ADVANCE

Circulation User's Guide

(Release 6.82)

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NOTE: To navigate in this manual, you can click on:

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1
Introduction

Purpose

ADVANCE Circulation is a sophisticated item-specific inventory tracking system. It can be used to track the status/availability of all items in the system, including the identification of borrowers and temporary locations. It is also used as an inventory tool, and can produce a number of management reports and statistics on use of the collection.

The *Circulation User's Guide* explains how to use the Circulation Module.

Contents

Chapter 2 of this guide provides a brief overview of the Circulation Module, and includes a function/menu map.

Chapters 3 discusses patron registration, added borrowers, transaction update, second screen definition and housebound patron history.

Chapter 4 explains checkout, its options and exceptions.

Chapter 5 discusses checkin, fines, fines payment, checkin dates and times, and item status query.

Chapter 6 deals with holds, recalls and traces.

Chapter 7 explains the methods for placing recalls.

Chapter 8 discusses renewals.

Chapter 9 deals with accounts receivable and how to access the online cash register.

Chapter 10 explains how to use the Reserve Book Room.

Chapter 11 describes item control.

Appendix A provides general instructions on accessing screens and editing fields in ADVANCE.

Appendix B provides a table of Edit Functions.

Appendix C describes Materials Booking.

Appendix D is a general ADVANCE glossary.

Appendix E discusses the optional, Inter-Library Loan add-on product.

Other Documentation

Consult other guides for related information:

• The *Circulation Management Guide* describes how to set up and customize the Circulation Module.

• The *Utilities Management Guide* describes general ADVANCE setup and management: port definitions, access control, the background processing calendar, the Report Writer, and so on.

Typographical Conventions

Two special text styles are used in this guide:

1. The screen identifiers, the text that you can enter, and screen messages are in a monospace font style. Examples: "ORDA", "Y", "REG", "Item on temporary hold by staff".

2. The names of screen fields and options, and cross-references to section or manual titles, are in **italics**. Examples: "*UNIT COST*", "*Exit*", "see *Handling Subscriptions*".

   Angle brackets around the name of a key mean press the key. For example, "<ENTER>" means press (or pressing) the ENTER key.

Generic Examples

Because system behaviour can be tailored by the library's system managers to meet local needs, the screens and options shown in this document may not match exactly the ones at your library.

Some sample screens may be shown shorter than they actually are. This occurs when blank lines have been deleted to reduce space requirements.

2

Overview

The ADVANCE Circulation system supports the following major functions:

- Checkout
- Checkin
- Holds, recalls and traces
- Patron record management
- Item status and action control
- Fine management and accounts receivable
- Reserve book room

Circulation Functions

The basic functions of the ADVANCE Circulation system are item checkout, checkin, holds, recalls, and renewals. Because most of these functions take place at the circulation desk, they are the most heavily used and visible functions of the ADVANCE Library System.

At the heart of all basic circulation functions are circulation policies, which include loan periods based upon patron and collection groups, fine policies, maximum number of items checked out, recalled, on hold, and renewed, and patron exception conditions. All these parameters are defined by the library through the procedures found in *Circulation Management Guide*, and are applied in all standard circulation transactions.

All standard circulation functions involve both patrons and items. Patrons and items may be identified either by reading their barcodes or through browsing. Standard online catalogue searches can be done from checkout, checkin, holds, and recalls. The date and time change option for checkout, checkin, and recalls allows ad hoc handling of exceptional situations.

Statistical data on all standard circulation functions are automatically tracked by the system. Circulation notices are generated based upon criteria defined in set up. Transaction blocks, partial and whole, both financial and message-type, are continually updated when the patron is served. The validity and integrity of the patron record are checked according to pre-defined codes each time a transaction is processed.

Handling Time Inputs

Throughout the system, enter the time in the 24 hour format. If your system has been set up to convert the time to the 12 hour format using AM and PM, this will be done automatically.

When entering time, the following points should be kept in mind.

- When a single digit is entered, the system reads the digit as minutes and adds the minutes to the base time of 12:00 AM. For example, if you enter 9 (assuming 9:00 am), then the actual time displayed is 12:09 am.

- When two digits are entered, the system reads the 2 digits as minutes and adds the minutes to the base time of 12:00 am. For example, 99 is read as 99 minutes and is converted to 01:39am.

- The system reads 3 or 4 digits as hours. If you enter 930, it is converted to 9:30am and 100 is converted to 1:00am.

- There is an edit-check for the 24 hour clock. The system will display the following error message if you enter invalid information — for example, if 777 was entered:

```
***Time cannot be less than 00:00 or greater than 23:59.
```

Circulation Menu

MM ADVANCE Master Menu

CIRC   Circulation Master Menu

GCM   General Circulation Menu
    CCM   Circulation Codes Menu
        CCCM   Circulation Configuration Codes
                CCT   Circulation Control Table
                COCT   Checkout Control Table
                CMEM   Membership Control Table
                CHRT   Hold/Recall/Trace Control
                SCCT   Self-Check Control Table
                CPICK Pick List Control Table
                CHOLD Holds Control
                    CHLDC   Holds control codes
                    CHLDC   Holds Reports control codes
                    CHSHELF Hold Shelf Messages
                CQUAL Qualifier Codes
                CPCC   Checkout Port Control
                CIPC   Checkin Port Control
                CPH   Hold Port Control
                CPBF   Block/Fine Description Codes

        CLPM   Loan Periods Menu
                CHSM   Holding Setup Menu
                    CHIC   Institution Codes
                    CHCS   Sublocation/Building Codes
                    CHCC   Collection Codes
                    CHPC   Call# Prefix Codes
                    CHNC   Class Number Codes
                    CDPT   Default Price Tag
                CLCM   Library Calendars
                CCC   Circulation Codes
                CCGC   Material Group Codes
                CPC   Patron Type Codes
                CPGC   Patron Group Codes
                MBP   Materials Booking Patterns
                CBLM   Build Loan Matrix
                CPLM   Print Loan Matrix

        COPM   Output Production Menu
                CNCT   General Notice Controls
                CNTC   Notice Type Codes

```
                              CCMC    Contact Method Codes
                              CNC     Notice Codes
                              COPC    Output Prod. Codes
                              COPG    Output Prod. Charges
                              CNHD    Notice Headers
                              CNFC    Notice Print Format Codes
                              CISFC   Notice Print Information Source Code
                              COPS    Notice Production Sequences
                              COPN    Notice Headers by Location
                              CIHP    Holiday Periods by Institiution

                      CPCM    Payment Collection Menu
                              CPFC    Fund Codes
                              CPFB    Fund/Transaction Codes
                              CPRL    Register Location Codes
                              CPRP    Register/Port Codes
                              CPTC    Payment Type Codes
                              CRHD    Receipt Header
                              CFRULE Fine Rules

                      CICM    Item Control Codes Menu
                              CIS     Item Status Control Codes
                              CISC    Item Status Calendar Codes
                              CIA     Item Action Control Codes
                              CISC    Item Action Calendar Codes
                              CSAC    Status/Action Calendar Access Codes

                      CGCM    General Codes Menu
                              CTC     Transaction Codes
                              CHC     Hold Codes
                              CRC     Recall Codes
                              CADM    Administration Stop Messages
                              SMAIL   Sendmail Path

                      CLVIS  LViS Codes
                              CLVT    LViS Control Times
                              CLVL    LViS Contact Language Codes

              SCM     Standard Circulation Menu
                      COUT    Checkout
                      CIN     Checkin
                      PHONER  Telephone Renewals
                      HRT     Holds by patron
                      CHQ     Hold Queue by Title
                      CREL    Recall
                      MB      Materials Booking
```

