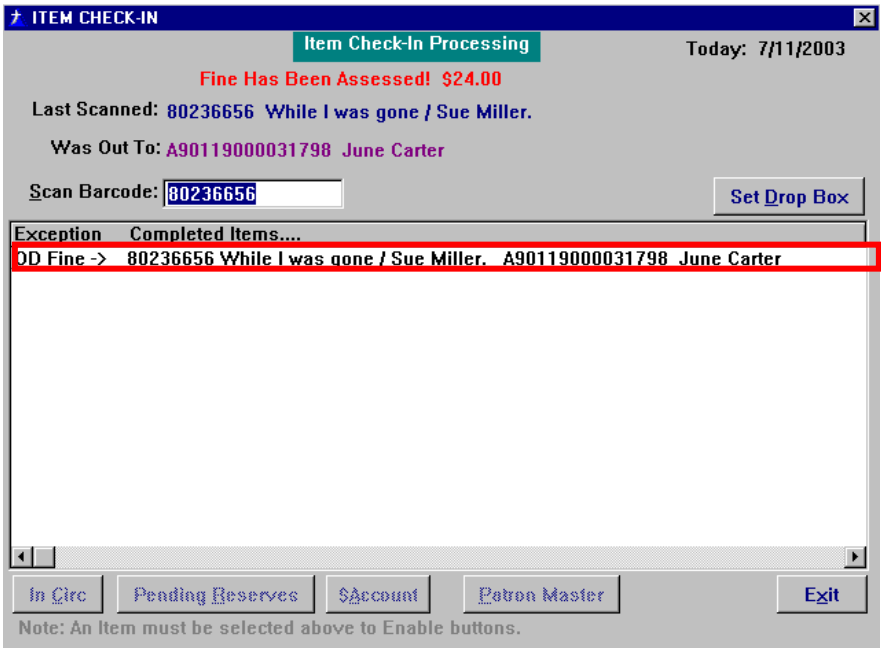
CIRCLESS 5-15a

At the **ITEM CHECK-IN** screen (see Circless5-15b, below), scan or type the barcode in the **Scan Barcode** field for the damaged item being returned, and press the **ENTER** key on the computer keyboard.



CIRCLESS5-15b

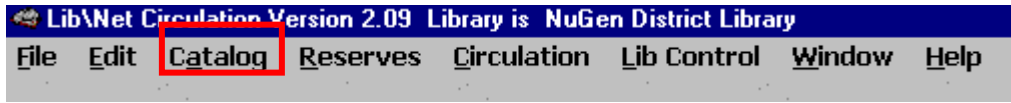
The item appears on the screen (see Circless5-15c, below). Complete the check-in process, then exit from this screen.



CIRCLESS5-15c

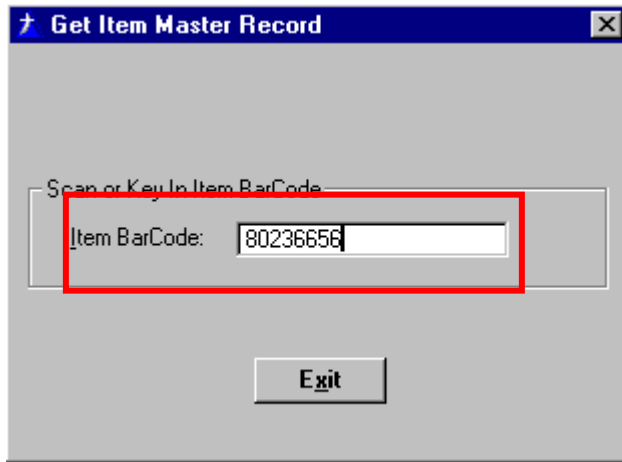
NOTE: Because the damaged item is overdue, an overdue fine was automatically posted.

After the damaged item is checked in, go back to the opening **LibNet Circulation** menu (see Circless5-15, below).



CIRCLESS5-15

Go to the **Catalog** menu (refer back to Circless5-9c, above) and select **Holdings Record by BarCode**. The **Get Item Master Record** screen appears (see Circless5-9d, below). Scan or type in the damaged item's barcode in the **Item BarCode** box (Circless5-9d) and select the **Enter** key on the computer keyboard.



CIRCLESS5-15d

The master record for the damaged item, *While I Was Gone*, appears on the **Record Will Be Changed** screen (see Circless5-9e, below).

Item Master Record | Statistics Catalog | COLLIER 1/28/1999 6:06PM 1

**While I was gone / Sue Miller.
Miller, Sue**

ISBN/ISSN: **0375401121 (alk**

Barcode: 80236656 Change BarCode Added To Collection: **1/28/1999**

Item Class: **ADULT** >> **Adult**

Location: >> Price: 24.00

Call Number: FIC MILLE Cost: 0.00

How Acquired: >>

Deactivate>

Circulation Info:

Last Out: **1/22/2001 3:35PM**

Last Renewed: Times Renewed:

Due date:

Checked In: **7/11/2003 2:06PM** YTD Circ: **31** LTD Circ: **31**

OK **Circulation History** **Trap Message** **Cancel** **Help**

CIRCLESS5-15e

Select the **Circulation History** button at the bottom of the screen (refer back to Circless5-9e).

The **Circulation History** screen appears for this item (see Circless5-9f, below).

CIRCLESS5-15f

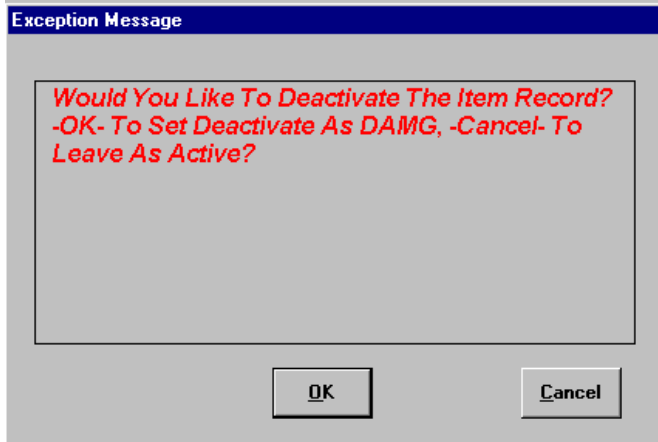
NOTE: The system automatically defaults to the price of the item (in this case \$24), as indicated in the **Amount To Charge For Damages** box on the **Circulation History** screen (refer back to Circless5-15f, above).

For a user’s reference, the system stores the last two patron circulations, and either patron listed may be billed (refer back to Circless5-15f, above). (In Circless5-15f, above, the second circulation patron’s name has been covered for confidentiality purposes; the first circulation patron’s name is an example and the name is contrived.)

To bill for the damages to this item, select the **Bill Damages To This Patron** button next to the appropriate patron (in the case of the example above, the patron is that of the “Last Circulation,” June Carter – refer back to Circless5-15f, above).

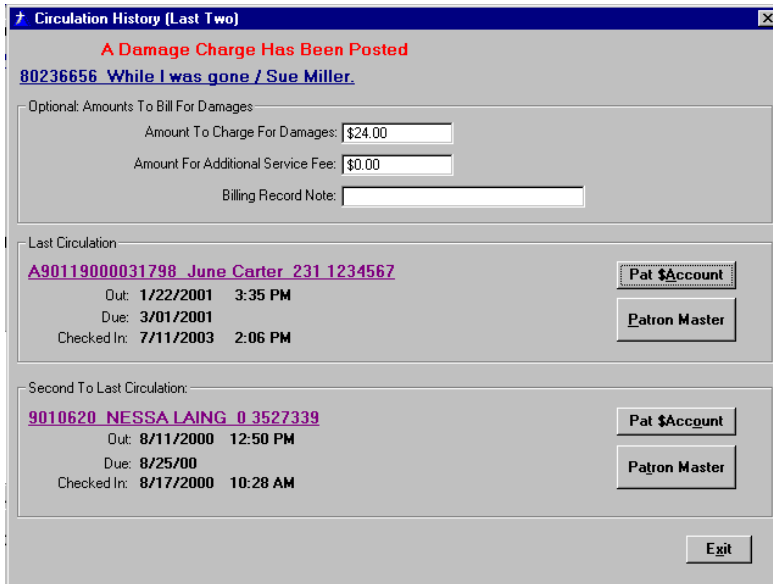
A message appears (Circless5-15g, below), asking whether the user wishes to:

- select deactivate and indicate the record as damaged (select the **OK** button)
- or
- leave record as “active” by selecting the Cancel button



CIRCLESS5-15g

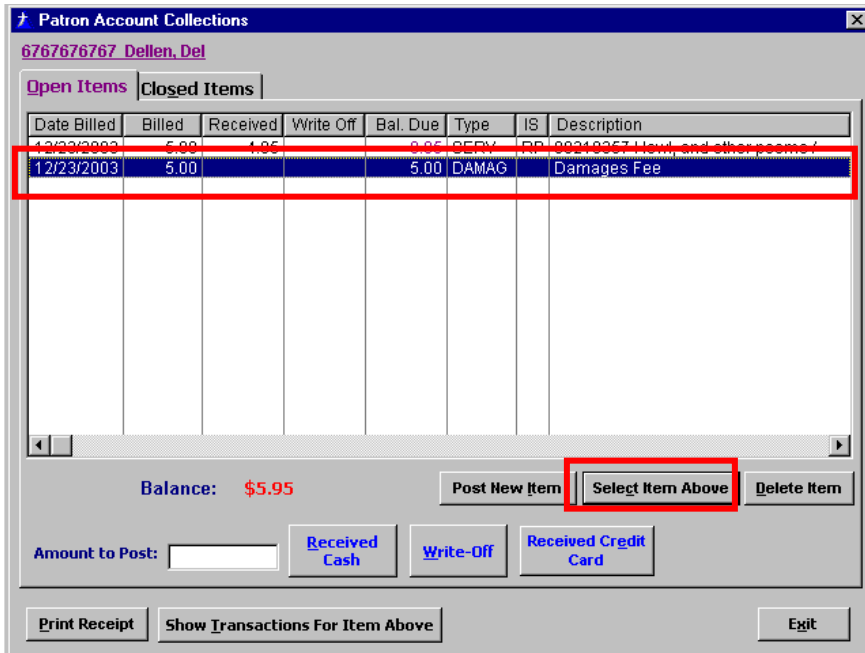
Either choice prompts the system to bill the patron and the **Circulation History** screen reappears (see Circless5-15i, below), with a notice in red letters at the top of the screen stating that “A Damage Charge Has Been Posted.”



CIRCLESS5-15i

Receiving Payment from a Patron in Response to a Bill for a Damaged Item

If a patron is waiting to pay for damages at the time he or she is billed by library staff, return to the patron's **Patron Account Collections** screen (see Circless5-16, below) to post the amount to be paid for the damaged item and to process the payment.



CIRCLESS5-16

With the mouse, highlight the open item in question, then choose the **Select Item Above** button (refer back to Circless5-16, above, where the **DAMAG** line item for \$5.00 has been highlighted).

Next, the **Changing a LB_PAC Record** screen appears (see Circless5-16a, below),

CIRCLESS5-16a

At this screen, type the amount to be paid in the **Enter Amount to Post** box – in this case, \$5.00 (refer back to Circless5-16a, above).

Next, select one of the Received buttons, either **Cash** or **Credit Card** (refer back to Circless5-16a, above).

Notice that the \$5.00 previously shown next to **Balance Due** area and in the **Enter Amount to Post** box are now gone (see Circless5-16b, below).

CIRCLESS5-16b

Select the **OK Update Record** button to process the change and update the patron's accounts record.

LibNet Circulation Manual

The system automatically returns to the **Patron Account Collections** screen for Del Dellen, and the damages charge is no longer there (see Circless5-16c, below).

Patron Account Collections

67676767 Dellen, Del

Open Items | Closed Items

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/23/2003	5.00	4.05		0.95	SERV	RP	80218357 Howl, and other poems /

Balance: \$0.95

Post New Item | Select Item Above | Delete Item

Amount to Post:

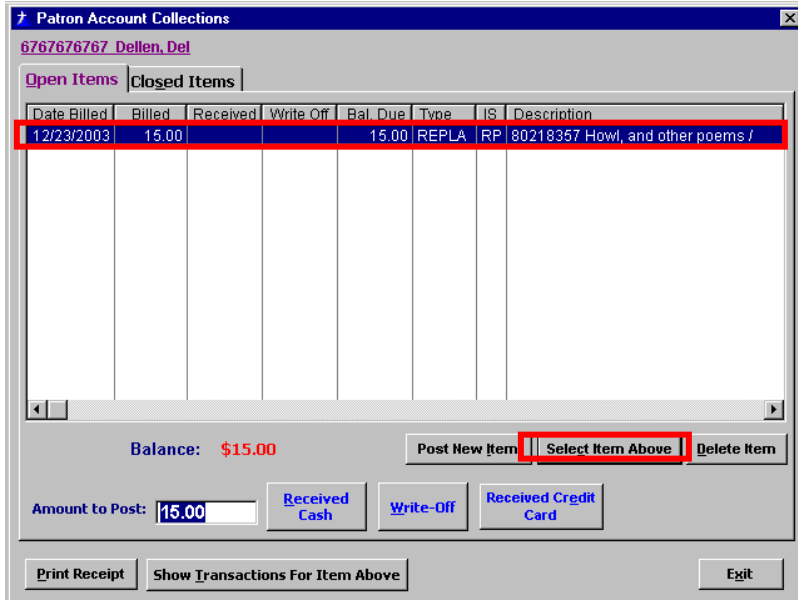
Received Cash | Write-Off | Received Credit Card

Print Receipt | Show Transactions For Item Above | Billing Reversal (Credit Item | Refund Item) | Exit

CIRCLESS5-16c

Writing Off Charges

The LibNet Circulation system makes it possible for library staff to write off all or a portion of amounts owed by a patron. An example of a “write-off” situation is when a patron insists that he or she already returned an item, or when an item such as a book is extremely old and library staff decide to write off part or all of the book replacement fee.



CIRCLESS5-17

For example, to write off the amount owed for the book, *Howl, and Other Poems*, highlight this title on Del Dellen’s **Patron Account Collections** screen, then choose the **Select Item Above** button at the bottom right of the screen (see Circless5-17, above).

The **Changing a LB_PAC Record** screen appears (see Circless5-17a, below).

CIRCLESS5-17a

At this screen, type the amount to be written off into the **Enter Amount to Post** field (refer back to Circless5-17a, above) and select the **Write-Off** key.

The system places the amount into the **Tot Wrt-Off** box or field, and the **Write-Off** key disappears from the screen (see Circless5-17b, below).

CIRCLESS5-17b

Select the **OK Update Record** button (refer back to Circless5-17b, above).

Because this item was a “Bill for Replacement” and because it was written off, after the **OK Update Record** button is selected, the system provides an **Exception Message** box, asking if the user wants to deactivate the item (**OK**) or to leave the item as active in the collection (**Cancel**) (see Circless5-17c, below).

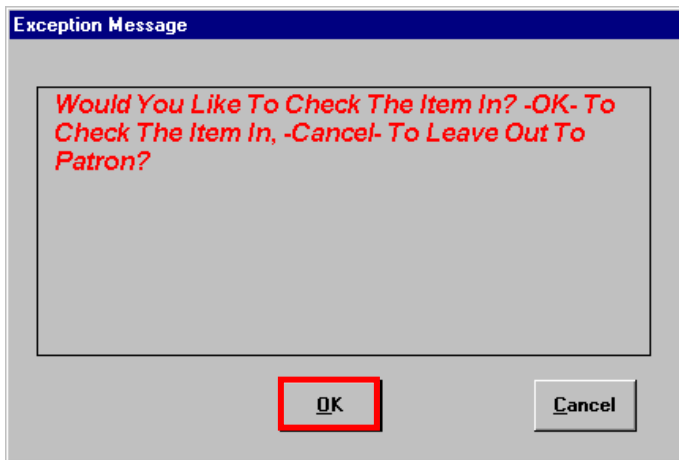


CIRCLESS5-17c

NOTE: If the damage to a returned item is extensive, the item should be deactivated.

After selecting **OK** to deactivate the item as “claimed returned” by the patron, a second **Exception Message** screen appears, asking whether staff will check in the item or leave it checked out to the patron (see Circless5-11e, below).

In the instance of this example, the item is checked in by selecting **OK**.



CIRCLESS5-17d

The system automatically returns to Del Dellen's **Patron Account Collections** screen, and the bill for replacement item is no longer on the screen, having been successfully written off.

Patron Account Collections

67676767 Dellen, Del

Open Items Closed Items

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description

Balance:

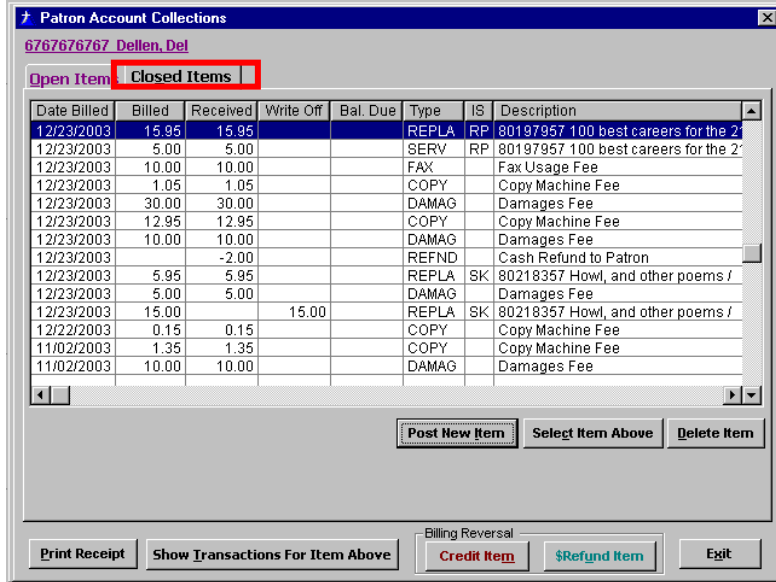
Post New Item Select Item Above Delete Item

Amount to Post: Received Cash Write-Off Received Credit Card

Print Receipt Show Transactions For Item Above Exit

CIRCLESS5-17e

NOTE: When a payment is entered into the system, the system automatically applies the total amount and closes individual items by indicating that they have been paid, starting from the oldest item to the most recent due. All “closed” items (see **Closed** tab at the top of the screen shown in Circless5-17f, below) are saved for future reference or refunds, and can be viewed under the **Closed Items** tab at the top of this screen (see Circless5-17f, below).



CIRCLESS5-17f

The system also automatically calculates and adds financial transactions, such as overdue fines, videotape rental fees, item replacement charges, etc. to a patron’s account.

Users also may manually bill patrons for any type of service fees such as photocopying, faxing, interlibrary loans, etc.

Finally, the system makes it possible for library staff to apply “credit on account” and item charge refunds to a patron’s account.

NOTE: When a Bill-R item is returned. The “check-in” program automatically writes off the replacement fee. This insures that a patron will not be billed for an item that he or she already has returned.

Other Patron Account Collections and Related Screen Functions

The screenshot shows a window titled "Patron Account Collections" for user "6767676767 Dellen, Del". It has two tabs: "Open Items" (selected) and "Closed Items". The table below shows two items:

Date Billed	Billed	Received	Write Off	Bal. Due	Type	IS	Description
12/24/2003	8.00			8.00	ODFIN		Overdue Fine (Returned)
12/24/2003	24.00			24.00	SERV		Service Processing Fee

At the bottom, a control panel includes:

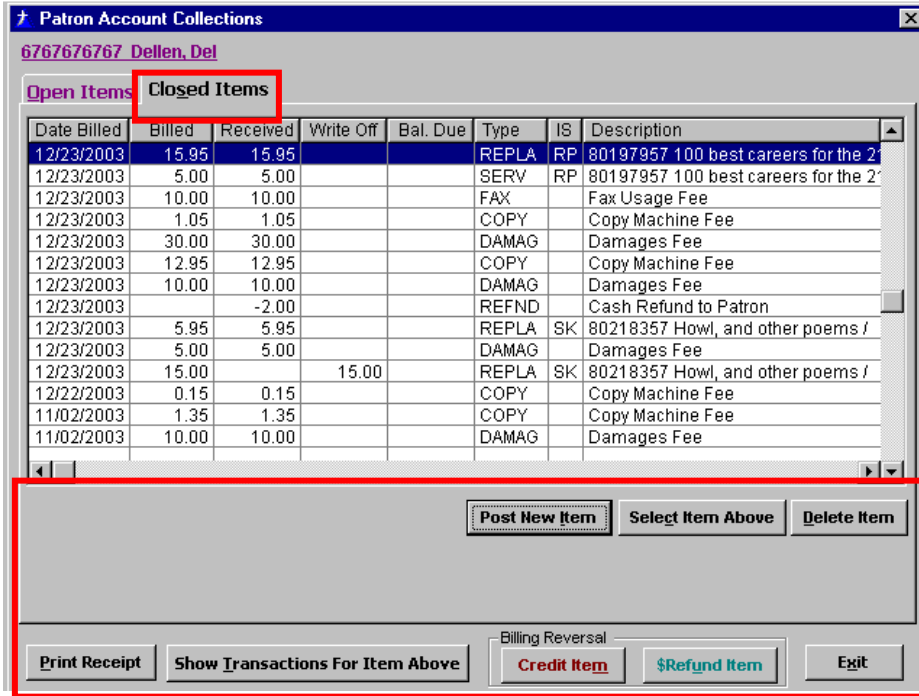
- Balance: \$32.00
- Buttons: Post New Item, Select Item Above, Delete Item
- Amount to Post: 32.00 (input field)
- Buttons: Received Cash, Write-Off, Received Credit Card
- Buttons: Print Receipt, Show Transactions For Item Above, Exit

CIRCLESS5-18

To summarize, using the buttons available on the bottom of the **Patron Account Collections** screen – **Open Items** tab (see Circless5-18, above), a user has the capability to:

- enter a total pay (or partial pay) amount in the **Enter Amount to Post** box (refer to Circless5-18, above); items are processed from oldest to newest
- post a new charge (**Post New Item** button)
- select an item from the list of those with charges on the screen (**Select Item Above** button)
- delete an item from the list of those with charges (**Delete Item** button)
- post an item as received (using one of the two **Received** buttons – **Cash** or **Credit Card**)
- post an item as a write-off (**Write-Off** button)
- print a receipt for a patron who has paid on his account and asks for one (**Print Receipt** button)
- review the history of the item shown on the screen (**Show Transactions For Item Above** button)

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Using the buttons available on the bottom of the **Patron Account Collections** screen – **Closed Items** tab (see Circless5-18, above), a user has the capabilities to:

- post a new charge (**Post New Item** button)
- select an item from the list of those with charges on the screen (**Select Item Above** button)
- delete an item from the list of those with charges (**Delete Item** button)
- print a receipt for a patron who has paid on his account and asks for one (**Print Receipt** button)
- review the history of the item shown on the screen (**Show Transactions For Item Above** button)
- credit an item (**Credit Item**)
- provide a refund for an item (**\$Refund Item**)

Final Notes

- If no replacement cost for an item is listed, then a user may enter one. A user may also override the posted costs and manually raise or lower the fees.
- The **Overdue Notice** feature of the system also changes the status of a book to **Bill-R** after a certain number of overdue notices have been sent to a patron, depending on the library's policy. When this happens, the system automatically posts the fee to the patron's account and changes the status of the item in the patron's accounts. The system also automatically sends out overdue notices to patrons.
- If a patron returns a **Bill-R** item, the replacement cost of that item can be **written off** from the patron's account using the Post as a **Write-Off** button. The patron may still be responsible, however, for the service fee for that item.

Lesson 6: Reserving Items

Introduction

It is normal procedure to reserve materials by catalog record. In doing this, all copies of a cataloged item are tracked by the system, and a patron receives the copy that becomes available first.

Circulation system users have the ability to select a particular copy of an item for reserve (**Select Single Barcode for Reserve**). This is useful for reserving a particular volume in a series or a particular issue of a magazine. When a particular copy of an item is reserved, only the selected holdings record is tracked by the system.

