CARL.X

Fundamentals of Circulation

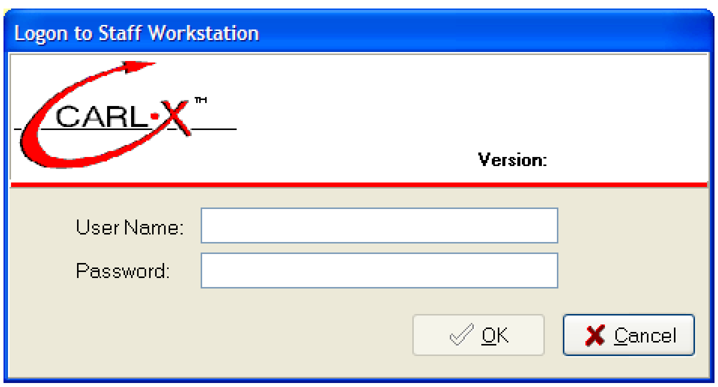
Last Updated: June 2015

Logging In and Out of the CARL.X Staff Workstation

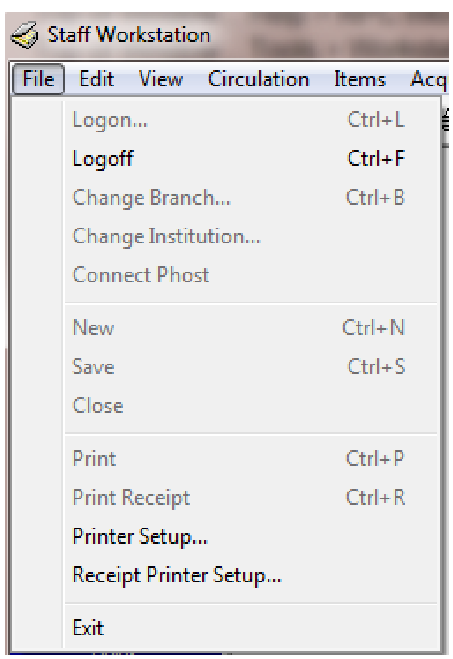
The CARL.X shortcut is on the desktop on your PC for easy access to the Staff client.

The logon window appears when the CARL.X Staff workstation is launched. A valid User ID and Password are required at the Logon window to access the Staff workstation. ID and Password are case-sensitive.

HINT: Your password should be something that you can enter quickly (you will be logging in and out A LOT each day) Do Not share your login and password – remember that the system will log who completes each action in the system, so unless you want your login to be 'responsible' for others' actions in the system, you will want to log off when you are away from the computer.

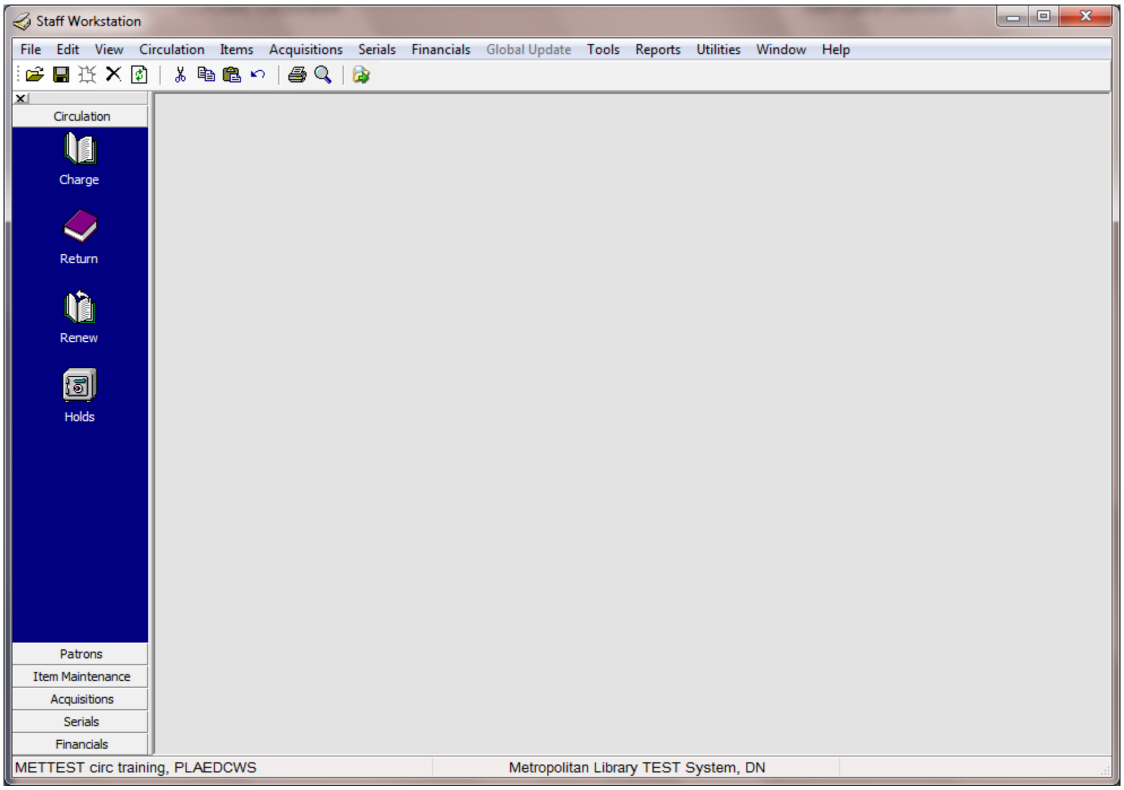


To log out of the CARL.X Staff workstation, you can either select Logoff from the File Menu or use Ctrl+F.



Covering the Basics – The Menu Bar

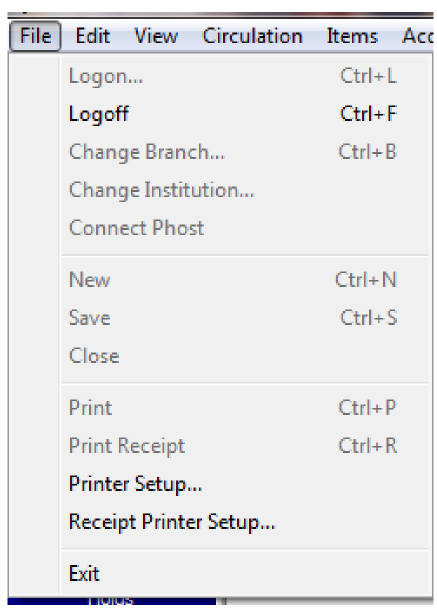
The Main window appears after successful logon. When you log on, the security level setting linked to your User ID and Password will determine which functions are available to you.



File

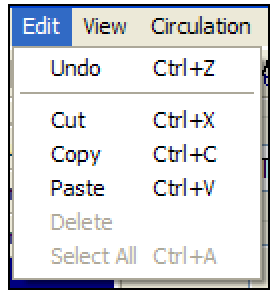
From the **File** pull-down menu, you can logon and logoff, access and modify the printer and receipt printer setup, and exit the application.

Logoff allows you to leave the client up, disabling all features until the next staff member comes to logon.



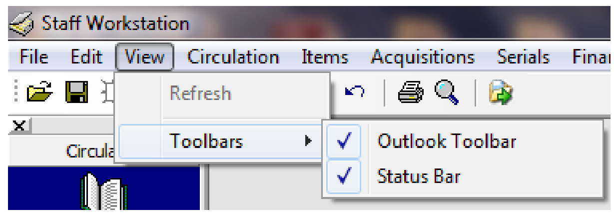
Edit

The **E**dit pull-down menu provides standard editing capabilities, including undo, cut, copy, and paste. The menu also contains editing shortcut keys. Equivalent editing toolbar buttons are available on the toolbar, if the workstation is set to display the Edit toolbar.

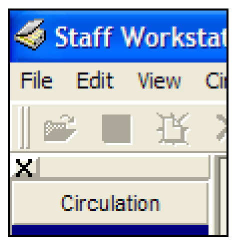


View

View pull-down menu allows you to customize the look of your workstation. You may turn off/on the Outlook Toolbar and the Status Bar.



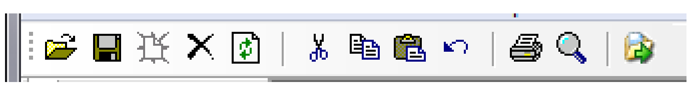
The Outlook Toolbar can also be closed by clicking on the X in the upper left corner. The Outlook Toolbar can be opened again by clicking on the X when the toolbar is closed.



Status Bar

The status bar displays your connection information. This shows the database you are connected to (in the above example this is 'METTEST'), you user logon ('circ training'), the name of the PC you are on ('PLAEDCWS'), the Institution name ('Metropolitan Library TEST'), and the Branch code ('DN').

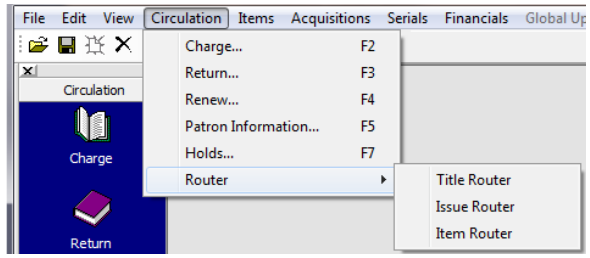
Tool Bar



The Toolbar contains the standard Cut, Copy and Paste functionality. The print button will print information displayed in your active window. This does not print a screen shot of the information in the window, so the format will look different on the printed page. The magnifying glass will open Companion Searcher. You can access the Help files from the toolbar, and also access information about reports you are running.

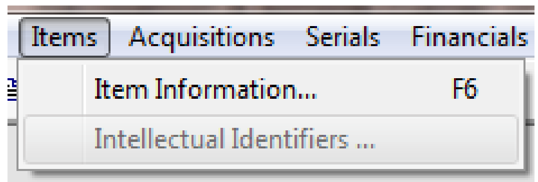
Circulation

The Circu**L**ation pull-down menu makes navigation a simple matter of highlighting the desired function, using the designated hot keys (for example, C for Charge), or pressing a function key (F2 for Charge).



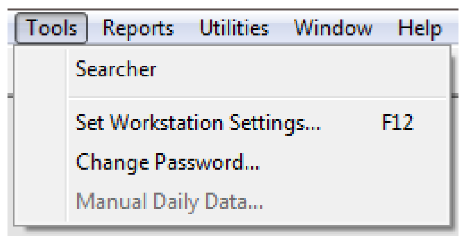
Items

The **I**tems drop-down provides access to Item Information where Item Creation, Deletion and material searching is available (also available by pressing F6).



Tools

The **T**ools drop-down provides access to the stand-alone Companion Searcher tool, Set Workstation Settings where defaults and preferences can be set (F12), the ability to Change Password (for the user currently logged in).



Hot Keys and Function Keys

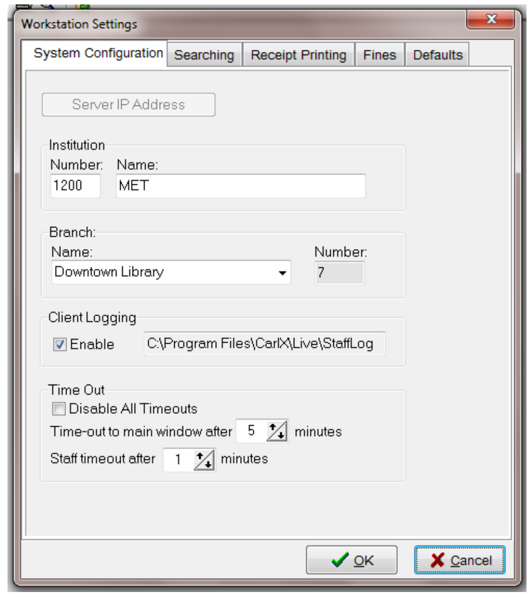
File >
Ctrl L – Login
Ctrl F – Log Off
Ctrl R – Print Receipt

Circulation >
F2 - CHARGE
F3 – RETURN
F4 – RENEW
F5 – PATRON INFORMATION
F6 – ITEM INFORMATION
F7 – PLACE HOLD
F12 – WORKSTATION SETTINGS

Workstation Settings

Workstation settings allow each staff member to customize their PC for the workflow that makes them the most productive.

The Tabs:

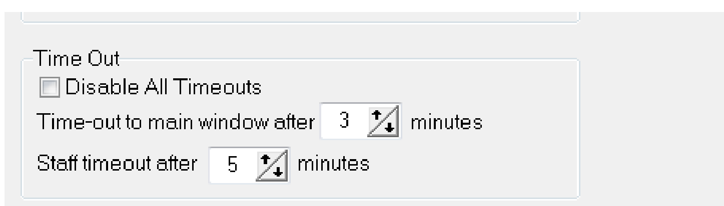


S**Y**stem Configuration - shows institution and branch the client is pointing to, and the location of the error log. If you are experiencing error messages in the client, turning on the error log will log the messages, and this log can be sent to your system administrator for analysis.

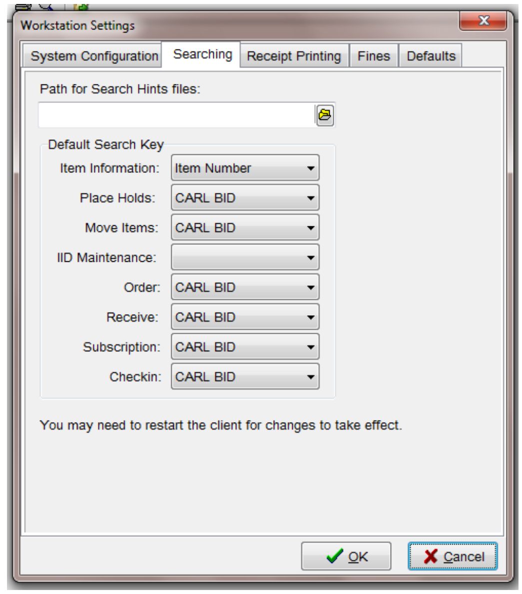
Time Out - is the amount of idle time before your workstation closes windows and logs out of the client will be displayed.

The Main Window timeout will close all of the functions within the staff client.

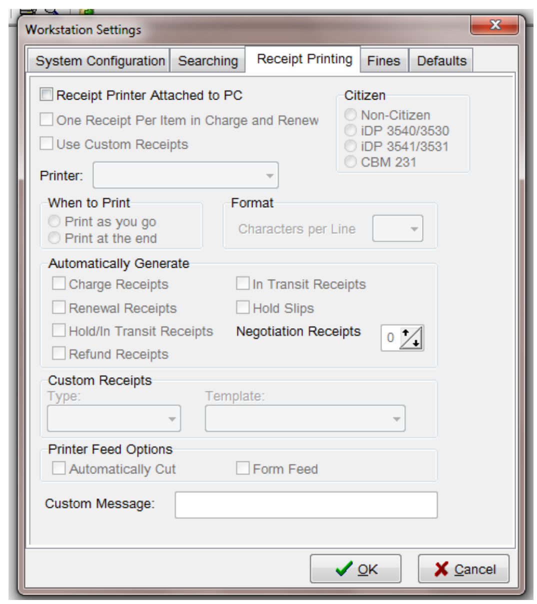
NOTE: The default time out settings will be 3 minutes for main windows and 5 minutes for staff timeout for all staff members.



Searc**H**ing – allows you to set search defaults for Item Information, Place Holds, Move Items, IID Maintenance (for the Outreach feature), Order, Receive, Subscription, and Checkin. This tab also provides the location of the searching hints files that are loaded on each PC when the CARL.X Installer is run.

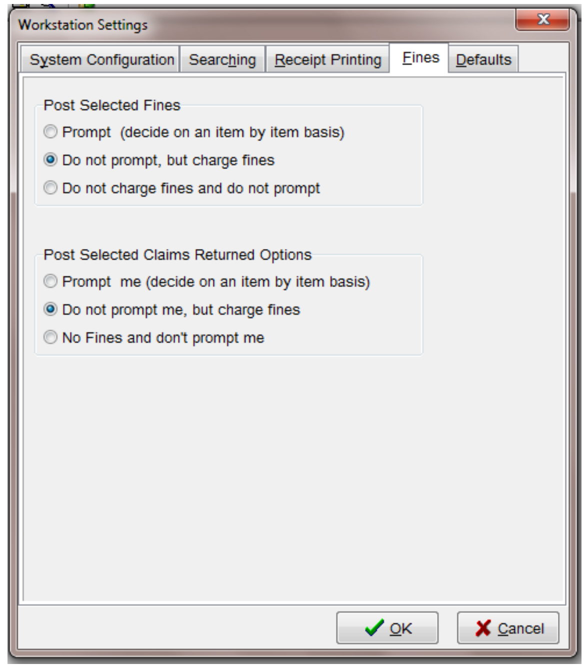


Receipt Printing – creates a quick and easy way to set the receipt printer settings that best meet your workflow.



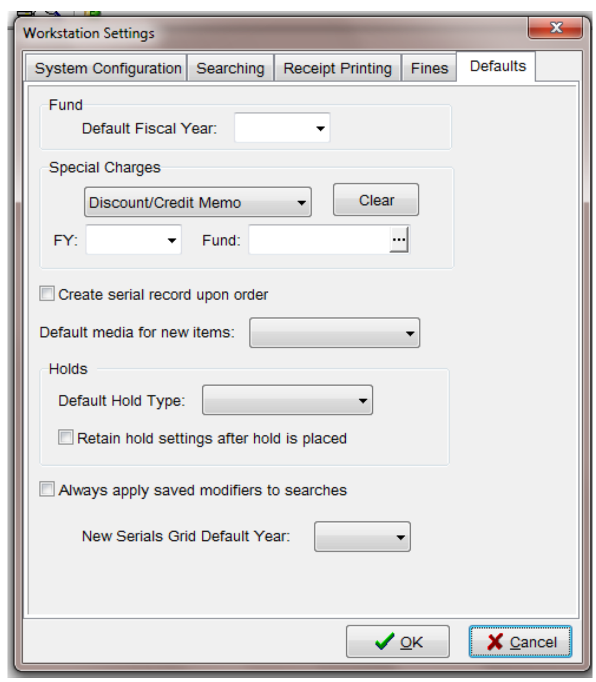
Fines

Post Selected Fines allows you to select if you want to be prompted when overdue items are returned and fines are owed and if fines are to be posted for these items. The options are to be prompted each time fines are due and you can decide at that point, to not be prompted if fines are due but to charge the fines anyway, or to not attach any fines and not be prompted.



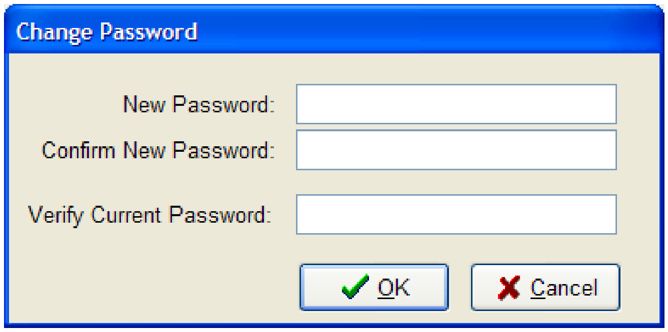
Post Selected Claims Returned Options allows you to select if you want to be prompted when Claims Returned items are returned and if fines are to be posted for these items. The options are to be prompted each time an item with Claims Returned status is returned and you can decide at that point, to not be prompted if an item in Claims Returned status is returned, but to charge fines anyway, or not to attach any fines and not be prompted.

Defaults **-** allows you to set the Default Fiscal Year information, and Special Charges defaults for use in Acquisitions. You can determine if you would like a Serials Record created at the point of order, and the default media type to automatically fill in when converting items in Item Information. You can also determine the behavior on the Holds screen by selecting your default hold type, and determine if the settings are reset to defaults after a hold is placed. You may also specify if you would like saved Companion Searcher modifiers always applied to a search within Circulation.



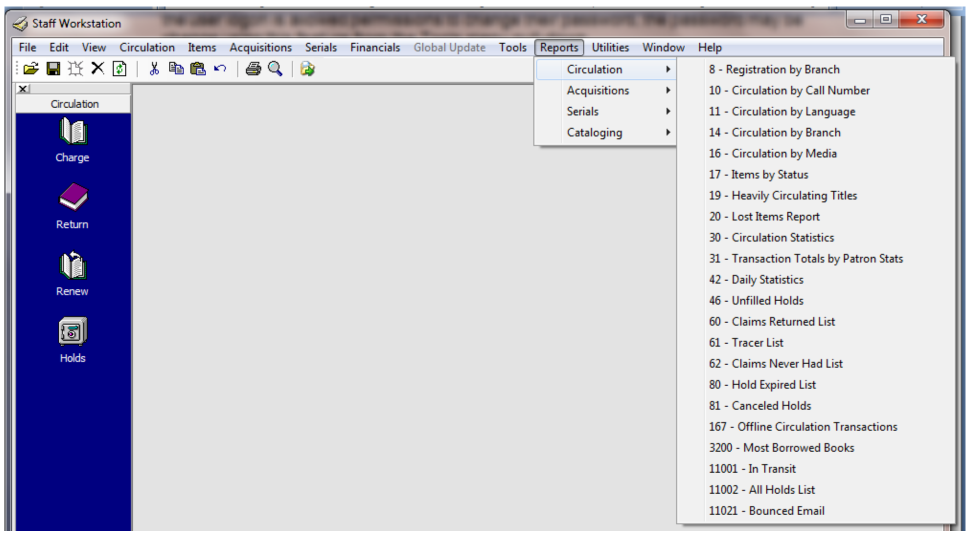
Change Password

You may change your password using this feature from the Tools menu pull-down.



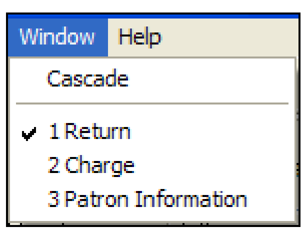
Reports

The Reports pull-down menu will allow staff to access the reports that are made available through the staff client. Access to reports will be dependent on each employee's permission level.



Windows

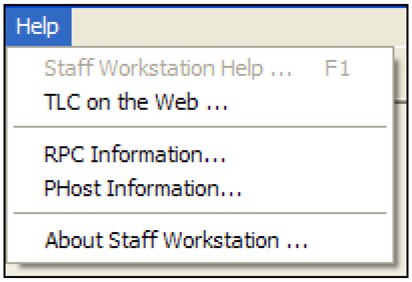
The Windows pull-down menu becomes active when more than one window is open within Circulation. The top portion arranges the various windows in a cascade manner. The bottom portion shows you which windows are open and the active window has a “check” mark next to it.



Window Maximums:

- Only 1 each for Charge, Renew, Return, Item Info, and Holds
- 5 Patron Windows allowed.

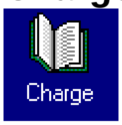
Help
The Help pull-down menu provides access to various help screens available within the Staff Workstation.



CARL.X Circulation Functions

CARL.X Circulation tracks changes in and links between holdings and patrons, updating the records of each as items are charged and returned, and other transactions are processed. Circulation supports six major functions: Charge, Return, Renew, Holds, Patron Information, and Item Maintenance.

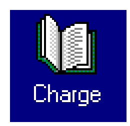
Charge (F2)

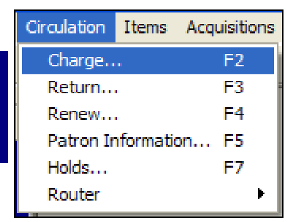


The Charge function controls the circulation of library materials by linking item records to individual patron records in the form of transactions. You can access patron records through the library card barcode or patron name. Patron records can also be searched by keyword. Item records in Charge can be accessed by item number only.

The Charge function creates a transaction record based on library-supplied parameters, determines loan periods, checks patron delinquency and other blocks or flags, and calculates due dates. An item's circulation history is incremented each time it is charged, and the Charge function updates the status of the holdings record, allowing display of charge status in staff and public access modules.

You can access the Charge function by Clicking the Charge Icon, by selecting Charge from the Circulation menu, by pressing F2, or by pressing <ALT> then <L> then <C>.





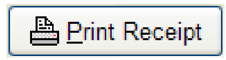
How to Charge an Item

Scan or type in a Patron ID in the Patron Barcode field. If typing in the barcode, press <Enter> when finished.