PCM   Patron Control Menu
     CPR   Patron Registration
     CTU   Transaction Update
     CAR   Accounts Receivable
     CPSS   Patron Second Screen Definition
     HPH   Housebound Patron History
     MEMGRP Patron Membership Groups
     PAC   Patron Address Control
     PAD   Patron Address Descriptions
     CRPM   Reset Patron Memberships

ICM   Item Control Menu
     CEH   Edit Holdings
     CEHD   Holdings Default Definitions
     CAHD   Action on Holdings Deletion
     CHMF   Holdings Maintenance Functions
     CCA   Change Actions
     CCS   Change Status
     PHYI   Physical Inventory Control
     CLPD   Last Access Patron History Display
     CLPC   Last Access Patron History Clear
     CFHC   Flagged Hold Cancellations

OCM   Output Control Menu
     OCP   Calendar Processor
     ORR   Register Reports
     OVR   Voice Processing Utilities

CILL   ILL Maintenance
     CIRE   Request Entry/Update
     CICS   ILL OPAC/CAT Setup
     CIRTE   Request Template Editor
     CIRT   Request Types
     CILC   Supplying Library Codes
     CAPD   AVISO Patron Download

RCM   **RBR Circulation Menu**
CRSM   Reserve Setup Menu
     CRLC   Temporary Location Codes
     CRBNI   Add a New Instructor Record
     CRBNC   Add a New Course Record
     CRBI   Rebuild RBR Indexes
     CRBC   Check RBR File Consistency
CREM   Reserve Processing Main Menu

	CRLM	Move Items into RBR
	CRUM	Move Items out of RBR

CRM **Circulation Reporting Menu**

	CCR	System Reports
		Patron Registration Reports
		Patron Accounting Reports
		Patron Blocks Reports
		Physical Inventory Reports
		Checkout and Status/Action Reports
		Holds and Booking Picklists/Alerts
		Reserve Book Room Reports
		Circulation Checkin Statistics
		Circulation Recall Statistics
		Circulation Checkout Statistics
		Circulation Renewal Statistics
		Circulation Hold Statistics
		Physical Inventory Reports
	RW	Report Writer
	CRGC	Report Group Codes
	RPC	Report Prompt Codes

CBM **Circulation Backup Menu**

	LBFCM	Live to Backup File Creation Menu
		CFPA	Create Full Abbrev. Patron
		CFPE	Create Full Abbrev. Pieces
		DAFT	Dump Abbrev. Files to Tape
	CBLF	Load Tape Files from Backup
	BLU	Backup to Live Update
	CBCT	Circulation Backup Control Table
	CBFC	Clear Backup & Report Files
	CCRB	Reports Menu

CPFM **Circulation Purge Files Menu**

	CPPR	Patron File Purge Report
	CPPD	Patron File Purge
	CPMBP	Materials Booking Pattern Deletion

UTIL   Utility Menu

UTLM Import/Export Menu
UPIM   Patron Importing Menu
UPIR   Import Patron Records
UIPR   Index Patron Records
DVPF   Define Valid Patron Fields

3

Patron Registration

This chapter discusses:

- Patron Registration

- Added Borrowers

- Second Patron Screen Definition

- Patron Address Control and Descriptions

- Patron Blocks Transaction Update

- Housebound Patron History.

Permissions   Editing, adding, and deleting patron records and patron blocks requires the appropriate level of user permissions. For a complete list of all circulation permissions, see the appendix, *User Permissions*.

Register New Patron

To register a new patron in the system database, select the PATRON CONTROL MENU(PCM) from the GENERAL CIRCULATION MENU.

```
 DD MMM YYYY          Geac ADVANCE Library System (#.##)          IIIII  PP
  HH:MM                      Your Library Name


                       GENERAL CIRCULATION MENU


                   1. CCM  Circulation Codes Menu

                   2. SCM  Standard Circulation Menu

                   3. PCM  Patron Control Menu

                   4. ICM  Item Control Menu

                   5. OCM  Output Control Menu


           Enter the number of your selection and press <ENTER>
                   or  ?  followed by <ENTER> for Help.

                Press <ENTER> to return to previous level :
```

Select the PATRON REGISTRATION(CPR) screen from the PATRON CONTROL MENU.

```
 DD MMM YYYY          Geac ADVANCE Library System (#.##)          IIIII  PP
   HH:MM                       Your Library Name

                          PATRON CONTROL MENU

                    1. CPR     Patron Registration

                    2. CTU     Transaction Update
                    3. CAR     Accounts Receivable

                    4. CPSS    Patron Second Screen Definition

                    5. HPH     Housebound Patron History

                    6. MEMGRP  Patron Membership Groups

                    7. PAC     Patron Address Control
                    8. PAD     Patron Address Descriptions

                    9. CRPM    Reset Patron Memberships
             Enter the number of your selection and press <ENTER>
                    or  ?  followed by <ENTER> for Help.

                  Press <ENTER> to return to previous level :
```

Patron ID

The PATRON REGISTRATION screen appears. Enter N for *New* patron at the Patron ID prompt, or enter a new barcode.

```
                       PATRON REGISTRATION

     Enter Patron Name or Barcode:  _____
```

If you enter a new **barcode**, see *Assigning New Barcodes* on page 3-11.

Registration Screen

After you have entered the N (new patron), a blank PATRON REGISTRA-TION screen appears. Select the *Line by Line* option. Enter patron's name in the format *Last name, First initial, Second initial*.

The *Name*, *Address* and *Patron Code* fields are required and cannot be left blank. If you try to skip required fields, the message:

```
An entry is required at the name field.
```

appears. To omit data in required fields enter two blank spaces.

```
                        PATRON REGISTRATION
                                              Outstanding charges : 12.50
     Patron Barcode..: 20000002004343                Last Update: 02/19/96
     Old Barcode.....: 20000002003232,-102948        Last Trans.: 02/14/96
 1. Name (Last, F M): Carter, Bruce                   Registered : 08/04/95
 2. Address.1.......: 123 Box 17
                      Johnson's Landing
 3. Zip/Postal Code.: PURCELL, B.C N3R5t8
 4. Phone Number(s).: 111-2222
 5. Address 2.......:

 6. Zip/Postal Code.:                  14. Password...: ####
 7. Personal ID.....: s                15. Home Inst..:
 8. ID Type.........: SSN              16. Home Subl..:
 9. Patron Code.....: S-Student        17. Housebound (Y/N) ? : N
10. Expiration Date.: 31 MAY 1999
11. Comments........:

12. Rte. Recipient..: N                18. Std. Contact Method : Email
13. Rte. Location...:                  19. Hol. Contact Method : Mail
 Options:
  # line   Line by line   Added borrowers   Delete   File   Update barcode
   Second screen   Item list   Blocks display   Addresses   Exit   ? help
```

Registration Field Descriptions

Patron Barcode

Contains the barcode attached to this patron record. A negative sign means that the number is system-assigned. This assignment occurs when a real barcode number has not yet been provided. Use the *Update Barcode* option to assign a real barcode.