The circulation system stores each item's catalog information in a master catalog record (MARC record). Copy information is stored in separate holdings records. There is a separate holdings record for each copy of a particular catalog item. A catalog entry can have an unlimited number of copies.

Two types of reserve flags are used in the LibNet Circulation system:

- Reserve **Status** flags
- Reserve **Type** flags

Both types of flags are described below.

Reserve STATUS Flags

The **reserve status** flags are:

Blank: Normal status (system is waiting for an item to come in)

N: New reserve, not looked at by staff or the "print new reserves" report yet

S: A copy of a reserved item is on the Reserve shelf awaiting pickup by the patron

D: Reserve has been deleted and will be removed by the system

Reserve TYPE Flags

The **reserve type** flags are:

Blank: Local reserve

G: Intralibrary loan request from a member library **inside of** the shared LibNet system

I: Interlibrary loan request from a library **outside of** the shared LibNet system

W: Web reserve made via the Internet (IPAC)

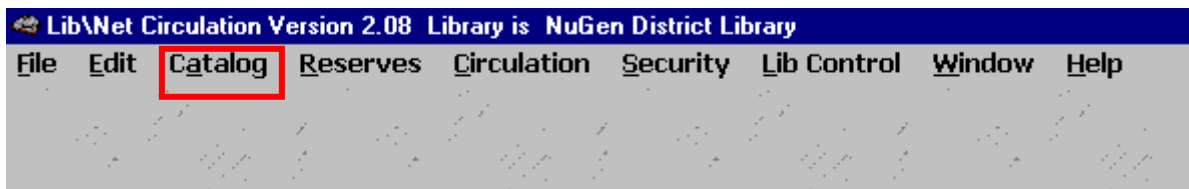
Placing an Item on Reserve

NOTE the difference between *Union* and *Local* catalog holdings: Before proceeding, it is necessary to understand the difference between “Union” and “Local” catalog holdings, as explained below.

Union Catalog: The Union Catalog is comprised of holdings from all libraries that share the system. With this catalog, a user can select reserves from other libraries. This system automatically is intra-library loaded.

Local Catalog: The Local Catalog is comprised of a library’s own holdings. A user only can select reserves from that library.

To place a reserve on an item, start by selecting the **Catalog** pull-down menu from the main **Circulation** menu (Circless6-1, below).



CIRCLESS6-1

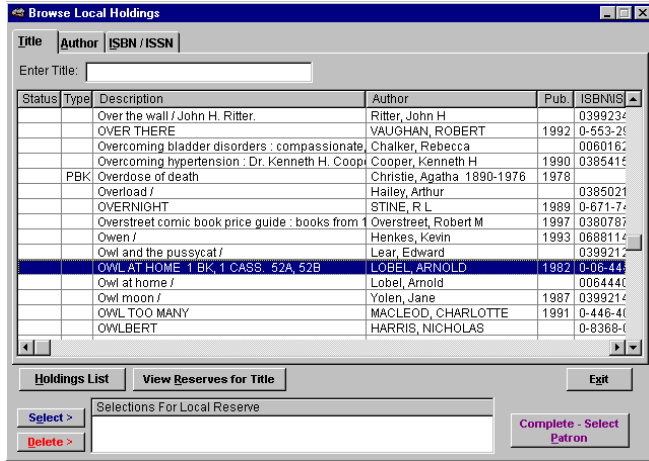
The following pull-down menu appears:

- Browse Local Catalog
- Browse Union Catalog
- Browse Local Catalog -- With Items
- Browse Union Catalog -- With Items
- Browse Local Holdings by Call Number
- Search Union Holdings by Call Number
- Holdings Record by BarCode
- Browse Deleted Holdings (by Item Barcode)

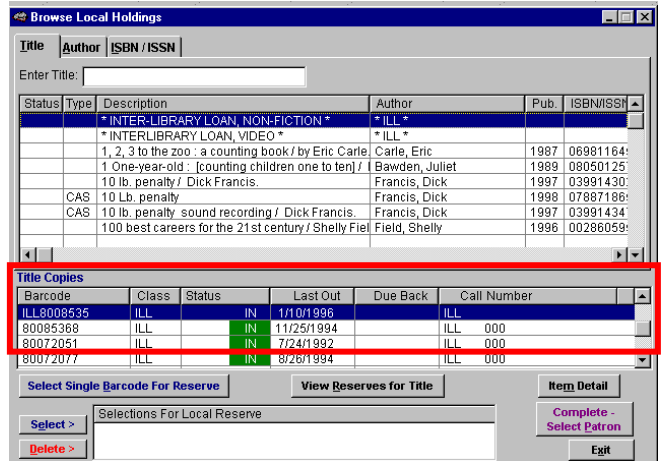
- Browse Deleted Holdings (by Title)

From the **Catalog** pull-down menu, either select **Browse Local Catalog** or **Browse Local Catalog – With Items**.

The **Browse Local Holdings** screen will appear – either without items on that screen (Circless6-2, below, left), or with items or “title copies” at the bottom of the screen (Circless6-2a, below, right).



CIRCLESS6-2

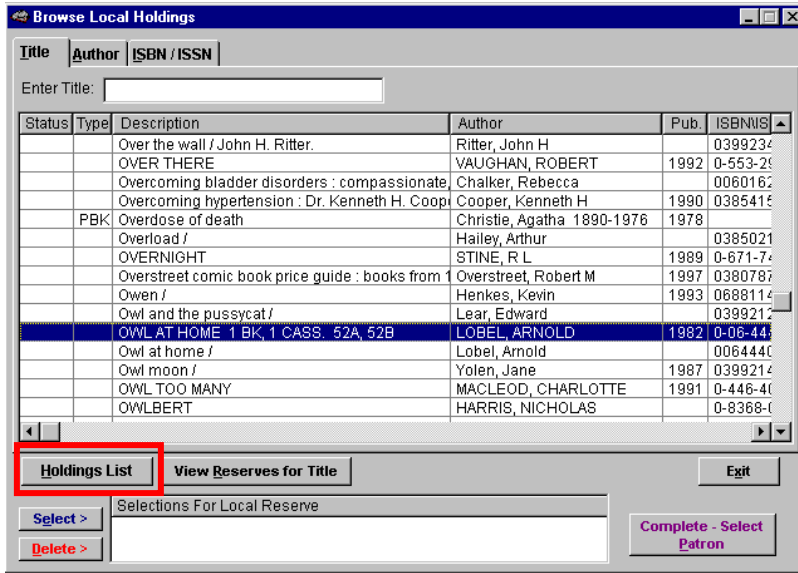


CIRCLESS6-2a

The difference between the standard **Browse Local Catalog** screen and the **Browse Local Catalog -- With Items** screen is that the **With Items** screen features a box of title copies (items) associated with the highlighted title shown on the same window (refer back to Circless6-2a, above, right).

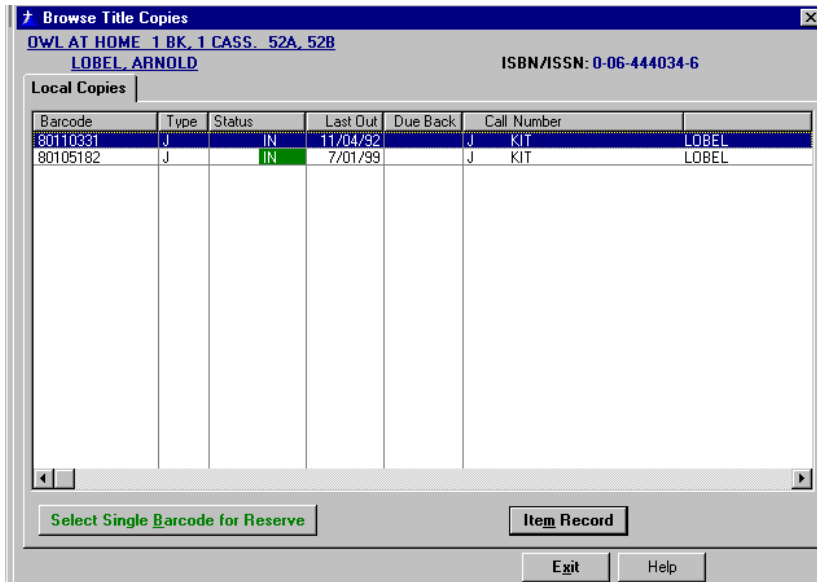
NOTE: Except for the difference noted above, both the **Browse Local Catalog** and **Browse Local Catalog With Items** screens feature the same buttons to be used for reserving items.

The standard **Browse Local Holdings** screen, displays holdings or items in a separate window. To access the **Browse Title Copies** screen and a list of holdings, highlight a title on the local holdings list (in this case, it is *Owl at Home* – refer to Circless6-2, below), then select the **Holdings List** button (see Circless6-2, below) at the bottom of the **Browse Local Holdings** screen.



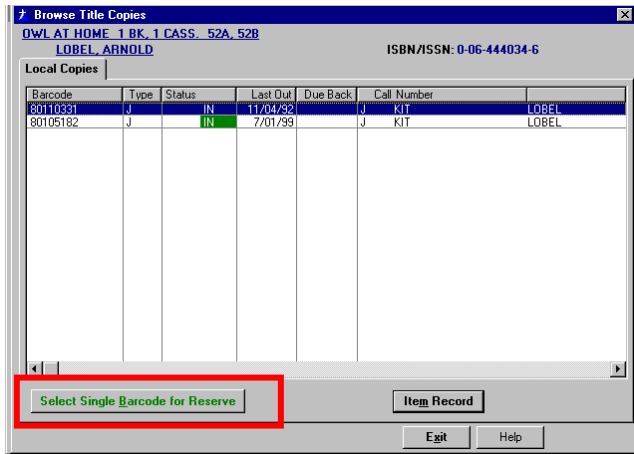
CIRCLESS6-2

Once the **Holdings List** button has been selected, the **Browse Title Copies** screen with a list of holdings appears (see Circless6-2c, below).

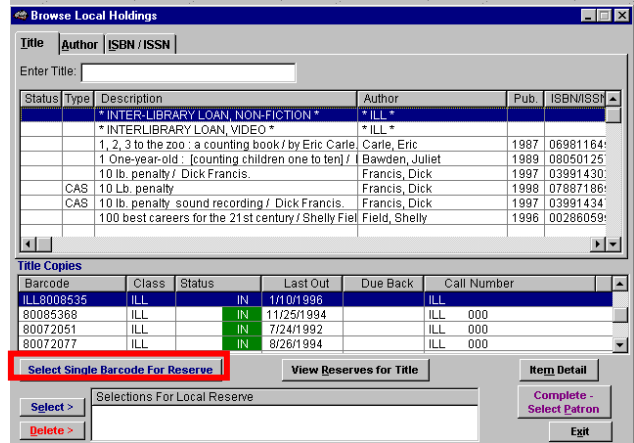


CIRCLESS6-2c

The **Select Single Barcode For Reserve** buttons on each **Browse** screen shown below (Circless6-2c, left and 6-2, right), can be used to select a particular copy of an item for reserve.

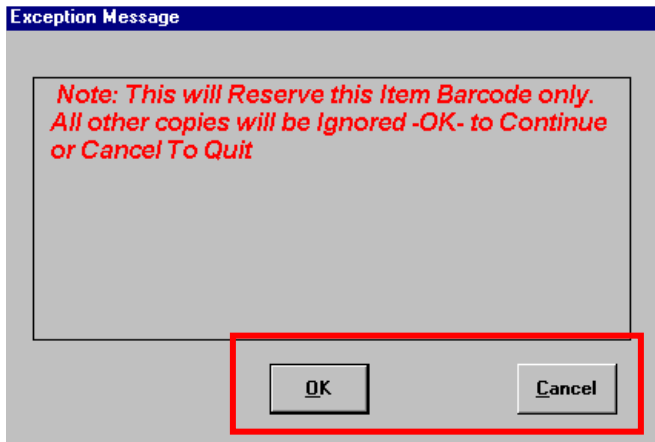


CIRCLESS6-2c



CIRCLESS6-2

For instance, when the **Select Single Barcode for Reserve** button is chosen from the **Browse Title Copies** screen (Circless6-2c above, left), then the following **Exception Message** appears (Circless6-2d, below).



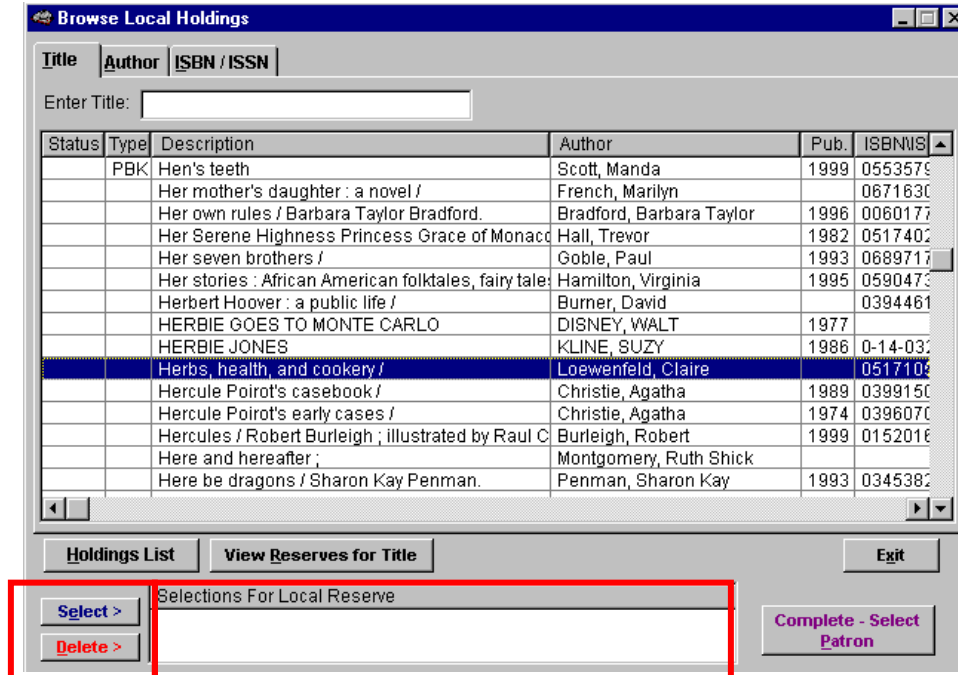
CIRCLESS6-2d

The options presented by the **Exception Message** is to select **OK** to reserve the item by barcode only, then all other copies will be ignored, or to select **Cancel**.

The ability to reserve a title copy for an item is useful when reserving a particular volume in a series or a particular issue of a magazine. In doing this, only the selected holdings record is tracked.

NOTE: At either one of the **Local Holdings** screens, a user can select an item for reserve by author, title, or Dewey Decimal number.

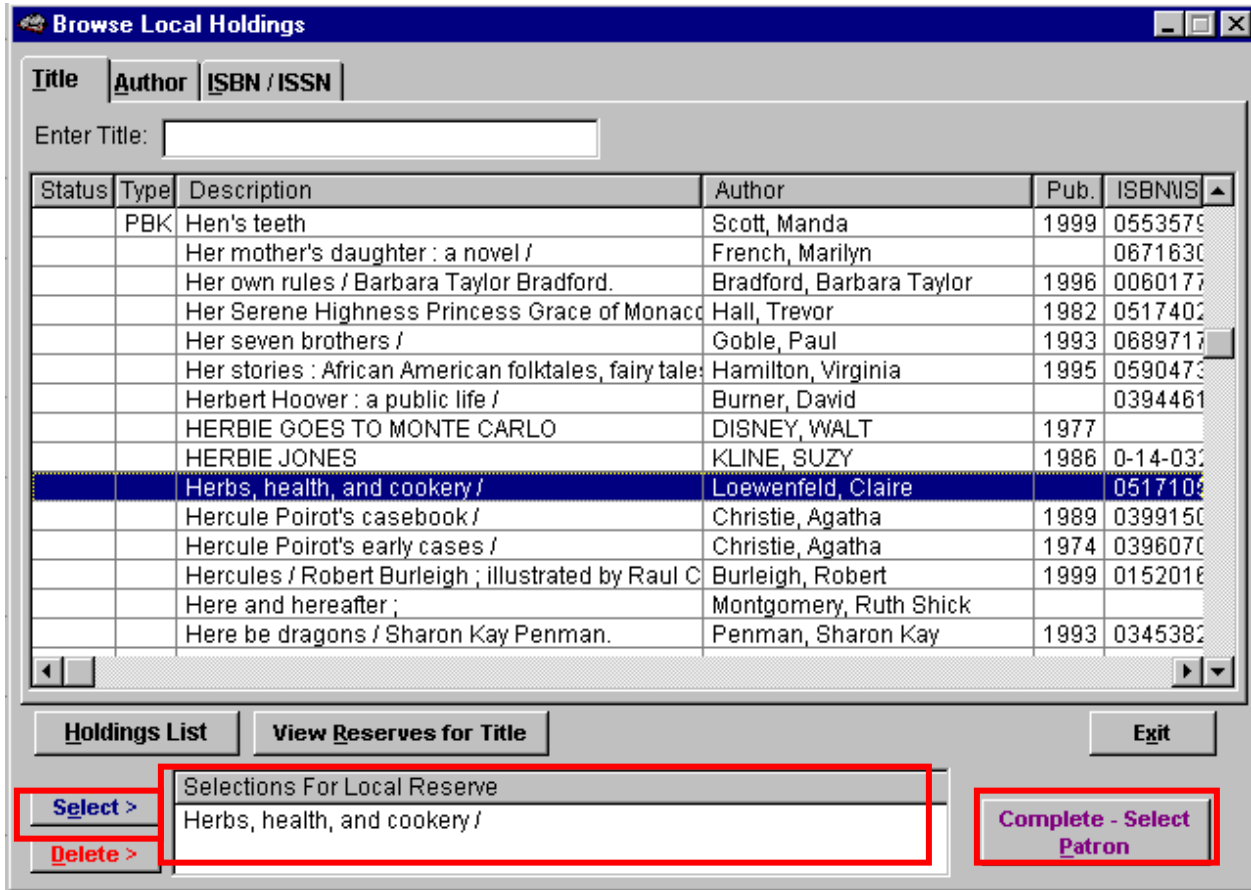
To reserve an item using the **Browse Local Holdings** screen, select the item that the patron wishes to reserve by highlighting that choice with the cursor. In this case, the book *Herbs, Health, and Cookery* has been selected (see Catless6-3, below).



CIRCLESS6-3

At the bottom of the screen (refer back to Circless6-3, above) is a box titled, **Selections For Local Reserve**, a queue for holding items to be reserved. To the left of this box are two buttons, labeled **Select** and **Delete**, which are used to select and delete reserve choices.

Choose the **Select** button, and the system places the book that was highlighted into the **Selections for Local Reserve** box (see Circless6-4, below).

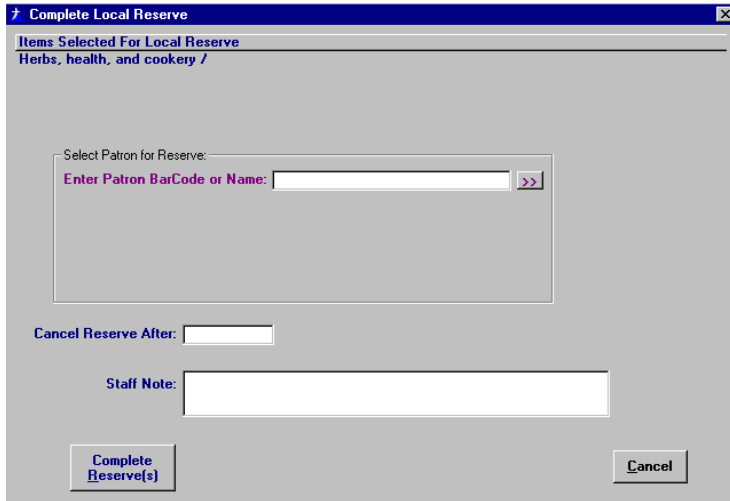


CIRCLESS6-4


NOTE: The **Selections for Local Reserve** box can hold an unlimited number of titles. Use the up and down arrows on the computer keyboard to view a list of titles that is longer than what the actual reserve window displays.

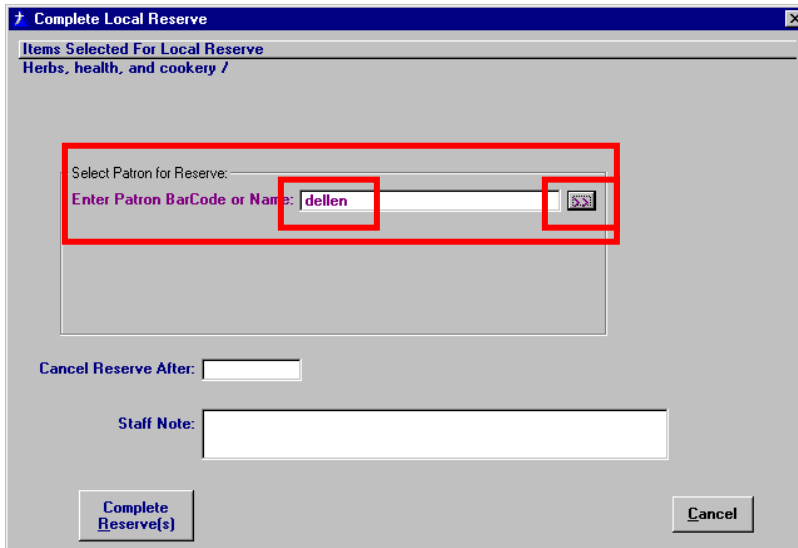
To continue the item reservation process, select the **Complete – Select Patron** button to the right of the **Selections For Local Reserve** box (refer back to Circless6-4, above).

The **Complete Local Reserve** screen will appear (Circless6-5, below).




CIRCLESS6-5

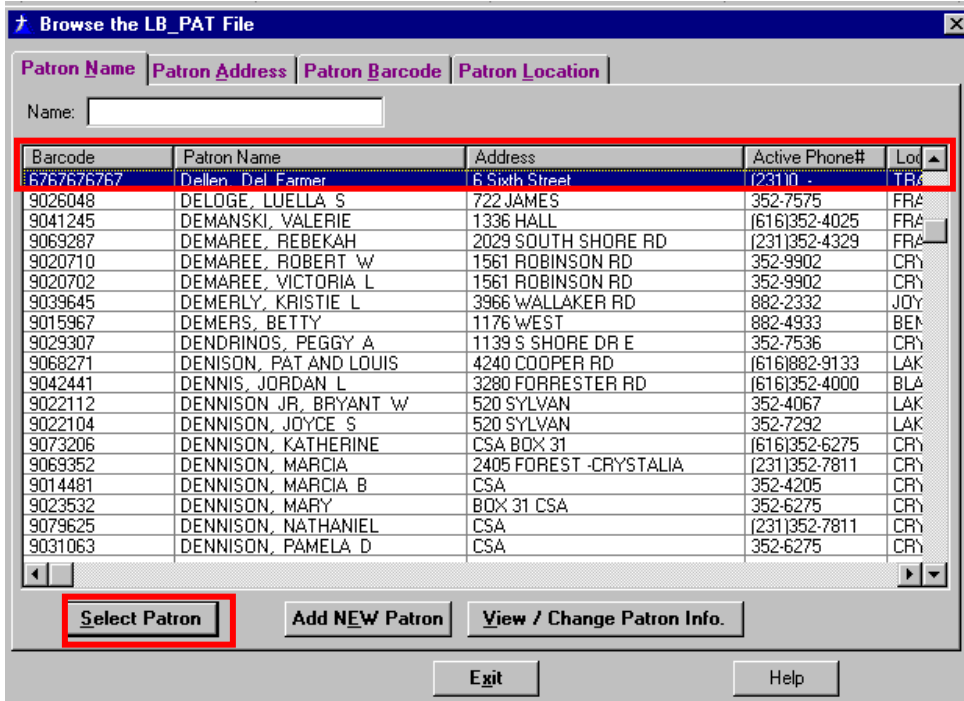
At this screen, either type in the patron's name or barcode in the **Enter Patron BarCode or Name** box (see Circless 6-6, below), or select the arrow  to the right of the box and scroll through a list of patron's names/barcodes until the patron is located in the system. In this case, the name "Dellen" has been typed into the box (see Circless6-6 below, again).