After you scan or type in a Patron Barcode or retrieve the patron by browsing, the cursor remains in the Patron Barcode box, but the box itself now says Item Barcode in highlighted text. It is ready for you to begin scanning item numbers to charge items out to patrons.

Scan or type in an Item Barcode number. Items are charged in real time, reflecting the new status in Staff and Public modules. A running list of charged items appears in the grid in the Charge window.

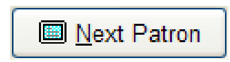
The Charged counter at the bottom of the grid tracks the number of items checked out in this session. The Denied counter tracks the number of items in this session that were not checked out to the patron. The Quick Returned counter tracts the number of items that were quick returned in this session.

When all items are charged to the patron, click on the 

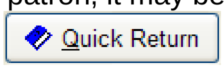
button to print a receipt of items checked out and the corresponding due date.

OR

When you have completed your work with the Patron Account, click the button to clear the Charge screen and print a receipt. You are ready for your next patron.

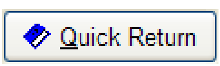


Quick Return

After charging an item to a patron, it may become necessary to return the item to remove it from the patron's account. The 

option makes this an easy process without having to leave the Charge function.

From the Charge window, highlight the item in the grid that the patron no longer wishes to borrow.

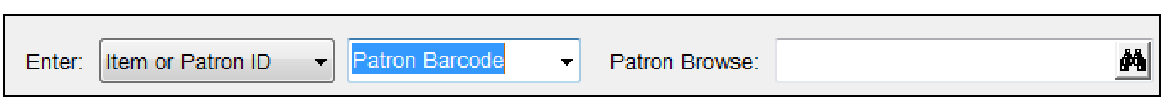
Press the 

button. The item will be returned from the patron account with the appropriate item status and the Charge grid will reflect the Quick Return.

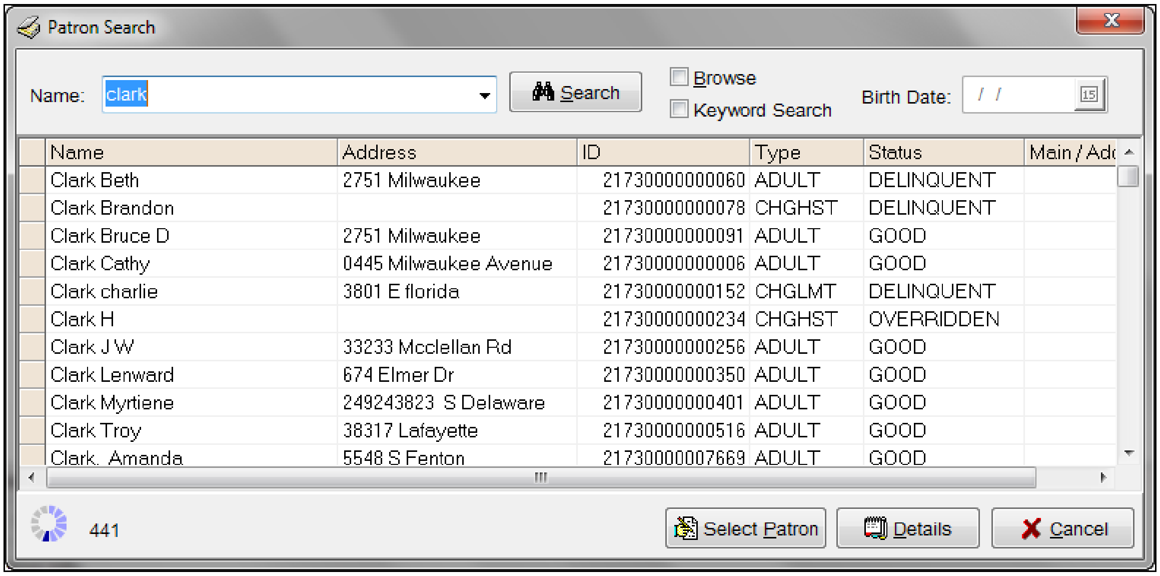
Looking up patron in the Charge screen

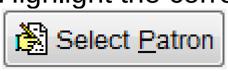
It is possible that a patron may not have their card with them. If that is the case, the patron record can be retrieved in Charge by performing a Patron Name search after checking appropriate ID. The default search is a Patron Keyword Search. You can access additional searching methods by clicking on the binoculars, or by entering no search term and pressing <Enter>.

Perform a Patron Name search by entering the search team into the Patron Browse field and either pressing the binoculars or pressing <Enter>. Some searching hints include: Leaving off the middle initial; Looking up addresses by leaving off words like dr, street, blvd, etc.; You can also use a wild card search (e.g. Anders* to get both Anderson and Andersen results).

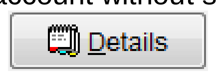


The Patron Search result window will display.

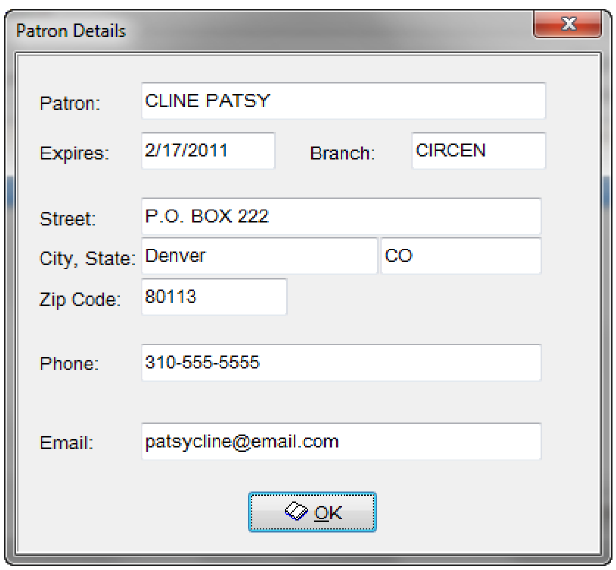


Highlight the correct patron from the grid and either double-click the line, or click the 

button. The patron record will be pulled back into Charge and will be ready to have materials checked out to him/her.

To find out more detailed information about a patron account without selecting the record into Charge, highlight the account in the grid and click the 

button.

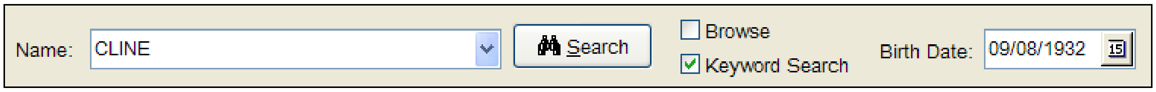


Clicking 

on the Details screen will return you to the search result screen.

You can change the type of patron search you would like to complete from within the results screen. To complete a Patron Keyword Search, check the Keyword Search checkbox. This will search the patron record for the entered terms. All accounts that contain the entered search terms in any indexed field will be displayed in the result screen.

A Patron Search by Birth Date can also be completed if you were unable to location your patron. Make sure the Keyword Search box is checked, and there is an entered search term in the Patron Browse field. Enter the Birth Date manually or click on the Calendar icon to select the birthday, and then click Search or press <Enter>.

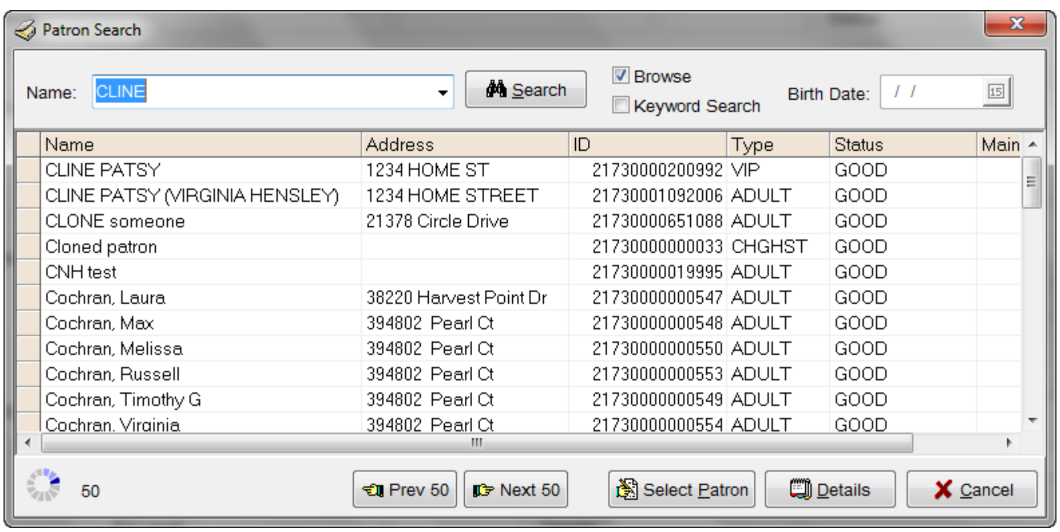


You can click the Browse checkbox to change the type of search to an alphabetical browse. Click the 

button to re-execute your search, or type in your search term and press <Enter>.

A Patron Browse will display an alphabetical listing of Patron Accounts starting with your entered search term.

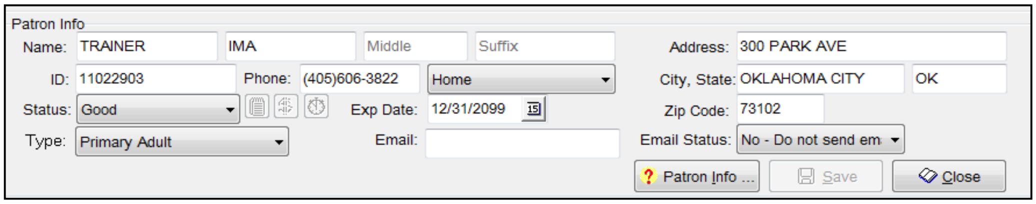
When you complete a Patron Browse, a result set of 50 patrons will be displayed. You can browse forward and backwards through the alphabetical listing of the patron file by using the Previous and Next buttons.



If both the Browse and Keyword Search options are unchecked, the system will search for names that begin with the term entered. A search for SMI will find patrons that are registered with the first three characters of their name being SMI (Smith, Smithson, Smithy, etc).

Patron Information from the Charge screen

In any given Charge session, there may be a variety of reasons why you need more details about a patron. Charge makes it easy to view details about a patron's record. Whenever you select a patron, the Patron Info panel (at the bottom of the window) fills in with basic details about the patron.

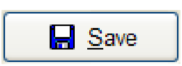


All of the fields in the Patron Info panel can be edited; however, a new application will need to be completed for address, name or card number changes.

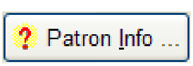
Status and Type fields feature drop-down list boxes for easy updates.

The Phone field is paired with a dropdown for Phone Type. This field indicates whether the entered phone number is a home or work number (i.e., a land line) or is a cell phone with the option to receive text messages. Selecting a Carrier from the dropdown sets the Patron Account up to receive text messages for hold notifications.

The Email field will display in red text if an email message sent to this patron was bounced back as undeliverable. This visual alert is designed to encourage staff to collect an updated email address from the patron at that time. You may enter a corrected email address on this screen, and the account will be updated to remove any notes regarding the bounced email address, and will also correct the email status to send email to the patron. If there have been no problems delivering the email to the account, the text will display in black.

The 

button will become active when any changes are made in the Patron Info panel. You will be required to save the changes before being allowed to move on to the next patron.

The 

button may be used at any time to bridge from Charge directly to Patron Information.

The three icons just to the right of the Status field provide quick access to Patron Information for details about Notes, Fines, and Overdue items. These icons are only active if Notes, Fines, or Overdue items exist for the patron loaded into the Charge screen. Click on the:

Notes icon to view staff or system-generated notes on patron's card.

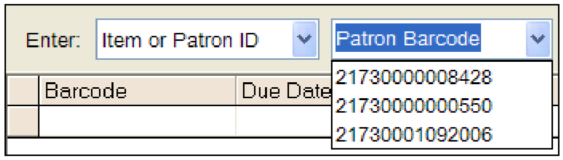
Dollar Sign icon to view fines assessed to this patron.

Stopwatch icon to view this patron's overdue items.

Previous Search

On occasion, you may need to access the last patron account you worked with. A combo box appears in the barcode field, and the last patron can quickly be retrieved. Click the down arrow to see the list of previous patrons, and select the account you would like to access.

When a Patron Account is loaded in to the Charge screen, the barcode combo box will contain the previous Item Barcode entered into the client. NOTE: The system will remember the last 3 accounts in the dropdown box.



In Item Information and Holds, whenever the search key is set to Item Number Search, the last item number entered into a Circulation function will default into the search term box. To re-execute the search simply press the <Enter> key.

Charge Screen Big Red Box Exceptions and Dialog Boxes

Whenever an exception is encountered in Charge, an exception message will display. These boxes are referred to as “Big Red Boxes.” These boxes are designed to visually alert the staff and force action to address the situation before proceeding. Below are the various Big Red Boxes you may encounter in Charge and details that will help you determine how to proceed.

In addition to Big Red Boxes, dialog Boxes are displayed when there is a problem with entered information, or an error has occurred with the system.

Invalid Barcode

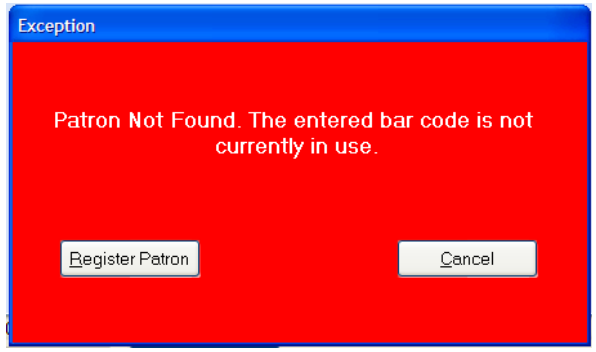
The Invalid Barcode box will display when a Patron Barcode or Item Barcode is entered incorrectly. The only option is to acknowledge the box and try the entering the barcode again.

Patron Not Found

The Patron Not Found exception will display when searching by patron name and no names match the search data entered. The only option is to acknowledge the box and try using another search method to locate the patron.

Patron Not Found, Entered bar code not in use

"The entered bar code is not currently in use" exception will display when a barcode not associated with a Patron Account is scanned into the Charge function. Selecting Register Patron will take you to the Patron Information Registration screen, and you can create a new Patron Account using this bar code. Clicking Cancel takes you back to the Charge screen, and you can scan another barcode.



Patron Exception – Delinquencies

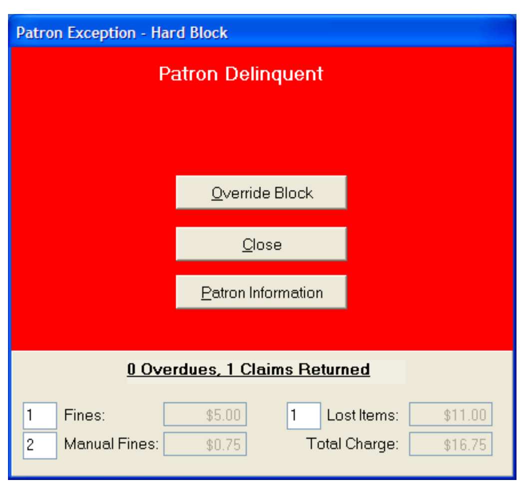
If a patron currently has delinquencies (i.e., Fines, Fees, or Overdue), but not enough to block privileges, the Patron Exception – Delinquencies box will display when you enter the barcode.

- The Negotiate button will allow you to negotiate the patron's delinquencies before charging any materials to them. The Charge session will be in the background, and the Patron Information – Negotiate window will be opened. Once you are finished in Negotiate, close the window and you will be returned to the Charge session. You may now charge material to the patron.

- The OK button will allow you to continue with the charge session and not negotiate the delinquencies.

Patron Exception – Hard Block

A hard block on a patron's record prevents a patron from charging out additional items. A hard or system block is placed on the patron record when a patron exceeds one or more of the library's delinquency thresholds. In Charge, when a hard blocked patron's barcode is scanned, the exception dialog box displays, requiring action before proceeding.



Thresholds Include:

- $25 or more in fines.

- Lost Item / Item more than 60 days overdue
- 3 Claims Returned/Never Had in 12 months

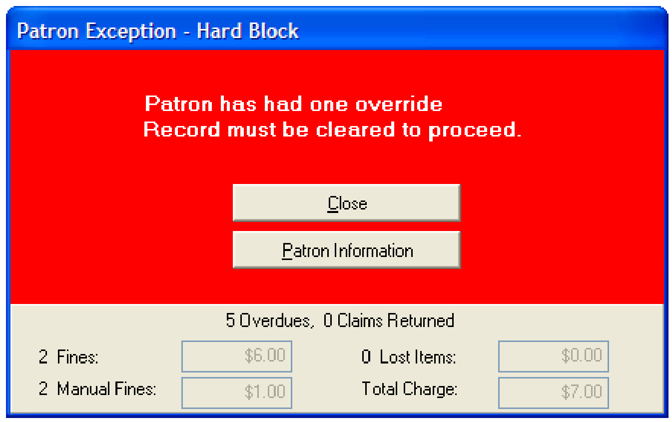
- The Override Block button enables you to charge items to the patron while retaining the block on the patron record. The Patron Exception window disappears, and you are able to proceed with the charge transaction. **Each patron is allowed only one override of a Hard Block.**

- The Close button will retain the hard block on the patron's record and deny any charges to the patron.

- The Patron Information button will take you to Patron Information. You may negotiate any delinquencies from the patron's record then return to the Charge session.

Patron Exception – Overridden Hard Block

Based on library parameter settings mentioned previously, once a hard block is overridden, it may not be overridden again until the patron is below all the blocking thresholds.

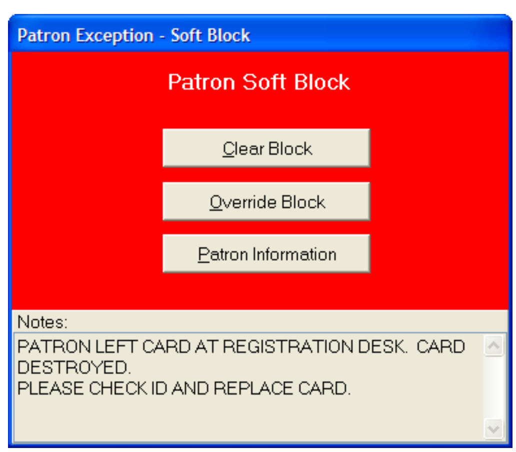


- The Close button will retain the hard block on the patron's record and deny any charges to the patron. The patron may not charge any materials until all delinquencies on their record are cleared.

- The Patron Information button will take you to Patron Information. You may negotiate any delinquencies from the patron's record then return to your Charge session.

Patron Exception – Soft Block

In those instances where you want to alert staff about a particular patron, you can change the patron's status to 'See Notes' and add a note to the record. The Soft Block exception message and notes will display the next time the patron record is retrieved. Soft Blocks can be overridden multiple times without being satisfied, but should be taken care of as soon as possible.



- The Clear Block button will remove the Soft Block status and return the patron's status to Good. The Charge window will then display and materials can be charged out to the patron.

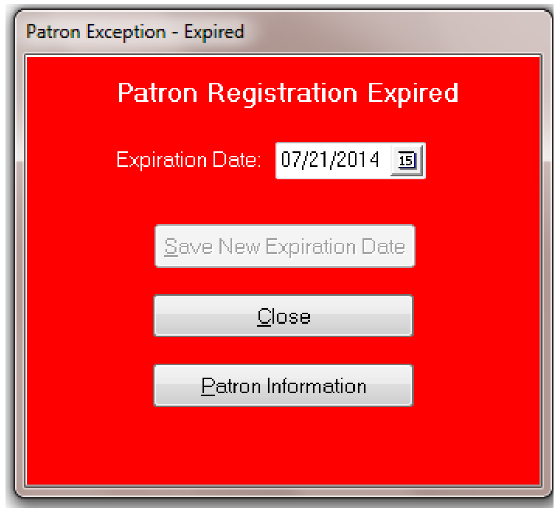
- The Override Block button will leave the Soft Block in place an allow you to charge materials out to the patron. The next time the patron's card is scanned, the Soft Block exception will display.

- The Patron Information button will take you to Patron Information. You may view any areas of the patron record that are needed to resolve the alert.

If a customer has an Urgent Note with a 'See Note' status the note will not display. If the customer has a Standard Note with a 'See Note' status the note will display. If there is a Standard Note on the card but the status of the card is 'Good' no note will display.

Patron Registration Expired

The Patron Registration Expired box will display when the patron's annual fee or student card has expired. The box provides the opportunity to modify Patron Information and issue a renewal of the annual fee or school cards.



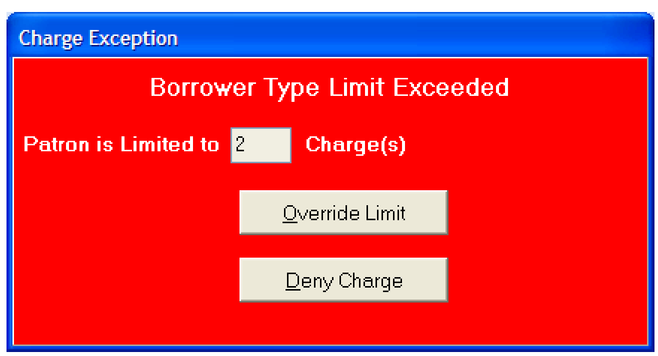
- The Close button will close the exception box without making any modifications to the patron record and without pulling the patron into Charge.

- The Patron Information button will take you to Patron Information where you can view and update any information that is needed.

If Circ Control has added the $40 annual fee to an annual fee card an expiration box will not appear, it will show the 'Over Threshold' (Hard Block) BRB. If the customer waits until their annual fee card has expired (after the annual fee has been assessed to the card) the 'Over Threshold' (Hard Block) BRB will not show, it will show the Patron Registration Expired BRB.

Borrower Limit Exceeded

MLS maintains a 30 item borrowing limit per patron. When the limit is reached, the Borrower Type Limit Exceeded box will display. It will inform staff of the number of items the patron is limited to.

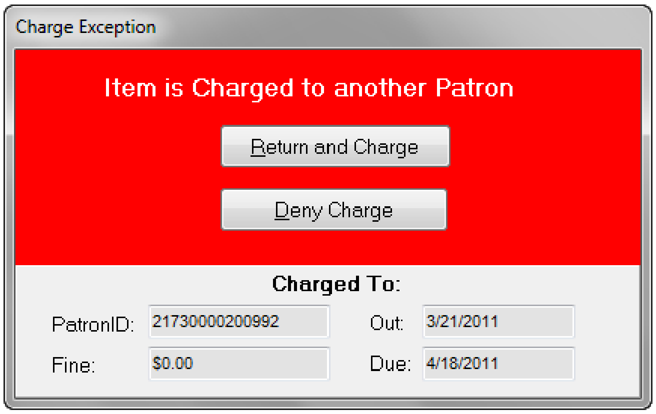


- The Override Limit will override the limit this one time and allow the item to be charged. This option is helpful if a patron would rather let a previously charged item of the same Location Code be returned in favor of the current item. A quick return could be performed to return the previously charged item.

- The Deny Charge button will not charge the item to the patron. The item will retain an On Shelf status.

Item is Charged to Another Patron
If an item charged to a different patron is scanned through Charge for a new patron, this exception box will display. The exception is alerting you that the item is currently charged to another patron and allows you to decide how to proceed.

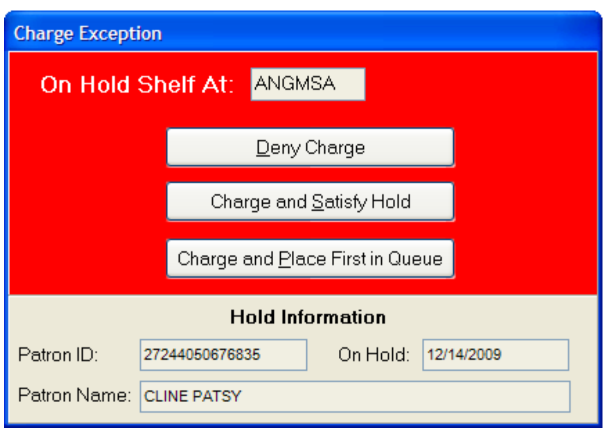
The panel at the bottom of the box displays the patron that currently has the item charged and includes the date charged, the due date, and any fines that might be owed.



