

Library Circulation & Borrower Information



How to use Circulation and How to Add or Modify a Borrower Account, plus a Review of Managing Items placed on Hold.

Main Circulation Display - Checkout Books



LRM Express Circulation (Build 3.6.1) : OCCS (user: lms) (Server: lion.lrms.local) - [Circulation]

View Help Exit Circulation

Check Out Check In Renew Hold (0 - 0)

Check Out

Check Out Date: 07/26/2018 Auto Due Date Determination Include Textbooks / Equipment
Default Due Date: TURN-OFF OverDue Warnings Suppress PHOTO ID Only Textbooks / Equipment

Borrower ID or Name: F3-Last Name Partial Add Edit

Circulation Page 0 of 0 Account

Item Barcode: F3-Type Partial Title for Lookup

Check Out Date Check Out
Due Date

Quick Catalog Search
View On-Line Library Catalog

Print Today's Checkouts
Print Active Circulation
Email Active Circulation

Incorrect Image

When Item Checkout is completed, Press the Ctrl key once to return to the Borrower ID or Name field. Simply Type or scan the new Borrower ID to begin the next Checkout.

Please Visit www.lrms.com for support 7/26/2018 9:49 AM

- ✓ Scan Borrower's ID Barcode. Their name will come up.
- ✓ If they do not have their patron ID card, then do these steps:
 - ✓ • Type in a few letters of or there Last name; Use the F3 function key located in the top row of the keyboard towards the left
 - ✓ • This displays a small dialog screen called Lookup Borrower
 - ✓ • Type in the first few letters of the patron's last name
 - ✓ • Hit the Enter key • A list of all patrons with that last name will appear
 - ✓ • You can either use the mouse arrow and single click the left mouse button on the correct patron name to highlight it, or you can use the down arrow key to highlight a name.
 - ✓ • Hit the Enter key once the correct patron name is highlighted
 - ✓ • This will return you the Check out screen and the patrons barcode number will be in the Borrower ID line near the top of the screen
 - ✓ • Hit the Enter key again, this will display the name of the borrower.

Manually Lookup Borrower and ID



- Lookup Borrower

Should scanning a ID Barcode fail and it is determined to continue circulating a library book to this individual, the library program has an F3 function key lookup capability. By typing in a partial or complete last name of the borrower into the Borrower ID field and the using the F3 key, the library program will open a list dialog screen displaying the individual or a list of individuals when a few alpha characters of a last name is used (Ex: sm for Smith)

The screenshot shows a window titled "Lookup Borrower" with a search interface. At the top, there is a text input field labeled "Last Name:" containing the text "sm", followed by the instruction "(Enter to list)". To the right of this field are two buttons: "Select" and "Cancel". Below the input field is a list of search results, each consisting of a name and a number in brackets. The first item, "Smith, ADryetta [10]", is highlighted with a blue background. The list includes: SMITH, CHASE [09] PID[15], Smith, Daley [10], Smith, De'Laney [11], SMITH, IEESHA L [10], Smith, Jacob [11], Smith, Jaedyn [10], Smith, Katelyn [10], Smith, Katelyn [10], Smith, Katlynn [11], Smith, Raymond [10], Smith, Raymond [09] PID[15], Smith, Sam [11], Smith, Sarafina [07], Smith, Shanterica [12], Smith, TyTameshia [07], and Smitty, Robert [10]. To the right of the list is a "Search By:" section with three input fields: "Teacher ID", "Class Period", and "Group". Below these fields is a checkbox labeled "Clear Search By". Below the "Search By:" section is a button labeled "Search Selected Teacher ID". At the bottom of the window, there is a note: "Pressing F3 on subsequent searches will retain Search By qualifiers until Clear Search by is Checked." and a text label "8,000 Maximum Displayed Records".

Manually Add/Modify a Library Borrower



Adding or Modifying a borrower is accomplished by changing or adding information into the appropriate information fields and then Saving the information.