Old Barcode   Appears when you have used the *Update Barcode* option. This previous
                           number can be either the system-assigned negative number or an old real
                           barcode. (See *Current Patron* on page 3-13 for an example.)

Last Update   Contains the date of the most recent changes to this patron's record.

Last Trans.   Contains the date of the most recent transactions for this patron's record.
                           A transaction could be an item checked in or out, or a fine payment.

Registered   Indicates the date the patron first registered on the system.

Name (Last, F M)   **Required.** Enter last name first, followed by a comma. Then enter the
                           first and middle names.

2. Address   **Required.** Enter street and apartment address only. Two lines can be
                           used.

3. Zip/Postal Code   Allows you to enter an American zip code or a Canadian postal code.
                           When completed, the system displays the city and state/province.

```
 12:18PM     CITY - STATE/PROVINCE - ZIP/POSTAL CODE EDIT          DDMMM YY

         Zip/Postal Code    : V3P 4X


         1.  City           :


         2.  State/Province :


         3.  Country        :

      *** Record not found for V3P 4X

         Do you want to create a new record (Y/N)?
```

                           If the zip/postal code is not found in the system database, the CITY -
                           STATE/PROVINCE - ZIP/POSTAL CODE EDIT screen appears. (Canadian
                           postal code is used as an example.)

Answering Y, produces the message: Do you want to create a new record (Y/N)? and moves the cursor to the *City* field. Enter the appropriate information. When the third field is completed, the option line appears:

```
 Options:
 # line   Delete   File   Exit   ? help
```

File and the *Exit* returns you to the original Patron Registration screen.

4. Phone Number	Enter the patron's telephone number. Parts of the phone number, i.e. area code and digits are separated by hyphens; multiple phone numbers are separated by commas.
5. Address 2	Use if your patron has multiple addresses, such as an office or campus address and a home address. If patrons have more than two addresses, use the *Addresses* option to access them.
6. Zip/Postal Code	Attached to field 5. Enter the patron's second postal or zip code.
7. Personal ID	This number is unique to the patron and can be any number, such as driver's licence, social insurance number, social security number, credit card number, student number, faculty number, etc. Letters can be included.
	The Personal ID number is an alternate to the patron's name or barcode number. You can enter this number, preceded by ID=, at the Enter Patron Name or Barcode: prompt.
8. ID type	Describes the number entered in the *Personal ID* field. For example, you could enter *SSN, SIN*, or *VISA* card number.
9. Patron code	**Required.** Designates the patron type. These codes are previously defined.
10. Expiration Date	This date will be automatically calculated and entered by the system using the conditions assigned to each patron type. You may change the system-assigned patron expiration date by overwriting the date shown.
11. Comments	Provides space for notes about each patron record.

12. Rte. Recipient	Enables you to indicate that this patron receives items from a **routing list**. Enter Y, to enable this patron to receive routing items. If this patron should not receive routed items, enter N. The system defaults to N. Routing lists are created and maintained in the Serials Control module. The lists permit routing of issues of periodicals.
	When a patron is **deleted**, you must also delete the patron's name from the various routing lists of which the patron was part.
13. Rte. Location	This field is used together with the Rte. Recipient.: field. When you specify that the patron will receive routed items, you must specify a department location for the patron.
14. Password	Use this field when a password is required to allow the patron to place holds. The patron will be able to use this password for placing *Patron Holds* in OPAC.
15. Home Inst.	Provides the patron with a home institution. This institution is used for routing items when the patron places holds. The system displays the Institution associated with the terminal where the patron is registering. This, or an alternate institution, can be entered.
16. Home Subl.	Provides the patron with a home sublocation. This sublocation is used for routing items when the patron places holds. The system displays the Sublocation associated with the terminal where the patron is registering. This, or an alternate sublocation, can be entered into this field. Neither field 15, nor 16, are automatically entered with the default associated with the terminal.
17. Housebound	Used to keep track of all the materials borrowed by this patron. This field is intended for the control of materials selected on behalf of housebound patrons. If you answer Y, the system displays the PATRON REGISTRATION (HOUSEBOUND PATRON) screen.

```
CPR - PATRON REGISTRATION (HOUSEBOUND PATRON)    MEM

Patron Barcode:     -000058                 Ackerman, Susan

1. Volunteer/staff name doing the service : Jones, Alfred
2. Frequency of delivery                  : Weekly
3. Pick up location                       : Northeast Branch
4. Date of last delivery                  :
5. Note lines                             : 10




Options:
 # line   Line by line   Accept   Exit   ? help
```

The fields on this screen are for information only. Field 5 allows access to a notes window containing the number of lines indicated (up to 500 lines).

If you use the *Exit* option you will leave the patron record without saving any changes. Use the *Accept* option to return to the Patron Registration screen. There you can either *File* to save changes or *Exit* to leave the patron record without saving any changes.

In order to track materials borrowed for Housebound Patrons the *Keep Patron History* field in the Circulation Control Table (CCT) must also be answered YES. This table is found in the CONFIGURATION CODES MENU (CCCM) under the CIRCULATION CODES MENU (CCM). See *Housebound Patron History Menu*.

18. Std. Contact Method

Enter a contact method code for the standard method of sending notices to the patron.

19. Hol. Contact Method

Enter a contact method code for the method of sending notices to the patron during the holdiay period.

Second Screen - Patron Registration

This screen contains 12 to 15 fields. The first two fields prompt for email address and fax number. The third field prompts for ILL permissions for the patron (available if the customer has ILL installed). The fourth and fifth fields (formerly on the First Screen) prompt for LViS language code and contact time. The last 10 fields are the library's second screen fields as set up in Patron Second Screen Definition (CPSS).

```
              PATRON REGISTRATION - SECOND SCREEN

    Patron ID :   20000002003232 Carter, Bruce

    1. email address................:
    2. fax number...................:
    3. Allow ILL (Y/N/D)?...........: Y
    4. LViS lang. code..............:
    5. LViS Contact Time............:
    6. Department...................:
    7. New added field..............:
    8. Country of origin............:
    9. Numeric field................:
   10. Description of patron........:
   11. Favourite format............:
   12. Birthday date................:
   13. Not defined..................:
   14. Not defined..................:
   15. Not defined..................:

  Options:
   # line   Line by line   Accept   Exit   ? help
```

1. email address

Enter an email address that uses an at sign, @, or exclamation point, !, as a separator between characters. For example, the system accepts:

`bill@company.com` or `machine!bill`

This field is used by AVISO for downloading patron information only. It is not used within ADVANCE.

2. fax number

Text field. Enter a fax number.

This field is used by AVISO for downloading patron information only. It is not used within ADVANCE.

3. Allow ILL   Determines access to ILL.

　　　　　　　　　　D　ILL access defaults to the setting in the Patron Type Code table.

　　　　　　　　　　Y　Allows ILL access to the patron even if ILL permission has not been granted by the patron's Patron Type Code.

　　　　　　　　　　N　Denies ILL access to the patron even if ILL permission has been granted by the patron's Patron Type Code.