- The Return and Charge button will return the item from the other patron and then charge it to the new patron. It will not assess the fine to the first patron.

- The Deny Charge button will not charge the item to the new patron. The item will remain charged to the current patron.

Item on Hold Shelf
When charging items to a patron, if one of the items has an outstanding hold on it for a patron other than the charging patron, the Hold Shelf exception box will display.



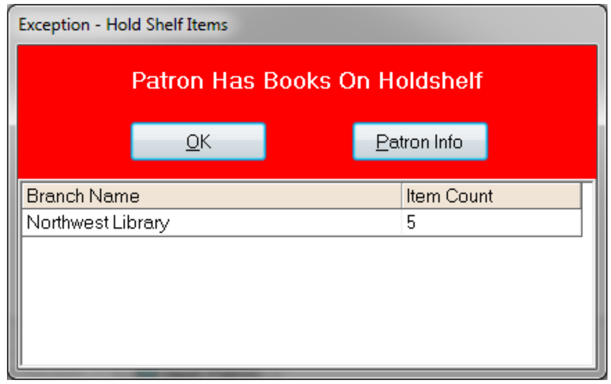
- The Deny Charge button will not charge the item and will leave it on the hold shelf for the patron displayed in the Hold Information panel.

- The Charge and Satisfy Hold button will charge the item to the charging patron and remove the hold for the requesting patron.

- The Charge and Place First in Queue button will charge the item to the charging patron, and will place a hold first in the title hold queue for the patron who had the item on hold.

Patron Has Books on Hold Shelf

If a patron has a book waiting for them on the hold shelf, the Books on Holdshelf exception message will display when the patron's library card is scanned or entered. It will state which location the holds are at and how many there are.

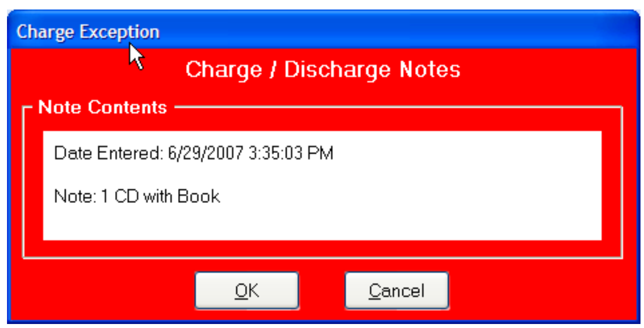


- The OK button will acknowledge the exception box and allow you to begin charging materials to the patron.

- The Patron Info button will bridge you to Patron Information and allow you to find out what titles are waiting for the patron.

Charge/Discharge Note

Charge/Discharge Notes may be placed on items to alert staff, at the point of Charge or Return, that there is something to be noted about this item. When a Charge/Discharge Note is on an item, the Charge Exception box will display each time the item is charged or returned.



- The OK button will acknowledge the exception and allow you to continue on in Charge or Return.

- The Cancel button will not charge the item and allow you to continue on in Charge. The item will remain with an 'On Shelf' status.

Item Not Converted

If an item barcode is scanned into Charge, but the item number is not in the holdings file, the Item Not Converted exception box displays. The item is considered Not Converted (e.g., the item does not exist in the Holdings of the library). The exception box gives you several options for how to proceed.

- The Search button will display the Companion Searcher window and allow you to search for the title in your library's database. Start by searching for the ISBN: If that doesn't work, search by title. If a record is found, and the classification matches (i.e. if the unconverted item is a JP, the call number in the record must also be JP), you may Select it Back and the Title, Author, Call Number, and Publication Year will be populated. You can then fill in Branch, Location, and Media information, then click the Convert Item button. This will associate the item with the Title and add the item to the holdings file.

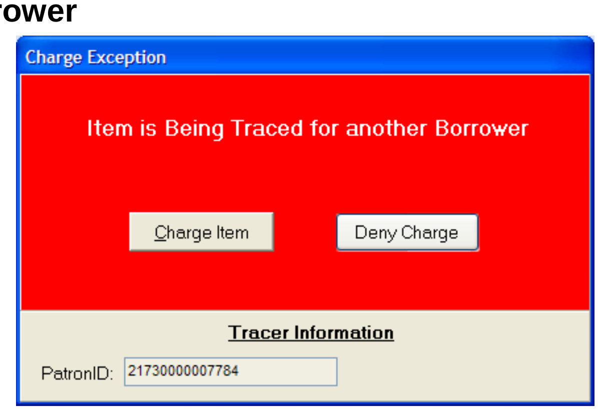
- The Deny Charge button will not charge the item to the patron. The item will remain Not Converted. If the material in hand is in excellent condition and meets guidelines for addition to the collection, you may send it to Cataloging or Material Selection for possible addition.

- The Convert Item button will only become active after you select a title back from Companion Searcher using the Search button. After clicking Convert Item, the Item Editor window will display. Save the item to attach it to the full bibliographic record you selected, and charge the item out to the patron.

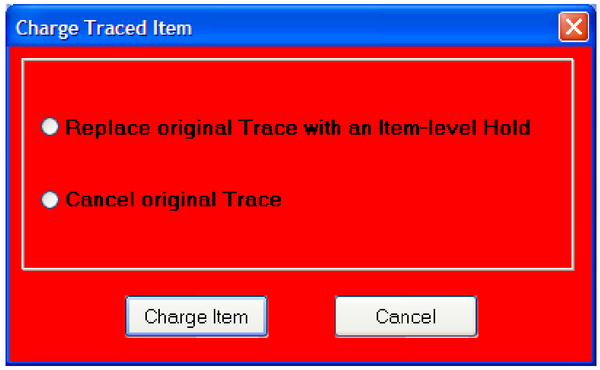
- The Create Temporary button will create a temporary bibliographic record for the item. You should fill in all the fields at the bottom of the window prior to clicking the Create Temporary Item button. <u>AVOID USING THIS OPTION WHENEVER POSSIBLE</u>.

Item Being Traced for another Borrower

If a Tracer exists on an item and that item is scanned through Charge, the Traced exception box will display.



- The Charge Item button will bring up another exception box allowing you to replace the trace with an Item-Level Hold or cancel the trace. Once the selection is made, the item will then be charged.



- The Deny Charge button will bring up another exception box allowing you to place the item on the Hold Shelf for the tracing patron and placing an Item Level Hold for the charging patron, or to cancel the original Trace. Once the selection is made, the item will not be charged.

Save Changes

If you made changes to the Patron Information on the screen and select Next Patron or try to close the Charge function without saving your changes, you will be prompted to save the changes before the window is closed.

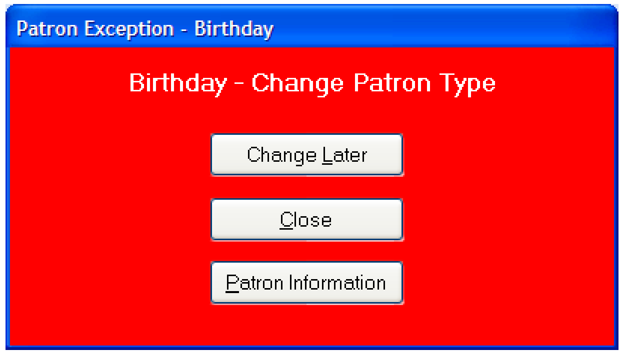
- The Yes button will save the changes made to the patron record, and clear the account from the Charge function.

- Selecting No will clear the Patron Account without saving any changes made.

- Selecting Cancel will return you to the Charge function with the un-saved patron record on the screen.

Change Borrower Type

Parameters allow for each Borrower Type to be limited to patrons of a specified age range. The Birth Date entered in the Patron Registration screen is compared to the age range for the patron's current Borrower Type when they are loaded into a function. If the system determines that the patron is no longer eligible for their current Borrower Type, you are prompted to update the account to the correct borrower type.



- The Change Later button will close the box, and take you into the Charge function, ready to check out.

- The Close button will close the box, and take you to the Charge screen without the Patron Account loaded.

- The Patron Information button will take you to the Patron Registration screen to update the Patron Registration Information.

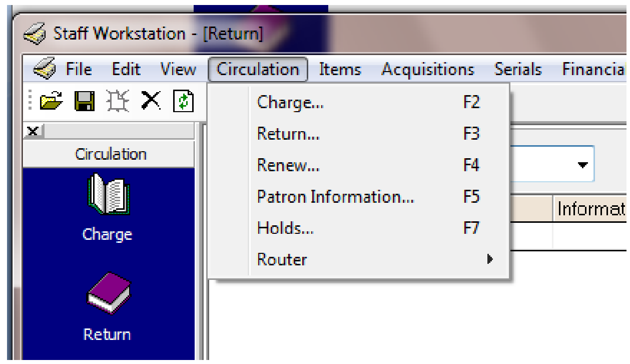
Blocks at the Self-Check Machines

A patron will be blocked from checking out at the self-check machines if their card has a status of 'See Notes' or 'Over Threshold' (the machine will show a screen that says to see Circulation). If the limit for the number of materials on the card has been reached the self-check machines will allow the patron to click on 'Checkout' it will simply show a red line on an item when scanned and say 'Item quota reached', it will also add an additional screen that lists the items that were not able to checkout when the patron exits the checkout screen.

Return (F3)

The Return function removes charge transactions from patron records when you check in items. The Return function checks due dates of returned items, and calculates and posts applicable fines using pre-set library-specified parameters. Return also processes outstanding holds and rotation of materials.

You can access the Return function by clicking the Return icon, by selecting Return from the Circulation menu, by pressing <F3>, or by pressing <ALT + L + R>.



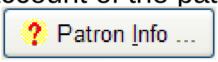
Returning an item

When you open Return, the Return Date defaults to today's date. This means that all items scanned through the function will be processed using today's date.

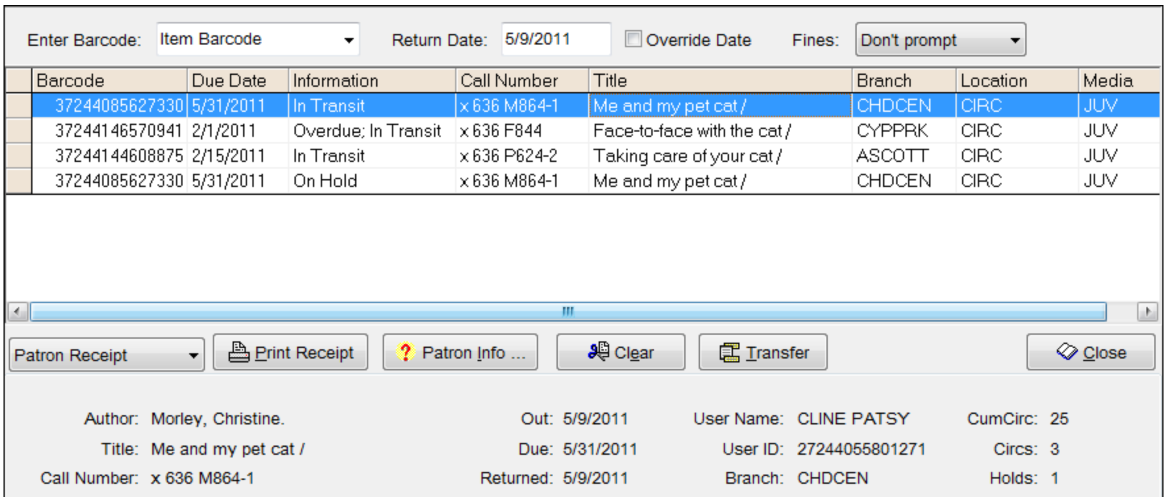
Scan item barcode to be returned into the Enter Barcode field. If the workstation does not have a scanner, the barcode number can be typed into the field.

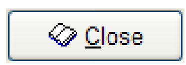
As items are scanned, the grid will populate with data about the item scanned. The grid displays data for returned items in the following columns: Barcode, Due Date, Information, Call Number, Title, Branch, Location, and Media type.

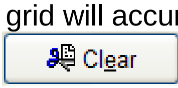
Barcode	Due Date	Information	Call Number	Title	Branch	Location	Media
37244146570941	2/1/2011	Overdue; In Transit	x 636 F844	Face-to-face with the cat /	CYPPRK	CIRC	JUV
37244144608875	2/15/2011	In Transit	x 636 P624-2	Taking care of your cat /	ASCOTT	CIRC	JUV
37244085627330	5/31/2011	On Hold	x 636 M864-1	Me and my pet cat /	CHDCEN	CIRC	JUV

Notice that the grey area below the returned items grid displays the patron information of the patron who had the item checked out. As you return each item, this area will change to reflect information specific for that item. The most recent item scanned into the Return function will display at the top of the grid and will populate the bottom of the screen by default. To view information for previous items scanned through Return, highlight the item in the grid. The bottom screen will display more detailed information about the highlighted item. Staff can access the account of the patron who had the highlighted item checked out by clicking on the 

button.



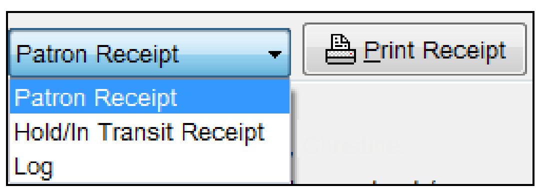
The Return grid will accumulate until you either click 

to the close the Return function or click the 

button to remove all data from the grid. Each time the Return function is opened, the grid will be empty and the Return Date will default to today's date.

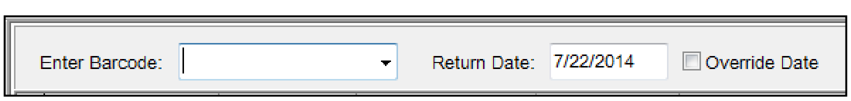
The 

button works with the Receipt type dropdown. Selecting Patron Receipt will print all items in the grid that were returned and had been checked out by the patron who had the highlighted item checked out. Selecting Hold/In Transit Receipt will print a Hold In Transit or In Transit slip for the highlighted item, if that item has a Hold In Transit or In Transit status. Selecting Log will print all items in the Return grid.

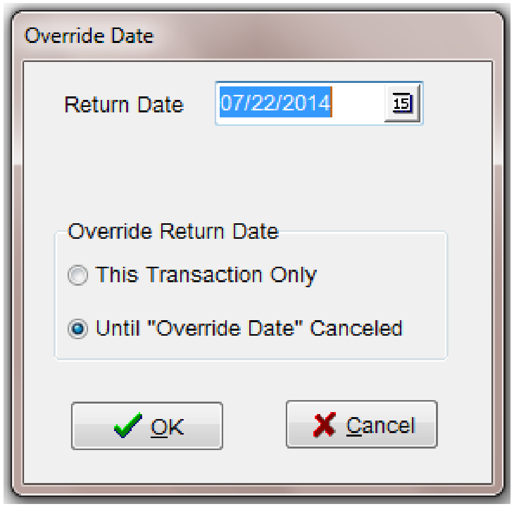


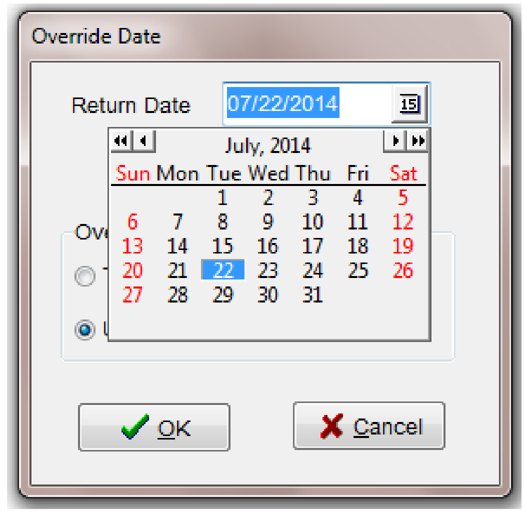
Override Date (Backdating)

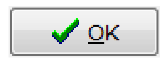
When the Return screen is opened, the function will default to using today's date as the return date. There are times when you may want to use a date in the past when returning items (e.g., when returning book drop materials before opening or after a holiday). To change the date used when returning items, check the Override Date Box next to the Return Date box.



Modify the return date in the dialog box that displays, or click on the calendar icon to select a date. The date cannot be set to a later date than today's date.



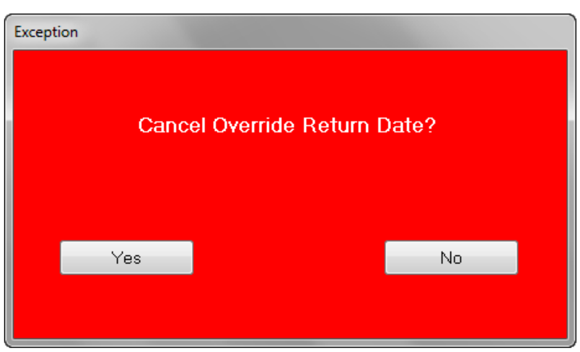


'Until "Override Date" Canceled' will be the default selection. Selecting  with this option selected will apply the new Return Date for items scanned through Return until the date is canceled. Selecting 'This Transaction Only' will apply the new Return Date to only the next item scanned through Return.

The return date being used for the next item to be scanned through Return is displayed in the Returned Date field. If a date other than today's date is being used, the Override Date checkbox is selected.

Items returned while the Override Date is activated will assess overdue fines according to the chosen return date. The status date of the item will be today's date, not the Override Date used when the item was returned.

To cancel the Override Date and set Returns back to using today's date, either close the Return window, or uncheck the Override Date checkbox. Upon deselecting this checkbox, a confirmation message will display.



Selecting "Yes" will cancel the date, and set Return to using today's date. Selecting "No" will leave the overridden return date in place, and send staff back to the Return screen.

Return Screen Big Red Box Exceptions and Dialog Boxes

Whenever an exception is encountered in Return, an exception message will display. Below are the various Big Red Boxes and other messages you may encounter in the Return function, along with details that will help you determine how you need to proceed.

Invalid Barcode

If the barcode entered is not a valid barcode (i.e., it does not follow the barcode parameters of your library) an Invalid Barcode dialog box will be displayed.

Hold Item

When an item is returned that has been requested by a patron for pickup at your branch, the Place on Holdshelf box will display. Selecting OK will place the item in Hold Shelf status for the designated patron. Selecting Print Receipt will print a Holdshelf label.

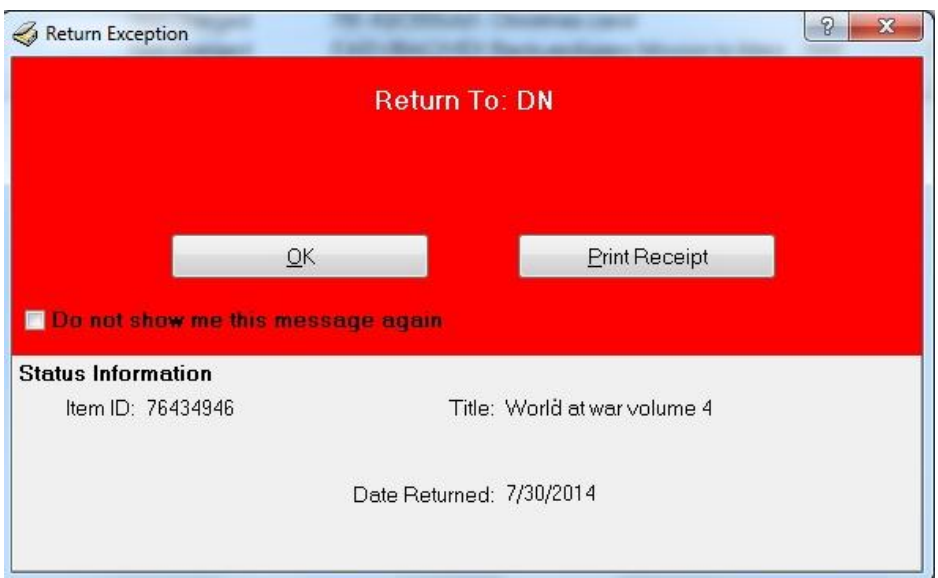
If the item was Hold-In Transit before the item was scanned to Holdshelf, the date the item was sent In Transit will be displayed on the Big Red Box.

Hold In Transit Item

When you return an item that has been requested by a patron at another branch, the Hold-In Transit box will display. Selecting OK will place the item in ‘Hold-In Transit’ status. Selecting Print Receipt will print a label with the Hold information and place the item in ‘Hold-In Transit’ status.

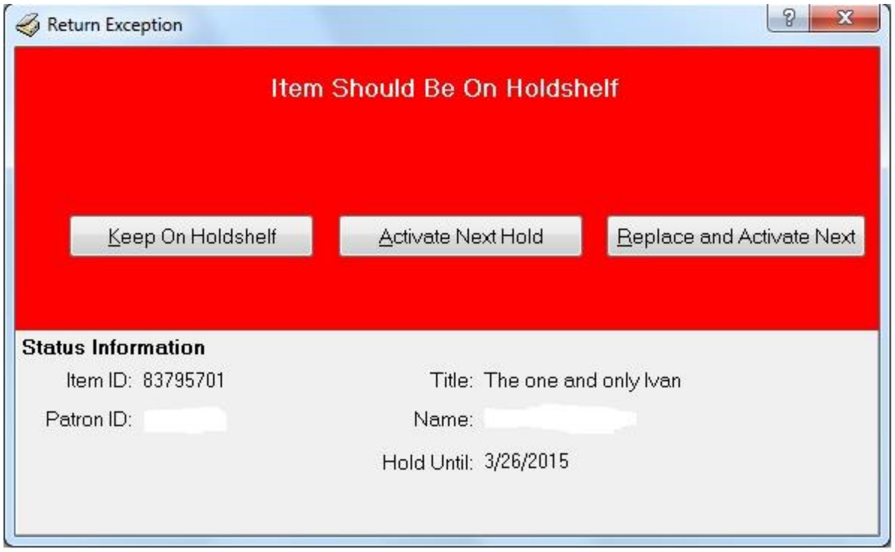
In Transit Item

When you return an item that belongs to another branch, the following Return Exception box will display. Select OK to send the item to ‘In Transit’ status and return to the Return screen to scan another item.



On Holdshelf

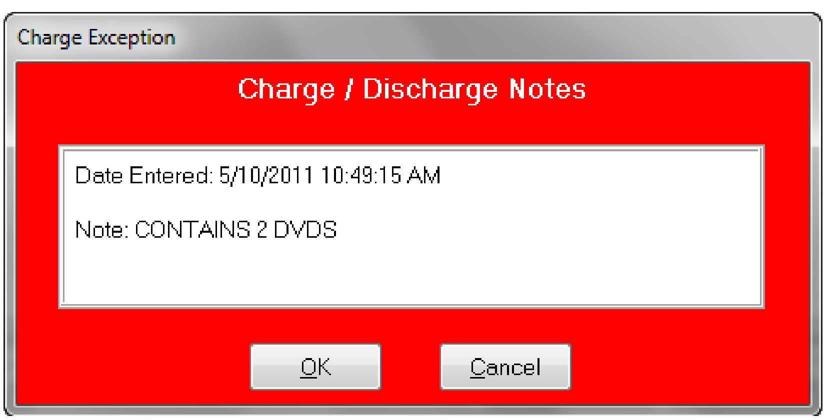
If an item is in a ‘Holdshelf’ status, and it is scanned through Return at the branch where it is on the Holdshelf, the following Holdshelf Big Red Box will display.



- Selecting ‘Keep on Holdshelf’ will leave the item in ‘Holdshelf’ status.
- Selecting ‘Activate Next Hold’ will clear the Holdshelf transaction, and trigger the next hold in the queue. If there are no remaining holds, the item will be returned to an ‘On Shelf’ status if owned by the scanning location, or switch to ‘In Transit’ status if owned by another location.
- Selecting ‘Replace and Activate Next’ will activate the next hold on the item and return the customer to the bottom of the hold list (if there is no one else on the hold list it will fill the hold for the same customer).

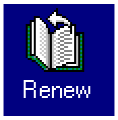
Charge/Discharge Notes

Charge/Discharge Notes may be placed on items to alert staff at the point of Charge or Return that there is something special about the item. When a Charge/Discharge note is on an item, this exception box will display each time the item is scanned through Charge or Return.



The OK button will acknowledge the exception and allow you to continue on in Return. The Cancel button will stop the return process for this item. The item will remain checked out to the patron.

