

Circulation helpers

Circulation Helpers will appear on appropriate screens as you perform circulation functions. Only helpers that function from a specific screen will display. (To set the properties for a helper, see Setup/Getting Started/Set Properties guide.)

1. User Search



The following methods are available to identify a user. **Select** one.

- **Keyword** - Locates and displays user records that contain the terms you entered. Boolean operators, field qualifiers, and other search strategies can be used to narrow or expand your search. The search indexes that display are wizard specific.
- **Browse** - Produces a list in the alphabetic vicinity of the term you entered. For example, a search on Jones J might return all users with a last name of Jones and whose first name begins with J.
- After choosing the method, **select** the Lookup field and enter the users name or ID.
- If a list of users displays, **select** a user, then continue the process.

2. Register New User



Using this helper, you can register a new user by selecting a profile name and entering other user information. New users often need to be registered during the checkout process.

Once the user is registered, you can check out materials to the new user, review the user information, or make additional changes to the new user record.

3. User Lost Card



Using this helper, you can replace a user's barcode by identifying the user, then entering a new user ID. As the user's library card and record is updated with a new barcode, the server creates a new user record and changes the user profile of the old user record to LOSTCARD.

- **Search** for the user who lost the card.
- **Select** the Assign New Card button to issue a new card, or **select** Cancel to search for another user record.
- **Scan** the new user ID on the new card, or **type** the new ID in the New User ID field. You will see a message confirming that the new card has been issued, and the old user ID has been deactivated.

When you return to the Checkout wizard or Renew User Checkouts wizard, the new user ID is entered automatically.

Set the properties of the User Lost Card helper to use default user search values.

4 Display User



Using this helper button, you can display user information by selecting from the following folder tabs.

- Summary
- Addresses
- Extended Info
- Bills
- Checkouts
- Suspension

5. Copy User



The Copy User helper is used to create a new user record by copying existing user information.

- **Click** the Copy User helper.
- **Search** for the user record.
- If a list of users displays, **select** a user.
- **Click** Clone/Copy User.

6. Modify User



The Modify User helper is used to change an existing user record.

- **Click** the Modify User helper.
- **Click** each tab, as needed, to make changes to the existing user record.

7. Renew Privilege



- This helper displays when the user's privilege is set to expire within 30 days. If you click **Extend Privilege**, the user's privilege expiration date is extended based on the associated User Profile policy.

8. Item Search



You can display item information with the Item Lookup step. The Item Lookup step allows you to perform a Keyword lookup, Browse lookup, or Exact lookup. If item information was recently modified, you can do a Current lookup.

- If a list of items displays, **select** an item, then continue the process.

Item information may need to be displayed in the following circumstances.

- Checking out an item
- Checking in an item
- Renewing an item
- Billing a user
- Making item holds available
- Inventorying an item
- Marking an item as used
- Checking in a bookdrop item
- Checking an item's status
- Receiving items from transit

FYI: Sort By

The Search or Browse lookup results will be sorted by the selected criteria. The following sort options are available.

- Author sorts by the first occurring author field in the record. Titles that do not include an author display first in the list. Main entry (1xx) and added entry (7xx) authors are combined in the sort.
- Title sorts by the title statement (245) entry.
- Subject sorts by the first occurring subject field in the record. All subject heading types, including topics, names, titles, and geographic headings (6xx) are combined in the sort.
- Pub Year sorts with the earliest published titles first.
- Reverse Pub Year sorts with the most recently published titles first.

9. Check Item Status



The Check Item Status helper is used to display information about the current status of an item, where the item is shelved, or whether it should be put in transit.

- **Click** the Check Item Status helper.
- **Scan** the item's ID in the Item ID box. The Current Status of Item window displays information about the item, proposed action, and current location of the item (if needed).
- **Click** OK to close the helper and return to the wizard to continue checking the status of other items.

10. Change Item I.D.



The Change Item I.D. helper guides you through the process of replacing a missing, damaged, or temporary barcode while you are using a wizard.