4. LViS lang. code   Displays only if the library has the LViS add-on which permits telephone contact with patrons. Enter a valid code or ?? to browse a list of codes.

5. LViS Contact Time   Displays only if the library has the LViS add-on. The field indicates the patron's preferred time for voice contact. Enter a valid code or ?? to browse a list of codes.

```
        LViS Contact Time

     Number of records : 7
     Code    Description of code
     ------  ----------------------------------------
 1.  0       No Voice contact
 2.  1       Morning
 3.  2       Afternoon
 4.  3       Evening
 5.  4       Night
 6.  5       Any time
 7.  6       Sunday
```

Fields 6-15   These fields are library definable using the Patron Second Screen Definition (CPSS).

Assigning New Barcodes

When completed, enter *File*. The system returns you to the initial registration screen.

```
                       PATRON REGISTRATION

  Enter Patron Name or Barcode:  _____
```

You may assign a new patron barcode to a **new** patron or assign a new barcode to an **existing** patron.

If you are prepared to assign a new barcode, retrieve the new patron record and enter *Update barcode*. This option could also have been used before you filed the new patron record.

Wand a barcode from a new patron library card or enter a valid new barcode using your workstation keyboard.

```
  Current Patron Barcode..: -1006609  Weston, James
  Enter new patron barcode: 20000003003377
```

<ENTER> or <RETURN KEY> enters the new barcode into the system. The system links the patron record with the barcode.

If you do **not** want to assign a barcode at this time, <ENTER> and the system will re-file your new patron without assigning a barcode. The patron will be automatically assigned a negative barcode number: for example, -1006615. The negative barcode is a temporary barcode used by the system until a real barcode ID number can be assigned.

You may assign this patron a barcode at a future date by doing a *Search* on the patron's name or the negative barcode assigned by the system.

New Barcode

If you enter a new **barcode** at the initial prompt on the *Patron Registration* screen, the message:

```
The record 29999000032657 is missing from the PATRON
file :
Do you want to create a new record (Y/N)? __
```

appears. Answering N returns you to the initial patron registration prompt.

However, if you want to continue with the new barcode, answer Y. The system displays a blank patron registration screen, see *Registration Screen* on page 3-4.

Searching for Patrons by Name

At the Enter Patron Name or Barcode: prompt, type all or part of a patron's name. If an exact match is not found, a browse list of patrons whose name closely matches your entry appears.

Two different types of browse lists can be set up. Use the *Circulation Control Table* (CCT) to select the type of display.

- Three lines per patron. Displays name, address, barcode, and phone number. Displays five records per screen.

- One line per patron. Displays name and barcode. Displays ten records per screen.

When you select a patron from the browse list, the patron registration screen appears and you can update the record as explained in the previous sections.

When you file or exit the patron record you are returned to the browse list. You can:

- select another patron to update

- enter a new search by choosing N

- exit to the menu by typing E.

Current Patron

Enter the patron's barcode number, at the `Enter Patron Name or Barcode:` prompt, if you need to update a current patron's record for some reason (e.g., the patron's address has changed due to a move). The system displays the patron registration screen for that patron.

```
                    PATRON REGISTRATION
                                         Outstanding charges : 12.50
   Patron Barcode..: 20000002004343               Last Update: 02/19/96
   Old Barcode.....: 20000002003232,-102948        Last Trans.: 02/14/96
 1. Name (Last, F M): Carter, Bruce                Registered : 08/04/95
 2. Address.1.......: 123 box 17
                     Johnson's Landing
 3. Zip/Postal Code.: PURCELL, B.C N3R5t8
 4. Phone Number(s).: 111-2222
 5. Address 2.......:

 6. Zip/Postal Code.:              14. Password...: ####
 7. Personal ID.....: s           15. Home Inst..:
 8. ID Type.........: SSN         16. Home Subl..:
 9. Patron Code.....: S-Student   17. Housebound (Y/N) ? : N
10. Expiration Date.: 31 MAY 1999
11. Comments.......:

12. Rte. Recipient..: N           18. Std. Contact Method :
13. Rte. Location...:             19. Hol. Contact Method :
 Options:
  # line   Line by line   Added borrowers   Delete   File   Update barcode
  Second screen   Item list   Blocks display   Pay charges   Waive charge
  Addresses   Exit   ? help
```

Entering a Name   You can retrieve any current patron by entering a complete name or part of a name at the `Enter Patron Name or Barcode:` prompt. If you entered the patron's complete name as it exists in the system's database, the appropriate *Patron Registration* screen will be displayed immediately.

If you entered part of the patron's name, the system presents a browse list. The second list item is the system's best match of the partial patron name entered. Select the patron sought from the browse list. (Refer to *Searching*.)

The appropriate PATRON REGISTRATION screen appears.

Return to Search   If you use the browse feature to search for a patron and retrieve their patron record, when you *File* or *Exit* you are returned to the browse list. Select the *New Search* option to return to the Patron Registration screen `Enter Patron Name or Barcode` prompt. Select *Exit* to return to a menu.

Entering an ID   You can retrieve a current patron by entering a complete ID number at the `Enter Patron Name or Barcode:` prompt. You must preface the search with `ID=`, and then enter the ID number exactly as it appears on the record. The system does not offer a browse search for ID numbers.

Entering LST   You can retrieve the last patron accessed in Circulation by entering `LST` at the `Enter Patron Name or Barcode:` prompt.

Changing Passwords

To remove an existing password, select the *Password* field and type #. (The number of masking characters might not correspond to the number of characters in the password.) Select *File*. To enter a new password, select the *Password* field, type the new password and select *File*.

Whether patrons require passwords is determined by the set up parameters in OPAC Port Control (OPC) table on the ONLINE SEARCH SETUP menu.

Added Borrowers

An *Added Borrower* is someone the patron wants added to his/her User ID (e.g., a child or professor's assistant). This option only works when the system has been set up to give the patron this privilege.

1. Select the *Added borrower* option on the PATRON REGISTRATION screen. The PATRON REGISTRATION screen appears.

```
                       PATRON REGISTRATION

     Patron Barcode..: 20000002001173            Last Update: 01/15/92

                                                 Last Trans.:

              << INSTITUTIONAL or ADDED BORROWER >>


 1.  Gold, Jody Ann                   7586378






  Options:
    Add item   Delete #   Forward   Backward   File   Exit   ? help
```

2. If the patron does **not** have this privilege, a message similar to the following displays in place of the screen options:

   No Additional Borrowers may be added to a <u>Student</u> patron.

3. Select Add item to add a name.

4. The system prompts:

   Borrower's Name or Barcode: _____

   This is a free text field. Data from this field displays in parentheses next to the name of the registered user when items are being checked out by the added borrower. It will also display on all notices sent to the registered user.

The added borrower does not need a patron record in the system (i.e., with his/her own barcode and patron record), therefore a barcode number is not needed in this field. If the added borrower is also a patron (for example a graduate student who is also an added borrower for a faculty member), a barcode number in this field will provide useful information to connect the two records.

5. On the next line the system prompts:

```
Borrower's ID and ID Type: _____
```

6. This is a free text field which allows you to enter an ID number and type which will correctly identify the added borrower. Further information might include an address or telephone number for the added borrower. This information could be used by library staff who need to contact the added borrower directly.

