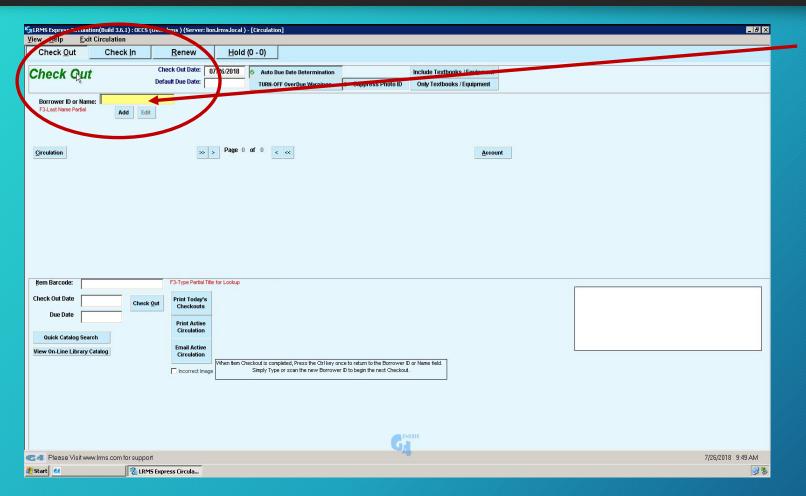# Library Circulation & Borrower Information

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

- ✓ 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)
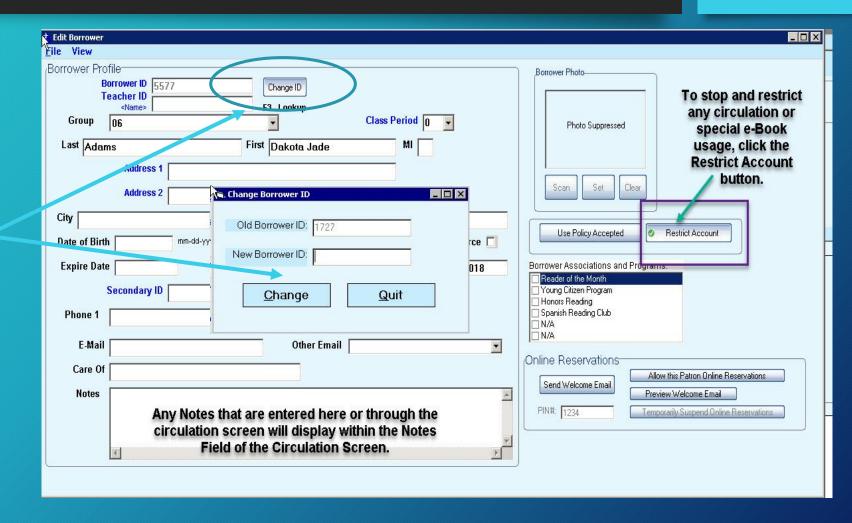
Manually Add/Modify a Library Borrower
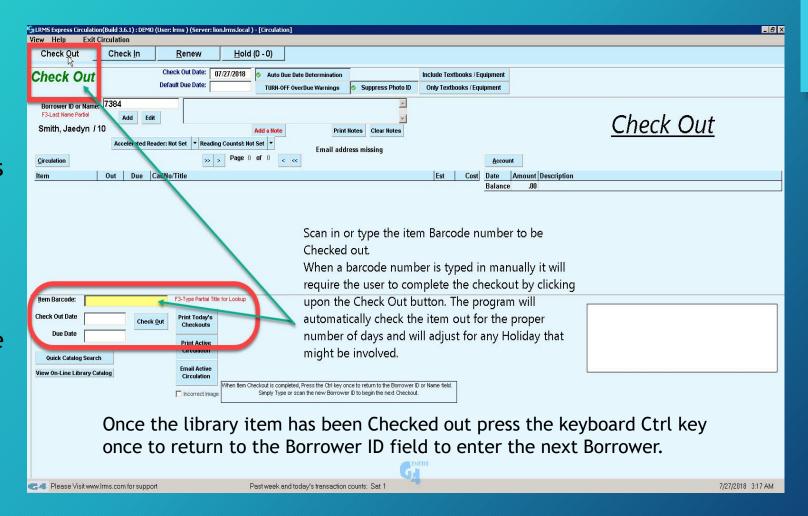

Adding or Modifying a borrower is accomplished by changing or adding information into the appropriate information fields and then Saving the information.