- **Scan** the item's barcode, or enter an item's call number. Select Current to accept the most recently displayed or modified item.
- **Select** a library from the Library verify list to qualify the lookup.
- If a list displays, **select** one on the items and **choose** the Change Item ID button.
- You can also **choose** the Cancel button to display another user.
- If you enter a call number and it has more than one item, **select** one of the listed items and **click** the Change Item ID button.
- In the Change Item ID Enter step, **scan** the item's new barcode and **select** Modify.

You can customize the Replace Item Barcode helper by setting its properties.

11. Limit List by Due Date



Using this helper with the Renew User Checkouts wizard, you can limit the items displayed on a renew list by the due date. Enter a date and time in the List Items Currently Due On or Before field, or select a date and time using the Calendar gadget. Only items with a due date on or before the specified date display in the item renew list.

12. Pay Bills



Using this helper button, you can accept bill payment during another Circulation activity. This helper button only displays when the identified user has unpaid bills. A payment can be made for a single bill or applied to the total.

The amount owed glossary shows bill information, such as the amount of the bill, the billing date, billing reason, number of payments, number of notices, amount still owed, the date paid, and the billing library. If the patron has made any payments on the bill, the payment due date, payment amount, and payment type are shown for each payment. If the bill is for an overdue item, the glossary displays the date the item was checked out, the date it was due, the date the item was renewed (if applicable), the date the item was returned, and the circulation rule. This information is useful if the patron questions the bill.

If the amount of the bill and the amount the user still owes differ, either the user made a payment on the bill, or tax has been figured on the amount billed. The tax rate is set for each billing reason in the Bill Reason policy.

Once a bill has been paid, you can review the payment or continue the current process. If bills are not paid in full, you can also make more payments.

13. Add Brief Title



A brief title record may need to be added when a patron wants to check out an item that has not been cataloged. See (10.2 Item Maintenance, Add Brief Title)

- **Select** the Add Brief Title helper from within the wizard.
- **Add** a temporary title record to the catalog by entering title and author information. The title is required.
- Additional copy information displays, allowing you to change the type, library, or item ID (barcode). Item groups, locations, and libraries are specified in your library's policies.
- After adding the temporary record, you can check out the item to the user.

NOTE: *Although the server will assign an auto-generated item ID in place of an actual barcode, the library should keep a supply of random item barcodes on hand at the Circulation Desk to be used when adding temporary (on-the-fly) titles. Checking in the item will then be much simpler when it is returned.*

14. Confirm Address



Using the Confirm Address helper button, you can display a user's address for confirmation. The K-12 staff client remembers the previous user ID. If the address needs to be updated, changes can be made, or information can be added using the Before, After, and Delete helper buttons.

After the address has been confirmed or updated, you can return to the current wizard, review the address again, or make additional changes to the address.

15. Special Due Date



When checking out or renewing an item, you can set a special due date before scanning the item(s). Use the Calendar gadget to select a date in the Special Due Date field. Then select how long you want this date effective.

- **From now on** – the date you select will remain in effect for all users until you close the Checkout wizard or use the Clear Date action button. This date will display on the checkout screen.
- **For this user only** – the date you select will affect all the items this user checks out.
- **For this checkout only** – the date you select will affect only this one item.

After returning to the checkout or renewal process, scan the item's barcode in the Item ID field.

16. Select Another Library



When you choose the Select Another Library helper in the Pending Transit wizard window, the Select Another Library window displays select a Library from the list.

- To view items in transit to another library, **select** the library name from the Library list, and then click OK.

17. Print User



Print User information by selecting the **PRINT USER** helper. This will allow for printing of user information from inside the wizard. The helper allows you to select to print All user information, or select from the following options.

- Summary** — Prints user information from the Summary tab of the user record.
- Addresses** — Prints all user address information.
- Extended Information** — Prints all user extended information.
- List of Checkouts** — By default, prints all Active checkouts. To change, select from the list options Active, All, Claims Returned, Inactive, Overdue, Recalls, Renewals.
- List of Bills** — By default, prints all Unpaid bills. To change, select from the list options Unpaid, Paid, All.
- List of Holds** — By default, prints all Holds. To change, select from the list options All, Available, Recalled, Reserve.

Note: For more detailed information or specific questions, search **ONLINE HELP**.