7. Then the system will give a final prompt:

```
 Are you sure this is  correct Y/N?  _
```

   Answer Y if correct.

8. The system adds the name to the list of the Added Borrowers at the top of the screen.

9. The system again displays the message:

```
  Borrower's Name or Barcode: _____
```

10. <ENTER> to return to the option line. Alternatively, enter the name or barcode of more Additional Borrowers and repeat the previous steps.

11. *File* the added names and return to the PATRON REGISTRATION screen.

12. To view all the Added Borrowers, select the option again. All the additional borrowers, old and new, are displayed.

```
                        PATRON REGISTRATION

   Patron Barcode..: 2000043269561                Last Update: 04/14/93
                                                   Last Trans.: 04/04/93
              << INSTITUTIONAL or ADDED BORROWER >>

1.  Ackerman, Susan               999864321- SSN
2.  Wilson, Francis               N4452677 - Calif Driver's Lic.
```

Added borrowers can also be added at checkout. When the barcode or name of patron with Added Borrower privileges is entered during the Checkout (COUT) process the system provides a list of current added borrowers and provides options as indicated on the CIRCULATION CHECKOUT screen.

```
 12:47PM                  CIRCULATION CHECKOUT              DD MMM YY

 Enter Patron Name or Barcode : -000043  Jordan, William
 Blocks : 0   Fines : 27.00    Items out : 18    Holds : 3

              << INSTITUTIONAL or ADDED BORROWER >>

1.  Ackerman, Susan               999864321-SSN
2.  Milligan, Jean                999837600-SSN
3.  Wilson, Francis               N4452677 - California Driver's




 Options:
  Add item    Retrieve #   Delete #   Forward   Backward   File   Exit
  ? help
```

A new added borrower can be created by selecting the *Add item* option, or a current added borrower can be deleted by selecting the *Delete #* option. By choosing *Exit*, the system will return to the Item prompt and

continue with checkouts to the registered patron. The *Retrieve #* option allows checkouts to the selected added borrower.

As items are checked out the added borrower's name appears in parentheses next to the name of the registered patron.

```
 12:47PM                    CIRCULATION CHECKOUT                  DD MMM YY

 Enter Patron Name or Barcode : -000043  Jordan, William (Ackerman, Susan)
 Blocks : 0   Fines : 27.00    Items out : 18    Holds : 3

      ITEM             TITLE                                      DUE


  1.
```

Item List

Selecting the *Item list* option on the PATRON REGISTRATION screen allows staff to display a list of current checkouts as well as lost items. While it is not possible to perform the functions available from a patron list in checkout, (e.g. create Lost items, Claim returns, Renew items, add notes, and access Full checkout details), this provides useful information on a patron's current status. Selecting the line # of an individual checked out item displays the full pieces record, however, no updates can be performed from PATRON REGISTRATION.

Blocks Display

Selecting the *Blocks display* option on the PATRON REGISTRATION screen allows staff to display a list of current blocks on the patron record.

```
02:43pm                    PATRON BLOCKS                    DD MMM YY


 Enter Patron name or barcode : 29999000557788  SMITH, BECKY

  #.#            PATRON TRANSACTIONS          AMT.   CNT    DATE
  1      *** ADMINISTRATIVE HOLD ***
   1     Maximum Outstanding debt exceeded    140.00        02-16-00
  ---    --------------------------------------  -------  ---  --------
  2      *** Lost Books ***
   1     The fauna of Krakatau, 1883-1933      20.00        05-25-99
  ---    --------------------------------------  -------  ---  --------
  3      *** Overdue Items ***
   1     Geflugelte worte                                   06-01-99
   2     NYU holdings test: Biochimica et biophys           08-17-99
   3     Fourier series and boundary value proble           11-23-99
   4     The Politics of regulation                         11-23-99
  ---    --------------------------------------  -------  ---  --------
  4      *** Late Return Fines ***

 Options:
  Toggle Barcodes   Accept payment   Add item   On/off display   Page #
  Del # range (#.#)   Forward   Backward   Exit   ? help
```

For details, see *Transaction Update* on page 3-31.

Quick Fine Payment

If your terminal allows quick fine payment, and the patron owes any fines, selecting the *Pay fines* option on the PATRON REGISTRATION screen allows staff to accept payment from the patron. The FAST FINE PAYMENT screen appears.

```
DD MMM YY           Geac ADVANCE Library System (#.##)          DEFAULT  AU
   HH:SS

                          FAST FINE PAYMENT


Patron barcode   : 29999000557788
Patron name      : SMITH, BECKY
Patron address   : 11 VISTA DRIVE




 Amount : 115.00         ("#" to quit)
```

To pay the full amount, <ENTER>. To pay a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without paying any amount.

Quick Fine Waiving

If your terminal allows quick fine waiving, and the patron owes any fines, selecting the *Waive fines* option on the PATRON REGISTRATION screen allows staff to waive payment from the patron. The FAST FINE PAYMENT screen appears.

```
DD MMM YY            Geac ADVANCE Library System (#.##)        DEFAULT  AU
   HH:SS


                         FAST FINE PAYMENT


Patron barcode  : 29999000557788
Patron name     : SMITH, BECKY
Patron address  : 11 VISTA DRIVE




 Amount : 115.00        ("#" to quit)
```

To waive the full amount, <ENTER>. To waive a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without waiving any amount.

Addresses

If you have set up the system to allow more than two addresses per patron, you can select the *Addresses* option on the PATRON REGISTRATION screen to display, edit, or delete addresses. The PATRON ADDRESSES screen appears.

```
                      PATRON ADDRESSES

   Patron Barcode  : 29999000557788
   Name            : SMITH, BECKY

1.  11 Vista Drive                                      L3R 9T8

2.  Office 325
    Devon Physics Building                             K6T 3R3

3.




Options:    Enter specified line number
 # line   Accept    Delete #    Exit   ? help
```

To edit an address, select *# line* and enter the address number. After you edit an address, the system prompts you to edit the postal or zip code as well.

To clear any address except Address 1, alsong with its postal/zip code, select the *Delete #* option.

Select the *Accept* option to file your changes before exiting the screen. You must also select the *File* option on the PATRON REGISTRATION screen.

Patron Second Screen Definition

You can define up to ten extra fields for registering patrons. These fields provide extra information about patrons for reports. These extra fields can be edit-checked.