Changing a Borrower ID number does require the use of the Change ID button as shown. The library program will present a Change ID information dialog screen. Add the “New” ID and save the added information by clicking the “Change” button.

The screenshot displays the 'Edit Borrower' application window. The 'Borrower Profile' section includes fields for Borrower ID (5577), Teacher ID, Group (06), Class Period (0), Last Name (Adams), First Name (Dakota Jade), MI, Address 1, Address 2, City, Date of Birth, Expire Date, Secondary ID, Phone 1, E-Mail, Other Email, Care Of, and Notes. A 'Change ID' button is circled in blue. A 'Change Borrower ID' dialog box is open, showing 'Old Borrower ID: 1727' and a field for 'New Borrower ID:'. The 'Change' button is highlighted with a blue arrow. On the right side, the 'Borrower Photo' section has 'Photo Suppressed' and buttons for 'Scan', 'Set', and 'Clear'. Below it, the 'Restrict Account' button is highlighted with a purple box and a green arrow. A text box next to it reads: 'To stop and restrict any circulation or special e-Book usage, click the Restrict Account button.' The 'Borrower Associations and Programs' section has checkboxes for 'Reader of the Month', 'Young Citizen Program', 'Honors Reading', 'Spanish Reading Club', and 'N/A'. The 'Online Reservations' section has buttons for 'Send Welcome Email', 'Allow this Patron Online Reservations', 'Preview Welcome Email', and 'Temporarily Suspend Online Reservations', along with a PIN# field containing '1234'. A note at the bottom of the Notes field states: 'Any Notes that are entered here or through the circulation screen will display within the Notes Field of the Circulation Screen.'



Once the Borrower information appears in the Checkout screen the cursor automatically appears in the “Yellow highlighted” Item Barcode field.

- Proceed to Scan barcode for item to be checked out, if the barcode number is manually entered it will be necessary to use the Check Out button to proceed.

LRM Express Circulation(Build 3.6.1) : DEMO (User: lrms) (Server: lion.lrms.local) - [Circulation]

View Help Exit Circulation

Check Out Check In Renew Hold (0 - 0)

Check Out Date: 07/27/2018 Auto Due Date Determination Include Textbooks / Equipment
Default Due Date: TURN-OFF OverDue Warnings Suppress Photo ID Only Textbooks / Equipment

Borrower ID or Name: 7384
F3-Last Name Partial
Smith, Jaedyn / 10 Add Edit Add a Note Print Notes Clear Notes

Accelerated Reader: Not Set Reading Counts: Not Set Email address missing

Circulation Page 0 of 0 Account

Item	Out	Due	Call No/Title	Est	Cost	Date	Amount	Description
							.00	

Item Barcode: F3-Type Partial Title for Lookup

Check Out Date Check Out Print Today's Checkouts
Due Date Print Active Circulation
Quick Catalog Search View On-Line Library Catalog Email Active Circulation

When Item Checkout is completed, Press the Ctrl key once to return to the Borrower ID or Name field. Simply Type or scan the new Borrower ID to begin the next Checkout.

Check Out

Scan in or type the item Barcode number to be Checked out
When a barcode number is typed in manually it will require the user to complete the checkout by clicking upon the Check Out button. The program will automatically check the item out for the proper number of days and will adjust for any Holiday that might be involved.

Once the library item has been Checked out press the keyboard Ctrl key once to return to the Borrower ID field to enter the next Borrower.

Please Visit www.lrms.com for support Past week and today's transaction counts: Set 1 7/27/2018 3:17 AM

Performing Check-in of materials



Select the Check-in Tab to return books.

- Check-in is simple, just enter or scan the barcode of the returning Item into the Item Barcode Field. The program will do the rest for you, any items that are overdue or Fines owed is addressed with simple statements. Depending upon your library program permission settings for program usage will determine your ability to manage answers.