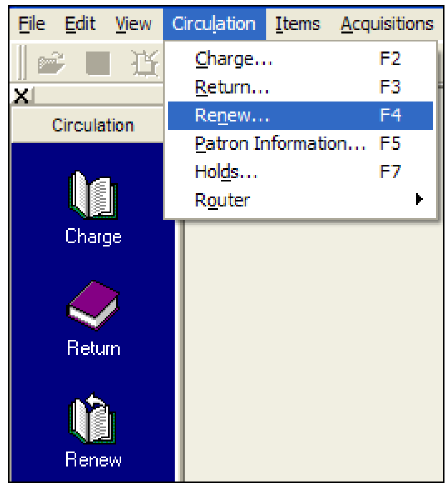
Renew (F4)



The Renew function allows you to extend the loan period on a patron's item according to library-specified parameters. Renew also calculates and establishes fines and shows patron blocks if applicable.

You can access Renew by clicking the Renew icon, selecting Renew from the Circulation menu, pressing F4, or pressing <ALT> and <L> and <N>.

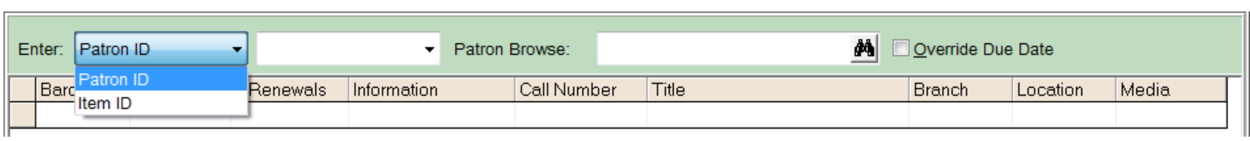
- *TIP* - If you have a patron loaded in the Charge screen, you can open the Renew function using one of the above methods, and the patron will be loaded into the Renew function.



How to Renew an Item

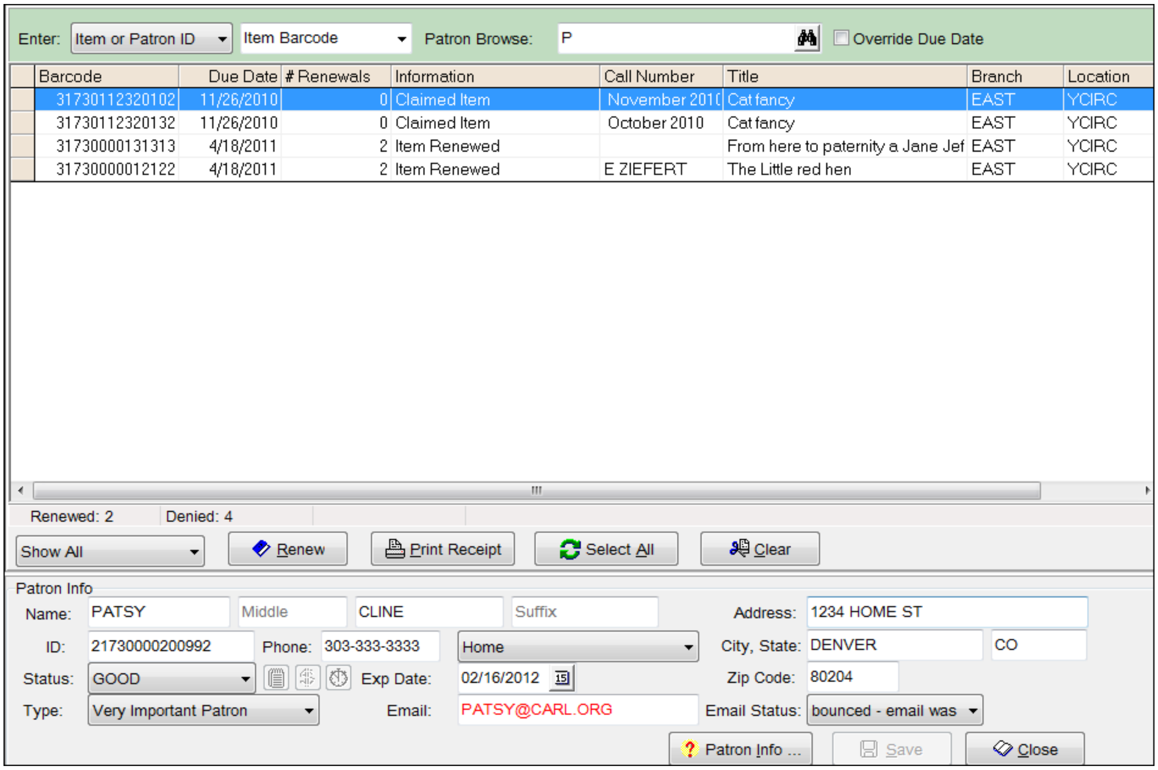
You can enter the Patron Barcode (or search for a Patron Name) and load the Patron Account into the Renew function. All items the patron has charged will be displayed in the Renew grid.

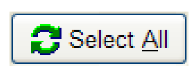
The dropdown default is Patron ID so you can enter the patron card number, or you can switch the drop down to Item ID and enter an item number. All materials on the card that the item is checked out on will appear in the Renew screen.



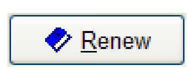
1. Scan or type in a Patron ID in the Patron ID field. If typing in the barcode, press <Enter> when finished. You may also search for a patron in this screen, see instructions in the Charge section.

2. Once the patron has been retrieved, Renew will retrieve a list of all items currently charged to the patron. Information about those items will be listed in the Information column. If the item is in Lost status or is Overdue, the status will be indicated in this column. The "# Renewals" column indicates how many renewals the patron already has had on the item.

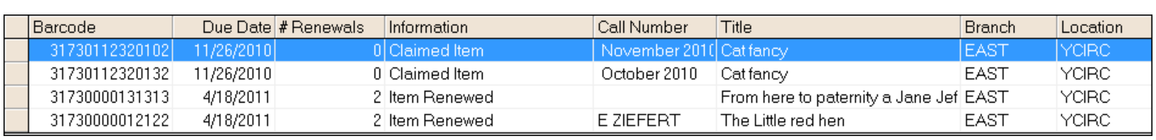


3. Select the item(s) to be renewed.
   You can select one item by highlighting the item in the grid.
   OR
   You can select multiple items by highlighting one item, holding the <CTRL> key, and clicking another item to highlight it.
   OR
   You can select a group of items by clicking one item to highlight it, holding the <Shift> key, and clicking another item. All items between and including the two selected items will be highlighted.
   OR
   You can select all items on the patron account by clicking the 

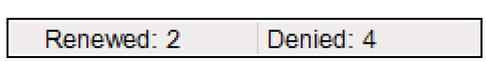
   button.

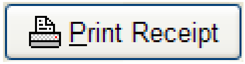
4. Once you have made your selection, click the 

button.



Renew will go through each item to process the renewal. If the item renewed, the Renewals counter is incremented, the Due Date is updated, and the information column displays Item Renewed.
If an item will not renew the reason will appear in the Information column. The number of items renewed and denied is displayed in the status bar located above the Patron Information.

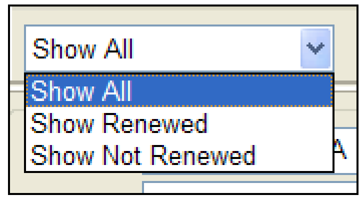


5. Selecting 

will print a receipt listing all items that were renewed or denied, with their title information and due dates.

   - *TIP* - You may load a patron into Renew, select all items and click Print Receipt to print a list of all items on the patron account without renewing them. This does give you a shorter receipt than what prints from the Patron Information screen but will not include fines or lost items.

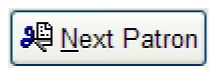
6. You may chose whether you want to display only renewed or not renewed items by selecting from the combo box



   The default is **Show All**, which will display all items checked out to the patron in the Renew grid.

   Selecting **Show Renewed** will display only the items that were successfully renewed in the Renew grid.

   Selecting **Show Not Renewed** will display only the items that were not successfully renewed in the Renew grid.

7. When you have finished working with the patron, click 

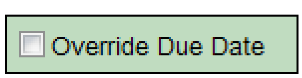
to clear the Renew screen.

8. When you are finished with the Renew function, close the Renew screen. There is an open bridge between the Charge and Renew function. If the Renew function is not being actively used, it should be closed and not left open in the background.

Overriding Due Dates

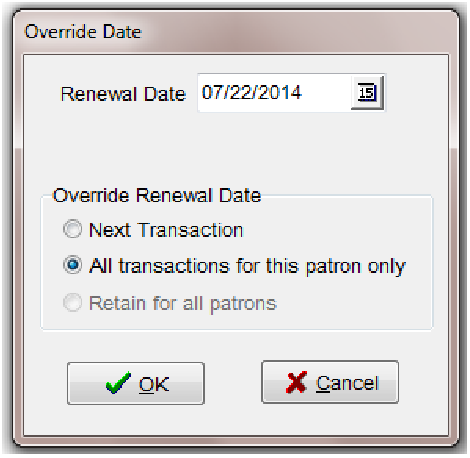
Occasionally it is necessary to override the default due date of an item and cause it to be due on a date different than the system generated date. The Override Due Date feature can be used to modify the default due date of materials. The override must be set *prior* to renewing any materials.

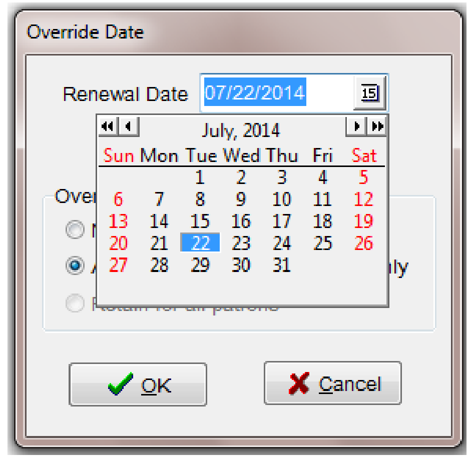
1. Select a patron into Renew by scanning or typing in the barcode number.

2. Check the 

box. Alternately, you can use <Alt + O> to activate the Override Date feature.

3. Modify the date in the dialog box that displays or click on the calendar icon to select a date.





4. Select the appropriate Override Renewal Date option.

   Next Transaction – will apply the desired due date to only the next item renewed. The override will be cancelled automatically after this transaction occurs. The override may also be cancelled prior to renewing by unchecking the Override Due Date box.

   All transactions for this patron only – will apply the desired due date to all items renewed for the current patron. As soon as the Next Patron button is selected, the Override will be cancelled. The override may also be cancelled prior to renewing by unchecking the Override Due Date box.

   Retain for all patrons – Is not available at MLS.

5. Click the OK button to enforce the override or Cancel to close the calendar without enforcing the override.

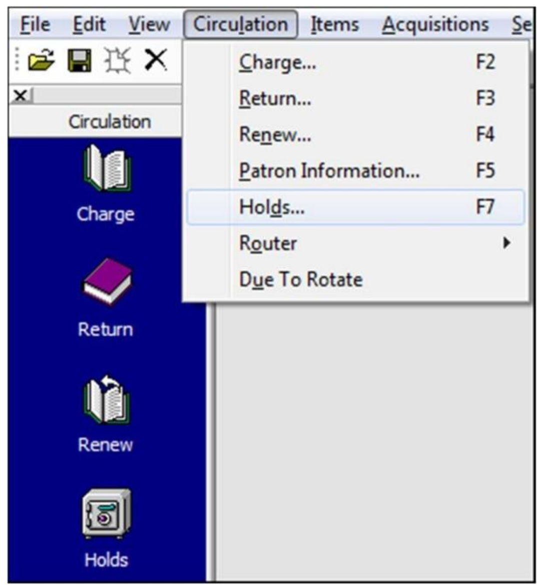
6. Once the Override Due Date is set, renew the desired items for the patron. The Circulation Status Bar will display the chosen date and Override Renewal Date option that is in place.

Holds (F7)

The Holds function allows you to place materials on hold (reserve) for a patron. Holds can be placed against materials that meet library-defined parameters governing branch, location, and media codes as well as patron types or any combination thereof. The Hold function automatically queues patrons according to the date and time stamp when the hold was placed. Holds may be suspended until a particular date, or staff may enter a date that the item is not needed after.

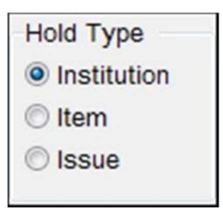
If a staff member has selected Trace for an On Shelf item from the Item Detail screen, then the Place Hold/Trace screen will display. The process of placing a Trace on an item is the same as placing a Hold. The Trace is placed against a specific item and triggers additional system reports to search for the item. A Trace is placed on the system card for the owning library.

You can access the Hold function by clicking on the Holds icon from the Outlook bar, by selecting Holds from the Circulation menu, by pressing F7, or by pressing <ALT + L +D>.



Hold Types

There are three Hold Types available.



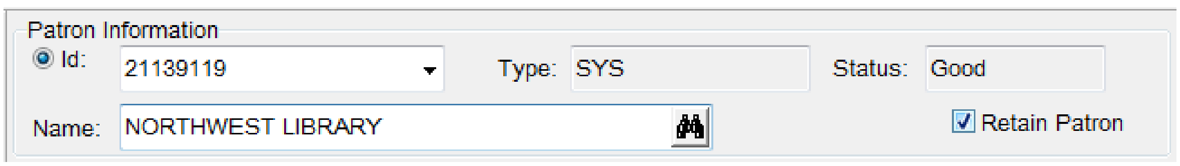
- **Institution** – Also known as Title Level Holds. Institutions Holds will be filled by any item on the bibliographic record that is allowed to fill holds. Institution Holds are the lowest priority, and will be filled when there are no holds to fill at other levels.

- **Item** – Item Level Holds will be placed against the specific item that is highlighted in the Item Information section of the Holds screen. The hold will be filled when that item is scanned through Return, and it will show up on the Item Router list if its status is ‘on shelf’. No other item on the bibliographic record will fill the hold. Item Holds take priority over Issue and Institution Holds, and will fill first.

- **Issue** – Issue Holds will be available only when the Items attached to the loaded bibliographic record have Chronology and Enumeration data saved in the item record. Issue Holds are placed against the issue of the item highlighted in the Item Information section of the Holds screen. Any item with matching issue information that is allowed to fill holds will fill the hold. For example, placing an Issue Hold against the January 2014 issue of a title will cause the hold to be against ALL January 2014 items on that title. Any January 2014 item that is scanned through the Return function will trigger the hold, and it will also appear on the Issue Router list if its status is ‘on shelf’. Issue Holds take priority before Institution Holds, and will be filled before any Institution holds are filled.

Retain Patron

By default, after placing a hold the Patron Information section of the Holds screen is reset to blank, allowing you to easily search for another patron to place a hold for. If you wish to place multiple holds for the same patron without having to search for the patron again, click the Retain Patron checkbox. This will prevent the Patron Information section from being reset.

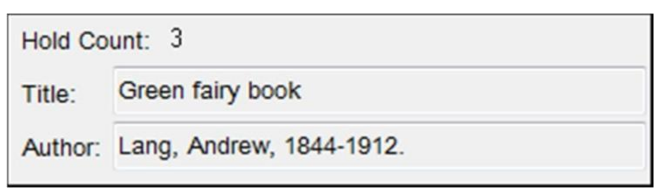


Retain Title

By default, after placing a hold the Bibliographic Information section of the Holds screen is reset to blank, allowing you to easily search for another title to place a hold against. If you wish to place multiple holds against the same title without having to search for the title again, click the Retain Title checkbox. This will prevent the Bibliographic Information section from being reset.

Hold Count

Shows the current number of Institution Holds placed against the title.

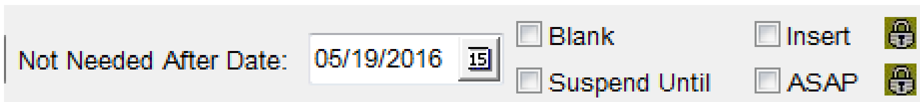


Pickup Branch

Select the branch where the patron wishes to pick up the hold at the bottom of the screen. Click the drop down arrow and choose the pickup branch. The Pickup Branch will default to the branch where the workstation is located.

Not Needed After Date

Provides the option to enter a date when the hold is no longer wanted by the patron. If the hold is not filled by the entered date, the patron will be removed from the hold queue. You can either edit the date or click the calendar icon to change the date. Please <u>DO NOT</u> use the Blank check box – this will set a Blank Not Needed After Date, which will leave the hold in the hold queue until it is filled.

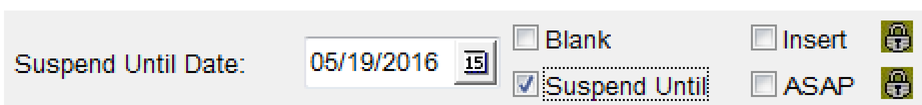


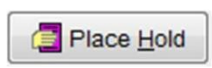
ASAP/Insert

In those cases where there has been a library mistake, a patron can be placed at the top of the hold queue or can be put back in the hold queue at the same number (ex: accidentally canceling hold when they were # 30 out of 100). Call Circ Control (606-3779) to complete this process.

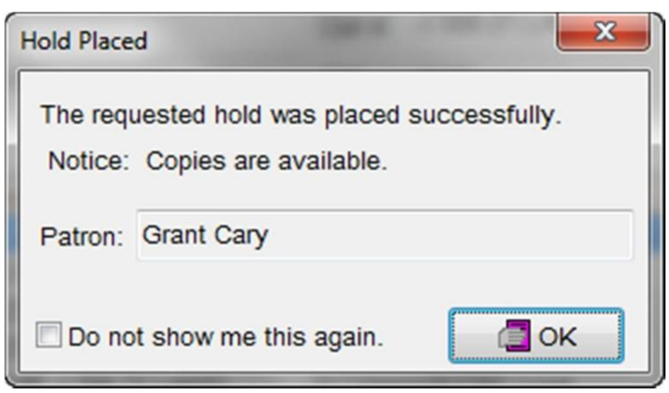
Suspend Until

At the time a hold is placed, it may be given a Suspend Until date. This causes the hold that is placed to be inactive. A Suspended Hold will move up in the queue like an active hold, but it will not be triggered by an item until the Suspend Until date has passed or the hold is reactivated by staff. Other holds in the queue will be triggered around it. Once the date has passed, the hold will become active. Suspend Until dates are frequently used when patrons will be on vacation, and will be unable to pick up hold material for a specified amount of time.



When all hold options have been set, click the 

button to initiate the request. The system will confirm a hold was placed.



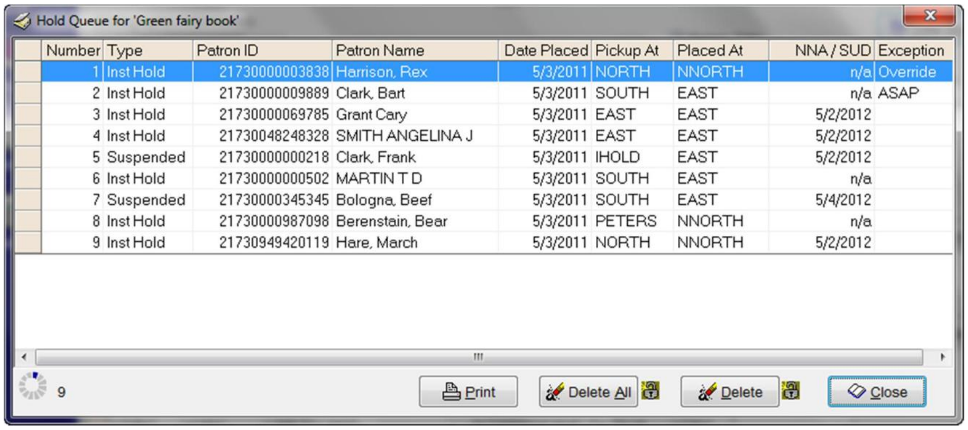
Click OK to clear the confirmation message. The "Do not show me this again" checkbox allows staff to turn off the confirmation message for their session in the Staff Client. When the client is closed and re-launched, the confirmation window will display after a hold is placed.

After the Place Hold button is selected, the Holds screen will reset to the systems defaults (for Hold Pickup Branch, Hold Type, Not Needed After or Suspend Until Date, etc). Workstation

Settings can be set so that the hold settings will be retained after clicking Place Hold. If the Workstation Settings are set to retain the Holds settings, the information will stay in place until the Holds window is closed, or until the settings are changed by staff.

Deleting Holds

You can also delete holds from the Hold Queue buttons in the Holds Screen.

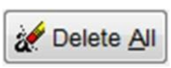


Number	Type	Patron ID	Patron Name	Date Placed	Pickup At	Placed At	NNA / SUD	Exception
1	Inst Hold	21730000003838	Harrison, Rex	5/3/2011	NORTH	NNORTH	n/a	Override
2	Inst Hold	21730000009889	Clark, Bart	5/3/2011	SOUTH	EAST	n/a	ASAP
3	Inst Hold	21730000069785	Grant Cary	5/3/2011	EAST	EAST	5/2/2012	
4	Inst Hold	21730048248328	SMITH ANGELINA J	5/3/2011	EAST	EAST	5/2/2012	
5	Suspended	21730000000218	Clark, Frank	5/3/2011	IHOLD	EAST	5/2/2012	
6	Inst Hold	21730000000502	MARTIN T D	5/3/2011	SOUTH	EAST	n/a	
7	Suspended	21730000345345	Bologna, Beef	5/3/2011	SOUTH	EAST	5/4/2012	
8	Inst Hold	21730000987098	Berenstain, Bear	5/3/2011	PETERS	NNORTH	n/a	
9	Inst Hold	21730949420119	Hare, March	5/3/2011	NORTH	NNORTH	5/2/2012	

Highlight the hold you want to delete and click 

. A Confirmation window will appear. Click Cancel to return to the Hold Queue, no holds will be deleted. Click OK to continue deleting the hold.

Choose a reason for the cancellation from the dropdown menu. If the patron does not need notification, uncheck the Patron Notification Needed box. Click OK and the hold will be removed from the Queue.

Clicking 

will bring up an Administrative Override box. Only those with administrative log ins will be able to 'Delete All'.

Hold Screen Big Red Box Exceptions

Hold has already been requested

If a patron has an outstanding hold against a title, a Big Red Box will display informing you that the patron has already placed a hold against this title. You can select Override to place an additional hold for the patron. Selecting Cancel will close the Big Red Box without placing the hold.

Item is being Traced

If an item is being Traced, and staff attempt to place an Item Level Hold against it, the Item is being Traced Big Red Box will display. The only option is to Cancel the Hold Request and return to the Hold screen.

Exceeded Hold Limit

MLS limits the number of items a patron can have on hold (reserve) to 30 items. When that limit is reached, the Hold Limit Exceeded Big Red Box is displayed. The only option is to Cancel the Hold Request and return to the Hold screen.

Patrons (F5)

The Patrons function consists of three primary tasks. This function allows:

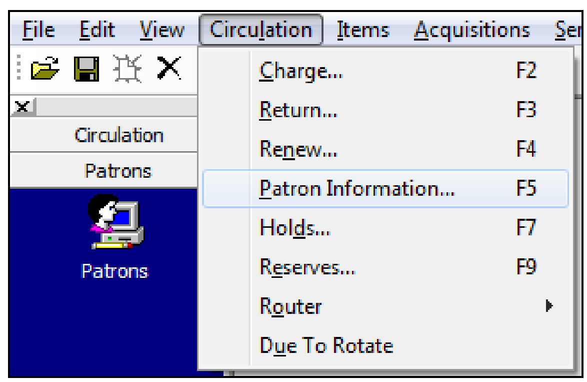
- Accessing patron records for online editing
- Reviewing specific patron records
- Registering new patrons (Issuing Library Cards)

The Patron Information function allows you to edit fields in the patron record according to the parameters set up by the library system. You may also manually place notes and blocks on the patron record that are not related to system-generated blocks and notes.

Through Patron Information, you can review specific patron information such as charges, holds, lost items, and overdue items. This screen is also where you waive or cancel fines through the 'Negotiate' button or mark overdue or lost items 'claims returned'. This application also allows batch renewal of all material charged to a patron and the assessing of manual fines.

Finally, Patron Information also allows online registration of new patrons. This application creates a new record in the patron file, which you can then access through the Charge, Return, Renew, Holds, or the other applications of Patron Information. During the registration process, a patron can be designated as an Outreach Borrower (Books by Mail) which enables additional data areas (this designation is only used through Books by Mail).