Select *Patron Second Screen Definition* (CPSS) on the PATRON CONTROL MENU.

```
DD MMM 19YY          Geac ADVANCE Library System (#.##)          IIIII PP
HH:MM                        Your Library Name


                        SECOND PATRON SCREEN DEFINITION


                    1. AGE GROUP
                    2. ZIP CODE
                    3. PARENT/GUARDIAN NAME
                    4. HIGH SCHOOL ATTENDED
                    5. MAJOR FOR STUDIES
                    6. DISABILITY
                    7. PREFERRED READING MATERIAL
                    8. Not defined
                    9. Not defined
                   10. Not defined

Options:
  # line   Exit   ? help
```

When patron records are imported into the ADVANCE system database from another automated system, information can be loaded into the fields defined on SECOND PATRON SCREEN DEFINITION. Patron records are loaded using the MARC records importing utility found on the UTILITY MENU (UTIL). Use the Import/Export Menu (UTLM) to import patron records. See "Importing Patron Records", *Circulation Management Guide.*

Enter a field's line number to define or update a field on the SECOND PATRON SCREEN DEFINITION screen. The term Not defined indicates the unused fields.

```
DD MMM YYYY             Geac ADVANCE Library System (#.##)        IIIII PP
   HH:MM                       Your Library Name

                       SECOND PATRON SCREEN DEFINITION


     1. Field Description.......................: AGE GROUP
     2. Field length...........................: 5
     3. Mandatory (1=Yes, 0=No)..................: 0
     4. File verification ( Filename*codes id )...: CODES*KBSTATS
     5. Pattern match .........................:
     6. Dictionary name for reports..............: AGE
     7. Dictionary heading......................: AGE
     8. Report field width......................: 60
     9. Help message...........................: Enter patron's statistic+




 Options:
  ? help   # line   Line by line   Delete   File   Exit
```

1. Field Description	Enter a free text description or title for the field.
2. Field length	Enter the length of the field in characters.
3. Mandatory	Entering a 0 or a 1 indicates whether or not the field is required.
4. File verification	Enter an unique identifier that can be used for file verification. If you enter a code selected from a table, (e.g. age ranges), this field determines the code table to be used. (Code tables must be previously defined.) This will also permit you to select a code by entering ?? for a list of acceptable codes. The system administrator can work with Geac support staff to create and edit these tables.
5. Pattern match	Enter the pattern of alphabetic and/or numeric characters, if required, for this field. Use numbers and the letters, A for alphabetic and/or N for numeric, to represent the pattern. For example, the pattern 2A 6N2A represents the pattern for the entry **PA 123456CB**. Using 0A enables the use of any number of alphabetic characters.

6. Dictionary name for reports	Enter a unique name for use by the Report Writer system.
7. Dictionary heading	Enter the heading as you would like to see it in reports.
8. Report field width	Enter a number representing the number of columns this field will need on a report. For example, entering 60 will produce a report that is 60 columns wide.
9. Help message	Enter a message that will help a user understand what kind of information should be entered in the field. The message will be displayed at the bottom of the screen when the cursor is in this field.

Patron Second Screen in Patron Registration

If the library has defined Second Screen fields (see *Second Screen - Patron Registration* on page 3-9), information is entered by selecting the *Second Screen* option on the main PATRON REGISTRATION screen.

```
DD MMM YYYY              Geac ADVANCE Library System (#.##)
HH:MM                            Your Library Name

                  PATRON REGISTRATION - SECOND SCREEN

    Patron ID :  -000043 Jones, Claudia

    1. AGE GROUP.....................:
    2. ZIP CODE......................:
    3. PARENT/GUARDIAN NAME..........:
    4. HIGH SCHOOL ATTENDED..........:
    5. MAJOR FOR STUDIES.............:
    6. DISABILITY....................:
    7. PREFERRED READING MATERIAL....:
    8. Not defined...................:
    9. Not defined...................:
   10. Not defined...................:



 Options:
  # line   Line by line   Accept   Exit   ? help
```

When you select a field by its line number, the instructions will depend on how the field was defined by the system administrator. In the following example, Field 1 - AGE GROUP, the message, and the codes to

be selected were defined by the library. These can correspond to statistical reports required by the library administration. Second screen fields can also be information-only fields for data not included in the standard first screen, such as parent/guardian name.

Enter patron's statistical group or ?? for list from which to choose

```
                    STATISTICAL CODES

     Number of records : 7
     Code    Description of code
     -----   ---------------------------------------------------------
  1. 5-10    Five to ten years old
  2. 10-15   Ten to fifteen years old
  3. 15-19   Fifteen to nineteen years old
  4. 20-25   Twenty to twenty-five years old
  5. 26-35   Twenty-six to thirty-five years old
  6. 36-45   Thirty-six to forty-five years old
  7. 46-55   Forty-six to fifty-five years old
  8. 56-70   Fifty-six to seventy years old
  9. 70+     Over seventy


Options:
  ? help   # line   Print   Forward   Backward   Search jump   Exit
```

After a code has been selected, it will be added to the Patron Registration Second Screen. Once all appropriate fields on the Second Screen have been completed, it is necessary to select *Accept* in order to file the additions and changes.

If you use the *Exit* option you will leave the patron record without saving any changes. Use the *Accept* option to return to the Patron Registration screen. There you can either *File* to save changes or *Exit* to leave the patron record without saving any changes.

Patron Address Control and Descriptions

You can define up to ten addresses for registering patrons, and define the descriptions (labels) that are shown for these addresses on the PATRON REGISTRATION screen.

Patron Address Control

Select *Patron Address Control* (PAC) on the PATRON CONTROL MENU.

```
                    PATRON ADDRESS CONTROL


    PATRON ADDRESS CONTROL CODE : PAT.ADDR.CTRL
    ------------------------------------------------------------------
1. Maximum number of addresses per patron (2 - 10) : 2
2. Maximum number of lines per address (2 - 10)    : 2
3. Mandatory addresses                             : 1


















Options:
 ? help   # line   Line by line   Print   Exit
```

Use the *# line* or *Line by line* option to enter information about patron addresses.

1. Maximum number of addresses per patron	Enter the maximum number of addresses (2 to 10) that can be stored for each patron.
2. Maximum number of lines per address	Enter the maximum number of lines of information (2 to 10) that can be stored for each address.
3. Mandatory addresses	Specify which addresses are mandatory when registering a patron. Use a comma between mandatory address numbers – for example, enter 1 , 2

to indicate that staff must enter both address 1 and address 2 when registering a patron. Use a slash between optional mandatory address numbers – for example, enter 1/2 to indicate that staff must enter address 1 or address 2 (or both) when registering a patron. Another example: enter 1/2,3/4/5 to indicate that staff must enter at least one of the first two addresses and at least one of the last three addresses.

Leave this field blank if no address information is required.

Patron Address Descriptions

Select *Patron Address Descriptions* (PAD) on the PATRON CONTROL MENU.

```
                    PATRON ADDRESS DEFINITION


     PATRON ADDRESS CONTROL CODE : PAT.ADDR.DEFS
     -------------------------------------------------------------------
  1. Description of address  #1  : Address 1
  2. Description of address  #2  : Address 2
  3. Description of address  #3  :
  4. Description of address  #4  :
  5. Description of address  #5  :
  6. Description of address  #6  :
  7. Description of address  #7  :
  8. Description of address  #8  :
  9. Description of address  #9  :
 10. Description of address #10  :




 Options:
  ? help   # line   Line by line   Print   Exit
```
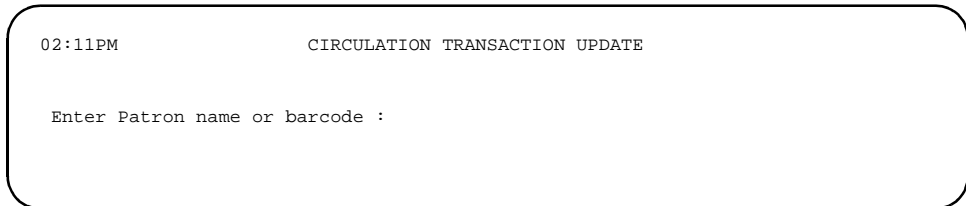
Use the *# line* or *Line by line* option to enter labels for the patron address fields.