The screenshot shows the L RMS Express Circulation web interface. At the top, there are navigation tabs: 'Check Out', 'Check In', 'Renew', and 'Hold (0 - 0)'. The 'Check In' tab is selected and highlighted with a red box. Below the tabs, the 'Check In' section is active, displaying a 'Check In Date' of 07/27/2018 and several checkboxes: 'Express Check In', 'Include Textbooks / Equipment', 'TURN-OFF OverDue Warnings', 'Suppress Photo ID', and 'Only Textbooks / Equipment'. A 'Borrower ID or Name' field is present with 'Add' and 'Edit' buttons. There are also 'Add a Note', 'Print Notes', and 'Clear Notes' options. A 'Circulation' section shows 'Page 0 of 0'. A large 'Check In' button is visible on the right side of the page. At the bottom, there is a section for 'Item Barcode' with a yellow highlighted input field, a 'Check In Date' field, and a 'Check In' button. A red box highlights the 'Item Barcode' field and the 'Check In' button. A green arrow points from the 'Check In' button to the 'Item Barcode' field. A text box on the right side of the screenshot contains the following instructions: 'To Check In any item in open circulation, simply scan or add the item barcode number into the "Item Barcode" "yellow" highlighted field. Manually adding the Barcode number will require clicking upon the Check In button. The program knows who this item is checked out to and will register the Check In properly.' The bottom of the screenshot shows a footer with 'Please Visit www.lrms.com for support', 'Past week and today's transaction counts: Set: 1', and the date '7/27/2018 7:46 AM'.

Renew a Circulated Item



Renewing a Checked out item

- By clicking upon the Renew Tab within the Circulation screen will automatically place the computer courser in the Item Barcode field. Simply Scan or type in the barcode number of the item to be renewed. The library program knows who the item is checked out too and will extend the circulation period to that of a regular circulation period.

The screenshot shows the LRM Express Circulation interface. At the top, there are navigation tabs: Check Out, Check In, Renew, and Hold (0 - 0). The 'Renew' tab is selected. Below the tabs, there are several input fields and buttons. A red box highlights the 'Renew' button. A green arrow points from this box to a text box on the right side of the screen. The text box contains the following instructions: "To Renew any item in open circulation, simply scan or add the item barcode number into the 'Item Barcode' 'yellow' highlighted field. Manually adding the Barcode number will require clicking upon the Renew button. The program knows who this item is checked out to and will register the renew properly for the renew number of days setup within the program." The 'Item Barcode' field is highlighted in yellow. Other fields include 'Renew Date' (07/27/2018), 'Due Date', and 'Borrower ID or Name'. There are also buttons for 'Add Note', 'Print Notes', 'Clear Notes', 'Quick Catalog Search', and 'View On-Line Library Catalog'. The bottom of the screen shows the system status, including the date and time (7/27/2018 8:26 AM) and the LRM Express Circulation logo.

To Renew any item in open circulation, simply scan or add the item barcode number into the "Item Barcode" "yellow" highlighted field. Manually adding the Barcode number will require clicking upon the Renew button. The program knows who this item is checked out to and will register the renew properly for the renew number of days setup within the program.

Place a Library Item on Hold for a Borrower



Placing any item on Hold allows the library to provide a method of allowing any Borrower to reserve an item that is currently circulated to another Borrower. Those libraries that utilize an active Online Library Catalog (OPAC) can provide the borrower direct access to placing a Hold on any item through the OPAC and permission to do so.

How this works:

An item that is placed on Hold when checked-in the library program will immediately notify the staff person of this item being on Hold for another Borrower. The program will open a series of comments and or Dialog boxes allowing the creation of notifying the new borrower of its availability.

The program will also provide the option to print a Hold ticket for placement within the item identifying the borrower who placed the Hold. Multiple Holds can be placed for the same item, if the 1st. Hold fails to pickup the item the 2nd. Hold takes priority, also Priorities can be downgraded or upgraded by any administrator.

Once an item is placed on Hold, the Status can be Viewed.