You can access Patron Information by clicking on the Patrons icon, by selecting Patron Information from the Circulation menu on the toolbar, by pressing<Ctrl + L + P>, or by pressing <F5>.



Patron Keyword Search

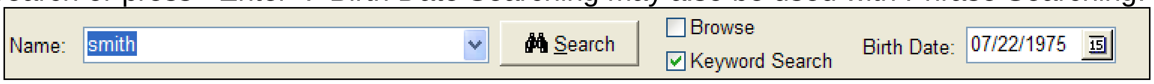
If the customer does not have their library card you will need to search for their card after checking appropriate ID. A Patron Keyword Search will search the patron record for the entered terms. All accounts that contain the entered search terms in any indexed field will be displayed in the results screen.

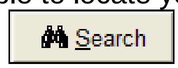
Phrase Searching

You may also complete a Phrase Search when using a Patron Keyword Search. Enter your search terms in the Name field in quotes. For example, type **"MAIN ST"** to search for the words MAIN and ST next to each other in the patron record. Make sure the Keyword Search box is checked and click Search or press <Enter>. You may combine Keyword Search and Phrase Searching. For example, entering **SMITH "MAIN ST"** will search for records with SMITH and MAIN ST. You can use wild cards in your search if you are unsure about how a word is saved in the account. For example, search **"MAIN ST*"** to find the phrase MAIN ST or MAIN STREET.

Birth Date Searching

A Patron Search by Birth Date can also be completed when using a Patron Keyword Search. Make sure the Keyword Search box is checked. Enter any desired search term information in the Name field, add the birth date manually or click on the calendar icon to select the birth date, and then click Search or press <Enter>. Birth Date Searching may also be used with Phrase Searching.



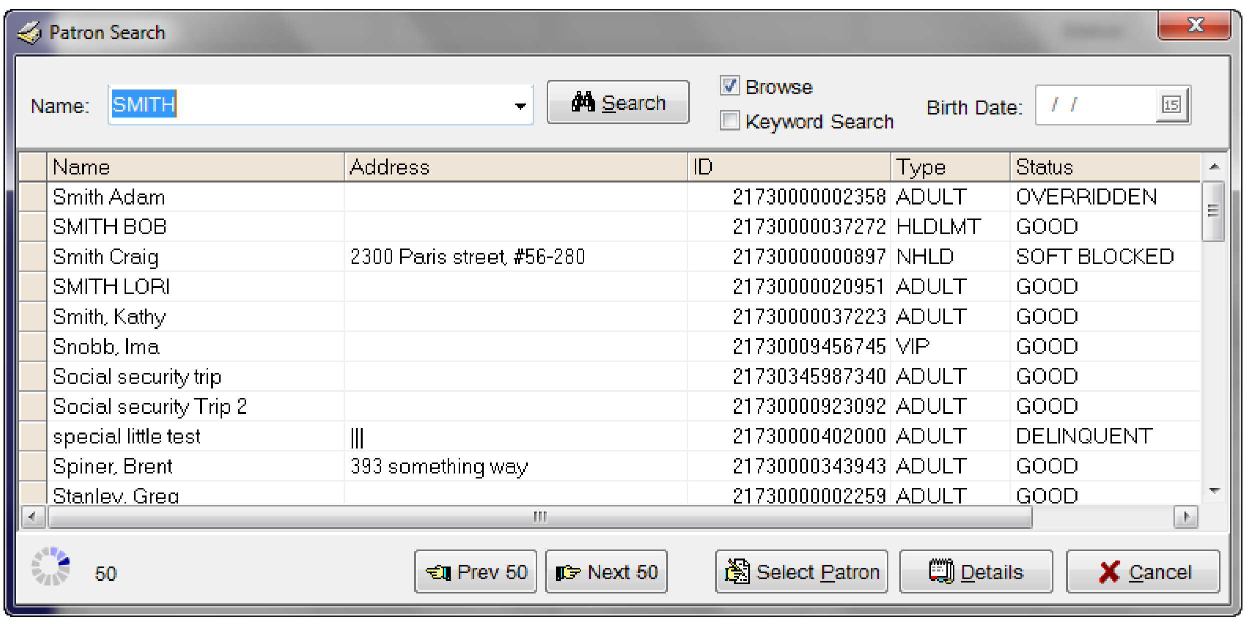
You can change the type of patron search you would like to complete from within the results screen. If you completed a Patron Keyword search and were unable to locate your patron, you can click the Browse checkbox to change the type of search. Click the 

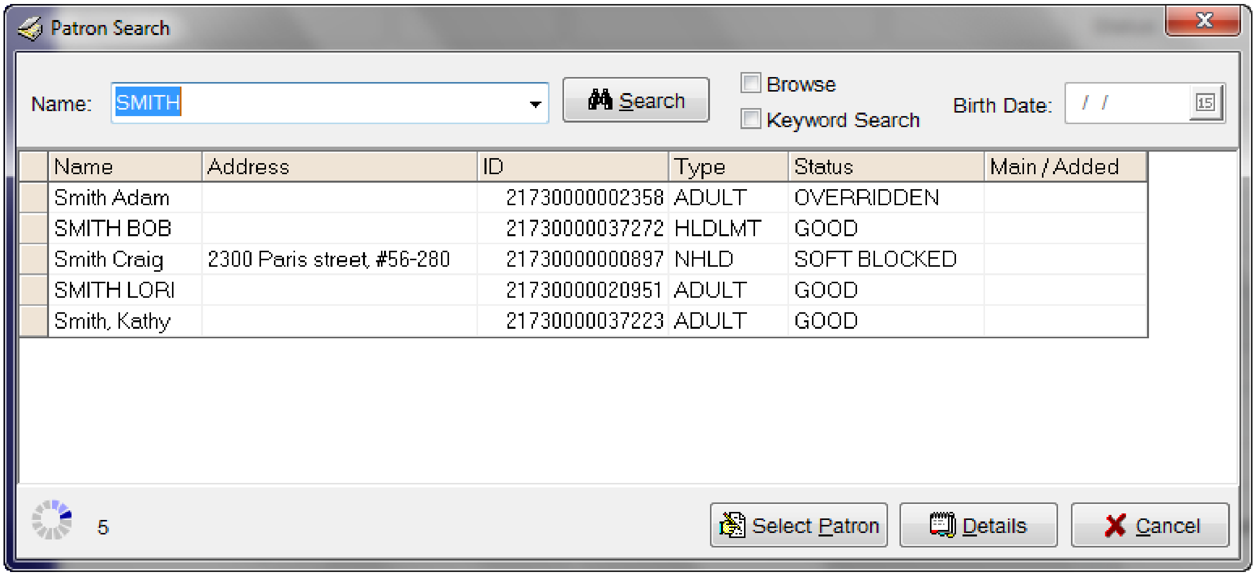
button to re-execute your search.

Patron Browse

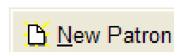
A Patron Browse will display an alphabetical listing of patron accounts starting with your entered search term. Compare the two different searches for Smith in the screens below.

When you complete a Patron Browse, the Previous and Next buttons will become available, allowing you to move forwards and backwards in the alphabetical listing.





You can also complete a “begins with” search by un-checking the Browse and Keyword Search boxes. A “begins with” search will look for patron names that begin with the letters you have entered. Entering **SMI** will display those patrons that have the first three characters of their names that begin with SMI.

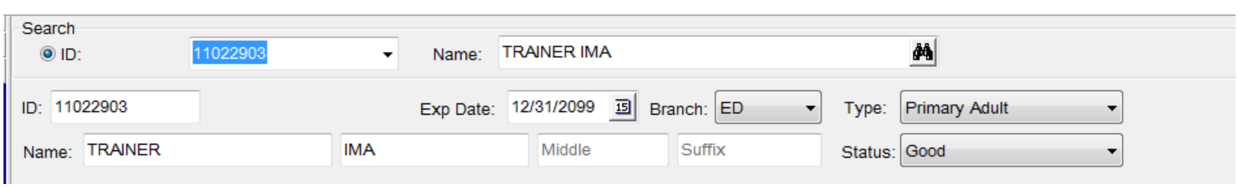
If you are unable to locate your patron within the patron database, click 

to register a new account.

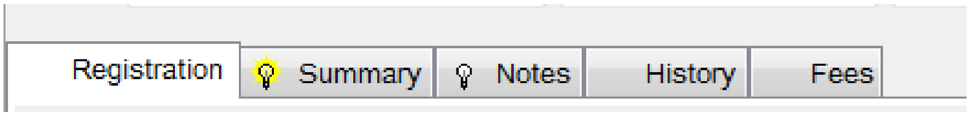
NOTE: If a customer has a previous card in the system and it is not caught when you search for the customer, Circulation Control can delete the old card from the system if there is nothing on it. Circulation Control is unable to transfer an old card to a new card so if there is something wrong with the old card you will need to write notes on both cards stating the problem and including the other library card number in the note section.

Patron Information

When you select back a patron record from the search results, the complete details of the patron’s record will be loaded into the Patron Information function. The top portion of the Patron Information screen (above the tabs) always displays primary patron account information, such as Patron ID, Account Expiration Date, Branch, Borrower Type, Patron First Name, Middle Name, Last Name and Suffix, and Account Status. This information can be changed while you are in any tab of the Patron Information function.



Data in the Patron Information tabs gives you details from various vantage points. Each tab offers different information about the patron.

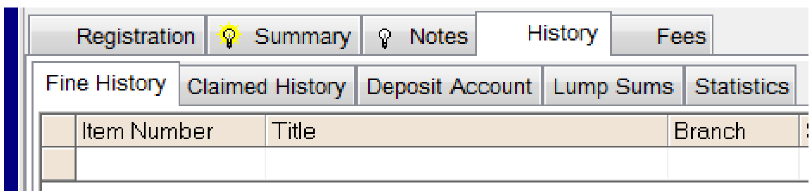


Registration – Detailed account registration information about the patron is located here.

Summary – Displays all current transaction information on the patron record. This includes items checked out, fines and fees owed, and requests for materials. If there are current transactions on the patron account, the light bulb icon is lit. If the icon is not lit then there are no transactions on the patron account.

Notes – Shows patron notes that contain information about the patron. The notes can be system generated. Most patron notes have been placed by staff to share information about a patron account with other staff members. The light bulb icon will light up when there are notes on the account.

History – Displays the patron's history with the library. This tab will also display additional tabs:



- The Fine History tab will list all fines and fees the patron has owed in the past, dates they were paid or cancelled, and when lost materials were returned or paid. NOTE: Fine history will remain on a customer's account for 6 months.

- The Claimed History tab displays the patron's claimed history with the library. This tab will list all items that a patron has Claimed Returned or Claimed Never Had, and also logs all transactions associated with each Claimed Returned/Never Had item. No changes can be made from this tab.

- The Deposit Account tab displays transactions against the patron's Deposit Account, including deposits and withdrawals. Only customers with a balance in their prepaid account prior to migration to Carl X will have money in this account. To use the money in the Deposit Account please contact Circ Control (606-3779).

- The Lump Sums tab displays fine payment amounts that were paid on particular dates. Detailed information about which fines were paid is not included on this tab.

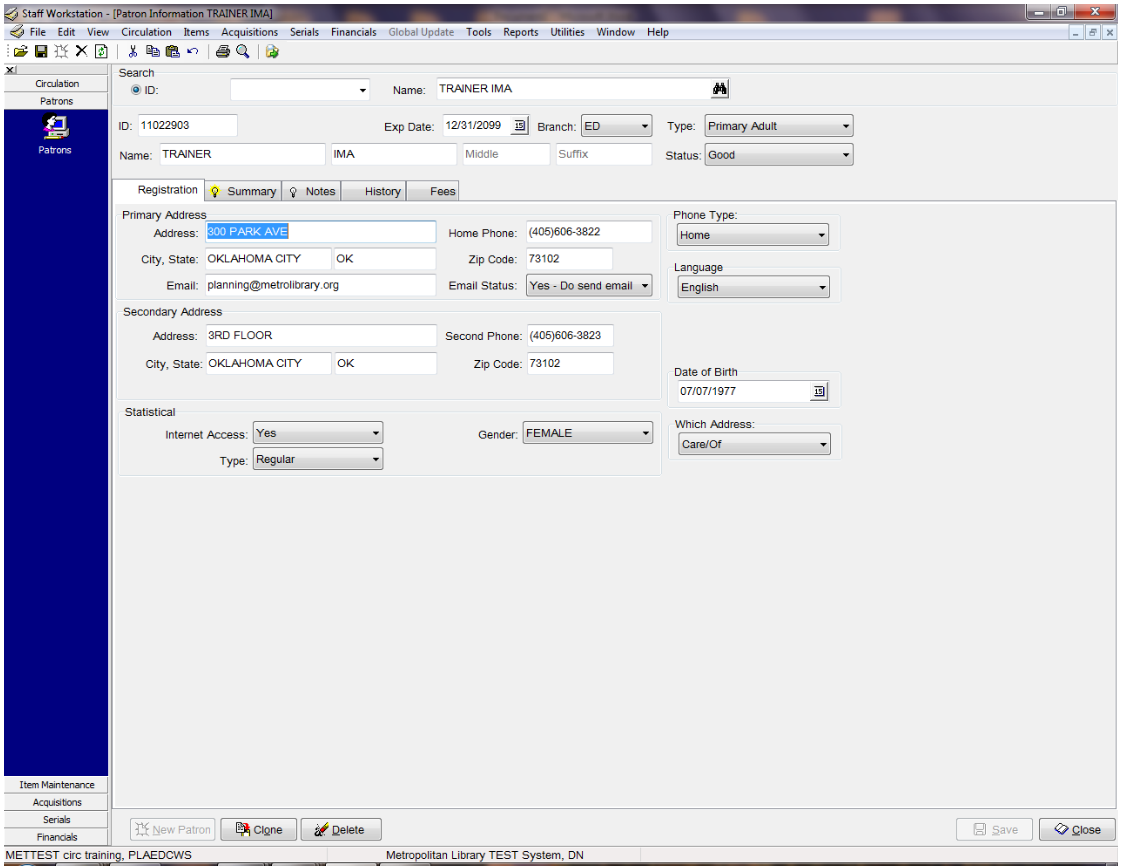
- The Statistics tab displays system supplied information about the activity of the patron. This includes account Registration Date and Branch, account Modification Date and Branch, and account Activity Date and Branch.

Fees – Displays Special Library and Service Fees created by your library (Annual Fee and Lost Card Fee). Choosing and writing a Library/Service Fee will create a Manual Fine on a patron's account.

Registration Tab

NOTE: You can **ONLY** register a new patron **AFTER** a patron search has been completed! The Registration tab contains contact information and other information needed by the library about the patron. You can use the tab key to move between fields in the Registration screen.

Enter patron information in **ALL CAPs** for consistency in name sorting when searching for patrons. NOTE: Email address information is to be entered in lowercase (some email servers are bouncing back emails that are entered in all caps).



ID – Scan or type in the barcode from a new library card.

Type – Select the appropriate customer type. Options are: Annual Fee Adult, Annual Fee Student, Annual Fee Student Restricted, Interlibrary Loan, Online Registration, Outreach, Primary Adult, Primary Student, Primary Student Restricted, Reciprocal Adult, Reciprocal Student, Reciprocal Student Restricted, School Adult, School Student, School Student Restricted, System, and Temporary. NOTE: 'Restricted' indicates the child is unable to check out R-rated materials.

Annual Fee Cards – Customers will receive notification two weeks before their Annual Fee card expires. Circ Control will manually add the fee to their card. If the customer comes in and want to pay their $40 fee, make sure the fee is not already applied to another household member's card before processing the fee. Then update all household cards to expire one year from the expired date or one year from the date paid if the account is already expired. Place a note on the customer's card, who pays the Annual Fee for the household, which states the date paid.
EX: 'Annual Fee paid on 5/14/2015'.

Online Registration – Account type for customers who complete the online library card application. This account is valid for 2 weeks and only allows the customer to place holds (but not check out the holds), and use our online resources (databases, Zinio, OverDrive, etc.). Customer must come into a library location and complete a full library card application, show proof of residency, and they will then be issued a permanent library card. Staff will update the customer's account with this new number and change the status to "Good". If the customer already has a library card assigned to them call Circ Control and have the library card deleted.

Status – Indicates the account standing. All new library accounts will be automatically in "Good" status.

Name – The name field consists of four editable fields, which will be combined to form the searchable name field. The name fields are in Last, First, Middle, and Suffix order.

Primary Address – Contains the primary contact information for the patron, such as mailing address, city, state, zip code, phone, and email. Reminder: Do not use 'TH' or 'ND' after a street number (ex: 5600 NW 122 **NOT** 5600 NW 122nd) or spell out STREET, BOULEVARD, etc. (300 Park Ave **NOT** 300 Park Avenue) and do not use ST (2914 SW 59 **NOT** 2914 SW 59 ST)

NOTE: The program has Zip Code information so entering the fifth character of the Zip Code will cause the City and State fields to be populated with data from the database. **Be sure to verify the city as some Zip codes may populate with an incorrect city.**

If the customer wants their mail to go to a different address be sure to change the "Which address" to Secondary. See Secondary Address below for more specific information regarding this function.

Phone Type – When entering the Phone Number, you can select the Phone Type. Selecting Home or Work will indicate that this patron does not receive text message notification for holds. Selecting a carrier from the list of providers indicates the patron wishes to receive a Text Message for hold arrival notification. NOTE: Selecting a provider with an MMS designation will send the patron a Multi Media message.

If a customer indicates that the phone number they provided is a cell phone and they do not wish to receive text message notifications simply choose "Cell – No text message" under Phone Type.

Email Address – Enter the patron's email address if they have one. If not, leave this field blank and choose one of the 'No' statuses as defined below. The Email Status field will need to be set according to the patron's notification preferences:

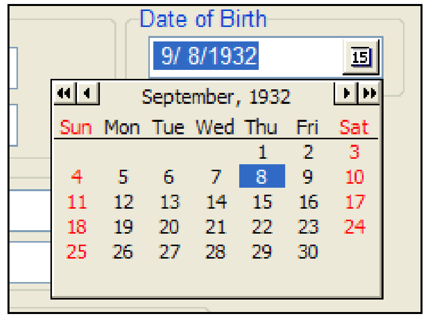
- Yes – Do send email – The patron wishes to receive email notification of holds ready for pickup and other account information emails.
- Bounced – The system has attempted to send an email to the patron, and the email bounced. The email address will be displayed in red text (see example below).

- No – Do not send email – The patron has either not provided an email address, or does not want to receive email at the provided email address.
- No – Opted Out – The patron has declined to provide an email address and doesn't want to be asked for one again.

Language – The language preference of the patron can be set in this field. This will determine in which language the patron will receive his/her email and print notices. The available languages are English and Spanish.

***Secondary / Sponsor Address* –** Contains alternative address information, such as address, city, state, Zip code, secondary phone, etc. Now when you select the following Patron types (student -- AS, ASR, PS, PSR, RS, RSR, SS, SSR), the "Which Address" field will automatically changes to Sponsor.
Enter the parent/guardian's name in the Sponsor name field as follows: LAST (comma) FIRST (space) MIDDLE INITIAL (no period) (e.g. TRAINER, IMA U)

If the address for both the student and the parent/guardian is the same **only enter the address information in the Sponsor field.** The address only need to be entered in this area since all mail goes to the Parent /Guardian and not the student, unless they want the mail to go to a different address like a PO Box. Then the primary address would go with the student name and the PO Box would go with the Parent/Guardian name.



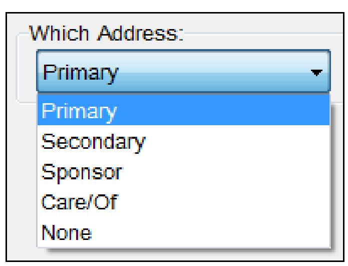
If the parent/guardian gives you an e-mail and/or cell number, that information will need to be entered in the "Primary Address" part of the registration screen.

If the parent/guardian has a different address than the student, complete **both** address fields with the corresponding information.

Date of Birth – You can enter the patron's date of birth by typing the numbers into the field, or using the calendar feature. The single arrows take you backwards and forwards by one month per click. The double arrows take you backwards and forwards by one year per click.

Carl.X features a "Grow Up" feature. When a Child/Student reaches his/her 17th birthday staff will be notified to update the Patron Registration when the account is next accessed, at which time the patron will need to fill out a new library card application to update his/her information. The patron will now sign the application him/herself indicating agreement to be financially responsible for items placed on the card.

***Which Address* –** Allows staff to designate which address should be used when contacting the patron with account notifications. When Sponsorship is selected, additional fields will be displayed on the screen that will require information before the Registration screen can be saved.



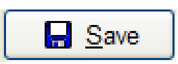
- **Care/Of –** needs to be the same address as your primary address. Put C/O person's name in Address line. Sometimes apartment buildings require the person's name that is on the mail box to be on their mail. Avoid using business names as C/O since most people do not live at their business. If you use sponsor format then the mail would only go the business and not the customer.

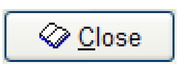
Statistical – Includes dropdown boxes for Internet Access, Type, and Gender. NOTE: Internet will not automatically be selected for adults – You must select either Yes or No in the Internet Access field.
The buttons available on the bottom of the registration tab provide options for actions in the account.

- The  button will open a new Patron Registration screen. All fields will be blank and will need to be filled in to complete a new patron registration.

- The  button will open a new Patron Registration screen. Information in the patron's Primary, Secondary Address fields and email will be copied over to the new registration screen. You can then enter in barcode, name, and patron specific information, such as Date of Birth, and save the patron.

- The  button will delete the patron from the database [Only completed by Circ Control]. If the patron has existing transactions (i.e., items checked out, fines, holds), the patron cannot be deleted. All transactions must be cleared before the patron can be deleted.

- The  button will save any changes made in the Registration screen.

- The  button will close the Patron Information screen. If registration information has changed, and the patron has not been saved, you will be prompted to save the changes to the patron record.

Misc. Patron Registration Issues:

Emancipated Minors – Make the card a "Student Restricted" card, change "Which address" to "Primary". Fill out the required information. In the Secondary Address line put Emancipated and select "Yes" to Internet Access.

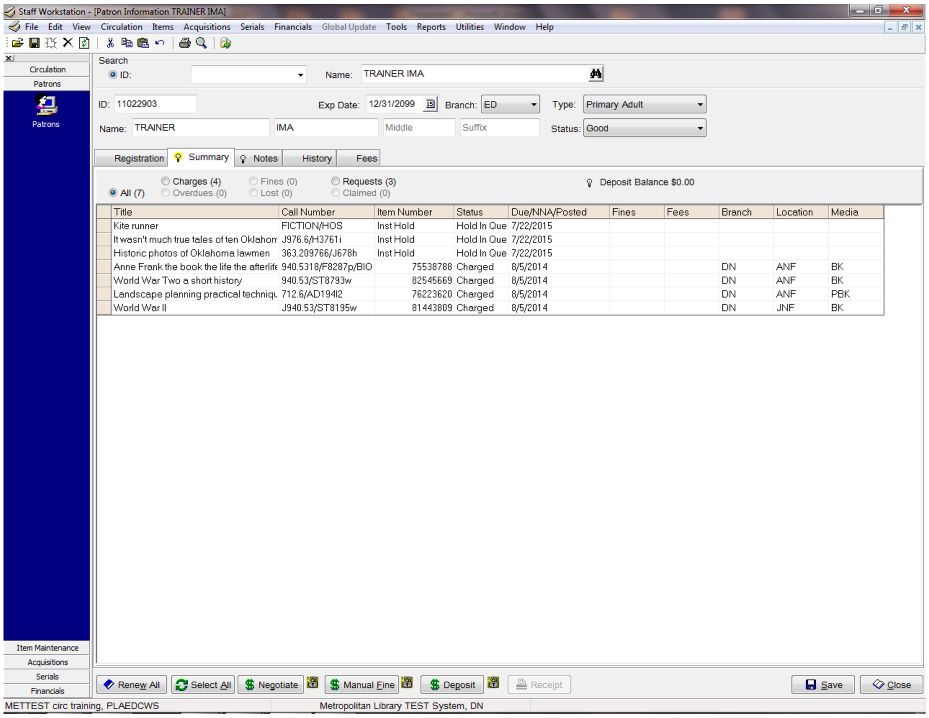
School Cards – Must be re-issued each year upon successful proof of qualification.