Description of address #

Enter a field label for the patron address for display on the PATRON REGISTRATION screen. Note that the registration screen displays 15 characters per line.

Transaction Update

You can change directly some of the blocks attached to a patron's record. Enter CTU, on the PATRON CONTROL MENU to use the *Transaction Update* option.

```
02:11PM                    CIRCULATION TRANSACTION UPDATE


 Enter Patron name or barcode :
```

From the CIRCULATION TRANSACTION UPDATE screen you can display the blocks attached to a patron's record. Some of these blocks can be modified at this point, though not all. Some blocks cannot be modified because they are important to the library's record keeping. For example, a block caused by an item being overdue cannot be modified until the item is checked in; you cannot override the checkin system unless you have specific authority.

Transaction Update is accessed whenever the *Block* option is used on the checkout screens or whenever a patron record with blocks attached is accessed anywhere within the Circulation system. Any options used here can be used at all other points from which the patron blocks record is accessed.

When you enter a patron's name, barcode, ID number, or enter LST to retrieve the patron accessed in Circulation, the PATRON BLOCKS screen displays.

```
02:15PM                    PATRON BLOCKS                    DD MMM YY


  Enter Patron name or barcode : 20000002001234  PATRON, JANE


   #.#              PATRON TRANSACTIONS           AMT.   CNT    DATE
   1      *** ADMINISTRATIVE HOLD ***
     1    Maximum Outstanding debt exceeded      195.00       04-12-93
     2    Maximum Overdue Items Exceeded                  18  01-19-93
   ---    -------------------------------------  -------  ---  --------
   2      *** Overdue Items ***
     1    Weissenborn's Homeric life                           04-13-93
     2    Christmas at Thompson Hall : a mid-Victo             04-13-93
     3    Cranford                                             04-13-93
     4    Spiral and worm gearing; a treatise on t             04-13-93

  Options:
   Toggle barcodes   Accept payment   Add item   On/off display   Page #
   Del # range (#.#)   Forward   Backward   Exit   ? help
```

The screen presents all the blocks attached to that patron's record. If there are no blocks, the following message appears:

```
    ***      THIS TRANSACTION RECORD IS EMPTY!
```

On/Off Blocks Display   Applies to Materials Booking.

Block Types

Blocks are defined by the system administrator/circulation supervisor during circulation setup. Blocks are controlled in the TRANSACTION CODES (CTC) table, which is accessed from the GENERAL CODES MENU (CGCM), under the CIRCULATION CODES MENU (CCM).

Among the features that can be controlled are:

• Whether or not the block has charges associated with it

• If the staff can add the block manually

• If the staff can delete, or override, the block

• If it is a full or partial block

When a **full** block is imposed on a patron, no further checkout transactions are allowed until the problem is resolved. The following list shows some examples of full blocks:

• administrative hold,

• expired card,

• delinquent.

Most of the other blocks are **partial** blocks. Partial blocks inform patrons about their outstanding transactions or status (e.g., fines owed, items held, items overdue, messages), and do not prevent item checkout.

```
02:15PM                      PATRON BLOCKS                    DD MMM YY


  Enter Patron name or barcode : 20000002001234  PATRON, JANE


      Number of records : 23
      Code   Description of code
      -----  ------------------------------------------------------------
   1. 1      ADMINISTRATIVE HOLD
   2. 10     Messages
   3. 11     Item Waiting from Hold
   4. 14     Late Return Fines
   5. 2      Lost Books
   6. 25     Damaged Book
   7. 3      Claimed Returned
   8. 30     Lost Card
   9. 35     LATE FINES
  10. 4      Mail Returned
  11. 5      Charges (Future use)

 Options:
  ? help   # line   Print   Forward   Backward   Search jump   Exit
```

Charge-Controlled Blocks

Charge-controlled blocks (blocks with fines attached) cannot be manually deleted. You must use CTU and either pay or waive the fine to remove the administrative hold. If you attempt to use the `Del # range (D.#.#)` option on blocks that have charges attached, this message displays:

```
 This Block cannot be manually deleted. Please press
<ENTER> :
```

These type of blocks are automatically removed or deleted by going through the accept payment process (AP) and waiving or paying the entire charge. Selecting the accept payment option displays the accounts receivable screen:

```
04:01PM                    ACCOUNTS RECEIVABLE                 DD MMM YY
1_CIRC9
2999957611980   Smith, Yvonne              618-820-4555
                4381 Orchard Lane
                BOSTON,MCA  14116


Description               Code  Invoice/Date Due.date Ret.date    Due     Paid

Scottish jests and anecdot RL    04/13/93     04/04/93 04/13/93  10.00
Invoice Production Charge  PRO   04/14/93                          2.00
French chansons and dances LB    04/14/93     04/07/93           25.00




                                                              ------- ------
 ** LAST SCREEN **                                             37.00    0.00

 Options:
  Dollar amount    Partial payment    Backward    Forward    ? help   Exit
```

See *Accounts Receivable* on page 9-1.

Adding Patron Blocks

Enter Add item (A) at the options prompt to **add** a block to the patron's record. The following prompt appears:

    Enter block type code : _____

Entering a double question mark (??) produces a browse list.

```
 02:37PM                       PATRON BLOCKS                    DD MMM YY

   Enter Patron name or barcode : 20000002001234  PATRON JANE


        Number of records : 23
        Code   Description of code
        -----  ---------------------------------------------------------
    1. 1       ADMINISTRATIVE HOLD
    2. 10      Messages
    3. 11      Item Waiting from Hold
    4. 14      Late Return Fines
    5. 2       Lost Books
    6. 25      Damaged Book
    7. 3       Claimed Returned
    8. 30      Lost Card
    9. 35      LATE FINES
   10. 4       Mail Returned
   11. 5       Charges (Future use)


   Options:
   ? help   # line   Print   Forward   Backward   Search jump   Exit
```

Select the block type by entering a line number.

The browse list step can be avoided if you enter the exact block type code instead of double question marks.

Enter Barcode or Description

Enter the piece barcode or a description at the prompt PATRON BLOCKS screen. The example is for the `Mail Returned` code.

```
                           PATRON BLOCKS

   Enter Patron name or barcode : 20000002001234  PATRON JANE


     #.#              PATRON TRANSACTIONS              AMT.   CNT     DATE
       3     *** Delinquent fines ***                                10-25-92
      ---    --------------------------------------- -------  ---   --------
     5       *** Damaged Book ***
       1                              Total Due :     15.00         10-25-92
      ---    --------------------------------------- -------  ---   --------
     6       *** Lost Card ***
       1     Lost her card.                                         10-25-92
      ---    --------------------------------------- -------  ---   --------
     7       *** Lost Books ***
       1     Thunderhead, a novel                    25.00         10-22-92
      ---    --------------------------------------- -------  ---   --------


   Enter Item Barcode or Block description :
   ** Mail Returned


      _____
```

<ENTER> following the description of the block and the system will add the block and information to the patron's block screen.