The screenshot shows the LRM Express Circulation software interface. At the top, there are menu options: View, Help, Exit Circulation. Below that are buttons for Check Out, Check In, Renew, and Hold (0 - 0). The main area is titled 'Hold Items' and shows details for a borrower named Adams, Kash / 11. A 'Hold Date' of 07/27/2018 is displayed. A table below shows item details, including item number 216002410, due date 07/27/18, and call number 997.89 SCH / Frogs (MAIN COLLECTION). Several dialog boxes are overlaid on the screen: 'Hold Days' (Number of days until hold expires), 'Item Out' (Item is currently checked out to another patron. Would you like to place the request in the hold queue?), and 'LRM Express Circulation' (Item has been placed on hold). A 'Notification Message' and 'Confirmation Message' are also indicated. The bottom of the screen shows a status bar with the date 7/27/2018 and time 9:04 AM.

This inset screenshot shows the 'View' menu in the LRM Express Circulation software. The menu options are: View, Help, Exit Circulation. Below the menu are buttons for Check Out, Check In, Renew, Hold, and Hold Queue Status. The 'Hold Queue Status' button is highlighted with a red arrow. Below the buttons, there is a field for 'Borrower ID or Name' and a 'View On-Line Library Catalog' button. A red arrow points from the 'View' menu to the 'Hold Queue Status' button.

Select the View Tab and then the Hold Queue Status item

Managing Items on Hold



The Hold Queue Status view will display all items that have been reserved through Circulation or if active through the Online Library Catalog (OPAC). The Origin column will note where the Hold came from "Circulation or OPAC."

Items that are placed on Hold through the Library Online Catalog can only be done when the Borrower has been provided this privilege and must be in good standing or current within circulation.

The Hold Queue provides additional options as shown at the bottom of this screen view. When the same item is placed on Hold a Priority is set by who was 1st., 2nd., and so on. This priority can be managed where the Priority can be lowered or elevated changing who will receive the item next.

The screenshot shows a web application interface for managing holds. At the top, there is a menu bar with 'File' and 'Help' options. Below the menu is a table of hold records. The table has columns: Tagged, Barcode#, Priority, Borrower, Last Name, Status, Hold Date, Expires, Call Number, Title, Origin, and Marc. A red circle highlights the 'Origin' column in the first row, which contains the value 'Circulation'. Below the main table, there is a smaller table with columns: Tagged, Barcode#, Priority, Borrower, Last Name, and Status. A blue arrow points to the 'Priority' field of the first row in this smaller table. A 'Change Priority' button is positioned to the right of this field. A dialog box titled 'Change Priority' is open, showing the following information: 'You are going to change the priority of the following item', 'Title : Froggy's baby sister', 'Barcode : 33405000040512', 'Priority : 1', and 'Borrower : 2742'. There are 'OK' and 'Cancel' buttons in the dialog box. Below the dialog box, there is a text input field with a '1' inside. At the bottom of the screen, there are several buttons: 'Remove Selected Line', 'Tag All Items', 'UnTag All Items', 'Remove Tagged Items', 'Report', and 'Print Hold Tickets for Tagged Items'. There is also a 'Sort By:' section with radio buttons for 'Last Name', 'Hold Date', and 'Title'.

Tagged	Barcode#	Priority	Borrower	Last Name	Status	Hold Date	Expires	Call Number	Title	Origin	Marc
	33405000040512	1	2742	Adams	Waiting	07/27/2018	TBD	E LON	Froggy's baby sister	Circulation	26666

Tagged	Barcode#	Priority	Borrower	Last Name	Status
	33405000040512	1	2742	Adams	Waiting

Change Priority by highlighting the line item, place the mouse cursor in the Priority field and perform a Right Click in this field

Change Priority

Change Priority

You are going to change the priority of the following item

Title : Froggy's baby sister

Barcode : 33405000040512

Priority : 1

Borrower : 2742

Note : Priority level should be between 1 - 99

1

Remove Selected Line Tag All Items UnTag All Items Remove Tagged Items

Report Print Hold Tickets for Tagged Items

Sort By: Last Name Hold Date Title