Special Stop – When a customer resolves a Special Stop status issue contact Circulation Control (606-3779) so it can be removed. DO NOT delete any notes on the customer's account before calling Circ Control.

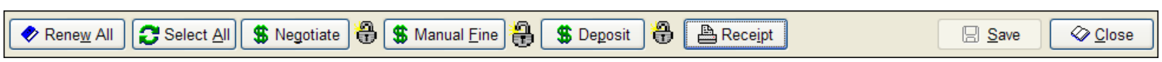
Library Card Signatures – a student card without a parent or guardian signature will be valid for two weeks and have a checkout limit of 2 items. (MLS policy update draft 8/14)

- The procedure will be to set the expiration date for two weeks from the date of issue.
- When parent/guardian comes in to sign, have him/her complete enough of the form to know what card it is for, complete the parent section, attach a printout of the account, and change the expiration date to 2037.
- Circ Control will add a patron note that adds the date of the signature scan.

Summary Tab



The Summary tab provides information on any active transaction against the patron record. You are able to move between views of different types of transactions to see more detailed information. Different buttons are available depending on the view that you have chosen. For all views, the row of buttons at the bottom of the Summary tab is available.

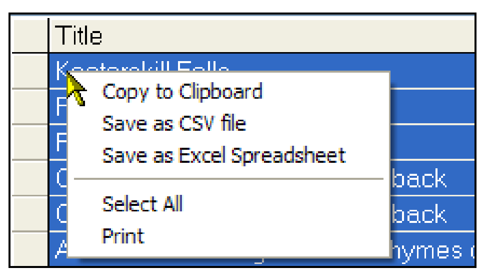


Renew All

Clicking Renew All will go through the Renewal Process for all items checked out to the patron. If the renewal is successful, the item's due date will be updated, and the renewal count for the item is incremented. If the renewal failed, a Big Red Box will be displayed explaining the reason for the failure. A Renewal Receipt will be printed.

Select All

You can use this button to highlight all items in the grid. You can right click with your mouse on the grid to view options of what you would like to do with the highlighted items.



Copy to Clipboard – you can copy the information in the grid, and paste the information to a new document.

Save as CSV file – you can save the grid as a comma delimited file.

Save as Excel spreadsheet – you can save the grid as an Excel spreadsheet.

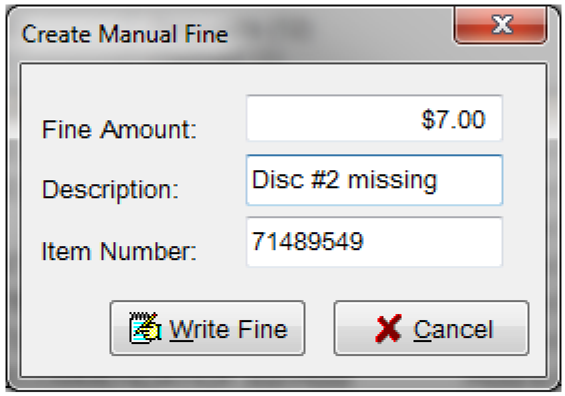
Select All – if the list is not highlighted, you can choose Select All to highlight the entire grid.

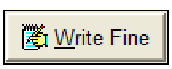
Print – You can print the information in the grid.

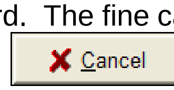
Negotiate
The Negotiate button will take you into the Negotiate function. This is where you can cancel or waive fines and fees owed by the patron.

Manual Fine
Click Manual Fine when you need to manually add a fee to the patron record. For example, if the patron lost a disc out of an audiobook set, you can place a manual fine for the $7.00 replacement fee for the missing disc. Every fine has an item # starting with 1200__ (MLS's unique Carl X #), counts up from 1. This number can be found in Transaction File.

After clicking Manual Fine, enter the dollar amount, including cents, into the Fine Amount box. Enter the reason for the fine in the Description box (16 characters maximum). If you are entering a Manual Fine in relation to a specific item (e.g. missing disc), enter the Item Number. The Item Number is not a required field when creating a Manual Fine. If you have an item highlighted when you click the Manual Fine button, then the item number will be filled in.



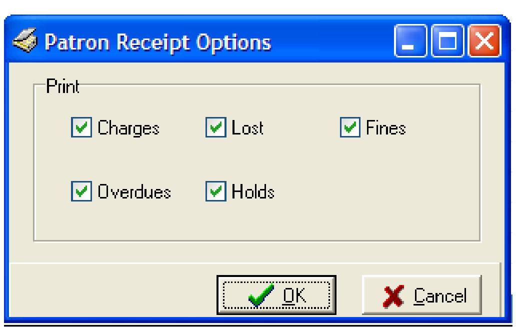
Click 

to save the fine to the patron record. The fine can now be paid through the Smart Money Manager (Point of Sale) software. Click 

to close the Create Manual Fine window without creating the fine.

Deposit
Contact Circ Control to apply Deposit Balance to fines or fees.

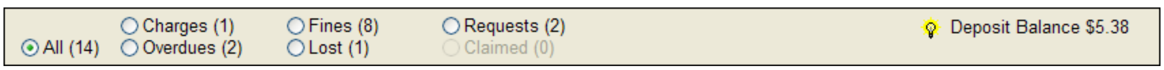
Receipt
After clicking the Receipt button, you will get a Patron Receipt Options menu. Select the options you want printed by checking or un-checking the boxes next to each transaction type. Click OK to print a receipt from an attached receipt printer. Clicking Cancel will not print a receipt and will return you to the Patron Information screen. If a customer only wants a list of items that currently checked out on their card a shorter receipt can be printed from the RENEW screen.



Save
If you have made changes to the Patron Registration information that is available at the top of the screen, the Save button will be enabled. Clicking this button will save the patron. If you attempt to close the patron account without saving, you will be prompted to save your changes.

Close
Selecting Close will close the Patron Information window. If the Registration Information has changed without being saved, you will be prompted to save the changes on the account.

Summary Views
From within the Summary tab, you can click on any of the active option buttons to view specific transaction information about a patron. When you load a patron into Patron Information, the All radio button is usually the default. The exceptions are when you load a patron from the Holds screen (defaults to Requests), from the Overdue button in Charge and Renew (defaults to Overdues) or from the Fines button in Charge and Renew (defaults to Fines). The All button displays all patron transactions and fines. Note that the number in parentheses after each radio button shows a running tally for each transaction or fine.

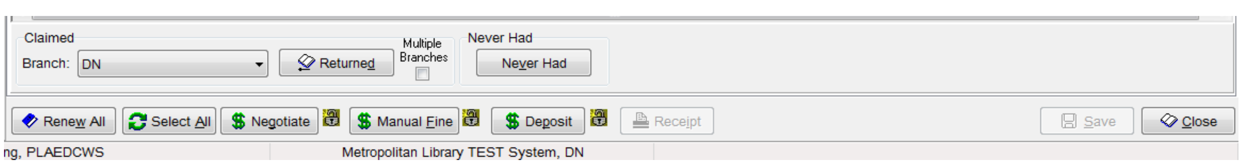


View All
This option displays all active transactions on a patron record. The Status column describes what type of transaction is listed.

Title	Call Number	Item Number	Status	Due/NNA	Fines	Fees	Branch	Location	Media
The Green and the Gray		31730000012837	Charged	11/15/2006			YCIRC	YCIRC	YCRC
The green eyed marriage survivinc		31730000012835	Charged	11/15/2006			YCIRC	YCIRC	YCRC
Cartoon festival The cat came bacl	JVHS CAR66	31730000012834	Lost	11/8/2006		$11.00	NORTH	YCIRC	YCRC
Cartoon festival The cat came bacl	LATIN JVHS C/	31730000014184	Brw. Fee	10/11/2006	0.01		WEST	YCIRC	YCRC
Home and beyond an anthology of		Inst Hold	Hold In Queu	10/12/2005					

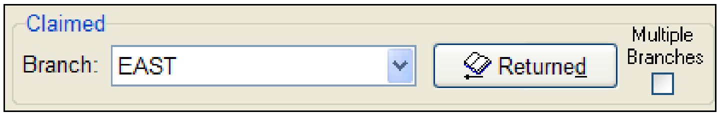
View Charges
This option displays only the items in Charged status. This does not include Overdue or Lost items. This view shows the date the item was charged, when it is due, and from where the item was checked out at. The Status column will list if an item is Charged.

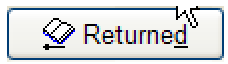
Title	Call Number	Item Number	Status	Charge Date	Due Date	Fee Total	Branch	Location	Media
Eloise at Christmastime	TWEEN/ELO/VIDEO,	75813983	Lost	3/7/2012	3/21/2012	$19.99	CH	T	DVD
Clifford's puppy days Puppy sports sp	EASY/CLI/VIDEO/DIS	78840181	Lost	3/7/2012	3/21/2012	$3.33	CH	E	DVD



When the Charge radio button is selected, additional buttons will be available. The buttons are used to take action on individual titles listed within the radio button.

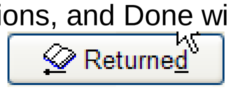
Claimed Returned - When an item is listed as being charged to a patron, but the patron claims that the item was already returned, staff have two options to initiate a Claims Returned search.



A staff member can select a branch the patron claims to have returned the item from the dropdown list of Branches and click on the 

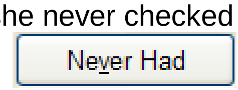
button. This will initiate a search for the item at this one Branch.

Alternatively, when a patron does not remember what branch they returned the item to, staff can initiate a multi-branch search. Checking the Multiple Branches box will bring up a listing of your library system's branches**.**

Using your mouse, click on a branch name to highlight it; when selecting more than one branch, hold down the <Ctrl> button and use your mouse to highlight more branches. Clear will clear all your selections, and Done will take you back to the Charged Display. You must then click the Returned 

button to activate the Claims Returned.

The item will be placed in Claims Returned status and will be logged in the Claimed History tab in Patron Information. Notices will be produced for staff to search the shelves for the item.

Claimed Never Had - When an item is listed as being charged to a patron, but the patron claims he/she never checked out the item, you can select the item in question and then click on the 

button. The Never Had item is removed from the patron account and will be logged in the Claimed History tab in Patron Information. The item will be updated with a Lost holdings status so that staff and customers know it is not available.

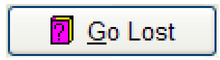
MLS customers are only allowed to have 3 'claims' in a 12 month period. Claims can be either returned or never had and are cumulative.

When an item is "**Claimed Returned**" it will show up on the **Claims Returned List (#60)** report for searching for six weeks. After that, the item status goes Lost and the customer is sent an **End of Claimed Cycle** notice telling him/her that the material was not found and he/she now owes for it.

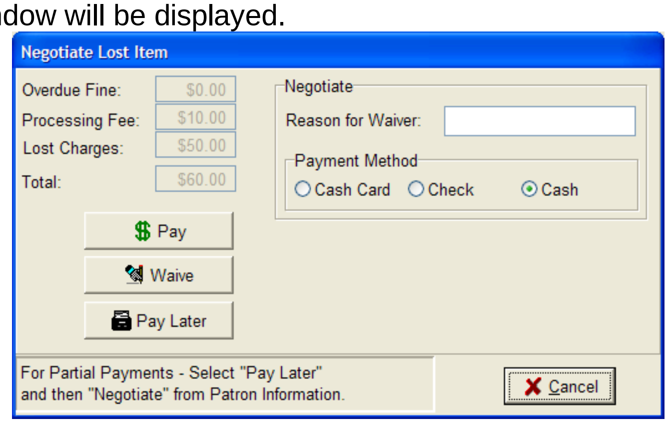
Items that have been claimed returned will appear on the appropriate list at day 1, 8, 22, 29, 43, and 50. These reports (#60) need to be run every day (along with #61-Tracer) to ensure the items are being properly located. An item that has been claimed never had will appear on the Claims Never Had List (#62); this list will show items claimed between dates that you have chosen.

Claims Returned* & *Claims Never Had MLS expectation of use:

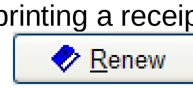
- The 12 month period is a rolling 12 months so if it gets to 12 months and a day after it was claimed, it won't count against the "3".
- The number of events is cumulative on both and only three events total are allowed before a block is placed on an account. Therefore, it is required that a staff member check their shelf as well as have the owning library (or the library where the customer believes they returned the material) check their shelf before they put a *claims returned* on it.
- Claims never had must only be used in rare instances with the customer well aware of the implications.
- The temporary tracers transferred to TLC as *lost* and permanent tracers will show as *claimed never had* but they have the date that they were set as permanent tracer in them so they're not going against the "3" count.

Go Lost - If staff need to assess Lost and Processing Fees for an item before the item is declared Lost by the system, highlighting the item and clicking 

will place the item into Lost status and assess the cost of the item to the customer's card. The Negotiate Lost Item window will be displayed.



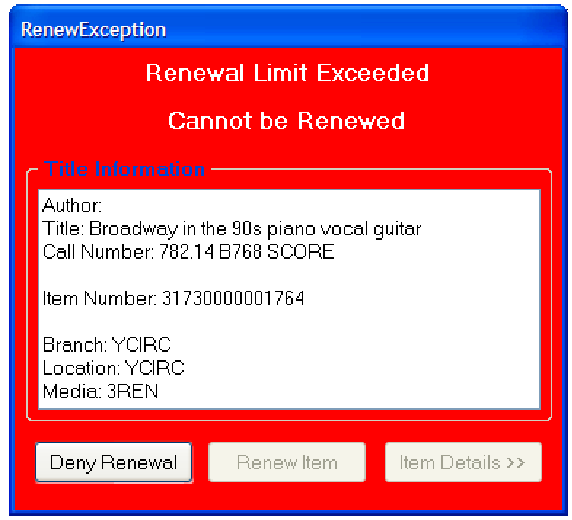
The Overdue Fine, Processing Fee, and Lost Charges that will be assessed are displayed. Selecting Cancel will return you to the Patron Information screen without having placed the item into Lost status. You should select 'Pay Later' and that will post the cost associated with the item to the account. The cost of the item will be available for future payment, but it will block the card as a 'Lost' item is a blocking threshold. If the customer would like to pay the same day go to the Smart Money Manager (Point of Sale) computer to take care of the customer.

Renew - This option allows for the renewal of individual items, without printing a receipt for the patron. To renew an item, highlight the item in the grid and click the 

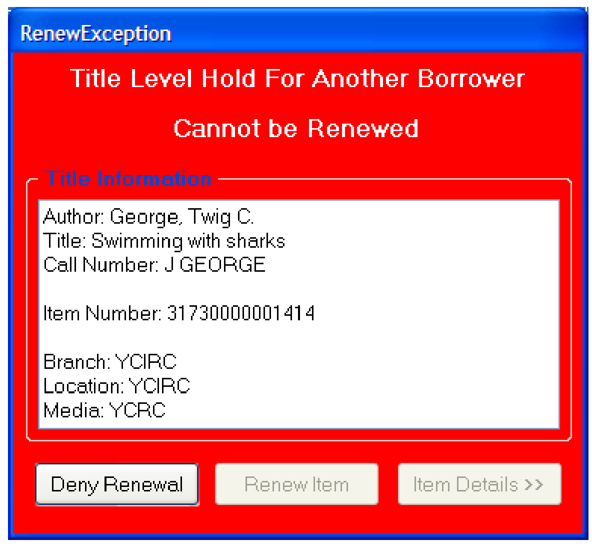
button. A renew attempt will be made. If the renewal is successful, the items due date will be updated, and the renewal counter of the item will be incremented. If the renewal failed, a failure Big Red Box will be displayed with the failure reason.

Below are some BRBs specifically related to the Renew function in the Patron Information screen.

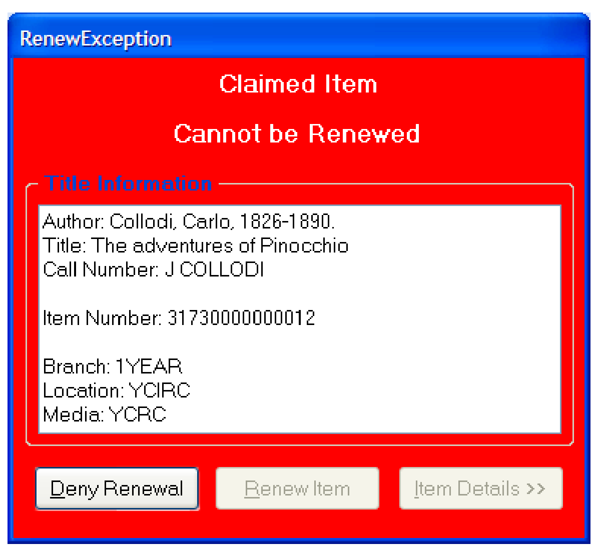
Renewal Limit Exceeded
MLS allows customers to renew an item twice. When the limit is reached, the Renewal Limit Exceeded exception box will display. The only option you have is to Deny Renewal.



Title Level Hold for Another Borrower
Patrons are prevented from renewing material with outstanding holds. When an item with a hold is encountered, the following exception box will display. The only option is to Deny Renewal.



Claimed Item
Items that are Claimed Returned or Claimed Never Had will display a Claimed Item message. The only option is to Deny Renewal.



Overdue/Lost Items

Items that have gone Lost are prevented from being renewed. The only option for these items is to Deny Renewal. Overdue items can be renewed.

View Overdues

This option displays information on items that are in an Overdue status, including the Overdue Fine that would be assessed if the item were returned or renewed today. The Status column will list items as Overdue unless a Claims Returned has been placed on the item. Additional buttons are available when the Overdues radio button is selected. These options are the same that are available in the Charge section above: Claimed Returned/Never Had, Go Lost, and Renew.

Title	Call Number	Item Number	Status	Charge Date	Due Date	Fine to Date	Branch	Location	Media
Festival fever Finland fe:	394.2694 VALKON	31730000009876	Overdue	10/1/2006	10/8/2006	2.50	SOUTH	YCIRC	YCRC

View Fines

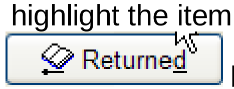
This option displays information about fines and fees that the patron owes. Included in the grid is the Assessed Date, the amount that was originally owed, any partial payments made against the fee, the alias of the staff member that was logged in when the fine was assessed, and the branch where the fine was assessed.

Title	Call Number	Item Number	Status	Assessed Date	Fines Total	Fines Paid	Notes	ID	Branch
Festival fever Finland fe	394.2694 VALKON	31730000009876	Manual Fine	10/11/2006	15.00	$0.00	test	qa2	SOUTH
Cat mischief	J KNUCKEY	31730000345678	Brw. Fee	10/12/2006	1.92	$0.00	Borrowing Fee	qa2	SOUTH
A cat came fiddling and	J 784 KAPP	31730004002123	Proc. Fee	10/12/2006	1000.00	$0.00	EA	qa2	HFEE
Festival fever Finland fe:	394.2694 VALKON	31730000009876	Fine	10/1/2006	1.00	$0.00		qa2	SOUTH

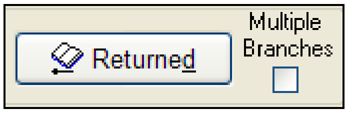
View Lost

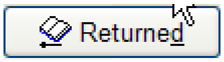
This option displays information on items that are in Lost status (items that have been checked out and overdue for 60 days). The Fine to Date column lists the Lost fee amount that is owed for the item.

Title	Call Number	Item Number	Status	Charge Date	Due Date	Fine to Date	Branch	Location	Media
The Christmas spirit strikes Rotten R	E GANTOS	31730000001659	Lost	10/14/2004	11/11/2004	12.95	EAST	YCIRC	YCRC
Pumpkin fever	F Suzanne	31730000006715	Lost	11/1/2004	11/29/2004	50.00	EAST	YCIRC	YCRC
Never let your cat make lunch for you	E HARRIS	31730000009004	Claims Ret.	10/18/2004	11/1/2004	11.00	WEST	YCIRC	YCRC
Grapes and gas Grape invaders		31730000005244	Lost	4/8/2005	4/8/2005	20.00	EAST	YCIRC	YCRC

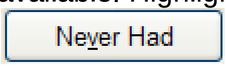
When the Lost radio button is selected, the option to place items on Claimed Returned is available. To initiate a Claims Returned for one branch, highlight the item to be claimed, select the branch from the drop down list, and click the 

button. To initiate a Claims Returned at multiple branches, highlight the item to be claimed, click the Multiple

Branches box 

and using your mouse, select at least one branch to search by clicking on the branch name. To select more than one branch for searching, hold down the <Ctrl> button and click on the branch names, click Done. Click the 

button. The Lost item will move to the Claimed display in Patron Information and the status will stay Lost.

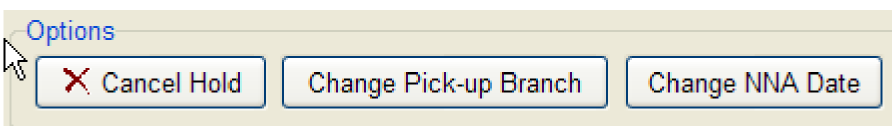
When the Lost radio button is selected, the option to mark the item Claimed Never Had is available. Highlight the item the customer says they never checked out and click the 

button. The transaction will be logged in the Claimed History tab and the item will remain with a Lost holdings status so that staff and customers know it is not available. The Claimed Never Had information is available in Item Detail.

View Requests
This option displays information about Holds for the patron. It includes the title, NNA or Suspend until date, status (Hold Shelf, Hold in Queue, Hold In Transit, etc.), place in the Hold Queue, and Pickup Branch.

Title	Call Number	Item Number	Status	Due/NNA	Pickup At	Placed At	Queue Pos
Pignic		Branch Hold	Hold In Queue		MARTIN	EA	1
Pumpkin fever	[Fic]	Inst Hold	Hold In Queue	10/30/2007	EAST	EA	1
Death of a hero	FIC HAYMON	31730244190006	Hold Suspended	10/27/2006	2LIMIT	2L	1

When the Requests radio button is selected, the following buttons become available.

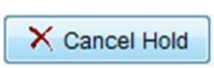


Cancel Hold
To cancel a Hold for a patron, click on the Requests radio button and highlight the hold that is to be removed.

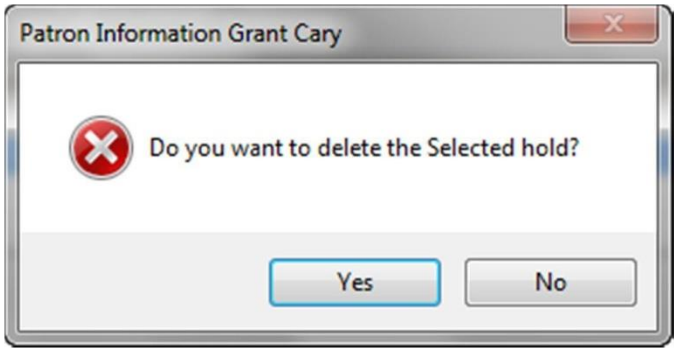
Registration | Summary | Notes | History | Fees

All (4) · Charges (0) · Overdues (0) · Fines (0) · Lost (0) · Requests (4) · Claimed (0) · Deposit Balance $0.00

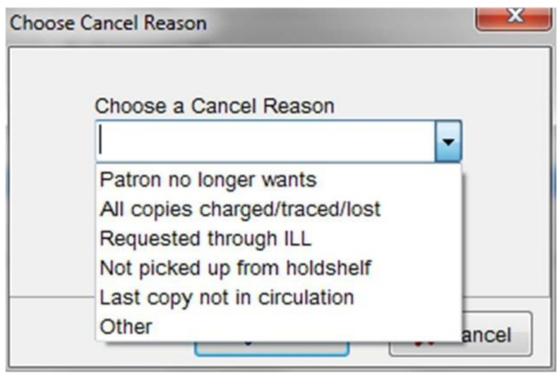
Title	Call Number	Item Number	Status	Due/NNA/Posted	Pickup At	Placed At	Queue Pos
Cat crimes a large print anthology		Inst Hold	Hold In Queue	5/14/2011	EAST	EA	1
Green fairy book	J 398.21 LANG	Inst Hold	Hold In Queue	5/2/2012	EAST	EA	3
Cat & canary /		31730051220081	Hold In Transit		WEST		0
Home alive the art of self defense		31730004042031	Hold Shelf	4/12/2011	EAST	EA	0

Click the 

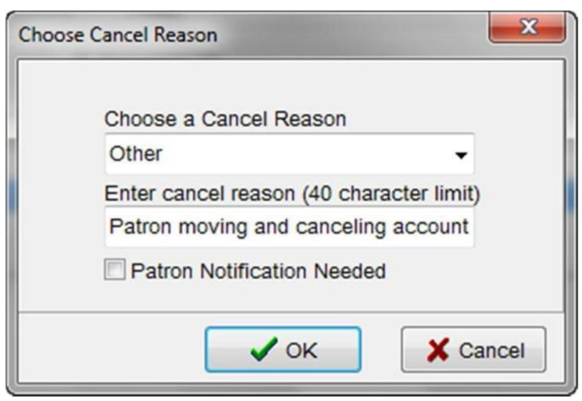
button to initiate the deletion against the selected hold. A confirmation window will display.