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.

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.

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.
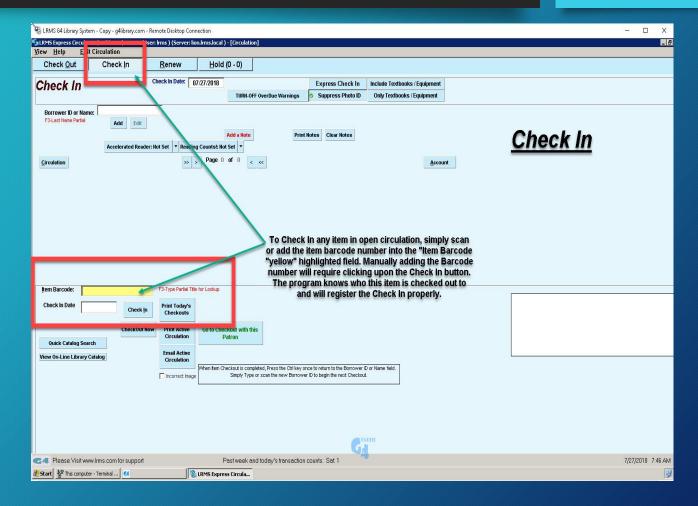
Performing Check-in of materials

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.
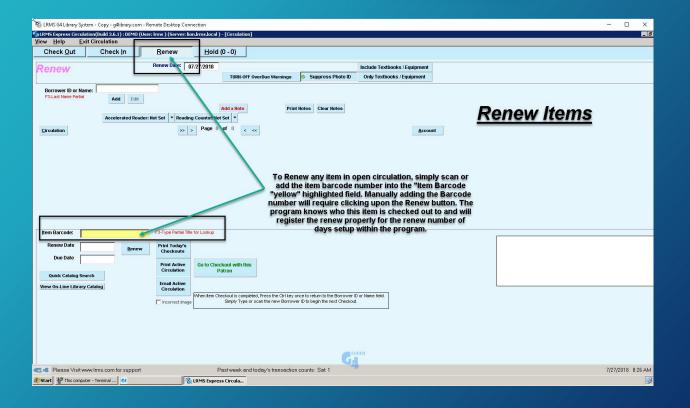
Renew a Circulated Item

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.

Renew Items

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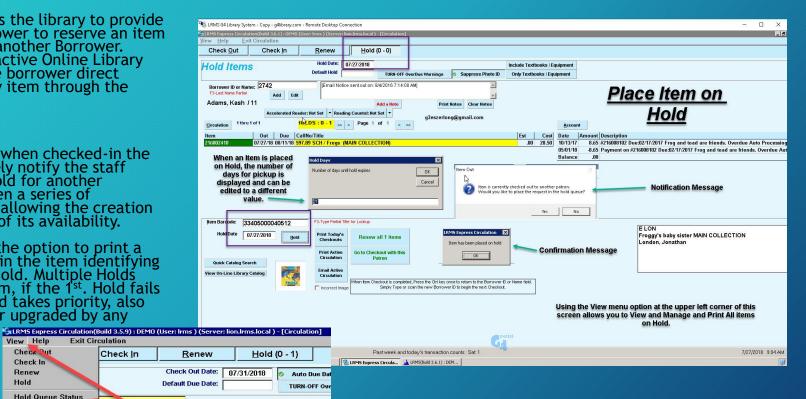
Once an item is placed on Hold, the Status can be Viewed.

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 lowered or elevated changing who will receive the item next.