CIRCLESS6-6

After patron Dellen's name is typed into the box, select the **Enter** or **Tab** key on the computer keyboard, or select the arrow button to the right of the box  on the screen (refer back to Circless6-6, above).

The system will locate this patron's name, and it appears highlighted on the **Browse the LB_PAT File** screen (see Circless6-7, below).

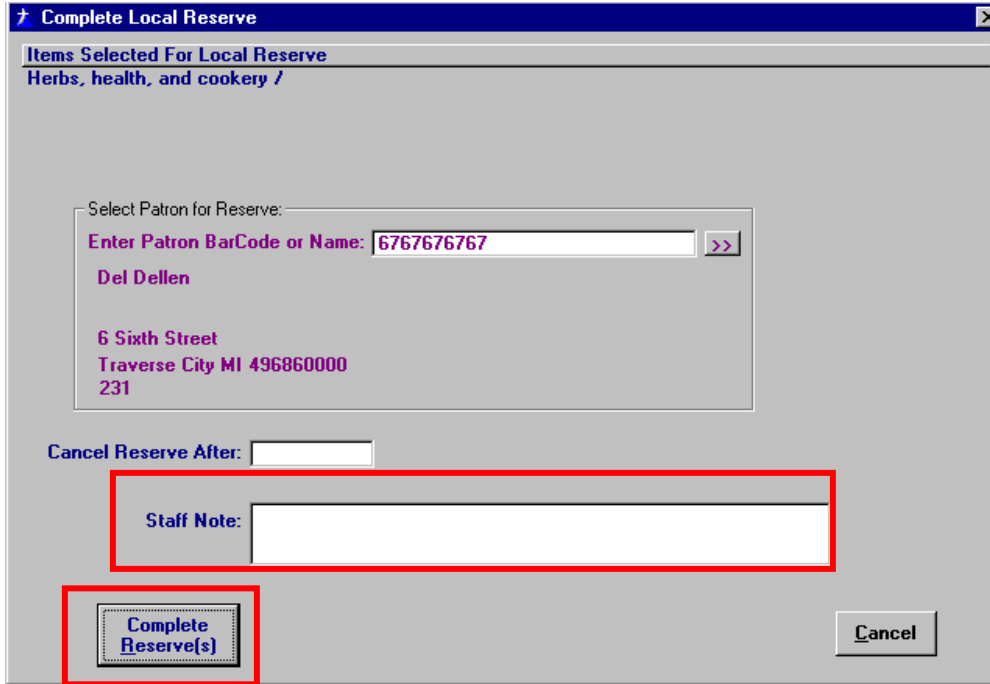


CIRCLESS6-7

Next, confirm the patron's (Del Farmer Dellen) selection by choosing the **Select Patron** button from the bottom of the screen (refer back to Circless6-7, above).

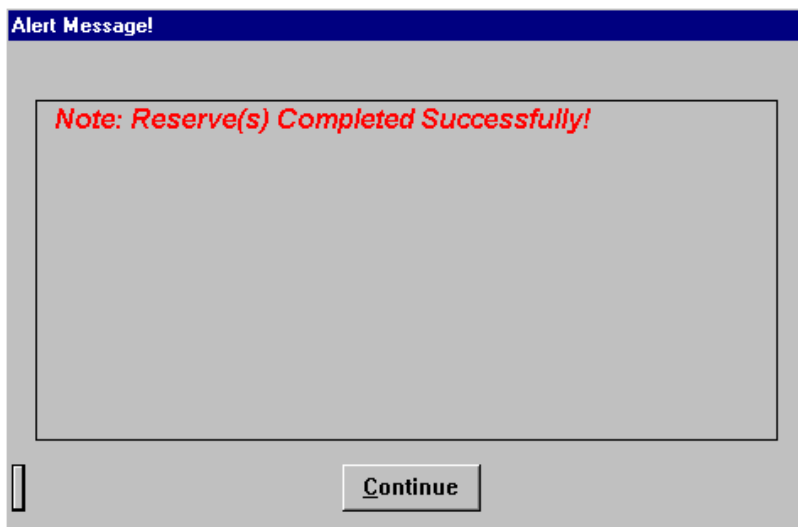
The **Complete Local Reserve** screen (also referred to as the “patron reserve form” -- see Circless6-8, below) appears. Complete the information on this form, such as the **Cancel Reserve After** box and any **Staff Note(s)**, then click on the **Complete Reserve(s)** button at the bottom of the screen (see Circless6-8, below).

NOTE: The **Staff Note** box (refer again to Circless6-8, above) is used by staff to enter a note, if necessary, such as: “When a book is ready, call the patron at the office, not at home.”



CIRCLESS6-8

An **Alert Message!** box appears, confirming that the reserve successfully has been completed (see Circless6-9, below).



CIRCLESS6-9

Alternate Groups Reserve Option

Another reserve option, “alternate” reserve, can be used when a patron wants only one reserved item out of several possible choices.

Example: A patron wants information from any source about using the Internet. The library has three titles in its collection about the Internet, but all of them are checked out, according to the system.

Options: With the regular reserve procedure, library staff could reserve one of the titles in hopes that this particular title would be returned first, **or** staff could reserve all three of the titles, even though the patron only wants one. Using the **Complete As Alternates** reserve option can solve this problem.

The screenshot shows a window titled "Complete Local Reserve". At the top, it lists "Items Selected For Local Reserve" with details: "*80110331* OWL AT HOME 1 BK, 1 CASS. 52A, 52B" and "Furniture treasury : (mostly of American origin) /". Below this is a section for "Select Patron for Reserve:" with a text input field containing "67676767" and a button with ">>". The patron's name "Del Dellen" and address "6 Sixth Street, Traverse City MI 496860000, 231" are displayed. There is a "Cancel Reserve After:" field and a "Staff Note:" text area. At the bottom, three buttons are visible: "Complete Reserve(s)", "Complete As Alternates" (which is highlighted with a red rectangular box), and "Cancel".

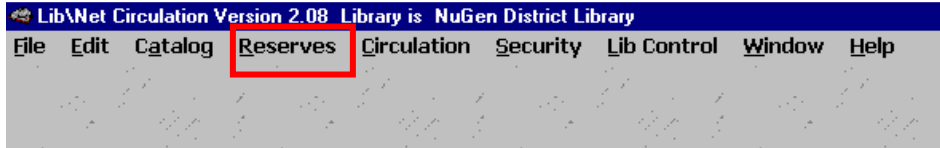
CIRCLESS6-9a

From the **Complete Local Reserve** screen (Circless6-9a, above), select the **Complete as Alternates** button, rather than the **Complete Reserve(s)** button. This allows the patron to reserve the entire **group** of items. Now, when any of the items become available, the system automatically will take the other two items off of reserve.

This option also helps the patron by reserving the first book that is returned, and helps the library (needlessly) avoid taking two other items out of circulation.

Reviewing Reserves

The **Reserves** pull-down menu at the main **Lib/Net Circulation** screen (see Circless2-1, below) features a variety of ways to view reserved items.



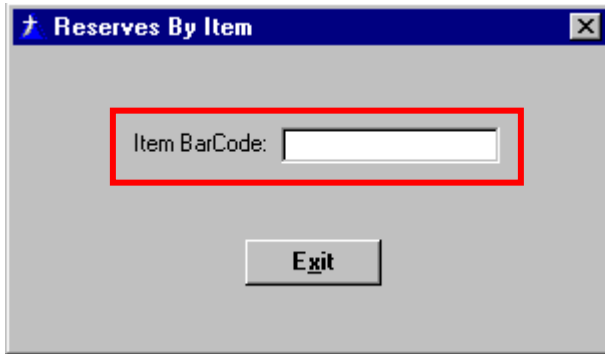
CIRCLESS6-1

The options provided by pulling down this menu are:

- Reserves by Holdings Barcode
- Reserves by Title
- Reserves by Selected Patron
- Reserves by Time "New/Hot Reserves"
- Inter-Library Loans
- ILL's by Selected Patron
- ILL Trigger Report

Reserves by Holdings Barcode

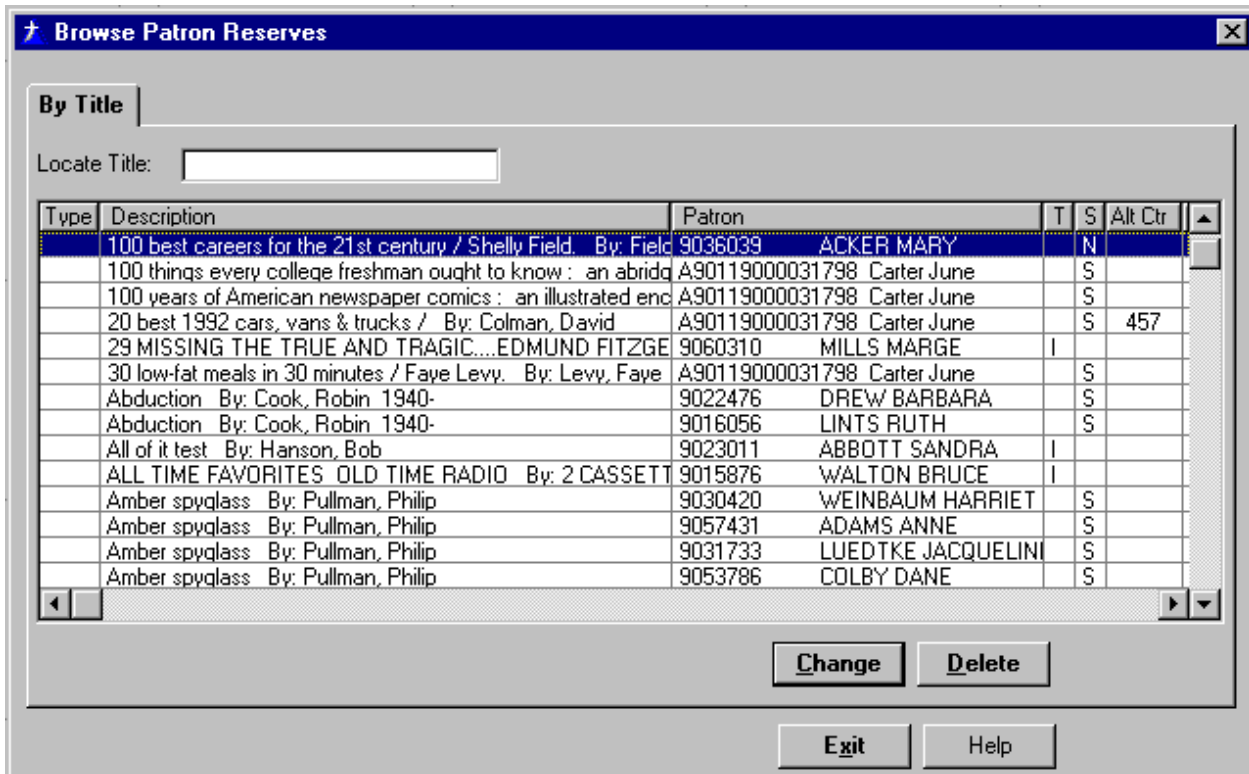
Select the **Reserves by Holdings Barcode** entry from the **Reserves** pull-down menu at the [opening LibNet screen](#), and the **Reserves by Item** screen appears (see Circless6-10, below). Here, a user enters the item barcode in the **Item Barcode** box.



CIRCLESS6-10

Reserves by Title

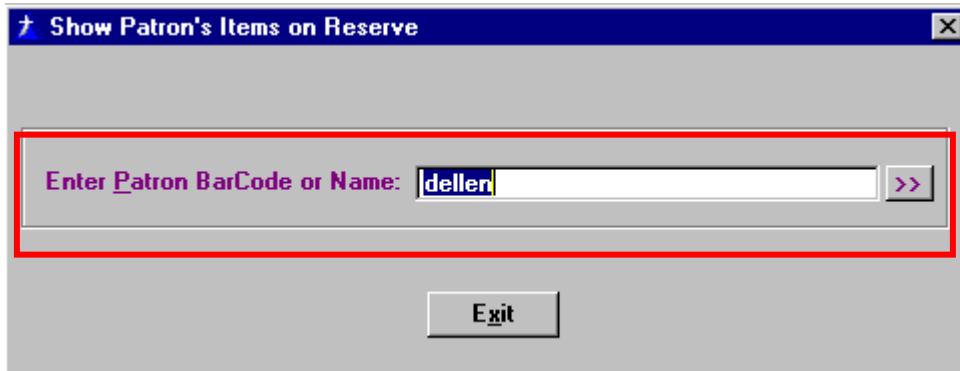
Select the **Reserves by Title** entry from the **Reserves** pull-down menu at the [opening LibNet screen](#), and the **Browse Patron Reserves (by Title)** screen appears (see Circless6-11, below).




CIRCLESS6-11

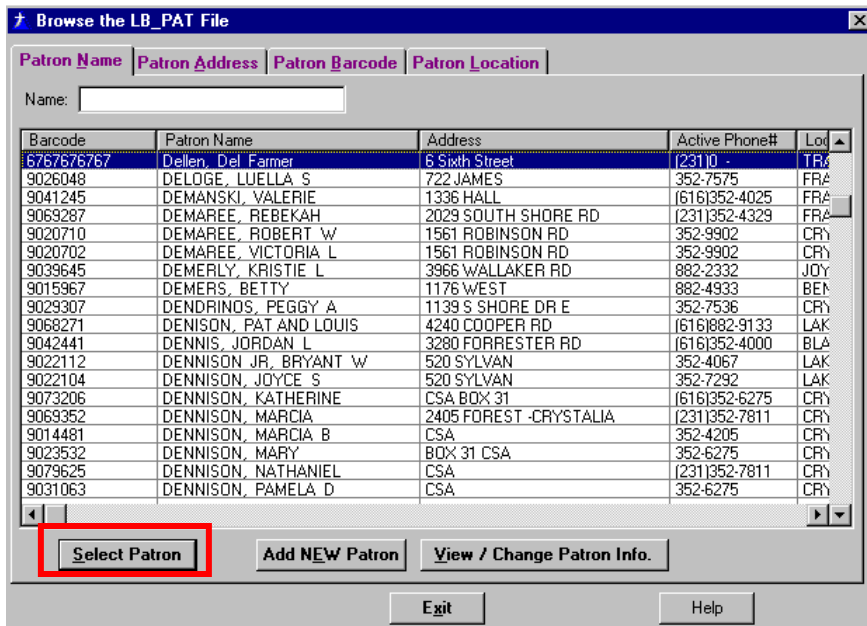
Reserves by Selected Patron

Select the **Reserves by Selected Patron** entry from the **Reserves** pull-down menu at the [opening LibNet screen](#), and the **Show Patron's Items on Reserve** screen appears (see Circless6-12, below).



CIRCLESS6-12

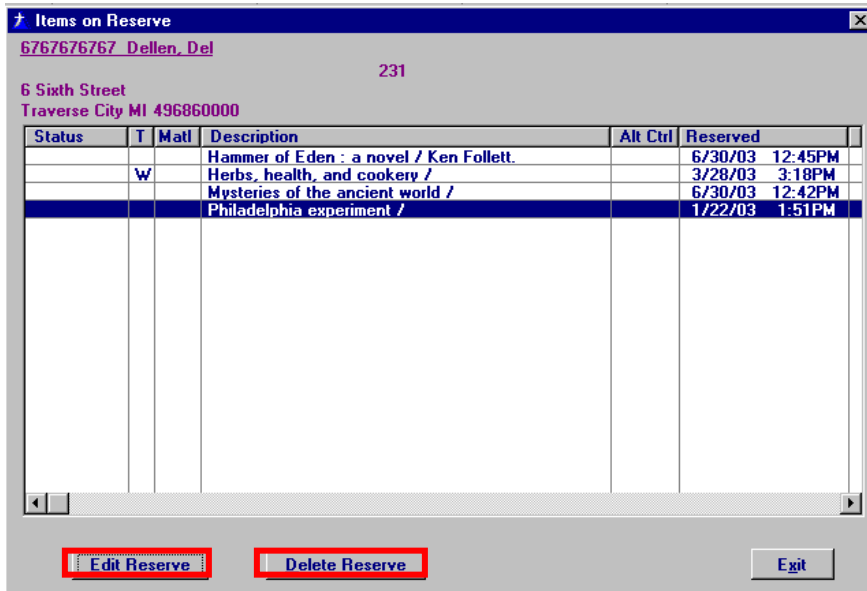
Type Del Farmer Dellen's last name into the **Enter Patron BarCode or Name** box on this screen, then select the arrow  to the right of that box to bring up the **Browse the LB_PAT File** screen (refer to 6-12a, below).



CIRCLESS6-12a

Choose the **Select Patron** button (in this case, Del Farmer Dellen) for the highlighted patron on this screen (refer back to Circless6-12a, above).

The **Items on Reserve** screen showing all of the items on reserve for Del Dellen appears (see Circless6-12b, below).

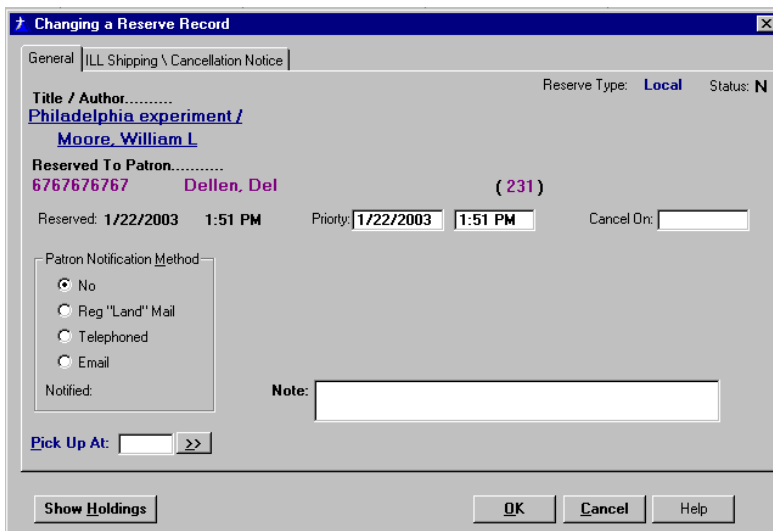


CIRCLESS6-12b

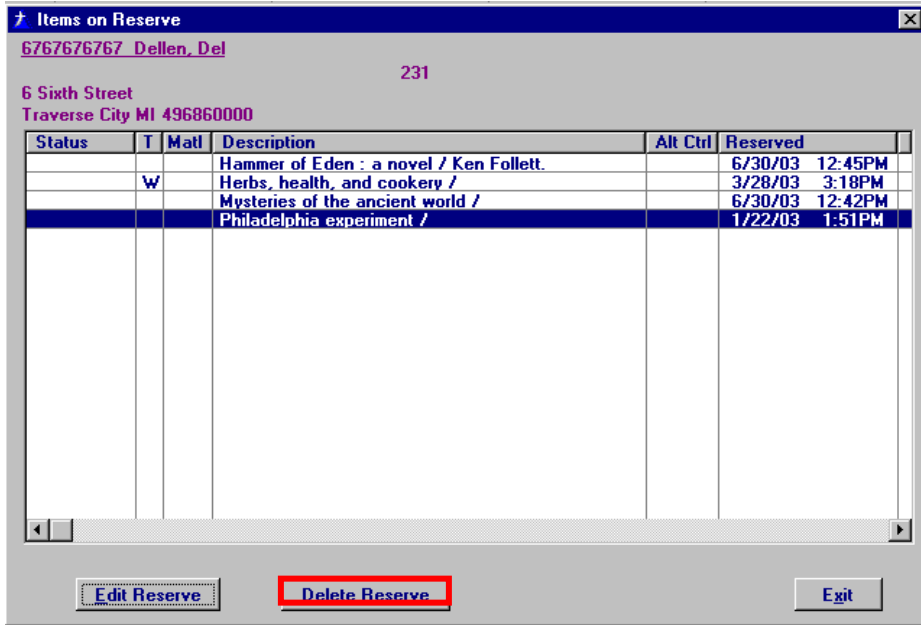
At this screen, a user may edit or delete any of the reserved holdings for Del Dellen by using the buttons at the bottom of the screen (refer back to Circless6-12b, above).

For example, to change information for the reserved title, *Philadelphia Experiment*, select that title with the mouse/cursor, as shown in Circless6-12b, above, then select the **Edit Reserve** button.

The **Edit Reserve** button leads to the **Changing a Reserve Record** screen (refer to Circless6-12c, below).

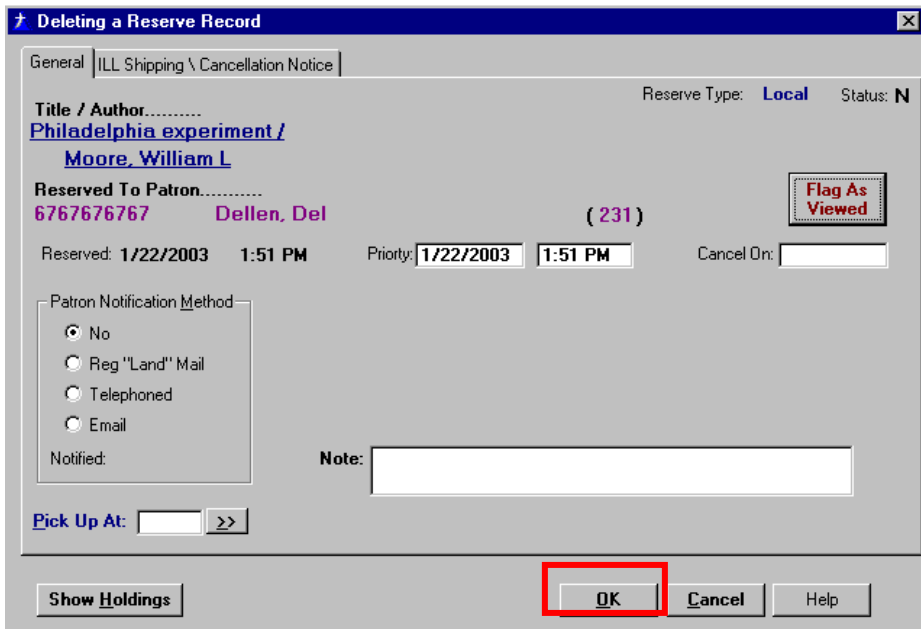


CIRCLESS6-12c



CIRCLESS6-12b

The **Delete Reserve** button (refer above to Circless6-12b) leads to the **Deleting a Reserve Record** screen (Circless6-12d, below).



CIRCLESS6-12d

To delete the reserved item from Del Dellen's record, simply select the **OK** key at the bottom of the screen (refer to Circless6-12d, above).

LibNet Circulation Manual

The reserve record for *Philadelphia Experiment* has been removed from the list of items on reserve for Del Dellen (see Circless6-12e, below).

Items on Reserve

6767676767 Dellen, Del 231

6 Sixth Street
Traverse City MI 496860000

Status	T	Matl	Description	Alt Ctrl	Reserved
			Hammer of Eden : a novel / Ken Follett.		6/30/03 12:45PM
	W		Herbs, health, and cookery /		3/28/03 3:18PM
			Mysteries of the ancient world /		6/30/03 12:42PM

Edit Reserve Delete Reserve Exit

Reserves by Time “New/Hot Reserves”

When the **Reserves by Time “New/Hot Reserves”** entry is selected from the **Reserves** pull-down menu, the **Browse New Reserves** screen appears (see Circless6-13, below). Notice that the newest title showing on this screen is *Herbs, health, and cookery* (refer to Circless6-13, below again).