Selecting No will close the confirmation box and take you back to Patron Information. The hold will not be deleted. Selecting Yes will bring up the Choose Cancel Reason window with a dropdown menu.

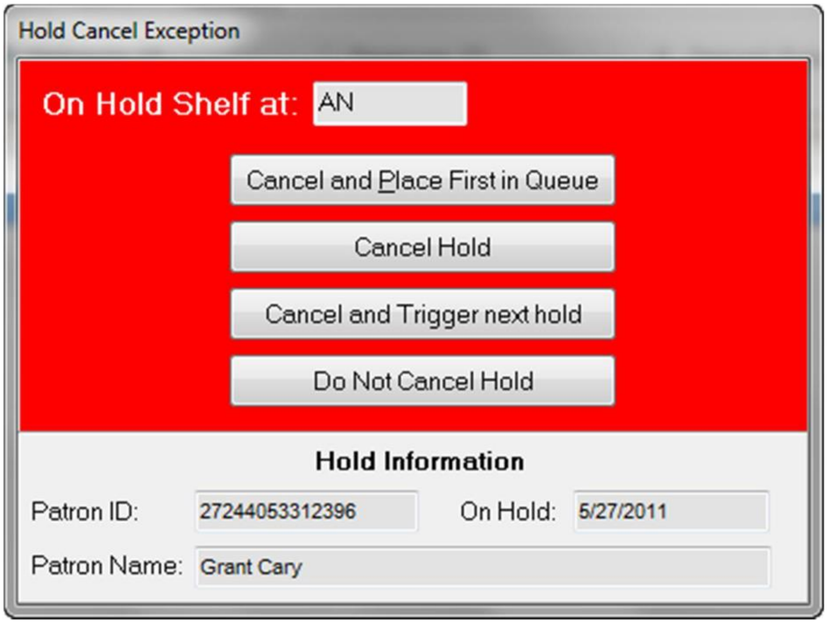


Choose any preset reason or select Other. Selecting Other provides a free text box to enter a cancellation reason, up to 40 characters. If the patron does not need notification of the cancellation, uncheck the Patron Notification Needed box.



Clicking Cancel will close the Choose Cancel Reason window and go back to the Patron Information screen and the hold will not have been cancelled. Clicking OK will return you to the Patron Information screen, and the hold will have been removed.

To delete a Hold that is already in Transit or on the Hold Shelf for a patron, go through the steps listed above. When you click OK after choosing a cancel reason, a Big Red Box – Hold Cancel Exception will come up. There are 4 options to choose from: Cancel and Place First in Queue, Cancel Hold, Cancel and Trigger next hold, and Do Not Cancel Hold.



Cancel and Place First in Queue – Will cancel the existing hold for the patron, and place them first in the Hold Queue for that title. The item status will change to 'On Shelf' (it will be 'on shelf' whether the location is the owning location or not) and the item will be removed from the patron's account. In Patron Information, there will be a new request where the patron is first in the queue, and the pick-up branch will be the same as what the original hold pickup branch was.

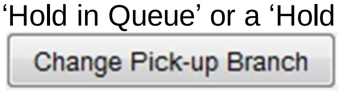
Cancel Hold – Cancels the existing hold for the patron, removing it from their account. The status of the item will change to 'In Transit' if not the owning location or to an 'On Shelf' status if the owning location. If there is an existing hold queue associated with the item or an Item Level hold for the item, it will not be triggered.

Cancel and Trigger next hold – Cancels the existing hold for the patron and triggers the next hold in queue or item level hold. Only use this option if you have the item in hand.

Do Not Cancel Hold – Does not cancel the hold, and returns to the Patron Information screen. The hold stays on the patron's account.

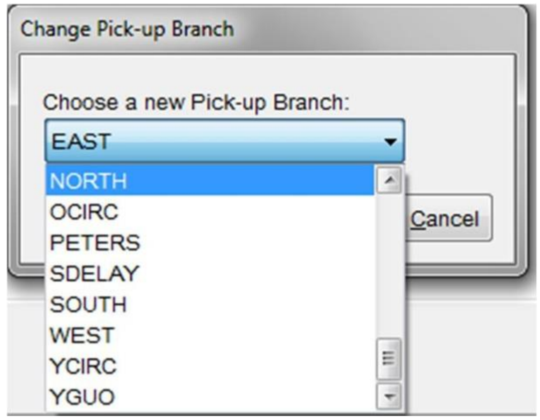
Change the Pick-Up Branch

Title	Call Number	Item Number	Status	Due/NNA/Posted	Pickup At	Placed At	Queue Pos
Cat crimes a large print anthology		Inst Hold	Hold In Que	5/14/2011	EAST	EA	1
Green fairy book	J 398.21 LANG	Inst Hold	Hold In Que	5/2/2012	EAST	EA	3
Cat & canary /		31730051220081	Hold In Trar		WEST		0

In the Patron Information screen under the requests radio button, you can change the pick-up branch of a 'Hold in Queue' or a 'Hold In Transit' request. Highlight the request to change, click the 

button.

Select the new Pick-up Branch from the dropdown list and click OK. The new Pick-Up Branch will be displayed in the Pickup At column in Patron Information.

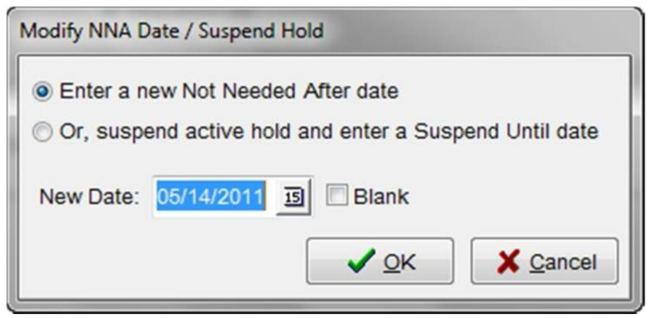


Modify the NNA Date

If a Hold has passed the NNA (Not Needed After) Date, it will fall off the Hold Queue. To extend the NNA date of a hold, highlight the Hold to be extended and click the

button. Select the 'Enter a new Not Needed After Date' radio button.

Enter the new Not Needed After date in the field or select a date from the calendar. Click OK.

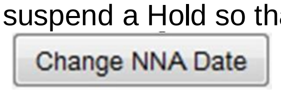


Here again, please DO NOT select the Blank checkbox as this will allow the Hold to remain in the Hold Queue without a NNA date.

Suspend a Hold

You can suspend a Hold so that a request will not be filled until a specified date.

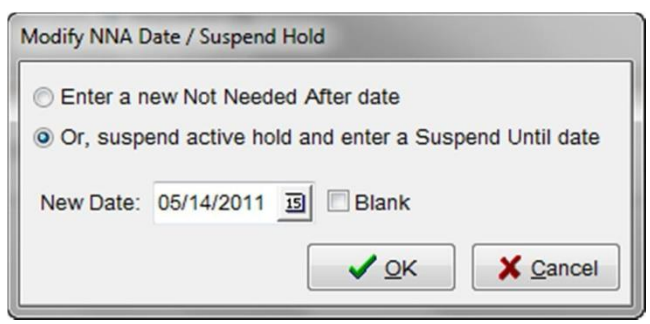
Click the



button.

Select the 'Or, suspend active hold and enter a Suspend Until date' radio button.

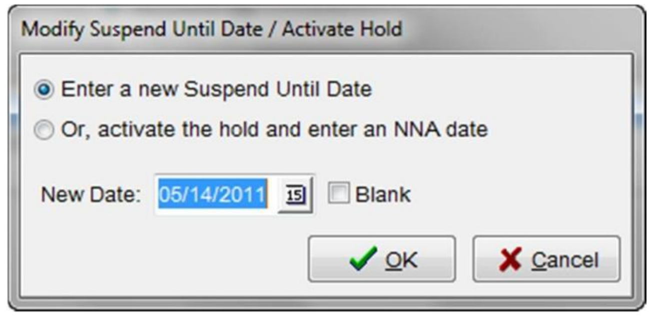
Enter the date that the Hold should be suspended until and click OK. The hold will be skipped over in the hold queue until the Suspend Until date is passed, or until the Hold is reactivated by a staff member.



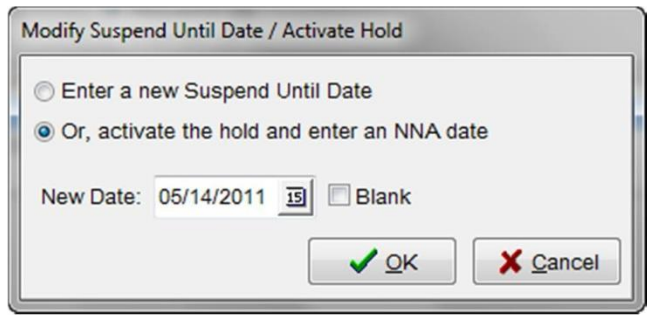
Modify a Suspended Hold

Highlight the suspended hold, and click the 

button. You can change the Suspend Until date by selecting ‘Enter a new Suspend Until Date’ and entering a new date. Click OK to update the hold with the new date.



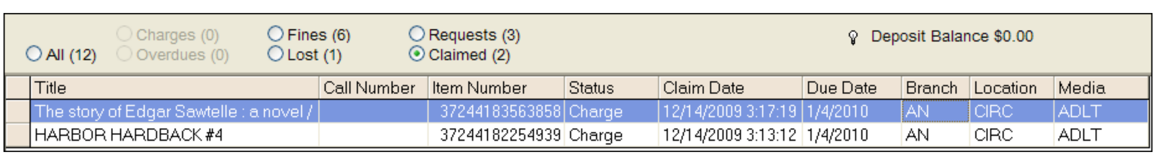
To reactive a suspended hold, select the ‘Or, activate the hold and enter a NNA date’ radio button and enter a date into the date field. Click OK to change the hold status to Hold in Queue.



To reactivate a hold with no Not Needed After Date, select ‘Or, activate the hold and enter a NNA date’ radio button and check the Blank checkbox. Click OK.

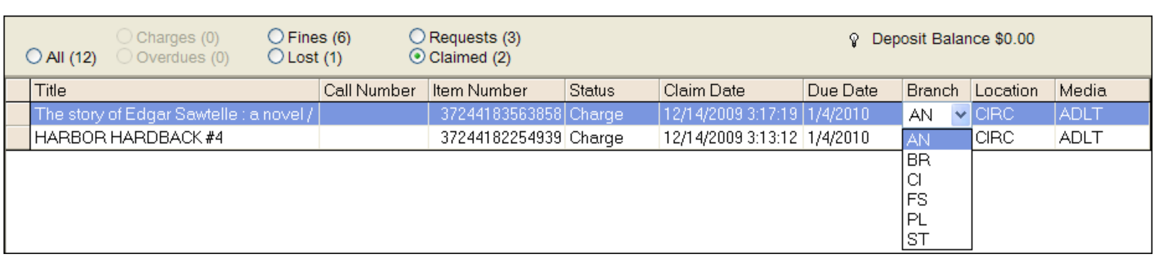
View Claimed

This option displays the items that have been Claims Returned for this patron. Each item will list the date the item was placed on Claims Returned and the branch or branches (for a Claimed Returned Multiples Branches) where the patron claims to have returned the item.

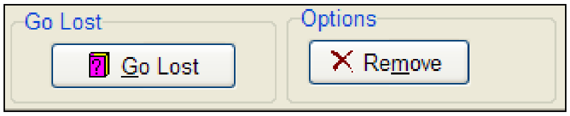


Title	Call Number	Item Number	Status	Claim Date	Due Date	Branch	Location	Media
The story of Edgar Sawtelle : a novel /		37244183563858	Charge	12/14/2009 3:17:19	1/4/2010	AN	CIRC	ADLT
HARBOR HARDBACK #4		37244182254939	Charge	12/14/2009 3:13:12	1/4/2010	AN	CIRC	ADLT

To see the branch(es) a patron claims to have returned the item, click in the Branch box of the title you wish to view the information and a dropdown menu will appear. The branch(es) will be listed in the dropdown menu.



Title	Call Number	Item Number	Status	Claim Date	Due Date	Branch	Location	Media
The story of Edgar Sawtelle : a novel /		37244183563858	Charge	12/14/2009 3:17:19	1/4/2010	AN	CIRC	ADLT
HARBOR HARDBACK #4		37244182254939	Charge	12/14/2009 3:13:12	1/4/2010		CIRC	ADLT



When viewing Claims Returned items, the Go Lost button is available. If you highlight a Claims Returned item and click 

, the Claims Returned status will be cleared, and the item will be placed in Lost status. See the Go Lost function that is described in the View Charges section previously in this document.

In the Claims Returned view, there is also a Remove button. Highlight the Claims Returned item and click Remove to clear the Claims Returned status and place the item into its regular status (i.e., Charged, Overdue or Lost).

Deposit Balance
This option displays the dollar amount the patron has on Deposit with the library. Deposit Balances can be used to pay Fines and Fees on the patron account. To use these funds, contact Circ Control to complete the transaction.

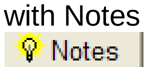
Notes Tab

The Notes Tab is used to communicate information about an account to staff members who are working with the patron. Some notes are system generated when specified events take place. For example, when an email notice bounces, notes are placed on the account stating this information.

Staff members can use the Notes tab to communicate with each other about an account. If there is information about a patron that you want the next staff member to know about (e.g., you set up a payment plan for fines, etc.), you can add this information.

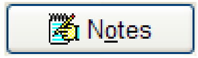
MLS expectation of use

- While these notes are not patron facing, it is important for staff to write as though the customer or a supervisor may see it.
- It is important to clean up outdated notes and circulation clerks, librarians and managers may add or delete the notes.
- Notes entered by Circ Control may only be removed or modified by Circ Control

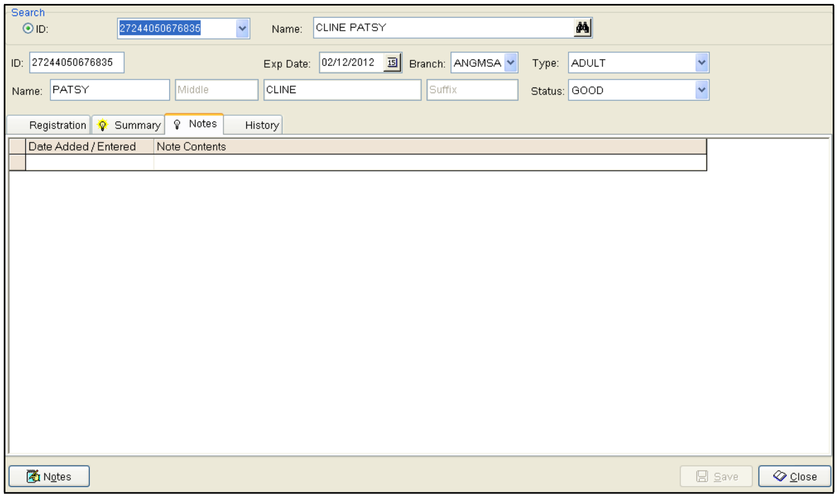
When a patron with Notes is displayed in Patron Information, the Notes tab light bulb icon is lit. Click on the 

tab to view the notes.

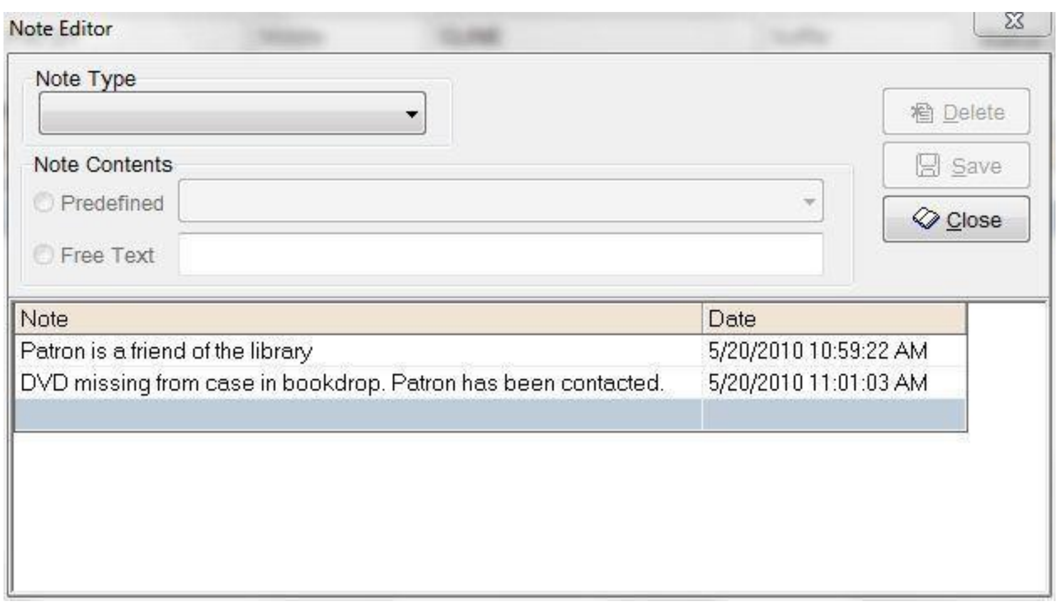
How to Add a Note

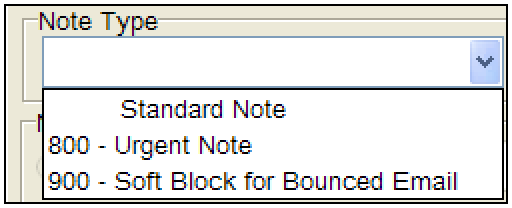
At the Notes screen, click on the 

button and the Notes Editor window will display.
You can also double click on the grid where the notes are displayed to open the Notes Editor window.



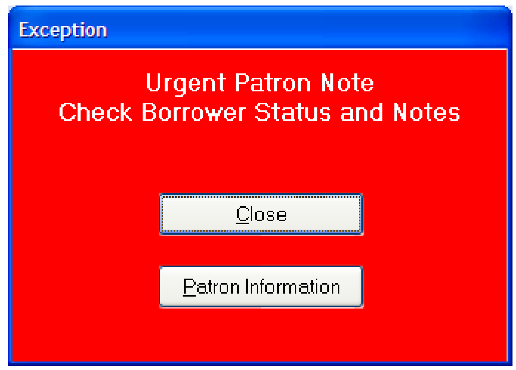
The cursor will default in the Note Type field. Press the down arrow on your keyboard to select a Standard Note and your cursor will be moved to the Free Text window to enter your note. Most notes that are entered by staff are Standard Notes. To change the Note Type, click on the down arrow next to the Note Type field.





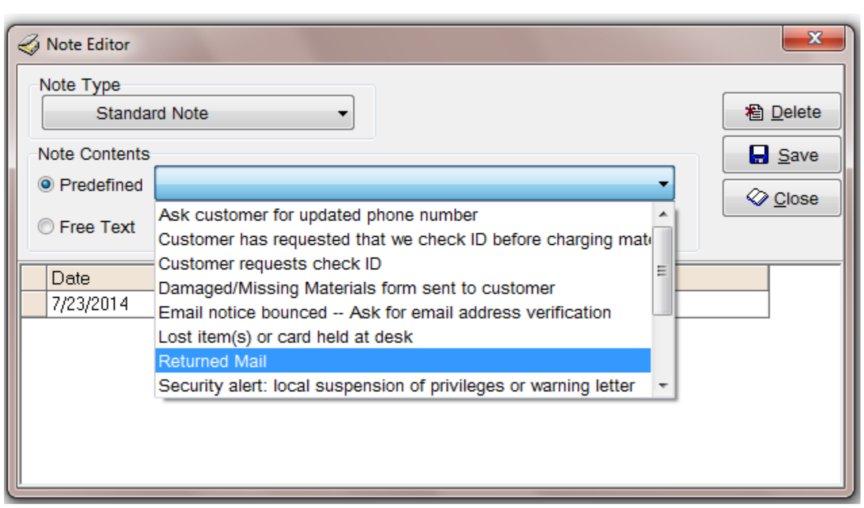
Standard Note
There are no system or client actions with this note type. This note will display in the Notes tab for informational purposes. To enter a Standard Note, press the down arrow on your keyboard.
Standard Note will be selected, and you will be placed in the Free Text field to enter your note text.

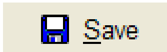
800 – Urgent Note
An Urgent Note can be placed by certain staff members, and has client implications. If a patron has an Urgent Note on their account, then the Urgent Note Big Red Box will be displayed.



900 – Soft Block for Bounced Email
This note is placed by the system when an email notification to a patron has been bounced back to the sender. The email status is changed to Bounced and the email address is displayed in red text. The account is Soft Blocked to bring the issue to the attention of staff. When the email address is updated, this note will automatically be removed, and the account will be placed in Good status.

Predefined Notes
To add a Predefined note to a customer's account, click on the Predefined radio button and then click on the dropdown list box to select a note from the list. If the predefined note needs to have a location specified (ex: if a lost item is held at desk or damage/missing materials form sent), you will need to recreate the note as a free text note.

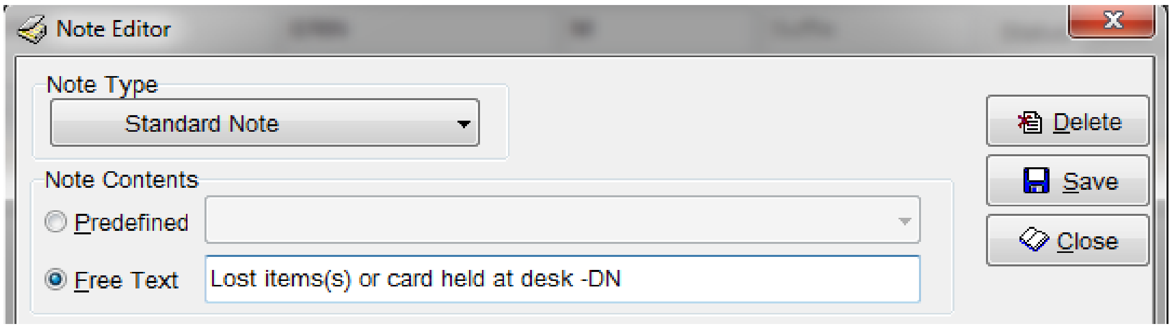


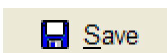
Click 

to add the note to the patron record.

To add a Free Text note, click on the Free Text radio button and enter a note in the adjacent field. Free Text notes can be up to 500 characters long. Any note that is longer than the display in the Patron Information screen will wrap to the next line in the screen.

Include your two digit library location in your note to assist other staff if there are questions regarding the note. The date is added automatically and displayed in Patron Information. If a note is modified at a later date, the original timestamp on the note does not change.



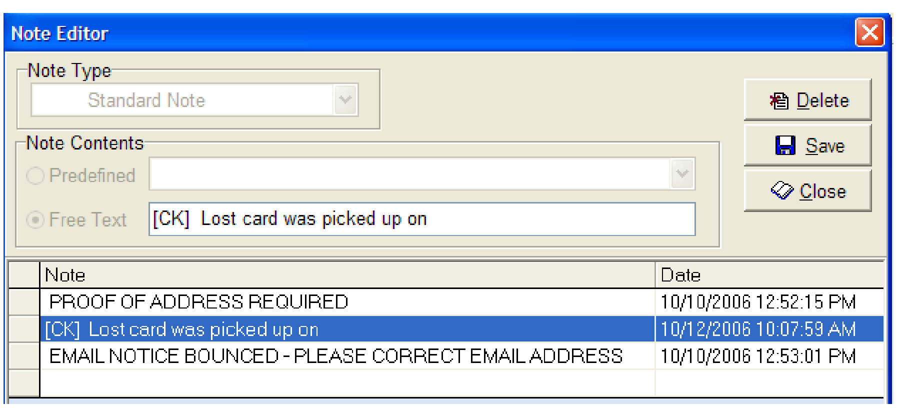
Click 

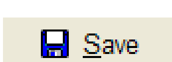
to save the note to the patron record.