Browse New Reserves

New Reserves By Time of Reserve

Reserves Searched: 366
Records Retrieved: 1

Date	Time	Description	Author	T	S	Patron
3/28/03	3:18PM	Herbs, health, and cookery /	Loewenfeld, Claire	W	N	6767676767 Del Fa

Show All New Reserves

View \ Change Delete

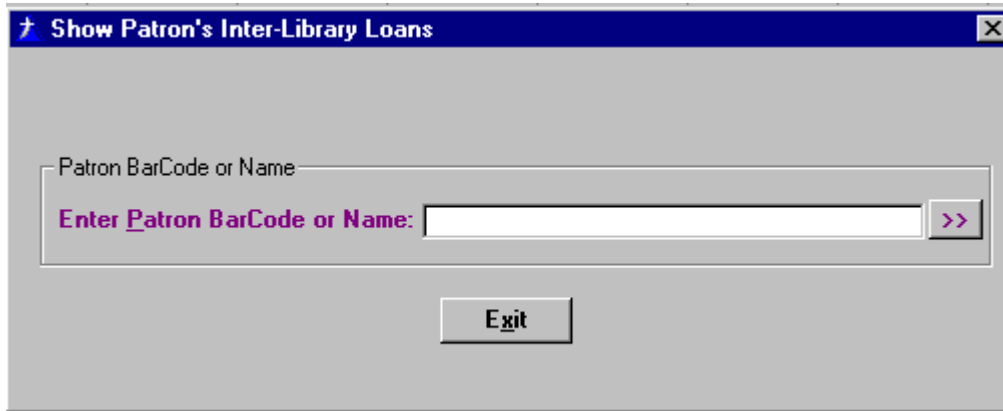
Exit

CIRCLESS6-13

Interlibrary Loans (ILLs) by Selected Patron

Choose the **ILL's by Selected Patron** menu entry from the **Reserves** pull-down menu at the [opening LibNet screen](#), and the **Show Patron's Inter-Library Loans** screen appears (see Circless6-15, below).

NOTE: See Chapter 8: Interlibrary Loan (ILL) Processing for a full description of how to use the interlibrary loan functions in the LibNet Circulation system.



Patron BarCode or Name

Enter Patron BarCode or Name: >>

Exit

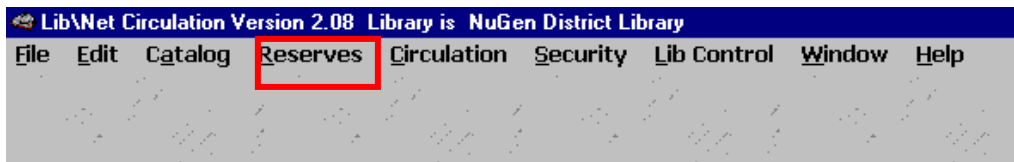
CIRCLESS6-15

Deleting Reserves

The **Lib/Net** system automatically deletes a reserved item when the patron who reserved the item checks it out.

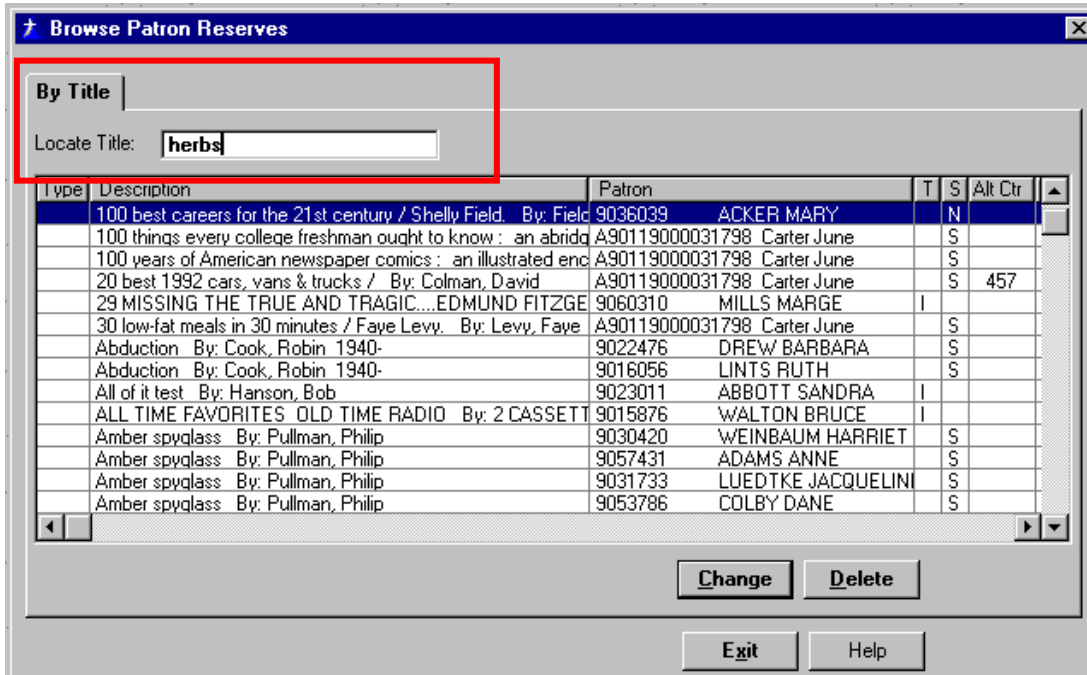
However, if a patron reserves an item, then sends a different patron back to the library to check it out instead of using his or her own library card, the reserve is not deleted because the reserve “path” leads to the original patron, not the person who is sent to check it out. In such a case, the system displays a message screen to notify the user that the patron who is checking out the item is NOT next in line for that reserved item.

A user can override this message, but the way to handle such a situation as described above (when a patron other than the patron who made the reserve checks out the book for the patron who reserved the book) is to select one of the search options from the **Reserves** pull-down menu (such as **Reserves by Holdings Barcode**, **Reserves by Title**, **Reserves by Selected Patron**, or **Hot Reserves**) at the main **LibNet Circulation** menu (see Circless 6-1, below). Then, manually delete that reserved item.



CIRCLESS6-1

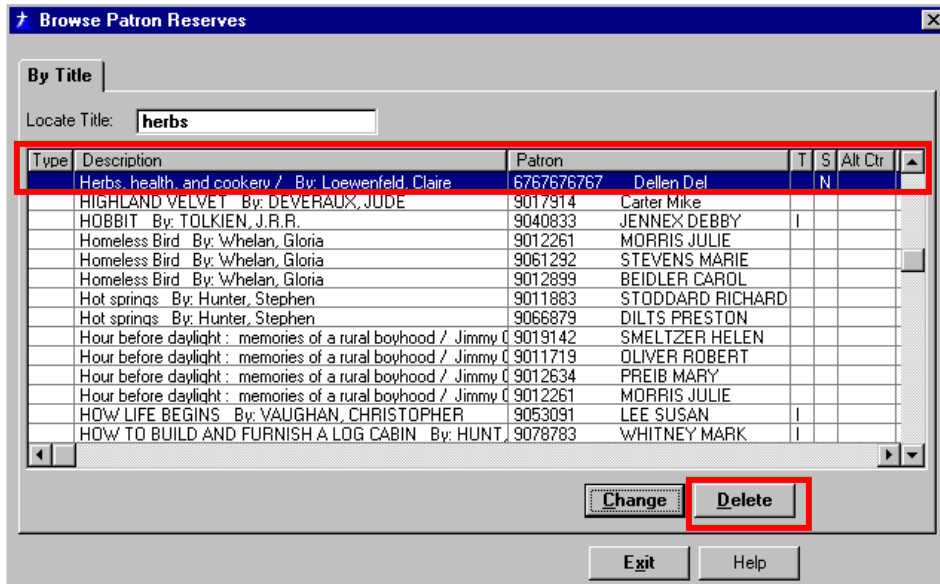
Select the **Reserves by Title** pull-down menu entry, and the **Browse Patron Reserves** screen appears. Type the first word of the title of the item (in this instance, it is “herbs” – see Circless6-16, below), in the **Locate Title** box at the top of the screen (see Circless6-16, below).



CIRCLESS6-16

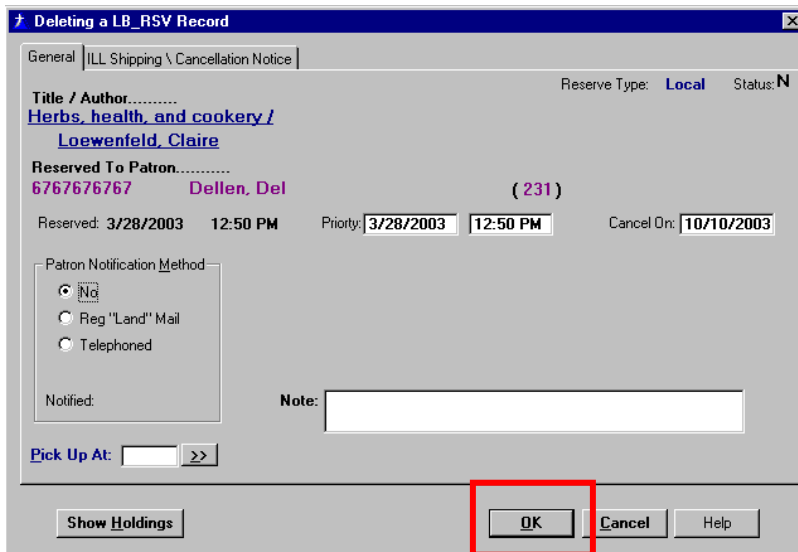
To process the search, either select the **Tab** key, or the **Enter** key on the computer keyboard.

Once the **Tab** or **Enter** key has been selected, the title of the item (or the closest title to it in the system) for which the search is being conducted (in this case, *Herbs, Health, and Cookery*) appears, highlighted in blue, on the **Browse Patron Reserves** screen (see Circless6-17, below).



CIRCLESS6-17

To delete this reserve title from the **Browse Patron Reserves** screen, select the **Delete** button at the bottom of the screen (refer back to Circless6-17, above), and the **Deleting a LB_RSV Record** screen appears (see Circless6-18, below).

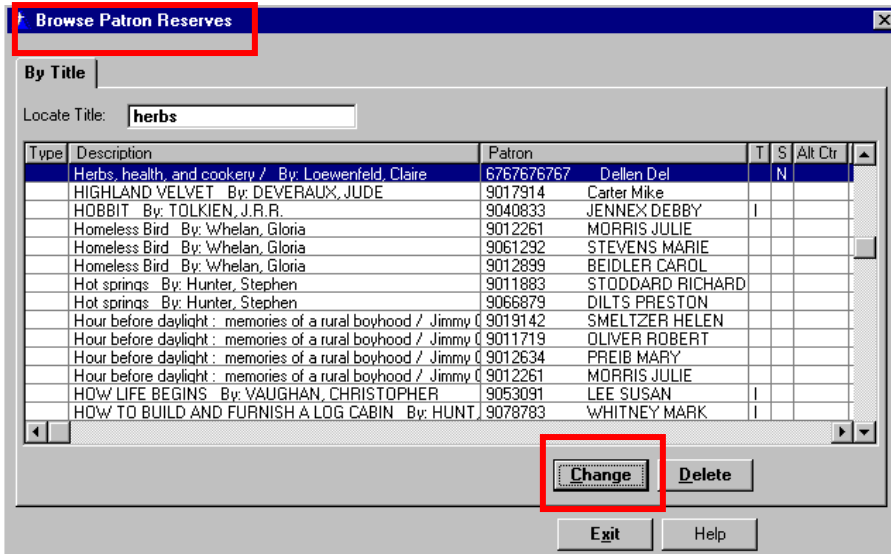


CIRCLESS6-18

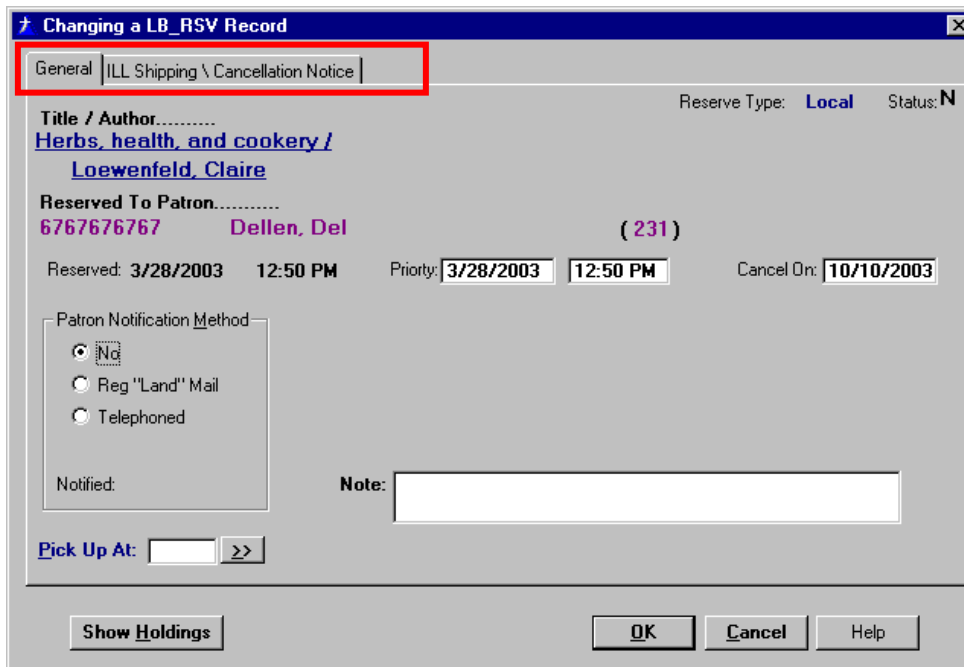
Select the **OK** button (see Circless6-18, above) to manually delete the record, and the system automatically returns to the **Browse Patron Reserves** screen, minus this reserve.

Changing a Reserve Record

To **change** a reserve record, with the mouse, highlight/select a title on the **Browse Patron Reserves** screen (see Circless6-17, below), then select the **Enter** key on the computer keyboard, or the **Change** button at the bottom of the screen (Circless6-17) to go to the reserve change form (known as the **Changing a LB_RSV Record** screen -- see Circless 6-19, below),



CIRCLESS6-17



CIRCLESS6-19

At this screen, a user can conduct any of the following functions, and make changes using any of them.

- Update the system to show that a reserved item is available to be picked up.
- Show where the patron who has reserved the item can pick it up (see **Patron Notification Method** list on left of screen with circles to be checked for “No”, “Reg ‘Land’ Mail”, and “Telephoned” in Circless6-19, below).
- Select how the patron will be notified that the reserve is in (see **Pick Up At** box with arrow in Circless6-19, below).
- Change the date and time (see **Priority** boxes in middle of form, Circless6-19, below).
- Change the cancellation date (see **Cancel On** box in middle of form, Circless6-19, below).
- If an interlibrary loan, make a shipping or cancellation notice (see ILL Shipping Cancellation Notice tab at top of screen, Circless6-19, below).
- Show a list of items associated with a title (see **Show Holdings** key at the bottom left of form, Circless6-19, below, which brings up the **Browse Title** screen, Circless6-20, below) – can be used to see if any items will become available soon.

LibNet Circulation Manual

Changing a LB_RSV Record

General | ILL Shipping \ Cancellation Notice | Reserve Type: Local Status: N

Title / Author.....
Herbs, health, and cookery /
Loewenfeld, Claire

Reserved To Patron.....
6767676767 Dellen, Del (231)

Reserved: 3/28/2003 12:50 PM Priority: 3/28/2003 12:50 PM Cancel On: 10/10/2003

Patron Notification Method:
 No
 Reg "Land" Mail
 Telephoned

Notified: Note:

Pick Up At: >>

Show Holdings OK Cancel Help

CIRCLESS6-19

Browse Title Copies

Herbs, health, and cookery /
Loewenfeld, Claire ISBN/ISSN: 0517105659

Local Copies

Barcode	Type	Status	Last Out	Due Back	Call Number	
80238844	ADULT	IN			005.44	RATHB

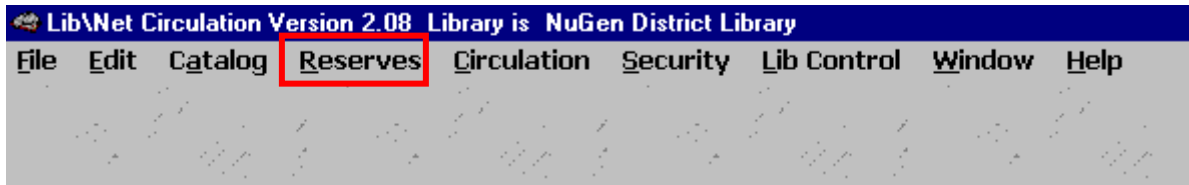
Exit Help

CIRCLESS6-20

Processing Items on Reserve

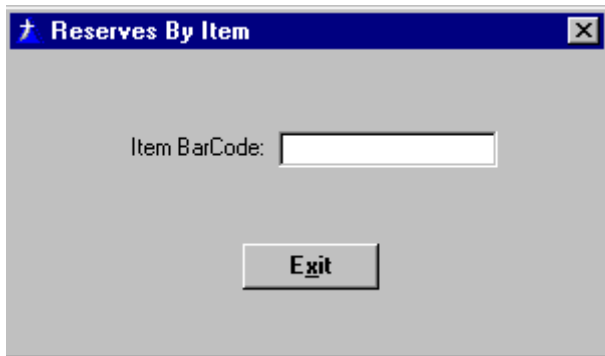
During the check-in process, items on reserve are flagged by the system. Typically, library staff set such items aside to process or handle later, such as notifying the patron that a reserve is ready to be picked up, etc.

To process a stack of reserved items, at the main **LibNet Circulation** screen (see Circless6-1, below), select the **Reserves** pull-down menu, then the **Reserves by Holding Barcode** entry.



CIRCLESS6-1

The **Reserves by Item** screen appears (see Circless6-21, below).



CIRCLESS6-21

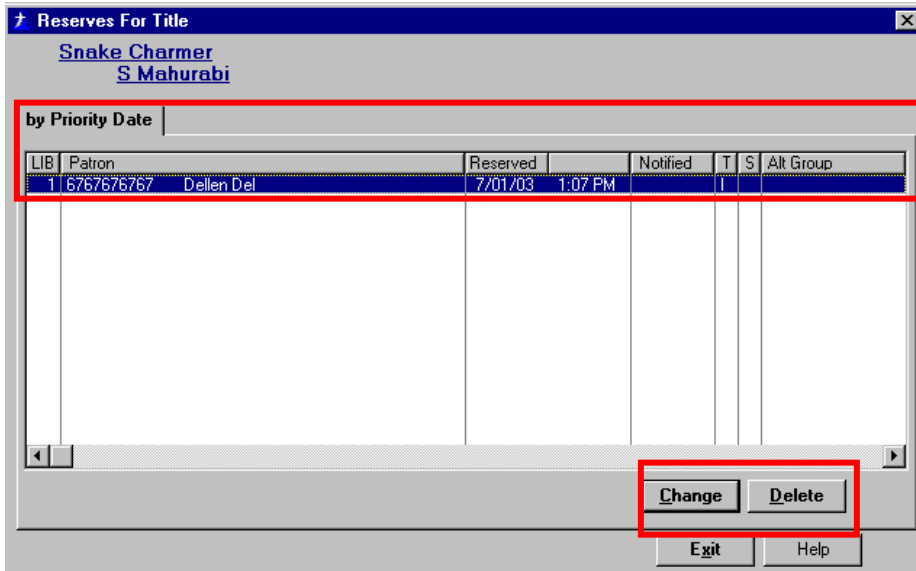
Scan the barcode of the reserved item or type it into the **Item BarCode** box on this screen (see Circless6-21a, below), then select the **Enter** key on the computer keyboard.



CIRCLESS6-21a

A list of patrons currently waiting for the item listed appears (see Circless6-21b, below) on the **Reserves For Title** screen. In the instance of the screen shown below, the patron who has reserved the title is Del Dellen and the title reserved is *Snake Charmer*.

NOTE: If the list features more than one patron, they are listed in order of priority with the oldest reserve listed first.

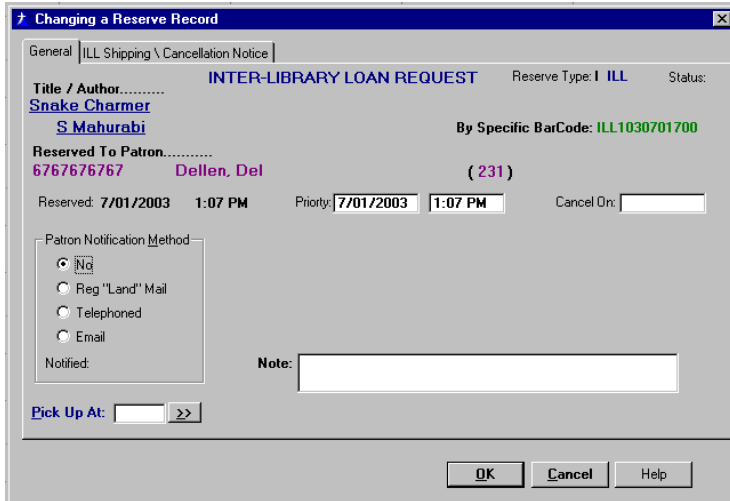


CIRCLESS6-21b

At this screen, the reserve records for patrons who have reserved the title can be changed or deleted, using the buttons at the bottom of the screen (refer back to Circless6-21b, above).

To change a record, highlight a record on the list, such as the one shown previously in Circless6-21b, and select the **Change** button.

The **Changing a Reserve Record** screen appears (see Circless6-21c, below).



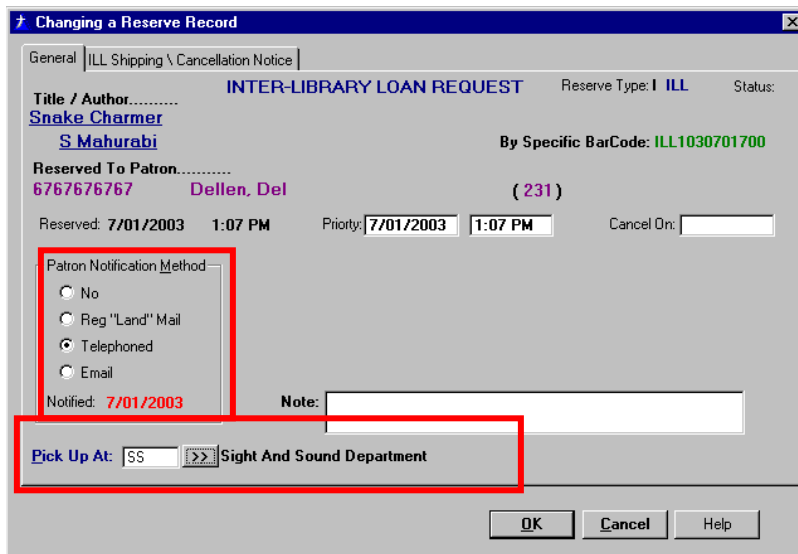
CIRCLESS6-21c

On the left side of this screen is the **Patron Notification Method** list of four selections:

- No
- Reg. “Land” Mail
- Telephoned
- Email

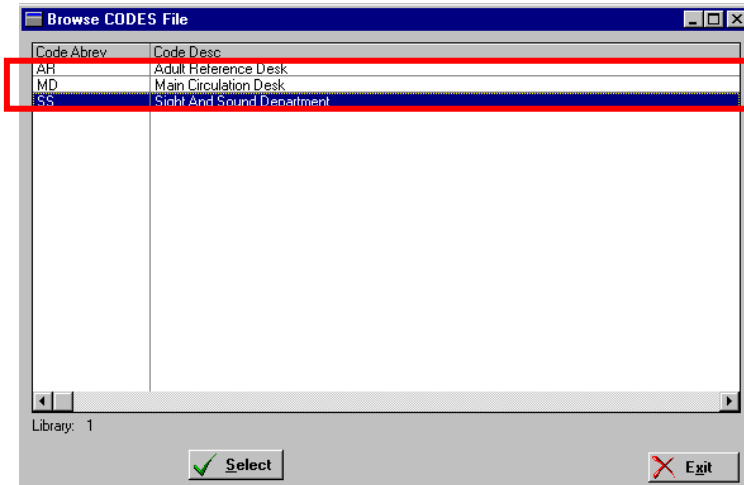
With the mouse, click on the circle next to the selection to indicate whether the patron will be notified by mail, telephone, or e-mail, or “No” for not at all (see Circless6-21d, below).

NOTE: An “Email” option only appears on the **Patron Notification Method** list if the patron’s record has an e-mail entry on it in the e-mail address field. Then, place the cursor in the box to the right of the words, “Pick Up At,” and a pull-down menu of selections for pickup locations appears on **Browse CODES File** screen.



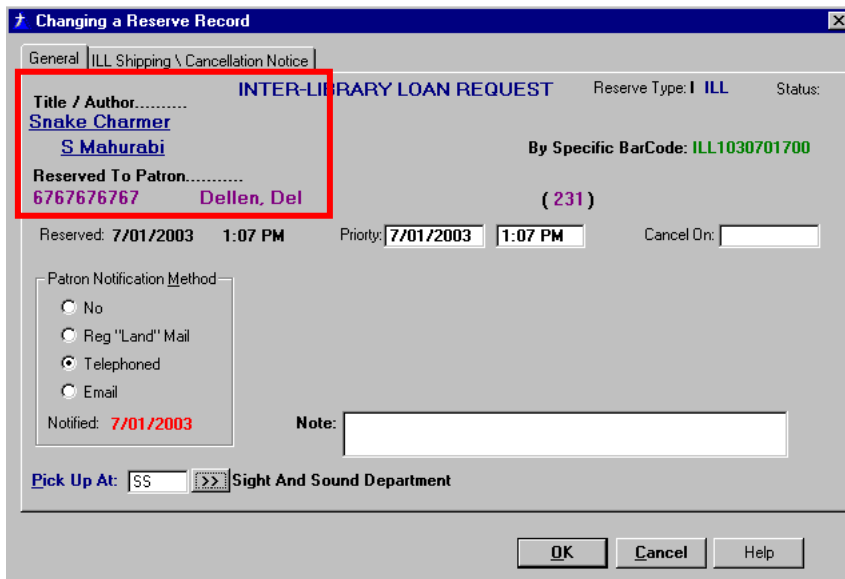
CIRCLESS6-21d

In the case of this example, the **Sight and Sound Department** is the pickup location (see Circless6-21e, below).



CIRCLESS6-21e

Click the mouse on the **Select** button at the bottom of the screen, and the changed interlibrary loan record for *Snake Charmer*, reserved by Del Dellen, looks like this (see Circless6-21f, below).

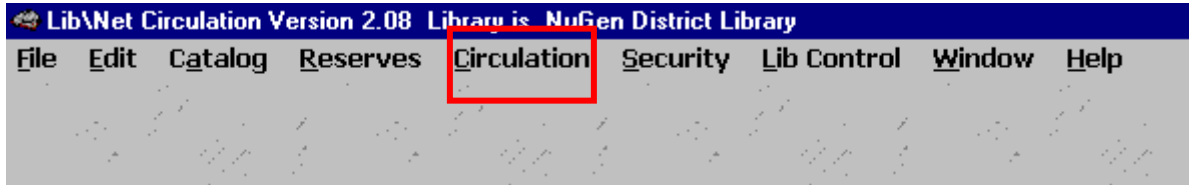


CIRCLESS6-21f

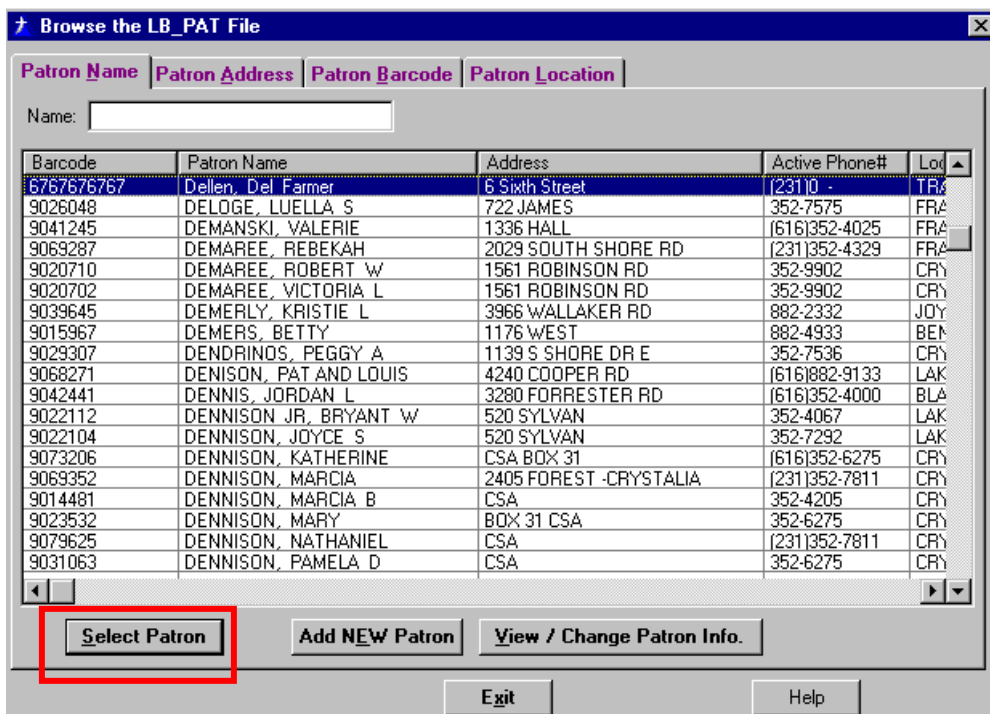
Once this process has been completed for an item, place the item at the proper pick-up location, and proceed with the rest of the reserved items.

Checking Reserves Using the Patron Checkout Screen

A patron's reserves also can be accessed from the **Check Out** screen. To check the reserves for a particular patron, select **Circulation** at the opening **LibNet** screen (see Circless6-1, below), select **Check Out** from the pull-down menu, and the **Browse the LB_PAT File** screen appears (see Circless6-22, below).



CIRCLESS6-1



CIRCLESS6-22

At this screen, highlight the name of a patron, then choose the **Select Patron** button from the bottom of the screen (refer back to Circless6-22, above).

The **PATRON CHECK-OUT** screen appears (see Circless6-22a, below).

PATRON CHECK-OUT

Regular Patron 7/01/03
6767676767
Del Dellen
6 Sixth Street
Traverse City MI 496860000
231

HAS OUT —
ADULT 1

Total Out: 1
OverDue: 1

\$Bal: \$25.00

Enter Item Barcode

Items Checked Out

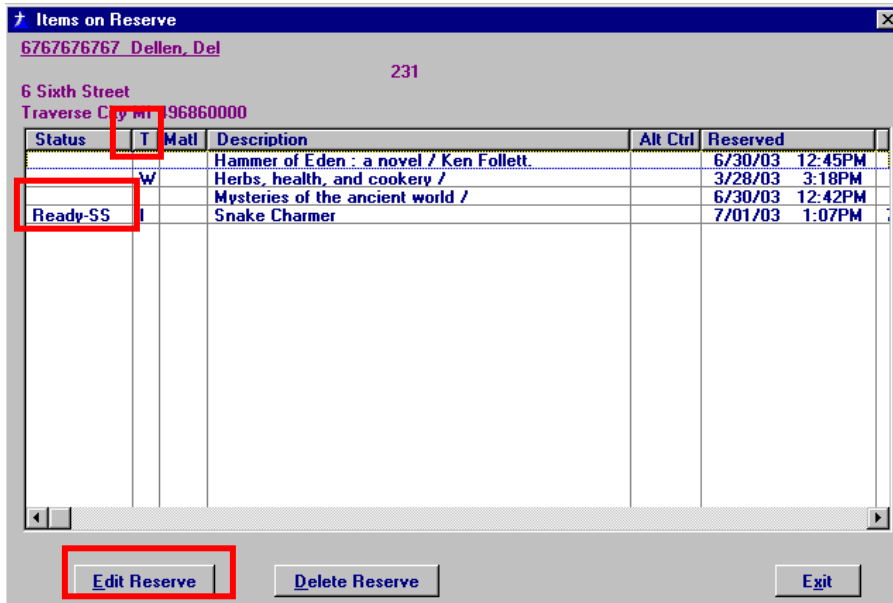
Due Date	R	Status	Description
1/10/03		BILL-R	80024730 Aliens from space ;

Renewal

CIRCLESS6-22a

At this screen, select the **Reserves** button (refer back to Circless6-22a, above) to access the items on reserve for a patron.

The **Items on Reserve** screen, which features a list of items reserved for a patron, appears (see Circless6-21c, below). The reserves shown on this screen are listed in alphabetical order, by title.



CIRCLESS6-21c

The **Type** or "T" column indicates the type of reserve:

- regular (a regular reserve from the library's local collection)
- incoming interlibrary loan (an incoming interlibrary loan item from another library)
- union (a union reserve from a member library that shares in the library's "union" system)
- Web (an Internet reserve from the Web catalog)

The **Status** column on the left of this screen shows **Ready** (refer back to Circless6-21c, above) if the patron in question has been notified that the item he or she awaits is on the shelf.

"N" in the **Status** column indicates that a reserve is new, has not been looked at yet, and that the patron has not been notified.

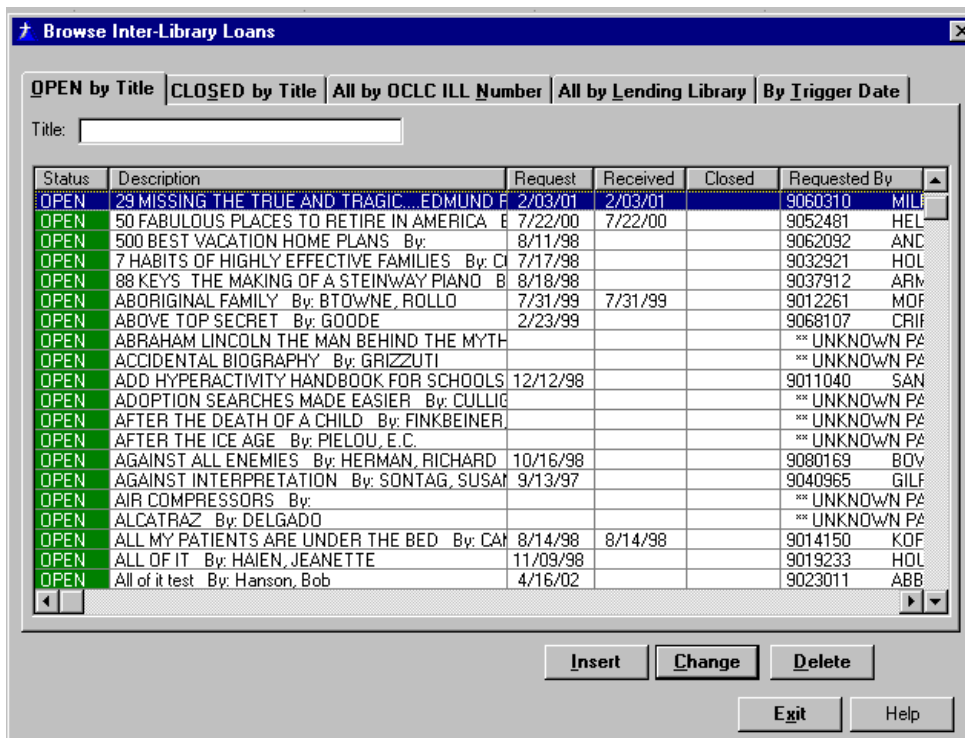
Blank status indicates that the item has not been returned or located by the library yet, and the patron has not been notified.

Interlibrary Loans

NOTE: This section briefly describes the function of each tab listed below. For a full description of all of the interlibrary loan functions of the LibNet Circulation system, refer to Chapter 8: Interlibrary Loan (ILL) Processing.

Interlibrary loans (ILLs) refer to items borrowed from libraries outside of your local library or outside of a shared system. The ILL function of the LibNet Circulation system allows a user to (temporarily) enter ILL titles so that they can be checked out to and traced to the requesting patron.

Select the **Inter-Library Loans** entry from the **Reserves** pull-down menu at the [opening LibNet screen](#), and the **Browse Inter-Library Loans** screen appears (see Circless6-14, below).



CIRCLESS6-14

On the **Browse Inter-Library Loans** screen above, a user can choose from several tabs to:

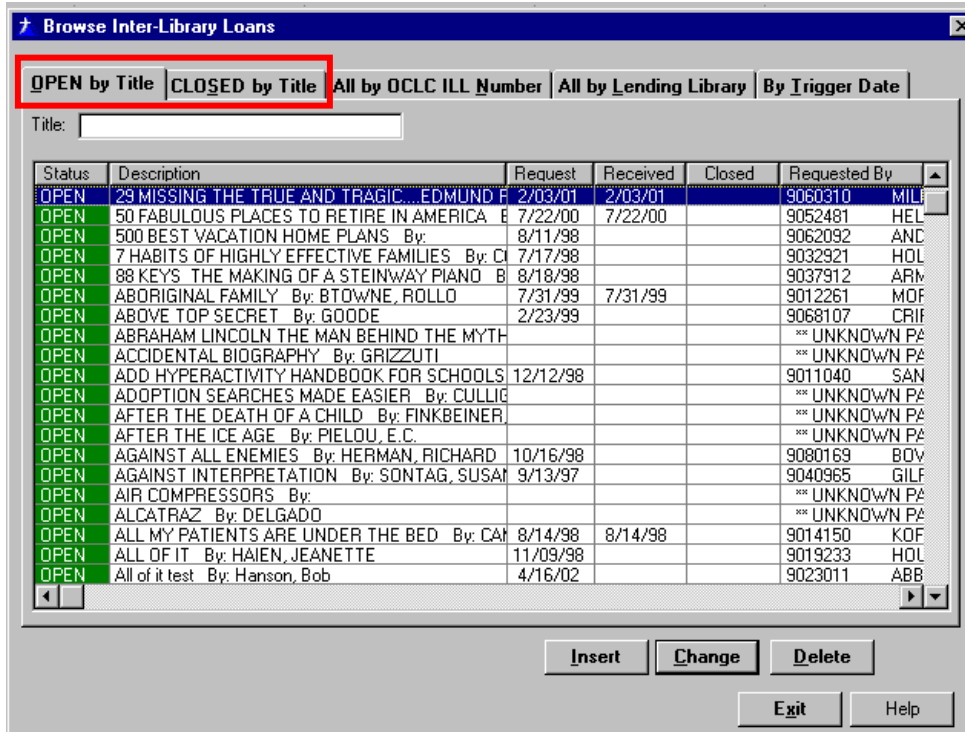
- view interlibrary loan items that are on reserve
- view interlibrary loan items were on reserve
- change information for interlibrary loan records
- add newly reserved interlibrary loan items
- delete previously reserved interlibrary loan items that have been cancelled

LibNet Circulation Manual

These tabs are:

- OPEN by Title
- CLOSED by Title
- All by OCLC ILL Number
- All by Lending Library
- By Trigger Date

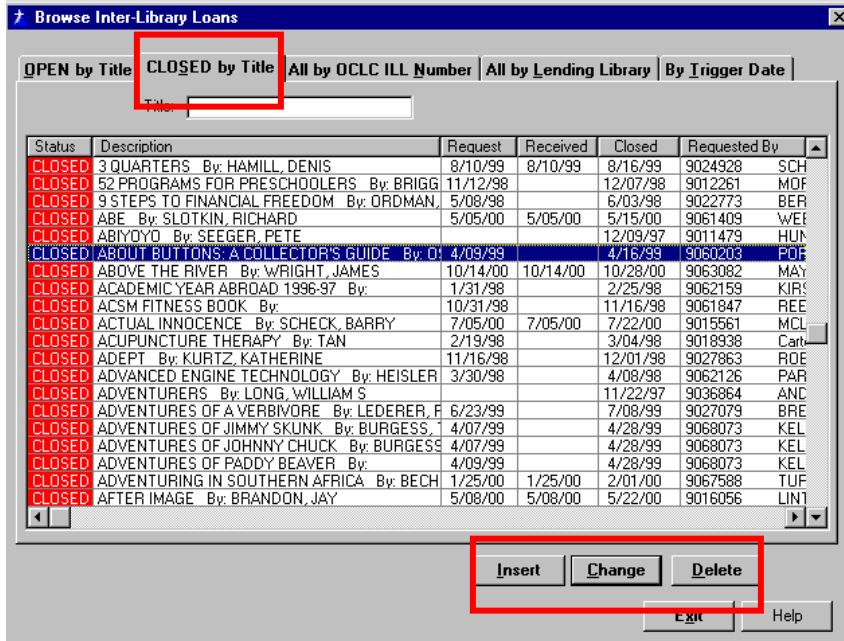
The **OPEN by Title** tab is used when the library has not received an item or an item has not been returned to the lending library (see Circless6-14aa, below).



CIRCLESS6-14aa

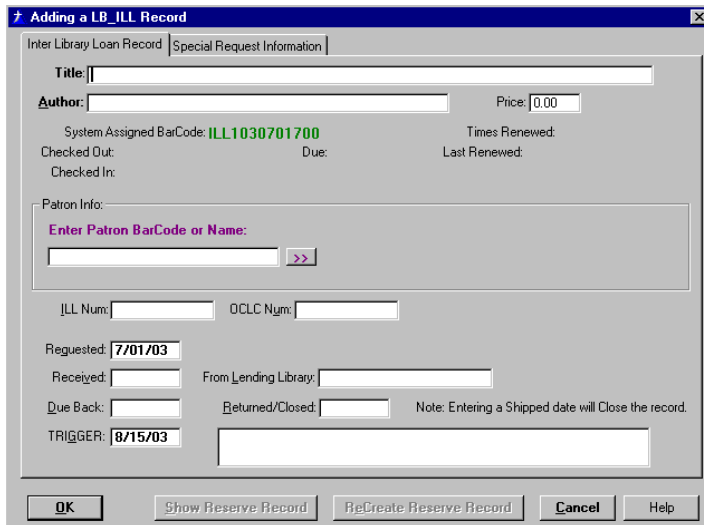
The **CLOSED by Title** tab is used when an item has been returned to the lending library (see Circless6-14a, below).

Select the **CLOSED by Title** tab, and the **Browse Inter-Library Loans** screen appears with a list of the closed titles (see Circless6-14a, below). At this screen, a user can insert, change, or delete a closed title, using the buttons at the bottom of it.



CIRCLESS6-14a

To insert a new title, select the **Insert** key and the **Adding a LB_ILL Record** screen appears (see Circless6-14d, below).



CIRCLESS6-14d

At this screen, complete the appropriate information, select the patron by entering a barcode or name in the **Patron Info** box, then select the **OK** button at the bottom of the screen to process the new record.

LibNet Circulation Manual

The system automatically adds the record to the database (see Circless6-14e, below).

Adding a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title: **Snake Charmer**

Author: **S. Mahurabi** Price: 0.00

System Assigned BarCode: **ILL1030701700** Times Renewed:

Checked Out: Due: Last Renewed:

Checked In:

Patron Info:

Enter Patron BarCode or Name: **67676767** >>

Del Dellen

231 **6 Sixth Street**
Traverse City MI 496860000

ILL Num: OCLC Num:

Requested: **7/01/03**

Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.

TRIGGER: **8/15/03**

OK Show Reserve Record ReCreate Reserve Record Cancel Help

CIRCLESS6-14e

To change a title, highlight the title, such as *About Buttons A Collector's Guide* shown previously in Circless6-14a. Select the **Change** button at the bottom of the screen to start the process. The **Changing a LB_ILL Record** screen appears (see Circless6-14b, below).

Changing a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title: **ABOUT BUTTONS: A COLLECTOR'S GUIDE**

Author: OSBORNE, PEGGY Price: 0.00

System Assigned BarCode: ILL1990409152 Times Renewed:

Checked Out: 4/16/1999 3:19PM Due: 4/30/1999 Last Renewed:

Checked In: 4/16/1999 3:38PM Checked-In On: 4/16/99

No Active Reserve Found!

Patron Info:

9060203

ILL Num: OCLC Num:

Requested: 4/09/99

Received: From Lending Library: DPL

Due Back: Returned/Closed: 4/16/99 Note: Entering a Shipped date will Close the record.

TRIGGER:

OK Show Reserve Record ReCreate Reserve Record Cancel Help

CIRCLESS6-14b

At this screen, a user can make changes to the interlibrary loan record, such as the **Returned/Closed** date, which has been changed from 4/16/99 to 6/30/03 (see Circless6-14b, above, then Circless6-14c, below). Simply type in the new date and select the **OK** button at the bottom of the screen to process the change.

Changing a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title: **ABOUT BUTTONS: A COLLECTOR'S GUIDE**

Author: OSBORNE, PEGGY Price: 0.00

System Assigned BarCode: ILL1990409152 Times Renewed:

Checked Out: 4/16/1999 3:19PM Due: 4/30/1999 Last Renewed:

Checked In: 4/16/1999 3:38PM Checked-In On: 4/16/99

No Active Reserve Found!

Patron Info:

9060203

ILL Num: OCLC Num:

Requested: 4/09/99

Received: From Lending Library: DPL

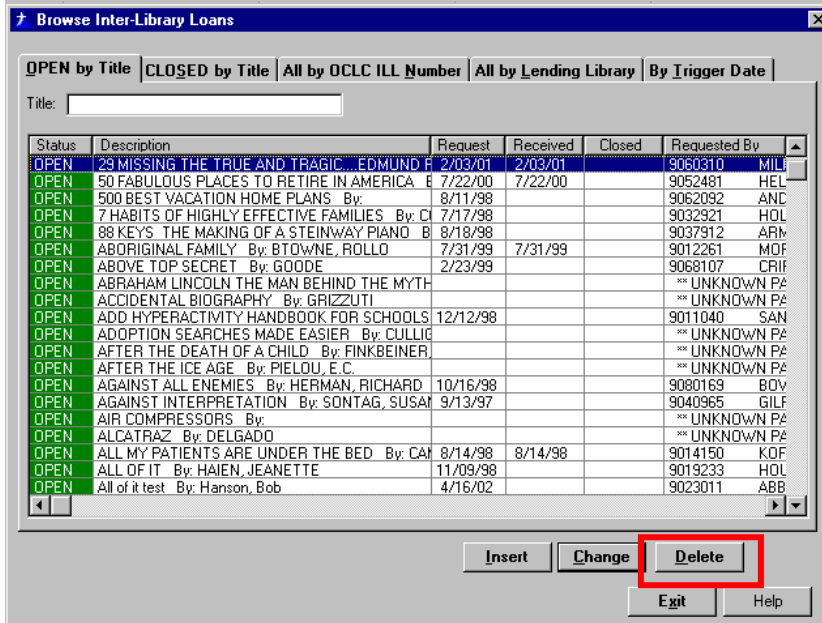
Due Back: Returned/Closed: 6/30/03 Note: Entering a Shipped date will Close the record.

TRIGGER:

OK Show Reserve Record ReCreate Reserve Record Cancel Help

CIRCLESS6-14c

To delete a record, highlight the title you wish to delete, select the **Delete** key from the bottom of the **Browse Inter-Library Loans** screen (refer to Circless6-14, below), and the record is deleted from the list and the database.



CIRCLESS6-14

Lesson 7: Deactivating and Reactivating Items

Deactivating Items

Items are deactivated for a variety of reasons discussed in this lesson. A common example of an item deactivation is one that has been flagged as not being available to patrons for a particular reason that is identified by a system code.

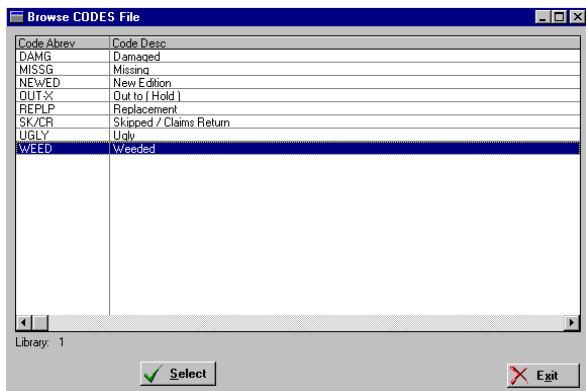
A useful feature of the LibNet Circulation system related to deactivation is the capability to generate a report about specific items that have been removed or deactivated from the collection so that library staff can decide to replace items or remove (i.e., “weed”) them from the collection.

IMPORTANT NOTE: To deactivate/reactivate items (only) use the LibNet Circulation system. Items that have been deactivated in the Circulation system remain in the active catalog, but appear as “inactive”. To delete items and/or titles from the active catalog and place them in the “deleted catalog”, use the LibNet Catalog Editor (CatEdit) system.