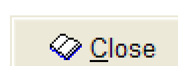
To add another note for the same patron, repeat the above steps. When you have finished adding notes, click Close.

How to Edit a Free Text Note
At the Notes window, double-click on the grid where the notes are displayed, or click the Notes Editor button.

When the Note Editor window opens, click to highlight the Free Text note you want to edit. The text for the note will be displayed in the Free Text window. Click in the Free Text window and modify the note as needed.



Click 

when you are finished making changes, then click 

to exit the Notes Editor window.

- Notice that you cannot edit the text of a Predefined Note.

- Notice that you cannot change the Note Type of a note after it has been saved.

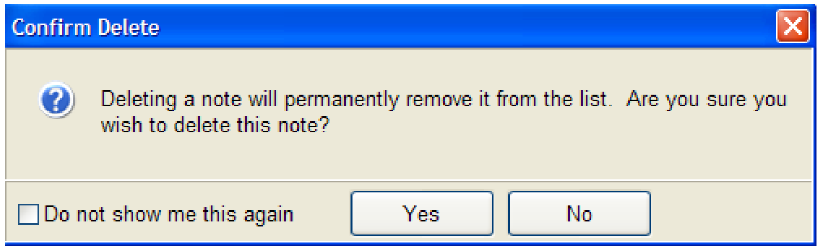
How to Delete a Note

At the Notes window, double-click on the grid where the notes are displayed, or click the Notes Editor button.

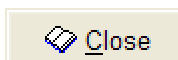
Highlight the note to be deleted, then click the 

button.

The system will prompt the user to confirm the note should be deleted.

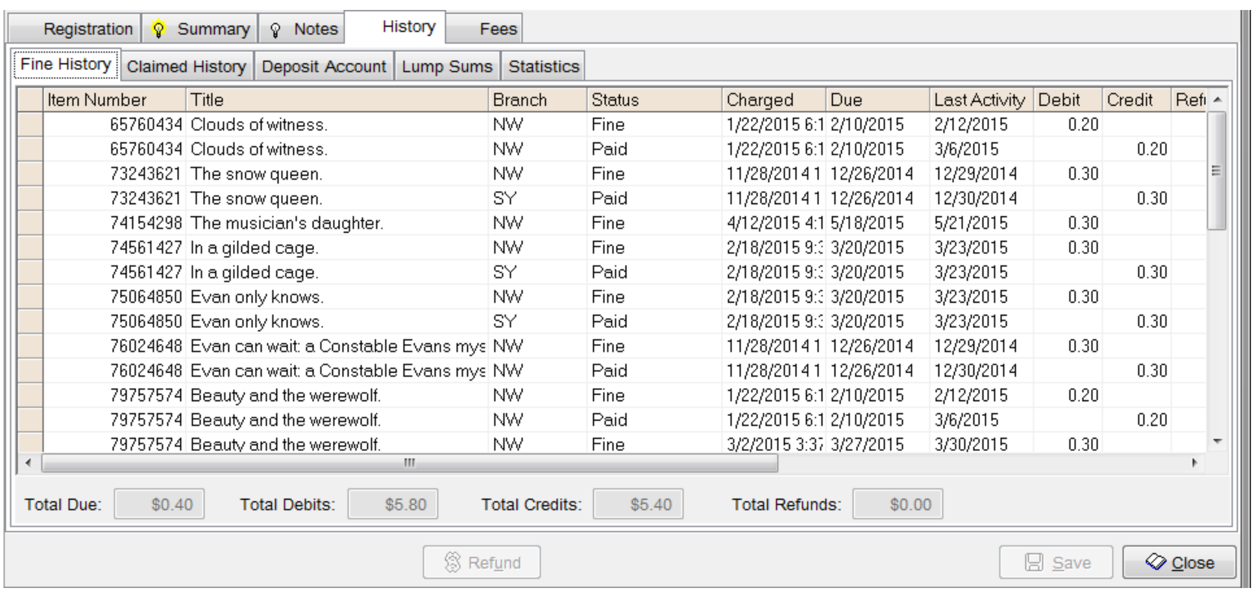


If you are deleting multiple notes, you can check the “Do not show me this again” checkbox. The confirmation will not display for the remainder of the notes you are deleting in this session of the Notes Editor.

Click the Yes button and then click 

to exit the window. Once you exit the Note screen, the note will be deleted.

History Tab



Item Number	Title	Branch	Status	Charged	Due	Last Activity	Debit	Credit	Refı
65760434	Clouds of witness.	NW	Fine	1/22/2015 6:1	2/10/2015	2/12/2015	0.20		
65760434	Clouds of witness.	NW	Paid	1/22/2015 6:1	2/10/2015	3/6/2015		0.20	
73243621	The snow queen.	NW	Fine	11/28/2014 1	12/26/2014	12/29/2014	0.30		
73243621	The snow queen.	SY	Paid	11/28/2014 1	12/26/2014	12/30/2014		0.30	
74154298	The musician's daughter.	NW	Fine	4/12/2015 4:1	5/18/2015	5/21/2015	0.30		
74561427	In a gilded cage.	NW	Fine	2/18/2015 9:3	3/20/2015	3/23/2015	0.30		
74561427	In a gilded cage.	SY	Paid	2/18/2015 9:3	3/20/2015	3/23/2015		0.30	
75064850	Evan only knows.	NW	Fine	2/18/2015 9:3	3/20/2015	3/23/2015	0.30		
75064850	Evan only knows.	SY	Paid	2/18/2015 9:3	3/20/2015	3/23/2015		0.30	
76024648	Evan can wait: a Constable Evans mys	NW	Fine	11/28/2014 1	12/26/2014	12/29/2014	0.30		
76024648	Evan can wait: a Constable Evans mys	NW	Paid	11/28/2014 1	12/26/2014	12/30/2014		0.30	
79757574	Beauty and the werewolf.	NW	Fine	1/22/2015 6:1	2/10/2015	2/12/2015	0.20		
79757574	Beauty and the werewolf.	NW	Paid	1/22/2015 6:1	2/10/2015	3/6/2015		0.20	
79757574	Beauty and the werewolf.	NW	Fine	3/2/2015 3:37	3/27/2015	3/30/2015	0.30		

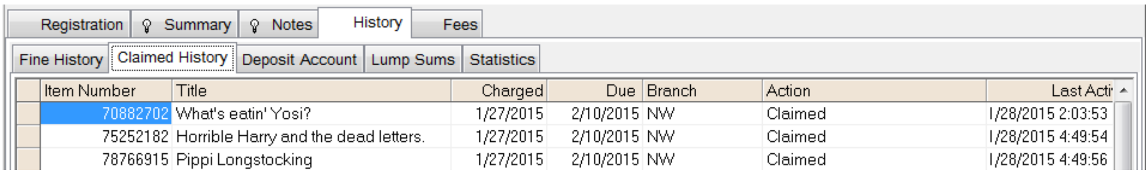
The History tab displays the patron’s history with the library. There are five tabs that are displayed in History.

Fine History

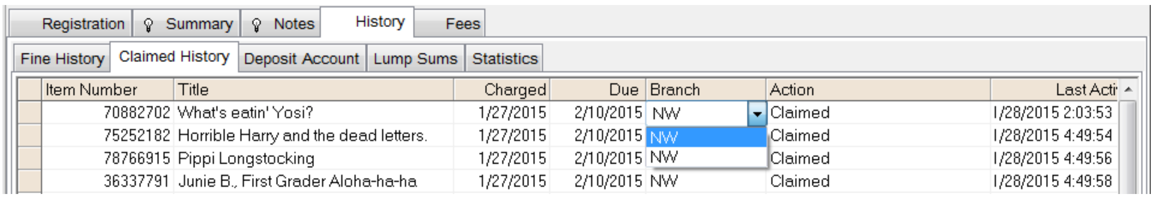
Fine History displays the patron’s financial history with the library. It only displays the history for 6 months.

Claimed History

Claimed History will list all items that a patron has Claimed Returned or Claimed Never Had. Clicking inside the branch box will give you a dropdown menu, listing the branch or branches at which the claimed item is being searched. The branch listing is determined when the item is initially claimed.

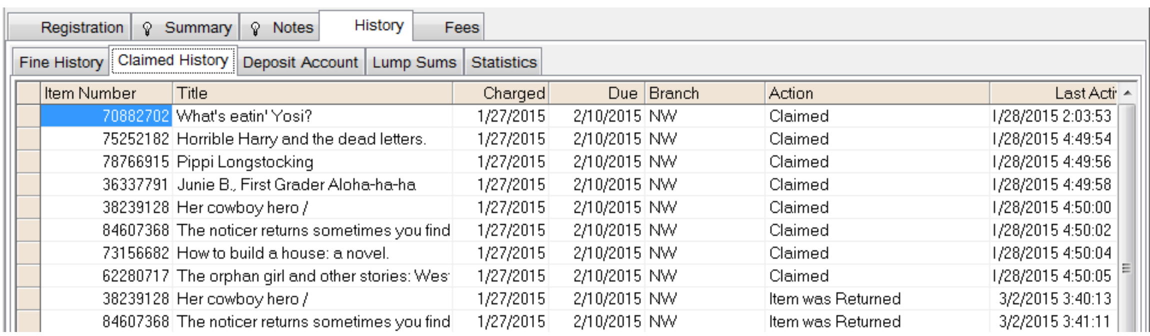


Item Number	Title	Charged	Due	Branch	Action	Last Acti
70882702	What's eatin' Yosi?	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 2:03:53
75252182	Horrible Harry and the dead letters.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:54
78766915	Pippi Longstocking	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:56



Item Number	Title	Charged	Due	Branch	Action	Last Acti
70882702	What's eatin' Yosi?	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 2:03:53
75252182	Horrible Harry and the dead letters.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:54
78766915	Pippi Longstocking	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:56
36337791	Junie B., First Grader Aloha-ha-ha	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:58

The Claimed History tab also logs all transactions associated with each Claimed Returned/Never Had item.



Item Number	Title	Charged	Due	Branch	Action	Last Acti
70882702	What's eatin' Yosi?	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 2:03:53
75252182	Horrible Harry and the dead letters.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:54
78766915	Pippi Longstocking	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:56
36337791	Junie B., First Grader Aloha-ha-ha	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:49:58
38239128	Her cowboy hero /	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:00
84607368	The noticer returns sometimes you find	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:02
73156682	How to build a house: a novel.	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:04
62280717	The orphan girl and other stories: Wes	1/27/2015	2/10/2015	NW	Claimed	1/28/2015 4:50:05
38239128	Her cowboy hero /	1/27/2015	2/10/2015	NW	Item was Returned	3/2/2015 3:40:13
84607368	The noticer returns sometimes you find	1/27/2015	2/10/2015	NW	Item was Returned	3/2/2015 3:41:11

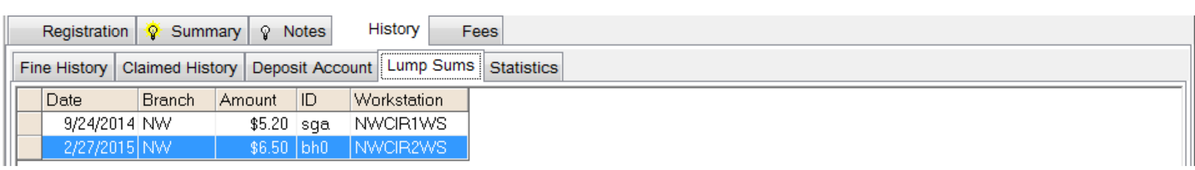
No changes can be made from the Claimed History Tab.

Deposit Account

The Deposit Account lists financial activity against the patron's Deposit Account, including deposits, and payments made using Deposit Account. No deposits can be made in the deposit account; only those customers who had money in their pre-paid account prior to migration will have money and those funds can be used to pay fines.

Lump Sums

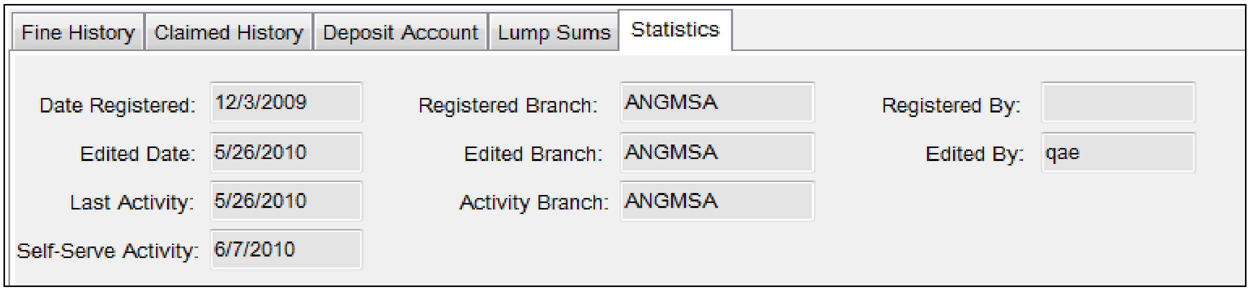
The Lump Sums tab displays fine payment amounts that were paid on particular dates. Detailed information about which fines were paid is not included on this tab.



Date	Branch	Amount	ID	Workstation
9/24/2014	NW	$5.20	sga	NWCIR1WS
2/27/2015	NW	$6.50	bh0	NWCIR2WS

Statistics

Statistics display patron historical data. This tab will act as a log for the date, activity branch and staff alias information for all the activities performed on or by the user. All the fields in this tab are system controlled and cannot be edited by staff.



Date Registered – The date that the account was added to the database.

Registered Branch – The Branch where the patron registration occurred.

Registered By – The three-letter user alias of the logon used to register the account. If completed online, the alias will be OBR.

Edited Date – The date that the account registration information was updated.

Edited Branch – The Branch where the registration update occurred.

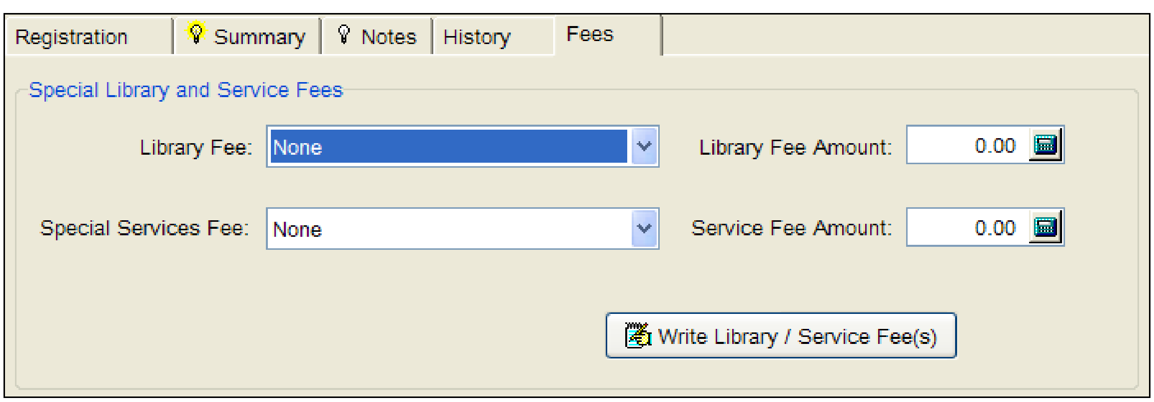
Edited By – The three-letter user alias of the logon used to update the registration information of the account.

Last Activity – The date of the most recent transaction activity that occurred on the account. Transaction activity includes item checkout, item renewal, hold placement and fine payment.

Activity Branch – The Branch where the most recent transaction activity occurred.

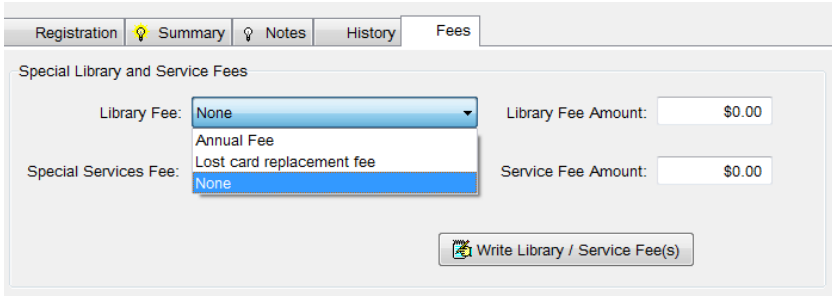
Self-Serve Activity – The date of the most recent self-service activity completed by the patron. Self Service activity includes logging on to view account information online, accessing online databases, or using a Self-Check machine.

Fees Tab

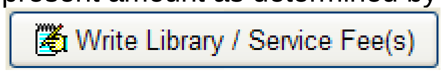


The Fees tab displays Library and Special Service Fees that can be added to a patron's library account. These include lost card fees and annual card fees.

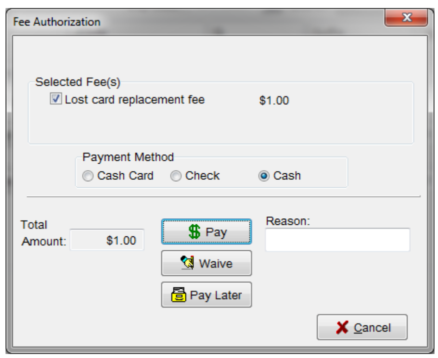
To add a Library or Special Service Fee, click on the Fees tab. There will be two dropdown menus: one for Library Fees and one for Special Service Fees. From the dropdown menu, select the name of the corresponding fee you would like to place on a patron's account.



After selecting the Library Fee, the Library Fee Amount will automatically populate with the present amount as determined by the System Administrator. Clicking



will bring up the below box:



Always choose 'Pay Later' as the payment will need to be completed through the Point of Sale, self-checks (if it is a $1 fine) or through the customer's account online.

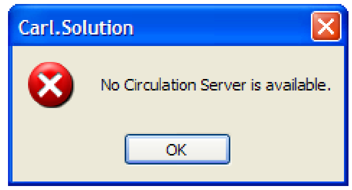
The Manual Fine will show up under the 'All' and 'Fines' radio button. In the Notes field, you will see the type of Fee that was created.

Title	Call Number	Item Number	Status	Assessed Date	Fines Total	Fines Paid	Notes
Manual Fine		#2509000000253	Manual Fine	7/5/2007	1.00	$0.00	Library Card Rep
Shades of twilight	FIC HOWARD L	31730070520073	Proc. Fee	7/5/2007	10.00	$0.00	EA

Error Messages

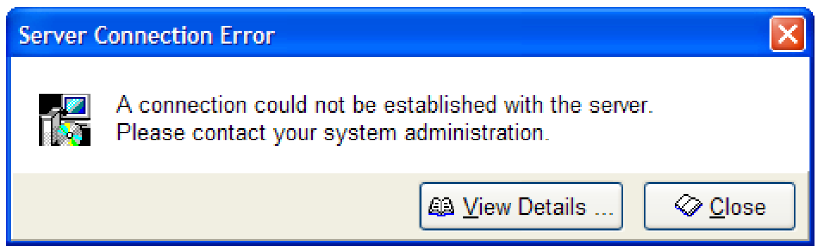
Listed are the most common error messages you might see and what to do about them.

No Server Available
This error will occur if one of the servers CARL.X is attempting to log onto is not available. The server that is not available will be named in the text of the message.

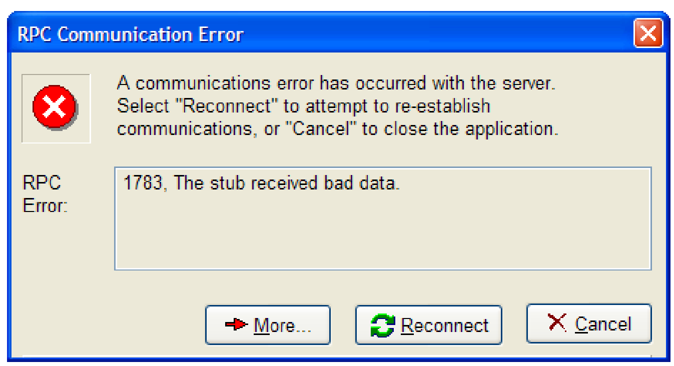


Try to re-launch 2 or 3 times. If you continue to see the error message, report the problem to IT.

Server Connection Error
This error will occur if the PC is unable to communicate with the application server. This is often an indicator of network outages, or that the server address in the configuration of the client is incorrect.



RPC Communication Error
This error message may be seen either as you launch the Staff Workstation or while working in the client.
Click on “Reconnect” to attempt to connect to a different server. If you are still unable to connect, click “More” for detailed information about the connection problem. Report the problem to the systems office, providing them with any RPC Error text.



When unable to reconnect to the Circulation Server you will be presented with the option to launch the Offline Circulation client.

The Offline Circulation client will allow staff members to scan a customer's library card and charge items to their account. You will also be able to print a receipt of the transaction for the customer. The receipt will only contain item numbers and due dates since it is unable to pull item specific information from the server.

The offline mode will also allow you to return items, but they will need to be set aside and re-returned once the server is back up and running as you will be unable to know whether or not the item is on hold or needs to be routed to another location. Receipts can also be printed for returns when the server is offline.

During Offline Circulation, Carl.X will continually try and re-connect to the server and once it has reconnected all the data entered while offline will automatically upload into the program.

MLS Processes

Processes for Damaged Items:

1. customer brings item to counter, ready to pay
    a. The item will need to be paid as a lost item. Bring up the customer record, from the Summary tab, click on the Charge radio button if it's not overdue or the Overdue radio button if it is. Select the item they've brought in, click the Go Lost button at the bottom of the screen and it will take you to a payment screen. Because it will have to be paid through the POS, click the Pay later button. The item is now coded lost and should be able to be paid through the POS.
2. deposited in the book drop & not returned
    a. Do not clear or discharge the item – Leave it on the customer's account
    b. Fill out a damage letter and send it to the appropriate locations including the customer
    c. Customer will have the remaining time up to the 60 day threshold to satisfy the issue. If not done in 60 days the item automatically converts to lost and blocks the customer's account until the fee is satisfied
3. returned via sorter/returned through book drop by mistake
    a. Complete an item information => item detail search
    b. Select Who Had It
    c. Print this record
    d. Complete a damage letter and attach a copy of the Who Had It record and send it to the appropriate locations including the customer
    e. Re-charge the material to the customer and assign a Standard Note about the item to the customer record stating: 1345678 Dmg ltr sent to customer
    f. If fines exist, do not cancel or waive – leave it on the account as a record. Fines can be cancelled or waived when the item is satisfied by the customer.
    g. Customer will have 60 days to satisfy the issue. If not done in 60 days the item automatically converts to lost and blocks the customer's account until the fee is satisfied.

Damaged Letter & Processes (may be emailed to the customer)

- Yes, you can fill the form out online and do a 'save as' pdf then attach it to the email.
- Something to consider: sending it via US Mail will indicate if the address is still valid.

Loaning Items to the Back Room

- Using the *Item Maintenance* locate and select the specific item.
- Access the holdings editor to make changes to the item by clicking the 'edit' button.
- Use the location drop drown menu in the top portion of the screen and select BKR, which is Back Room.
- Items that have a location code of BKR are set to not circulate and not available to fill holds. The items are suppressed so they will not show in the catalog.

Withdrawing Items When In “Hold In Transit” Status

If you are attempting to withdraw an item and the status of the item is "Hold In Transit," meaning the item is being requested by another customer, you will need to complete the following steps the proceed:

1. Return the item.
2. When you get a BRB saying "Hold - Send to CT" you need to select 'OK'
3. Double click on the item grid.
4. Select "Who Wants"
5. Select "Cancel Hold" and for the cancel reason select 'other' and type in "Damaged item-replace hold" and uncheck patron notification.
6. A BRB will be triggered called "Holds Cancel Exception" - Select the appropriate function.
7. If you are the owing library you can now change the status of the item to 'Withdrawn' status. The item needs to be in an 'on-shelf' status before the item can be changed to 'withdrawn' status.

Lost Library Cards at Library Location

Please remove all paper notes before sending in your lost library cards to Circulation Control. Also delete any customer notes such as “Lost item(s) or card held at desk” from Carl X.