Item weeding is performed using the LibNet CatEdit system, along with the *Catalog Editor User's Guide* module of the LibNet program user documentation series for guidance. For specific instructions about “general” item weeding, please refer to the LibNet *Catalog Editor (Catedit) User's Guide*

The reasons for deactivating an item, as listed on the **Browse CODES File** screen (see Circless7-0, below) are because it is:

- damaged (DAMG)
- missing (MISSG)
- new edition (NEWED)
- out to (hold) (OUT-X)
- replacement (REPLP)
- skipped/claims returned (SK/CR)
- ugly (UGLY)
- weeded (WEED)



CIRCLESS7-0

NOTE 1: Codes such as the sample codes listed previously in Circless7-0 are tables that may be added to your library's list of codes, too.

NOTE 2: The instructions in this section may be used to deactivate any item from circulation for any of the above reasons, **EXCEPT** for when a patron has not returned an item.

When an active item becomes **deactivated** by the system, it remains stored in the active catalog and still is displayed along with the active items, but is treated in a special manner because it is flagged as "inactive".

When an inactive item becomes **reactivated**, the "inactive" flag is removed.

Any item that has been checked in may be deleted. A title record can be deleted if no items remain attached to it. This is where deactivation comes in.

For the purposes of circulation, there are two ways to deactivate items:

- by title
- by item

This lesson describes how to deactivate items both ways.

Weeding by Title

At the main LibNet Circulation screen (see Circless7-1a, below), choose the **Catalog** pull-down menu.



CIRCLESS7-1a

From that menu, select:

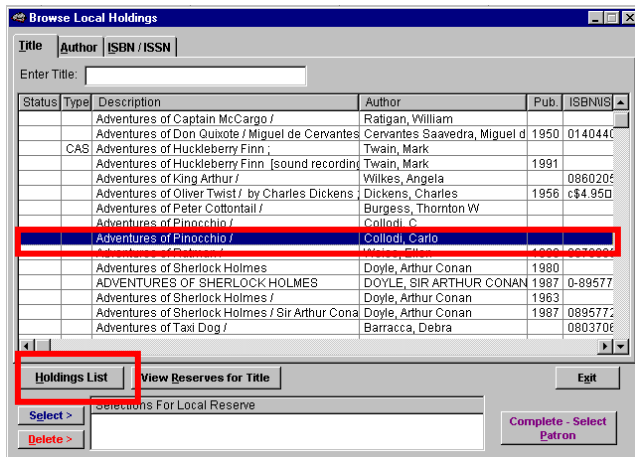
Browse Local Catalog

or

Browse Union Catalog

NOTE: The following procedure applies to both the Local and Union above **Catalog** pull-down menu selections.

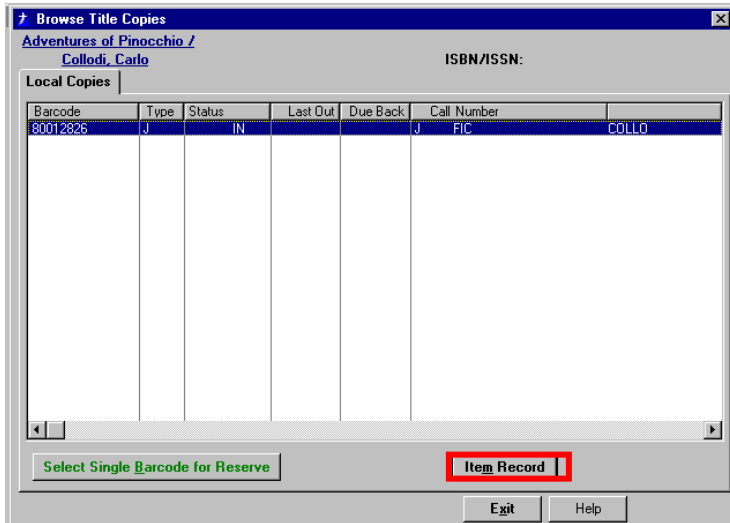
In both cases, once a **Catalog** menu item is selected, the **Browse Holdings** (either Local or Union) screen appears (see Circless7-1, below).



CIRCLESS7-1

To deactivate by title, first select the title (or titles) you wish to deactivate by highlighting it with the cursor (refer back to Circless7-1, above). In the case of Cicless7-1 above, the title is *Adventures of Pinocchio*. Next, select the **Holdings List** button.

The **Browse Title Copies** screen appears (see Circless7-2, below). At the bottom of this screen, select the **Item Record** button.



CIRCLESS7-2

The record or item form for *Adventures of Pinocchio* appears on the **Record Will Be Changed** screen (see Circless7-3, below).


The screenshot shows a window titled "Record Will Be Changed (80012826)". The main content area displays the following information:

- Item Master Record | Statistics Category | NUGEN 7/03/1995 5:47PM 0
- Adventures of Pinocchio / Collodi, Carlo** ISBN/ISSN:
- Barcode: 80012826 Change BarCode Added To Collection: 2/27/1991
- Item Class: >> **Juvenile**
- Location: >> Price: 15.00
- Call Number: J FIC COLLO Cost: 0.00
- How Acquired: >>
- Deactivate>** (highlighted with a red box)
- Circulation Info:
 - Last Out:
 - Last Renewed: Times Renewed:
 - Due date:
 - Checked In: YTD Circ: 0 LTD Circ: 0

At the bottom of the window are buttons: OK, Circulation History, Trap Message, Cancel, and Help.

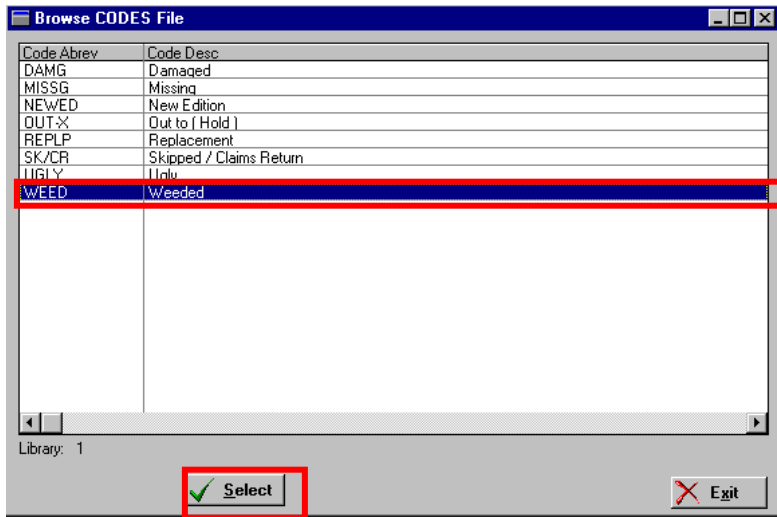
CIRCLESS7-3

“Deactivate” the item from this screen (refer back to Circless7-3, above) by selecting the **Deactivate>** button.

A **Status** field appears with an arrow  to the right of it (see Circless8-4, below). Click with the mouse on that arrow, and a list of deactivation codes (a list of reasons for deactivation) appears (see 7-5, below).



CIRCLESS7-4



CIRCLESS7-5

Select the **WEED** (Weeded) -- or any other code/reason pertinent to the situation -- from this list by highlighting it using the mouse (refer back to Circless7-5, above).

Then, choose the **Select** button at the bottom of the screen (see Circless7-5 again).

The item master record or the **Record Will Be Changed** screen reappears with the **Status** field now marked **WEED** for Weeded (see Circless7-6, below).

The screenshot shows a software window titled "Record Will Be Changed (80012826)". The window contains the following information:

- Item Master Record | Statistics Category | NUGEN 7/03/1995 5:47PM 0
- Adventures of Pinocchio / Collodi, Carlo
- Barcode: 80012826 Change BarCode
- ISBN/ISSN: Added To Collection: 2/27/1991
- Item Class: J >> Juvenile
- Location: >>
- Price: 15.00
- Call Number: J FIC COLLO Cost: 0.00
- How Acquired: >>
- Status: WEED >> Weeded (highlighted with a red box)
- Refresh button
- Circulation Info: Last Out, Last Renewed, Times Renewed, Due date, Checked In, YTD Circ: 0, LTD Circ: 0
- Buttons: OK, Circulation History, Trap Message, Cancel, Help

CIRCLESS7-6

Deactivating by Item

At the main **LibNet Circulation** screen, choose the **Catalog** pull-down menu. Rather than selecting **Browse Local Catalog** or **Browse Union Catalog**, instead select either:

Browse Local Catalog – With Items

or

Browse Union Catalog – With Items

NOTE: The following procedure applies to both of the above-mentioned **Catalog** pull-down menu selections.

In both cases, the **Browse Holdings** (Local or Union) screen will appear, showing items (**title copies**) for each title in the box in the center of the screen (see Circless7-6, below).

Select the title of the item you wish to deactivate by highlighting it with the cursor (see Circless7-6, below). In the case of the example below, the title to be weeded is *If Life Is a Bowl of Cherries, What Am I Doing In the Pits?*.

Next, select the **Item Detail** button at the bottom right side of this screen (refer again to Circless7-6, below).

The screenshot shows a window titled "Browse Local Holdings" with a search bar and a table of holdings. Below the table is a "Title Copies" section with a table of barcode, class, status, last out, due back, and call number. At the bottom, there are buttons for "Select Single Barcode For Reserve", "View Reserves for Title", "Item Detail" (highlighted with a red box), "Complete - Select Patron", and "Exit".

Status	Type	Description	Author	Pub.	ISBN/ISSN
	PBK	If death ever slept	Stout, Rex	1992	05532364
		If ever I return, pretty Peggy-O!	McCrum, Sharyn		06841910
		If I had long, long hair!	Hunt, Angela Elwell	1988	06871868
		IF I HAD MY LIFE TO LIVE OVER AGAIN	STAIR, NADINE	1992	0-918949-
		If I ran the circus!	Seuss		03948454
		If I ran the zoo!	Seuss	1977	03948008
		If I were captain!	Floethe, Louise Lee		
		If life is a bowl of cherries, what am I doing in the pits?	Bombeck, Erma		00700645

Barcode	Class	Status	Last Out	Due Back	Call Number	
80054075	ADULT	IN	6/02/2000		817	BOM

CIRCLESS7-6

The item record for this title on the **Record Will Be Changed** screen (see Circless7-7, below) appears. Select the **Deactivate>** button (Circless7-7, again) and proceed with the deactivation process, as outlined earlier in this lesson.

Record Will Be Changed (80054075)

Item Master Record | Statistics Category | NUGEN 7/03/1995 5:48PM 1

If life is a bowl of cherries, what am I doing in the pits? / Bombeck, Erma ISBN/ISSN: 0070064512 :
Barcode: 80054075 Change BarCode Added To Collection: 4/09/1991

Item Class: ADULT >> Adult
Location: >> Price: 7.95
Call Number: 817 BOMBE Cost: 0.00
How Acquired: >>

Deactivate>

Circulation Info:

Last Out: 6/02/2000 1:20PM
Last Renewed: Times Renewed:
Due date:
Checked In: 6/13/2000 12:40P YTD Circ: 3 LTD Circ: 3

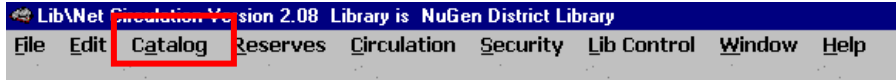
OK Circulation History Trap Message Cancel Help

CIRCLESS7-7

If a Patron Never Returns an Item

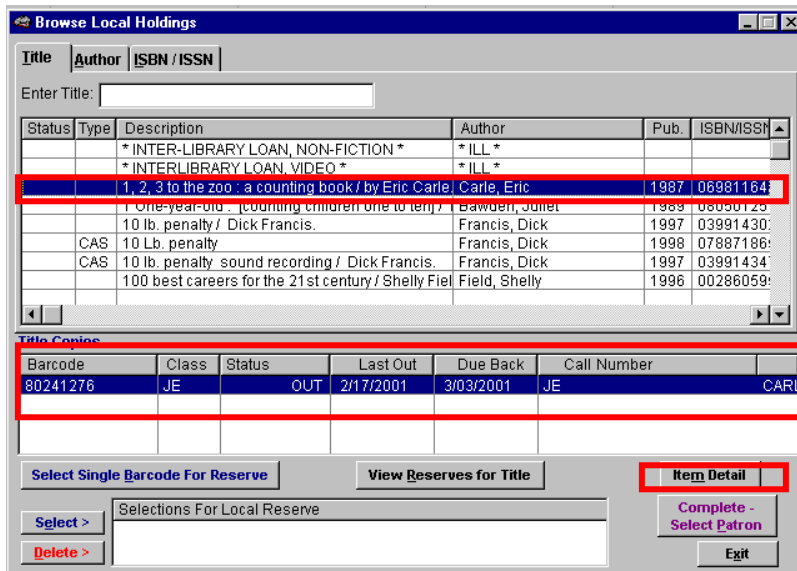
Once an “overdue” notice is returned by the Post Office and once it is determined that the patron cannot be contacted any other way, the overdue item should be deactivated using the process outlined below.

At the main **LibNet Circulation** screen (Circless7-8, below), select the **Catalog** pull-down menu, then select either the **Holdings Record by Barcode** or **Browse Local Catalog -- With Items**.



CIRCLESS7-8

In the case of the example presented in this section, **Browse Local Catalog – With Items** was selected, so the **Browse Local Holdings** screen appears (see Circless7-9, below).



CIRCLESS7-9

Highlight the overdue item that the patron says he or she returned or with which he or she has left town. In the case of the example above, in Circless7-9, the title of the item is *1, 2, 3 to the Zoo: A Counting Book*, by Eric Carle. The status of the book is “OUT”, as indicated under the **Title Copies** section at the bottom of the screen.

To deactivate this item, select **Item Detail** from the bottom right of the screen (refer back to Circless7-9, above).

The item record or **Record Will Be Changed** screen appears (see Circless7-9a, below).

Record Will Be Changed (80241276)

Item Master Record | Statistics Category | COLLIER 6/22/1999 2:52PM 1

1, 2, 3 to the zoo : a counting book / by Eric Carle.
Carle, Eric ISBN/ISSN: **0698116453**

Barcode: 80241276 Change BarCode Added To Collection: **6/22/1999**

Item Class: JE >> **Juvenile Easy Reader**

Location: >> Price: 16.00

Call Number: JE >> CARLE Cost: 0.00

How Acquired: >>

Deactivate>

Circulation Info:

Out To: **9060997** BUZZELL, JOEL Patron \$Account Patron Master
 Last Out: **2/17/2001** 10:37A 352-4616

Last Renewed: Times Renewed: ReNew Item

Due date: **3/03/2001** Print Renew Receipt

Checked In: YTD Circ: 7 LTD Circ: 7

OK Circulation History Trap Message Cancel Help

CIRCLESS7-9a

Select the **Deactivate>** button on this screen to begin the process of deactivation (refer back to Circless7-9a, above). The **Status** box with the arrow key >> next to it appears on this screen (see Circless7-9b, below). Select the arrow key to view the list of deactivation codes.

Record Will Be Changed (80241276)

Item Master Record | Statistics Category | COLLIER 6/22/1999 2:52PM 1

1, 2, 3 to the zoo : a counting book / by Eric Carle.
Carle, Eric ISBN/ISSN: **0698116453**

Barcode: 80241276 Change BarCode Added To Collection: **6/22/1999**

Item Class: JE >> **Juvenile Easy Reader**

Location: >> Price: 16.00

Call Number: JE >> CARLE Cost: 0.00

How Acquired: >>

Deactivate> Status: >>

Circulation Info:

Out To: **9060997** BUZZELL, JOEL Patron \$Account Patron Master
 Last Out: **2/17/2001** 10:37A 352-4616

Last Renewed: Times Renewed: ReNew Item

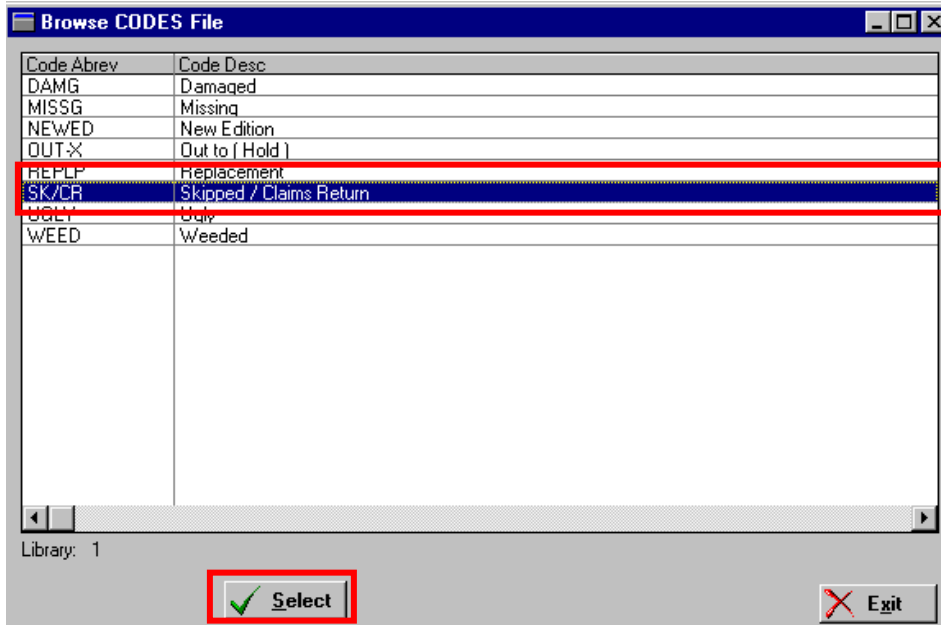
Due date: **3/03/2001** Print Renew Receipt

Checked In: YTD Circ: 7 LTD Circ: 7

OK Circulation History Trap Message Cancel Help

CIRCLESS7-9b

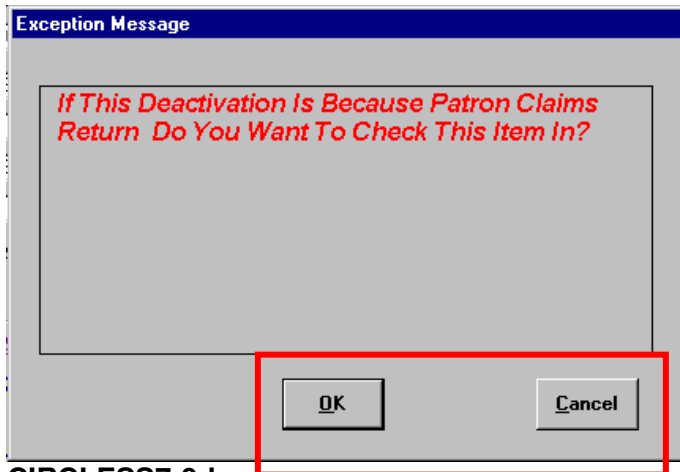
The **Browse CODES File** screen appears with the list of the circulation deactivation codes (see Circless7-9c, below).



CIRCLESS7-9c

With the mouse/cursor, highlight the **SK/CR** or **Skipped/Claims Return** code, then choose the **Select** button at the bottom of the screen (refer back to Circless7-9c, above).

An **Exception Message** screen (see Circless7-9d, below) appears, asking the question, "If this deactivation is because patron claims return do you want to check this item in?"



CIRCLESS7-9d

NOTE: The above **Exception Message** appears only when the previous item was checked out.

Select the **OK** button to check the item in, or the **Cancel** button to continue on.

In the case of the current example, assume that the patron who checked out the item left town without returning it. So, select the **Cancel** button and the item record form reappears with the item's **Status** box now marked with **SK/CR – Skipped/Claims Return** (see Circless7-9e, below).

Record Will Be Changed (80241276)

Item Master Record | Statistics Category | COLLIER 6/22/1999 2:52PM 1

1, 2, 3 to the zoo : a counting book / by Eric Carle.
Carle, Eric ISBN/ISSN: 0698116453

Barcode: 80241276 Change BarCode Added To Collection: 6/22/1999

Item Class: JE >> Juvenile Easy Reader

Location: >>

Call Number: JE >> CARLE Price: 16.00

How Acquired: >> Cost: 0.00

Status: **SK/CR** >> **Skipped / Claims Return** ReActivate

Circulation Info:

Out To: 9060997 BUZZELL, JOEL 352-4616 Patron \$Account Patron Master

Last Out: 2/17/2001 10:37A

Last Renewed: Times Renewed: ReNew Item

Due date: 3/03/2001 Print Renew Receipt

Checked In: YTD Circ: 7 LTD Circ: 7

OK Circulation History Trap Message Cancel Help

CIRCLESS7-9e

Select the **OK** button at the bottom of the screen (refer back to Circless7-9e, above), and the item will be deactivated.

From now on, when the record for this item is pulled up, it indicates that the item has been deactivated (see Circless7-9f, below).

Record Will Be Changed (80241276)

Item Master Record | Statistics Category | COLLIER 6/22/1999 2:52PM 1

1, 2, 3 to the zoo : a counting book / by Eric Carle.
Carle, Eric ISBN/ISSN: 0698116453

Barcode: 80241276 Change BarCode Added To Collection: 6/22/1999

Item Class: JE >> Juvenile Easy Reader

Location: >>

Call Number: JE >> CARLE Price: 16.00

How Acquired: >> Cost: 0.00

Status: SK/CR >> Skipped / Claims Return Deactivated: 7/08/2003 ReActivate

* Item Currently Inactive

Circulation Info:

Out To: 9060997 BUZZELL, JOEL 352-4616 Patron \$Account Patron Master

Last Out: 2/17/2001 10:37A

Last Renewed: Times Renewed: ReNew Item

Due date: 3/03/2001 Print Renew Receipt

Checked In: YTD Circ: 7 LTD Circ: 7

OK Circulation History Trap Message Cancel Help

CIRCLESS7-9f

A NOTE About Deactivating Damaged, Missing, and Weeded Items

After an item or items have been deactivated, a user can generate a report to show the items' circulation records, reserve status, and reasons for deactivation. Before these items are deleted for good, library staff should use this report to decide whether each item should be reordered or updated.

So that all reports are accurate, be sure to deactivate items at the **Item Record** screen as described in the previous section, and to select the appropriate deactivation code (damaged, missing, or weeded) from the list that automatically appears.

Item Reactivation

If a deactivated item is found at the library, the system's check-in or check-out functions alert a clerk about the "inactive" status of such an item, which must be **reactivated**.

Use the item record, also known as the **Record Will Be Changed** screen (Circless7-10a, below), to reactivate the item.

Record Will Be Changed (80241276)

Item Master Record | Statistics Category | COLLIER 6/22/1999 2:52PM 1

1, 2, 3 to the zoo : a counting book / by Eric Carle, Eric Carle, Eric ISBN/ISSN: 0698116453

Barcode: 80241276 Change BarCode Added To Collection: 6/22/1999

Item Class: JE >> Juvenile Easy Reader

Location: >> Price: 16.00

Call Number: JE >> CARLE Cost: 0.00

How Acquired: >>

Status: SK/CR >> Skipped / Claims Return Deactivated: 7/08/2003

*** Item Currently Inactive!**

Circulation Info:

Out To: 9060997 BUZZELL, JOEL 352-4616 Patron Account Patron Master

Last Out: 2/17/2001 10:37A

Last Renewed: Times Renewed: ReNew Item

Due date: 3/03/2001 Print Renew Receipt

Checked In: YTD Circ: 7 LTD Circ: 7

OK Circulation History Trap Message Cancel Help

CIRCLESS7-10a

Select the **ReActivate** button on the right side of the screen (refer back to Circless7-10a, above).

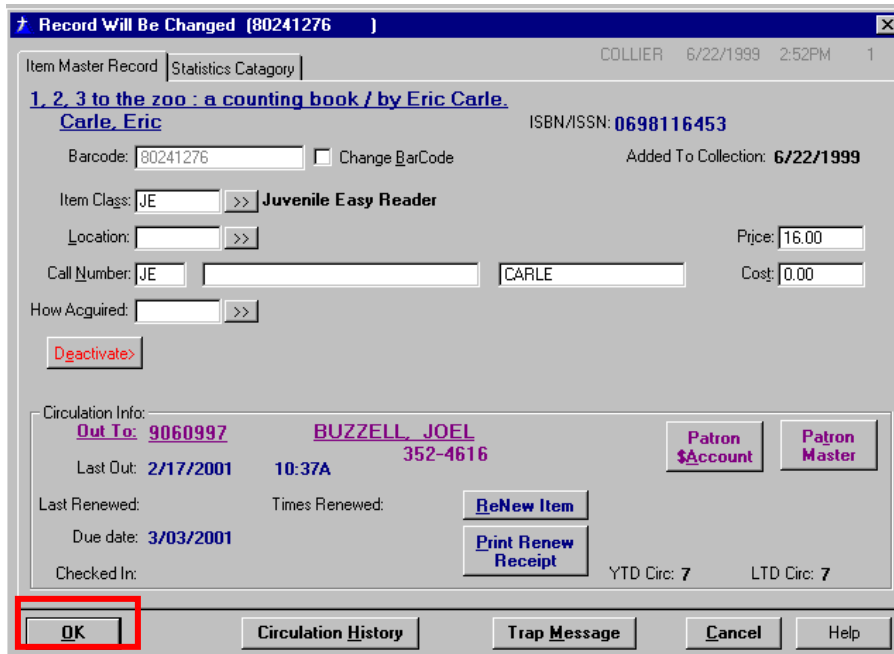
An **Exception Message** appears (see Circless7-10b, below) asking whether the user is certain that the item should be reactivated. Select **OK** to continue reactivating the item, or **Cancel** to cancel reactivation.



CIRCLESS7-10b

In the case of the example above, select **OK** to continue reactivating the item.

Once the **OK** button is selected, the item record or **Record Will Be Changed** screen reappears. Note that the **ReActivate** button or option now has vanished from this screen, and that the **Deactivate>** button has returned. Also gone is the **SK/CR** code and the **Status** box that held the code (see Circless7-10c, below).

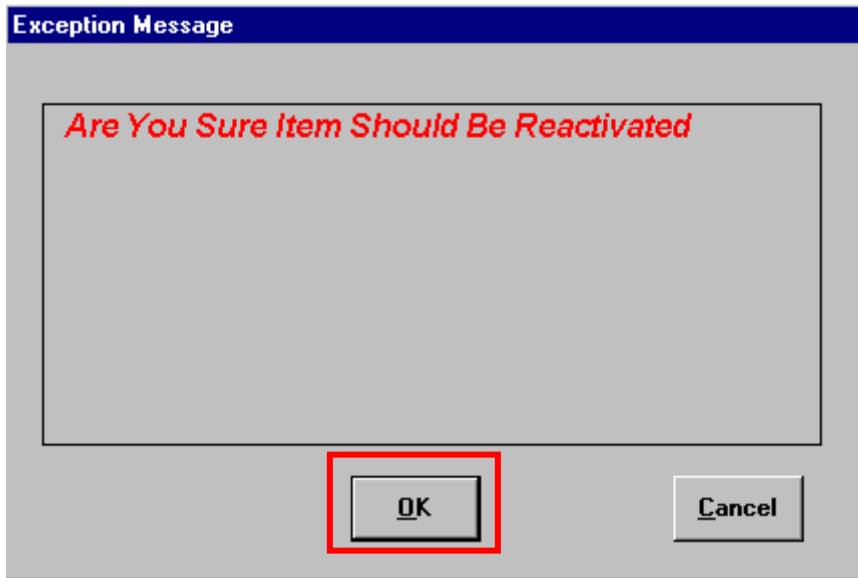


CIRCLESS7-10c

Select the **OK** button at the bottom left side of the screen (refer back to Circless7-10c, above), and the item now is reactivated in the system.

NOTE: Be sure to select the **OK** button when reactivating an item because if the **OK** button is NOT selected, the item will NOT be reactivated – it will remain inactive.

An **Exception Message** asking, “Are you sure item should be reactivated” appears (see Circless7-10d, below). Select **OK** at the bottom of the screen, in response to that message.



CIRCLESS7-10d

The item is now available for circulation again.

Lesson 8: Processing Interlibrary Loans (ILLs)

Introduction

There are two types of interlibrary loans:

1. items borrowed **by** your library, from other libraries, on behalf of your patrons
2. items borrowed **from** your library, by other libraries, on behalf of their patrons

Items Borrowed BY Your Library from Another Library

Items borrowed from another library should be entered into the circulation system by title and author so that they can be checked out to the patron, checked back in, and tracked.

The system generates a unique **item number** for each interlibrary loan when it is entered and assigned to the requesting patron. The interlibrary loan system also tracks all pending (open) and all returned (closed) items.

Items Borrowed FROM Your Library

Items borrowed from your library should be checked out to a special patron account that has been established for the borrowing library. Such a special interlibrary loan patron account allows for items to be checked out to that account, checked back in, and tracked by the system.

IMPORTANT NOTE About Duplicating Interlibrary Loan Records: ILL records are entered on a “one-for-one” basis – one ILL record per request. Titles CAN be duplicated in the ILL database.

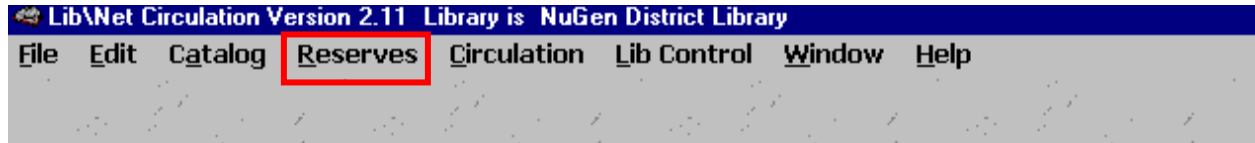
Example: Ten different patrons request the same title for interlibrary loan (this is a rare situation, but will work for the purposes of this example), so ten records are created – one separate record for each patron. However, although there are ten individual records, the same title and author are entered (duplicated) on each record. Now, the browse list shows ten records with the same title and author, but each record has a different patron’s name associated with it.

NOTE: The system automatically records the date that the patron checks the item out, and the day the item is checked back into the library.

Processing a Patron's Interlibrary Loan (ILL) Request

When a patron requests an item from another library through your library, such a request must be processed in the Circulation system.

To do this, first access the **Reserves** menu at the main **LibNet** Circulation screen (see Circless8-1a, below).



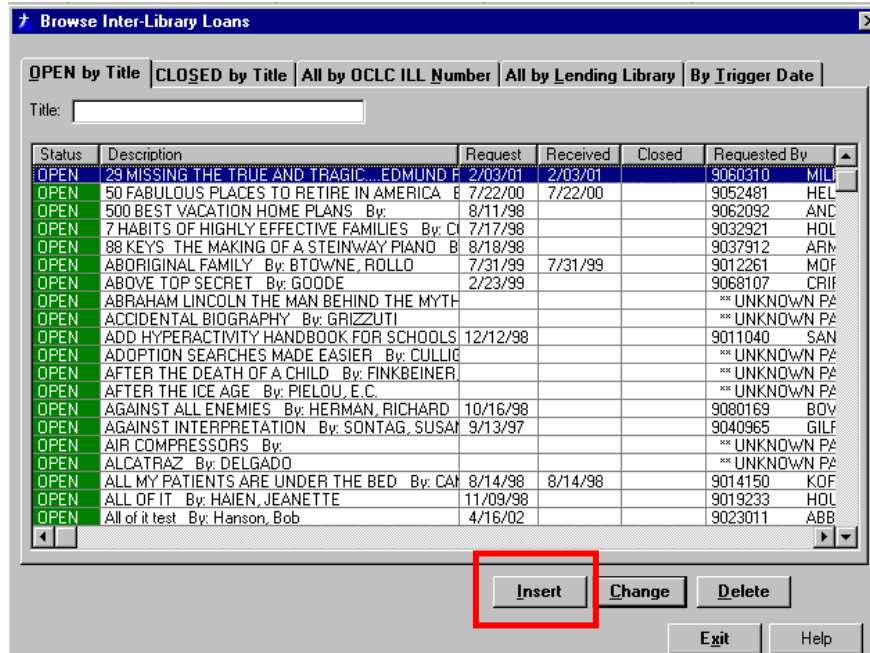
CIRCLESS8-1a

The list of items on the **Reserves** pull-down menu are:

- Reserves by Holdings Barcode
- Reserves by Title
- Reserves by Selected Patron
- Reserves by Time “New \Hot Reserves”
- Inter-Library Loans
- ILL's by Selected Patron
- ILL Trigger Report

From this menu, choose **ILL's by Selected Patron**.

The **Browse Inter-Library Loans** screen appears (see Circless8-2b, below).



CIRCLESS8-2b

Select the **Insert** button from the bottom of this screen (refer back to Circless8-2b, above).

The **Adding a LB_ILL Record** screen appears (see Circless8-3c, below).

Adding a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title:

Author: Price: 0.00

System Assigned BarCode: **ILL1031031702** Times Renewed:

Checked Out: Due: Last Renewed:

Checked In:

Patron Info:

Enter Patron BarCode or Name:

>>

ILL Num: OCLC Num:

Requested: 10/31/03

Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.

TRIGGER: 12/15/03

OK Show Reserve Record ReCreate Reserve Record Cancel Help

CIRCLESS8-3c

Use the interlibrary loan request form to complete the following information on the **Adding a LB_ILL Record** (ILL patron form – see Circless8-4d, below):

Title: Great Gatsby
Author: Fitzgerald
Patron's Name: Dellen

Adding a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title: **Great Gatsby**

Author: **Fitzgerald** Price: 0.00

System Assigned BarCode: **ILL1031031703** Times Renewed:

Checked Out: Due: Last Renewed:

Checked In:

Patron Info:

Enter Patron BarCode or Name: **Del Dellen**

67676767 >> **6 Sixth Street**
231 **Traverse City MI 496860000**

ILL Num: OCLC Num:

Requested: 10/31/03

Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.

TRIGGER: 12/15/03

OK Show Reserve Record ReCreate Reserve Record Cancel Help

CIRCLESS8-4d

The system automatically creates a reserve record that can be used to notify the patron when the item becomes available to be picked up.

Once the Requested ILL Book Arrives from Another Library. . .

Locate the seven-digit ILL number and enter it in the **ILL Num** box (see Circless8-5d, below).

The screenshot shows a dialog box titled "Changing a LB_ILL Record" with two tabs: "Inter Library Loan Record" and "Special Request Information". The "Inter Library Loan Record" tab is active. The form contains the following fields and values:

- Title: Great Gatsby
- Author: Fitzgerald
- Price: 0.00
- System Assigned BarCode: ILL1031031705
- Checked Out: (empty)
- Due: (empty)
- Times Renewed: (empty)
- Checked In: (empty)
- Last Renewed: (empty)
- Patron Info: Del Dellen, 6767676767, 231, 6 Sixth Street, Traverse City MI 496860000
- ILL Num: 1234567 (highlighted with a red box)
- OCLC Num: (empty)
- Requested: 10/31/03
- Received: (empty)
- From Lending Library: (empty)
- Due Back: (empty)
- Returned/Closed: (empty)
- Note: Entering a Shipped date will Close the record.
- TRIGGER: 12/15/03

Buttons at the bottom include: OK, Show Reserve Record, ReCreate Reserve Record, Cancel, and Help.

CIRCLESS8-5e

Enter the date the book arrived at the library – in this case, *The Great Gatsby* on November 2, 2003 -- and the name of the library that sent it (see Circless8-6f, below).

This screenshot is identical to the previous one, but with the "Received" field highlighted by a red box. The value in this field is "11/2/03". The "From Lending Library" field contains the value "TC".

CIRCLESS8-6f

NOTE: At this time, enter other pieces of information, such as the OCLC number, the ISBN (place in the comment box on the lower right side of the form), or anything else you wish to recall later on about this request.

Be sure to send a pickup notice to the patron, instructions for which are outlined below.

Sending an ILL Pickup Notice

To notify a patron that his or her interlibrary loan item has been sent and is ready to be picked up at your library, take the following steps.

At the **Changing a LB_ILL Record** screen, select the **Show Reserve Record** button at the bottom of the screen (see Circless8-6f, below).

Changing a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title:

Author: Price:

System Assigned BarCode: Times Renewed:

Checked Out: _____ Due: _____ Last Renewed: _____

Checked In: _____

Active Reserve! Pick Up Not Indicated!

Patron Info: _____

Del Dellen

6 Sixth Street

Traverse City MI 496860000

ILL Num: OCLC Num:

Requested:

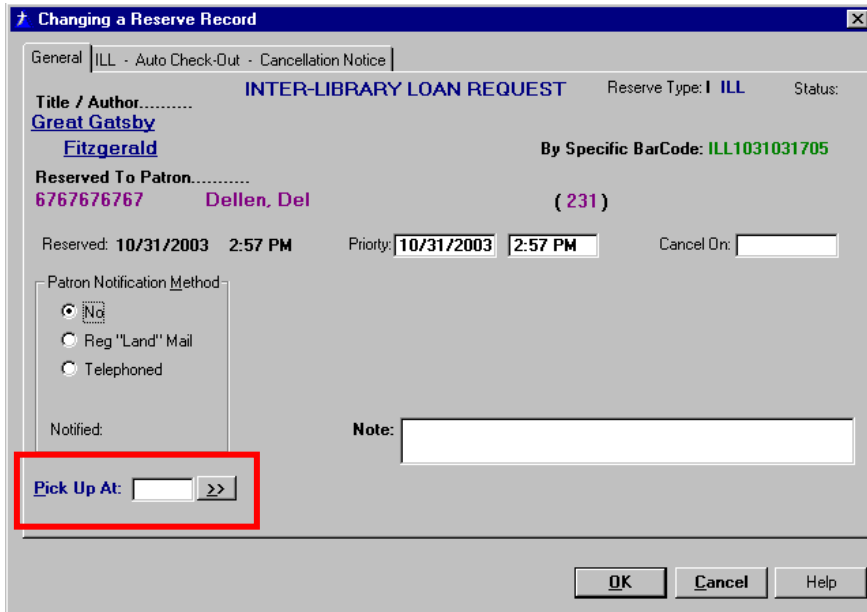
Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.


TRIGGER:

CIRCLESS8-6f

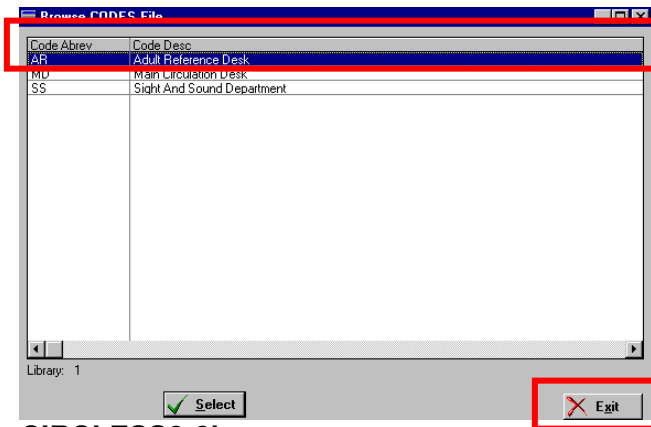
The **Changing a Reserve Record** screen with the patron's reserve record appears (see Circless8-7g, below).



CIRCLESS8-7g

At this screen, first indicate where the item will be available for pick-up, by selecting the arrow  key to the right of the **Pick Up At** box (refer back to Circless8-7g, above). The **Browse CODES** file with three options for pick-up appears (see Circless8-8h, below):

- Adult Reference Desk
- Main Circulation Desk
- Sight And Sound Department



CIRCLESS8-8h

For the purposes of the example above (Circless8-8h), the **AR** or **Adult Reference Desk** has been selected as the place to pick up the item.

Next, select the **Exit** button at the bottom of the **Browse CODES File** screen (refer back to Circless8-8h, above).

The system returns to the **Changing a Reserve Record** screen (see Circless8-9i, below).

Changing a Reserve Record

General | ILL - Auto Check-Out - Cancellation Notice

INTER-LIBRARY LOAN REQUEST Reserve Type: ILL Status:

Title / Author.....
Great Gatsby
Fitzgerald

Reserved To Patron.....
6767676767 Dellen, Del (231)

By Specific BarCode: **ILL1031031705**

Reserved: **10/31/2003 2:57 PM** Priority: **10/31/2003 2:57 PM** Cancel On:

Patron Notification Method

No

Reg "Land" Mail

Telephoned

Notified: Note:

Pick Up At: >> **Main Circulation Desk**

CIRCLESS8-9i

Now, it's time to notify the patron, Del Dellen, that his interlibrary loan item is at the library. To do this, use the mouse to make a selection from the list under **Patron Notification Method** on the **Changing Reserve Record** screen (refer back to Circless8-9i, above). The choices are **No** for not notified yet; **Reg "Land" Mail** for U.S. Postal Service mail; **Telephoned** for calling the patron directly; and **E-Mail** for sending a notification sent via e-mail to a patron via the Internet (this option does not appear in the case of the example on Circless8-9i, above, because the patron either does not have access to e-mail or did not provide an e-mail address for his account).

In the instance of Del Dellen above (Circless8-9i), **Reg "Land" Mail** has been selected. Once the notification method has been selected, choose the **OK** button at the bottom of the screen, and the notification method will be recorded in the system.

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In the case of the example shown in Circless8-15o, below, the **Due Back** date box contains the date that the lending library has set as its own due date. The lending library establishes this date when the item is received by the lending library from the other (“interloaning”) library. The system automatically assigns a patron due date (see **Checked Out** in Circless8-15o, below), during check-out.

Changing a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title:

Author: Price:

System Assigned BarCode: Times Renewed:

Checked Out: Due: Last Renewed:

Checked In:

Active Reserve! Pick Up Not Indicated!

Patron Info: **Del Dellen**

6 Sixth Street

Traverse City MI 496860000

ILL Num: OCLC Num:

Requested:

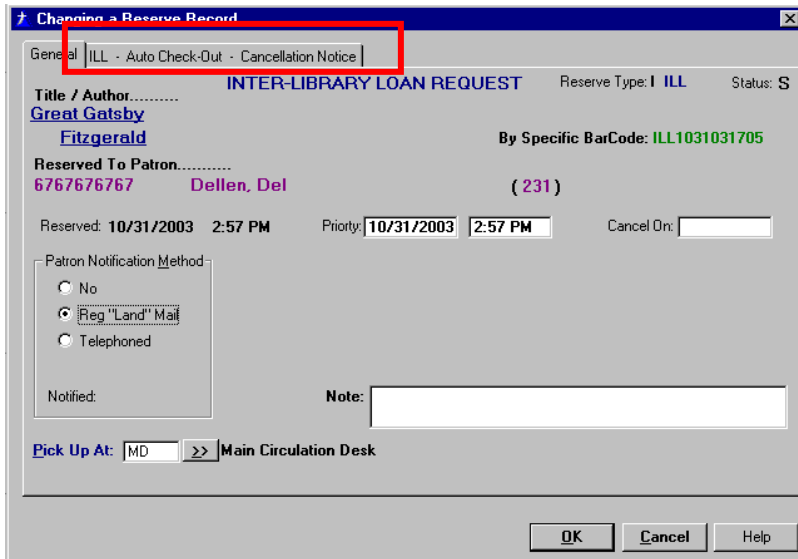
Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.

TRIGGER:

CIRCLESS8-15o

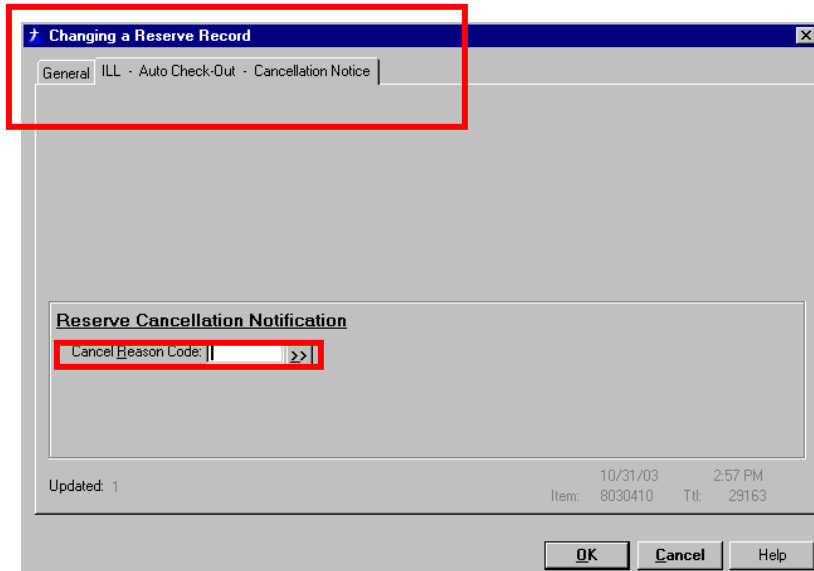
From the **Changing a Reserve Record** screen (Circless8-10j, below), an interlibrary loan reserve also may be cancelled. In this case, the system automatically sends a notice to the patron stating that the item that was reserved is being cancelled (for instance, because it cannot be located or it cannot be removed from the lending library, etc.).




CIRCLESS8-10j

To cancel an ILL reserve, first select the tab at the top of the screen, labeled **ILL – Auto Check-out – Cancellation Notice** (refer back to Circless8-10j, above).

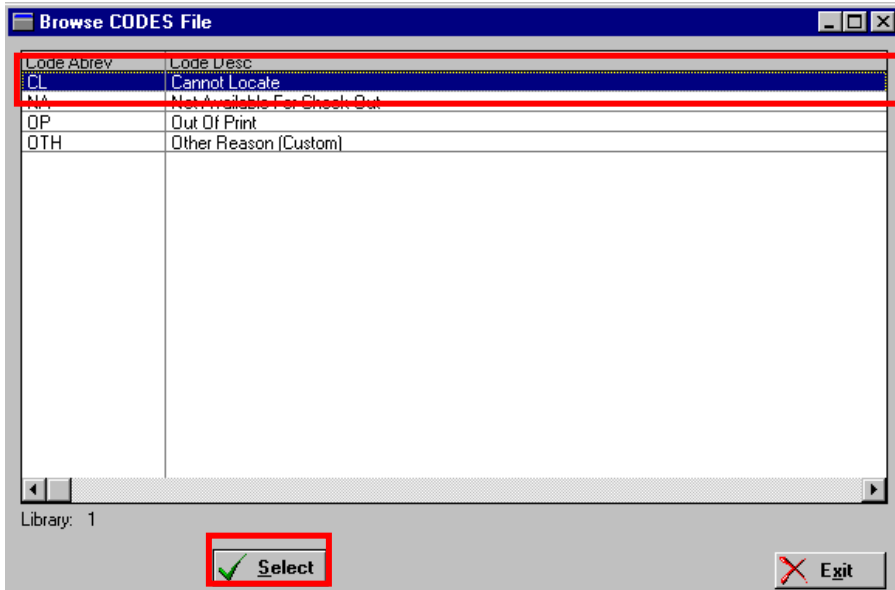
The **Changing a Reserve Record** screen appears with a view of the **III – Auto Check-Out – Cancellation Notice** tab (see Circless8-11k, below).



CIRCLESS8-11k

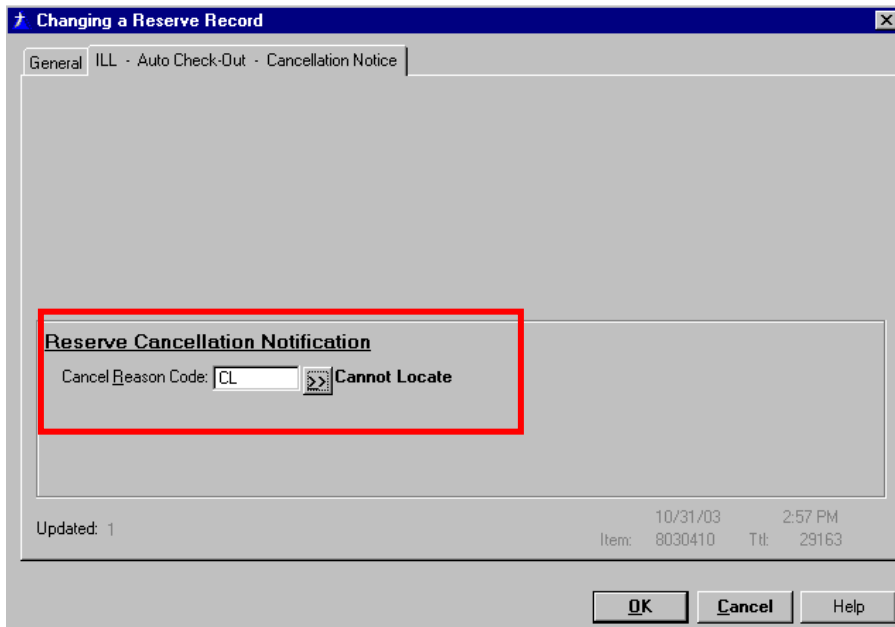
At this screen, access the **Cancel Reason Code** by clicking the mouse on the arrow  to the right of that box (refer back to Circless8-11k, above).

The **Browse CODES File** screen for canceling a reserve appears (see Circless8-12l, below).



CIRCLESS8-12l

From the list of cancellation codes, select/highlight a reason with the mouse, then select the **Select** button at the bottom of the screen to return to the **ILL – Auto Check-Out – Cancellation Notice** screen (see Circless8-13m, below). In the case of the example below, the **Cancel Reason Code** appears as “CL” for Cannot Locate.



CIRCLESS8-13m

The **Changing a LB_ILL Record** screen, featuring Del Dellen's ILL record, reappears with a notice that says, "Queued To Print Next Run," meaning that the message of Del Dellen's ILL request cancellation will be distributed during the next run of messages to other libraries (see Circless8-14n, below).

The screenshot shows a software window titled "Changing a LB_ILL Record" with a close button (X) in the top right corner. The window has two tabs: "Inter Library Loan Record" (selected) and "Special Request Information".

Fields and values:

- Title: Great Gatsby
- Author: Fitzgerald
- Price: 0.00
- System Assigned BarCode: ILL1031031705
- Times Renewed: (empty)
- Checked Out: (empty)
- Due: (empty)
- Last Renewed: (empty)
- Checked In: (empty)

A red rectangular box highlights a blue text notice: "Notice Queued To Print Next Run".

Patron Info:

- Patron Name: Del Dellen
- Patron ID: 6767676767
- Address: 231 6 Sixth Street, Traverse City MI 496860000

ILL Num: 1234567 OCLC Num: (empty)

Requested: 10/31/03

Received: 11/02/03 From Lending Library: TC

Due Back: (empty) Returned/Closed: (empty) Note: Entering a Shipped date will Close the record.

TRIGGER: 12/15/03

Buttons at the bottom: OK, Show Reserve Record, ReCreate Reserve Record, Cancel, Help.

CIRCLESS8-14n

Checking In Returned ILL Items

Before an interlibrary loaned item goes back to the library that “owns” it (lender), it must first be checked in to the “lendee” library (the library that actually lent it to the patron, not the library that “interloaned” the item to the lending library), using the regular check-in program and procedures.

NOTE: Interlibrary loans are checked in using the original, “system-generated” item number. This removes the interlibrary loan from the patron’s account. The item must then be sent back to the “original” loaning library.

With this in mind, assume that Del Dellen has returned an interlibrary loan item, *The Great Gatsby*, and it must be returned to the loaning library. How does staff check it in?

At the **Changing a LB_ILL Record** screen (see Circless8-16p, below), in the **Returned/Closed** box near the bottom of the screen, enter the date the item is scheduled to be sent back to the loaning library. Then, select the **OK** button at the bottom, left side of this screen.

Changing a LB_ILL Record

Inter Library Loan Record | Special Request Information

Title:

Author: Price:

System Assigned BarCode: Times Renewed:

Checked Out: _____ Due: _____ Last Renewed: _____

Checked In: _____

Notice Queued To Print Next Run!

Patron Info: _____

Del Dellen

6 Sixth Street

Traverse City MI 496860000

ILL Num: OCLC Num:

Requested:

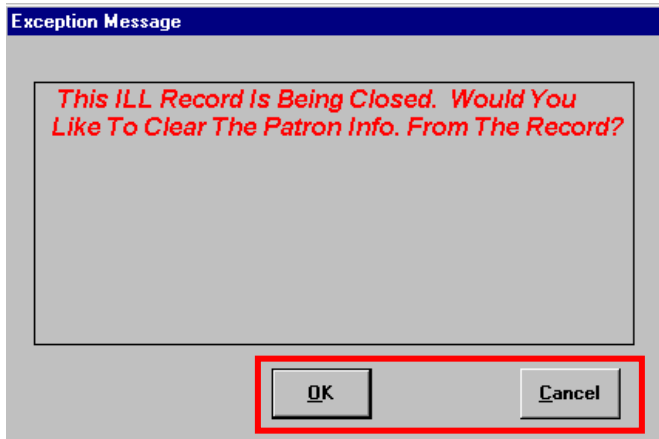
Received: From Lending Library:

Due Back: Returned/Closed: Note: Entering a Shipped date will Close the record.

TRIGGER:

CIRCLESS8-16p

An **Exception Message** asking whether the user would like to clear the patron's information from the ILL record appears (see Circless8-17q, below).



CIRCLESS8-17q

Either select **OK** to clear the record, or select **Cancel** to maintain the record information (refer back to Circless8-17q, above).

As soon as a return-date is recorded for an item in the **Returned/Closed** box (refer back to Circless8-16p, above), the system removes it from the "open" list, and places it on the **Closed Interlibrary Loan** list.

Special Note About Trigger Reports

The **TRIGGER** box or field at the bottom left side of an item's record (**Changing a LB_ILL Record** screen – see Circless8-18r, below) can be used to “trigger” a report when an item should be reviewed on a specific date. This is a “tickler” date set by the system, which defaults to exactly one month from the “requested” date.

In the example of Circless8-18r, below, the requested date is July 1, 2003, so the trigger date is August 1, 2003.

The screenshot shows a window titled "Changing a LB_ILL Record" with two tabs: "Inter Library Loan Record" and "Special Request Information". The "Inter Library Loan Record" tab is active. The form contains the following fields and information:

- Title:** Snake Charmer
- Author:** S Mahurabi
- Price:** 0.00
- System Assigned BarCode:** ILL1030701700
- Times Renewed:** (empty)
- Checked Out:** (empty)
- Due:** (empty)
- Last Renewed:** (empty)
- Checked In:** (empty)
- Awaiting Pick Up By:** Del Dellen
- Patron Info:**
 - Patron Name:** Del Dellen
 - Patron ID:** 6767676767
 - Address:** 6 Sixth Street, 231, Traverse City MI 496860000
- ILL Num:** (empty)
- OCLC Num:** (empty)
- Requested:** 7/01/03
- Received:** (empty)
- From Lending Library:** (empty)
- Due Back:** (empty)
- Returned/Closed:** (empty)
- Note:** Entering a Shipped date will Close the record.
- TRIGGER:** 8/01/03

At the bottom of the window are several buttons: OK, Show Reserve Record, ReCreate Reserve Record, Cancel, and Help.

CIRCLESS8-18r

Processing Requests from Other Libraries for Materials from Your Library

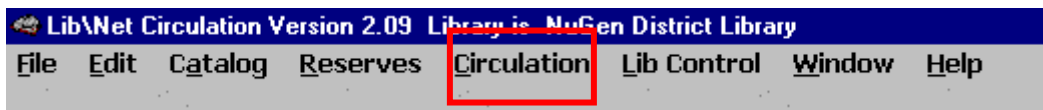
Before outgoing interlibrary loans can be processed, be sure that there is an **ILL** classification in the **Patron Classification** code file in the **LibNet** setup program. The codes screen is accessed from the **Setup** menu under **Patron Classification**.

First, it is necessary to create a patron record for each library to which items are loaned.

To establish such an account:

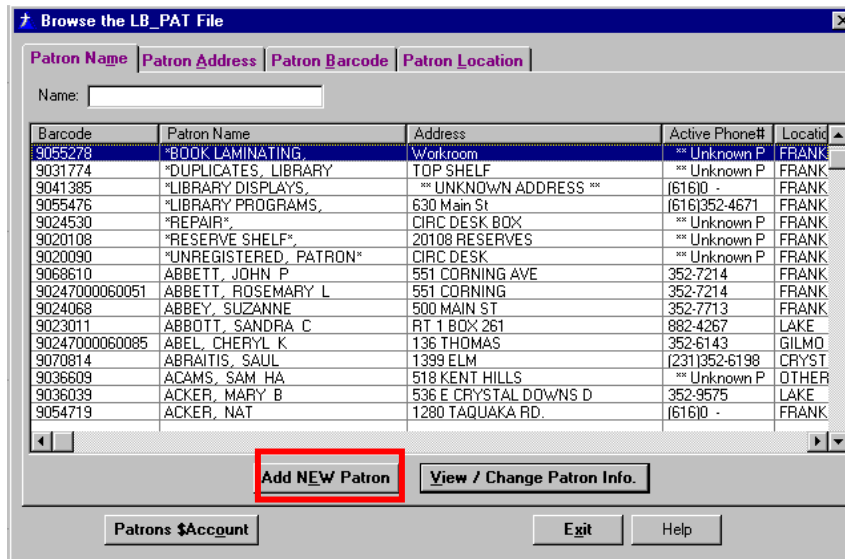
1. add a new patron record
2. enter the library's name and address on it

Select the **Circulation** pull-down menu at the opening **LibNet** screen (see Circless8-11, below).



CIRCLESS8-11

Select **Browse Active Patrons** from the Circulation pull-down menu, and the **Browse the LB_PAT File** screen appears (see Circless8-12, below).



CIRCLESS8-12

Select the **Add NEW Patron** key from this screen (refer back to Circless8-12, above).

LibNet Circulation Manual

The patron record form (the Adding a LB_PAT Record screen) appears (see Circless8-13, below).

Adding a LB_PAT Record

General | Address | Classification \ Statistics | Trap Message | \$Balance By Library | Patron Barcodes

Barcode: Assign New Barcode

Regular Patron
Patron Status: Active To Be Deleted

Last Name: <F3
First Name:
Middle Name:
In Care of Name: <F3

First Registered: 7/10/2003 at Lib: 1
Last Renewed: 7/10/2003 <SetDate

\$Due:

Active Address:
Traverse City MI 496840000
231 000-0000

Gender:
 Female Male Unknown Pin:

Date of Birth: Social Security: 000-00-0000

Driver License:

Patron Location: TC <F3 >>

Produce Card Mailer:
 Yes No 9687476 1

CIRCLESS8-13

Use this form to complete the appropriate information for the library requesting the item (see Circless8-14, below).

Adding a LB_PAT Record

General | Address | Classification \ Statistics | Trap Message | \$Balance By Library | Patron Barcodes

Barcode: Assign New Barcode

Regular Patron
Patron Status: Active To Be Deleted

Last Name: Anytown Public Library <F3
First Name:
Middle Name:
In Care of Name: <F3

First Registered: 7/10/2003 at Lib: 1
Last Renewed: 7/10/2003 <SetDate

\$Due:

Active Address:
Traverse City MI 496840000
231 000-0000

Gender:
 Female Male Unknown Pin:

Date of Birth: Social Security: 000-00-0000

Driver License:

Patron Location: TC <F3 >>

Produce Card Mailer:
 Yes No 9687476 1

CIRCLESS8-14

Then, select the **Classification\Statistics** tab at the top of the patron record (**Adding a LB_PAT Record** screen, see Circless8-15, below) to change the classification.

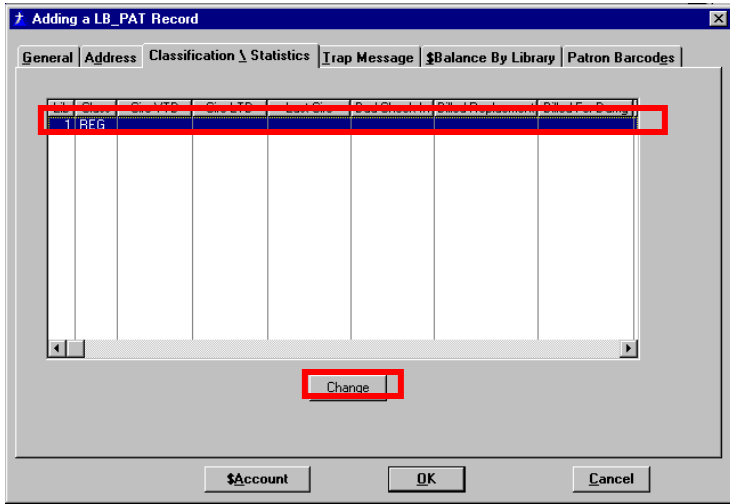
The screenshot shows a software window titled "Adding a LB_PAT Record". At the top, there are several tabs: "General", "Address", "Classification \ Statistics", "Trap Message", "\$Balance By Library", and "Patron Barcodes". The "Classification \ Statistics" tab is highlighted with a red rectangular box. Below the tabs, the form contains various fields for patron information. On the right side, there is a section titled "Regular Patron" with a "Patron Status" group containing radio buttons for "Active" (selected) and "To Be Deleted". Other fields include "Barcode", "Assign New Barcode" (checked), "Last Name" (with a red "<F3" label), "First Name", "Middle Name", "In Care of Name" (with a red "<F3" label), "Active Address" (displaying "Traverse City MI 496840000" and "231 000-0000"), "Gender" (radio buttons for "Female", "Male", and "Unknown" selected), "Pin", "Date of Birth", "Social Security" (with "000-00-0000"), "Driver License", "Patron Location" (with "TC" and a red "<F3" label), "Produce Card Mailer" (radio buttons for "Yes" and "No" selected), and a numeric field "9687476". At the bottom, there are three buttons: "\$Account", "OK", and "Cancel".

CIRCLESS8-15

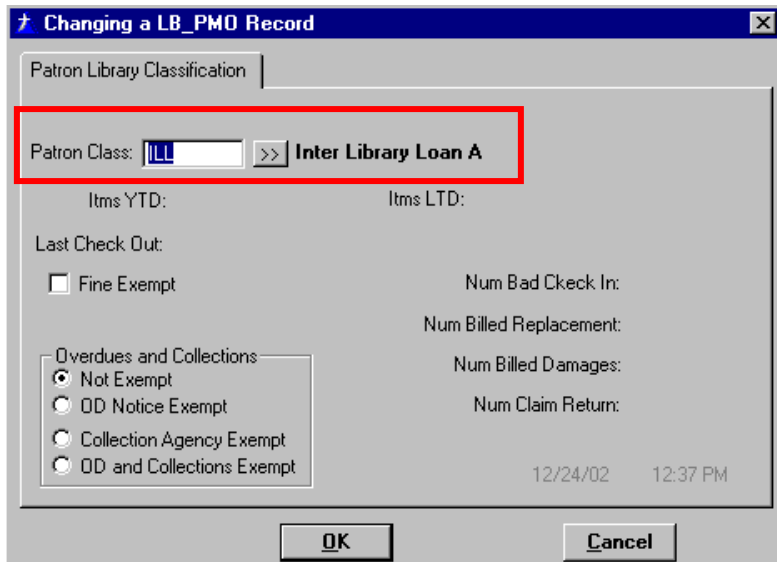
The **Classification\Statistics** tab opens the “folder” or page which has the classification information for that record on it (see Circless8-16, below).

The system defaults to the **REG** (regular) classification code, but rather than use this classification, for interlibrary loan library records it is necessary to use the **ILL** (interlibrary loan) classification code.


Change the code from **REG** (see Circless8-16, below) to **ILL** (see Circless8-23, below) by selecting the **Change** button near the bottom, center of this screen (refer back to Circless8-16, below).

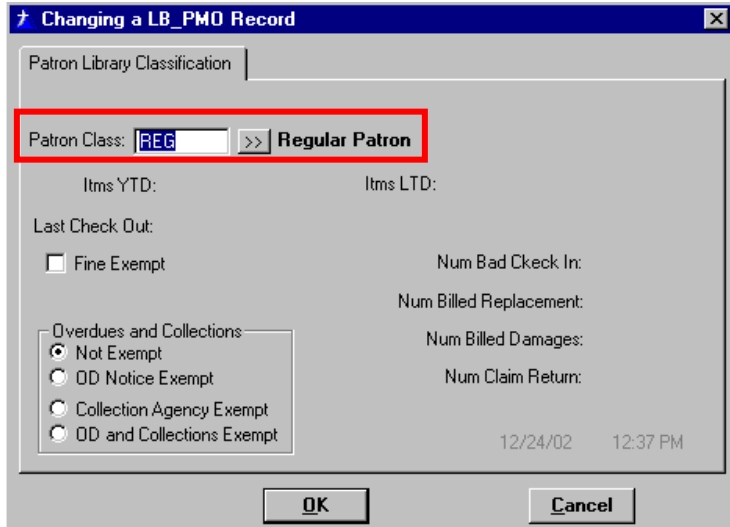


CIRCLESS8-16



CIRCLESS8-23

The **Changing a LB_PMO Record** screen appears (see Circless8-17, below). At this screen, select the arrow  button labeled **Regular Patron** to the right of the **Patron Class** field (refer again to Circless8-17, below).

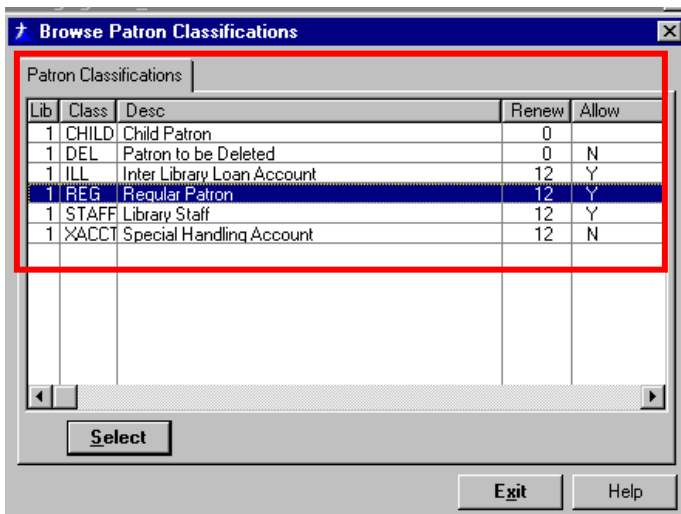


CIRCLESS8-17

A list of all of the patron classifications in the system appears on the **Browse Patron Classifications** screen (see Circless8-19, below).

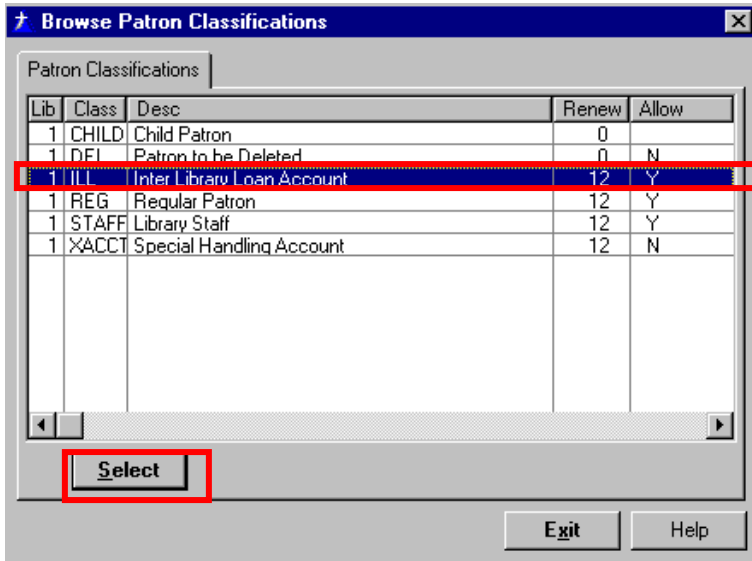
The patron classifications are:

- CHILD – Child Patron
- DEL – Patron to be Deleted
- ILL – Inter Library Loan Account
- REG – Regular Patron
- STAFF – Library Staff
- XACCT – Special Handling Account



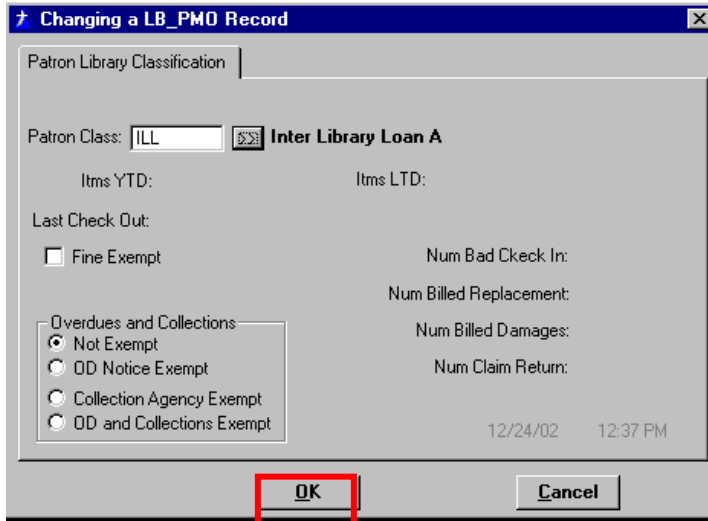
CIRCLESS8-19

With the mouse, highlight the **ILL** or **Inter Library Loan Account** code, then choose the **Select** button at the bottom left of the screen (refer back to Circless8-20, below).



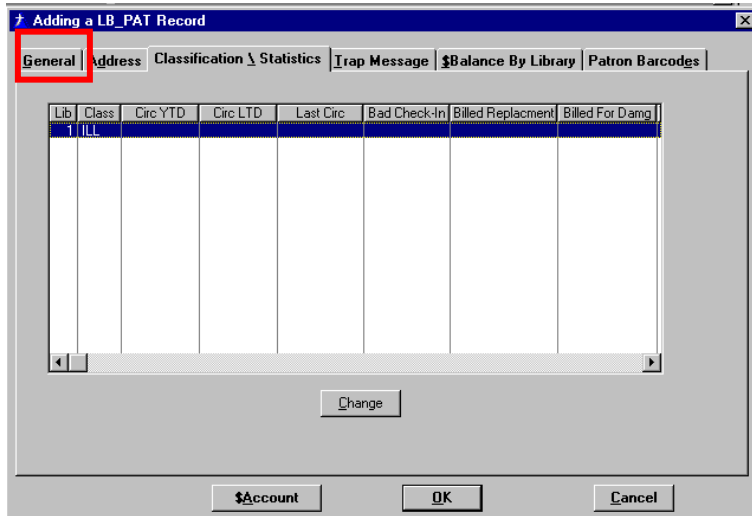
CIRCLESS8-20

The **Changing a LB_PMO Record** screen reappears (see Circless9-21, below). At this screen, select the **OK** button at the bottom of the screen.



CIRCLESS9-21

The **Adding a LB_PAT Record** screen reappears with the new **ILL** code on it (see Circless9-22, below).



CIRCLESS9-22

To continue completing the patron record, select the **General** tab at the top of this screen again (refer back to Circless9-22, above).

Once the library that wishes to borrow items has been established in the system as a patron, check out the items it has requested, then mail the books to that library.

NOTE: Circulation rules apply to a check-out, and are based on whatever codes have been established in the system for the ILL patron classification.

When the items are returned, simply check them back in.

Printer (Epson LQ570+) Setup Procedure for Printing Overdue Notices

Place box of overdue notice mailer forms directly behind printer.

Open cover to expose tractor feed mechanism and place leading form face-down between both sides of opened tractor feeds.

Lock both sides of the form on to the tractor pin feed clips.

Flip up the lever that locks the tractor rods and slide the entire form with tractors all the way to the right, as you face the front of the printer.

Lock the tractors on the rod with the locking levers.

On the left side of the printer inside the front cover, move the “number of copies” lever to “multiple copy” thickness.

Press the “load” button to automatically position the forms to print on the first line.

Notices are now ready to select and print.

When printing the overdue notices is completed, reload the printer with regular paper, slide the forms and tractors all the way to the left, and change the “number of copies” lever back to “single copy” thickness.