If the block type has a charge associated with it, example: a damaged book, enter the barcode of the damaged book at the prompt:

```
 Enter Item Barcode or Block description :
```

When you enter the barcode, the system displays the title to which the barcode is assigned. When the block has a fine attached (for example, in the case of a damaged book), the system prompts you for the cost. You can change the defaulted amount or accept by <ENTER>.

```
 Enter charge amount :  15.00
  ** Damaged Book   The Cyprus triangle
```

When the block is actually filed, the title of the damaged book will no longer display - just the block and the amount. Each damaged book block is added together. If the maximum fine amount is exceeded, the system adds an administrative hold to the patron's record. The message attached will say that the maximum fine amount has been exceeded.

When you select the *Accept payment* option, you can view the details of the damaged book blocks. These details include the title of the damaged book(s) and the amount charged for each. The accept payment option allows you to accept full or partial payments or to waive a fine. If a damaged book fine/charge is completely waived, then the damaged book block is automatically removed. The administrative hold may also be removed, but only if there are no other blocks that would cause an administrative hold.

Deleting Patron Blocks

If the block is not one that is related to charges, then you can delete the block by selecting the *Del # range (#.#)* option. Examples would be messages left for patrons, or Mail Returned blocks.

Del # range (#.#)   On the following screen, patron blocks are divided into three groups by category: Lost Books, Mail Returned; and Late Return Fines. The group number appears in the upper left corner of the list of blocks. Each occurrence of a block is listed within that category of blocks. For example, there are five occurrences of late return fines in group 3. To allow you to select one item (Graphic arts manual) from this list you need to select the *Del # range (#.#)* option and enter 3.4 (the group block number, period, the individual block number). If you enter just the block group number the system replaces the option line and prompts for the individual block number.

```
Overdue Items
Options: (?) or Block # :
```

You cannot enter a list of numbers separated by commas or hyphens to indicate a range of blocks.

Page #   Allows you to specify a page number. Select this option and enter a page number.

```
                         PATRON BLOCKS

  Enter Patron name or barcode : 2999900052  SULLIVAN,SAM

   #.#            PATRON TRANSACTIONS          AMT.   CNT    DATE
   1     *** Lost Books ***
     1   Mauriac                             21.30         06-07-96
   ---   ------------------------------------  -------  ---  --------
   2     *** Mail Returned ***
     1   NO FORWARDING ADDRESS                               02-12-97
     2   NO FORWARDING ADDRESS                               02-12-97
   ---   ------------------------------------  -------  ---  --------
   3     *** Late Return Fines ***
     1   Current controversies in cardiovascular  25.00      06-07-96
     2   War production in 1944               15.00         08-22-96
     3   The blood of his servants            13.50         08-27-96
     4   Graphic arts manual                  25.00         02-11-97
     5   Lewis Morris, Ango-American statesman, c  25.00     02-11-97

Options:
  Toggle Barcodes   Accept payment   Add item   On/off display   Page #
  Del # range (#.#)   Forward   Backward   Exit   ? help
```

Housebound Patron History

You can maintain a list of items that have been borrowed (checked out) by a *housebound* patron. These lists can be displayed and cleared through the *Housebound Patron History* option.

Enter HPH, on the PATRON CONTROL MENU to use the *Housebound Patron History* option. The screen HOUSEBOUND PATRON HISTORY MENU appears.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          XXXXX  YY
HH:MM                        Your Library Name

                      HOUSEBOUND PATRON HISTORY MENU



                  1. CHBD  Checkout History Display

                  2. CHBC  Checkout History Clear






            Enter the number of your selection and press <ENTER>
                    or  ?  followed by <ENTER> for Help.
                 Press <ENTER> to return to previous level :
```

Housebound Patron History Display

The CHBD option enables you to find out what items have been borrowed by a housebound patron. The system keeps track of these items only if the *Keep Patron History* field is answered *Yes* in the CIRCULATION CONTROL TABLE (CCT), and if the Housebound field in the patron's registration record is answered *Yes*.

HOUSEBOUND PATRON HISTORY DISPLAY appears after CHBD is selected.

```
 DD MMM YYYY              Geac ADVANCE Library System (#.##)          IIIII PP
    HH:MM                        Your Library name

                      HOUSEBOUND PATRON HISTORY DISPLAY



 Enter Patron Name or Barcode:
```

Enter a patron name, or patron barcode, or full patron ID, or LST (to retrieve the last patron accessed in Circulation). If you do not identify a housebound patron the system prompts:

`No checkout history for patron, press <return>:`

If you do identify a housebound patron, the system displays the HOUSE-BOUND PATRON CHECKOUT HISTORY screen, listing the items borrowed by the patron since they became a housebound patron, or since the list was last cleared.

```
                   HOUSEBOUND PATRON CHECKOUT HISTORY
    Patron: 20000002003377  SMITH, YVONNE                          Page 1
    Sort by date (Descending)
    Number of Records Retrieved: 3
    AUTHOR              TITLE                                       DATE
    ------------------  ----------------------------------------- --------
 1. Justin, Margaret M.  Problems in home living                   04-14-93
 2. Gardner, Erle Stanl+ This is murder                            04-14-93
 3. James, P. D.         Innocent blood                            04-14-93




    ** Last screen **
 Options:
  Sort   Print   ? help   Exit
```

The default sort sequence is by checkout date. Use the Sort option to change the display sequence. The system prompts:

```
Sort the list by <A>uthor/<T>itle/<S>ubject/<D>ate
(Descending) :
```

```
                    HOUSEBOUND PATRON CHECKOUT HISTORY
     Patron: 20000002003377  SMITH, YVONNE                         Page 1
     Sort by author
     Number of Records Retrieved: 3
     AUTHOR              TITLE                                      DATE
     ------------------- ------------------------------------------ --------
 1. Gardner, Erle Stanl+  This is murder                           04-14-93
 2. James, P. D.          Innocent blood                           04-14-93
 3. Justin, Margaret M.   Problems in home living                  04-14-93


         Sort by title
     Number of Records Retrieved: 3
     AUTHOR              TITLE                                      DATE
     ------------------- ------------------------------------------ --------
 1. James, P. D.          Innocent blood                           04-14-93
 2. Justin, Margaret M.   Problems in home living                  04-14-93
 3. Gardner, Erle Stanl+  This is murder                           04-14-93


     Sort by subject
     Number of Records Retrieved: 3
     AUTHOR              SUBJECT                                    DATE
     ------------------- ------------------------------------------ --------
 1. Gardner, Erle Stanl+                                           04-14-93
 2. James, P. D.                                                   04-14-93
 3. Justin, Margaret M.   Domestic economy                        04-14-93
```

Use the *Print* option to print the list in the current display sequence.

```
             PRINT HOUSEBOUND PATRON CHECKOUT HISTORY


     Please type in a heading you would like on the printout.
     This will identify the printout as being yours...

 Enter your name/heading :
```

Enter a heading for the report and <ENTER>. <ENTER> again to send the
report to the system printer, or select Exit and <ENTER> to exit without
printing.

The report is 132 columns wide, and displays the author, title, subject and checkout date information for the patron's complete list, sorted in the current display sequence.

Housebound Patron History Clear

The HOUSEBOUND PATRON HISTORY CLEAR (CHBC) function enables you to delete all or part of the item list for one, or all, housebound patrons. To access the function enter CHBC at any Circulation Menu, or select it from the HOUSEBOUND PATRON HISTORY MENU (HPH).

```
 DD MMM YYYY          Geac ADVANCE Library System (#.##)            IIIII PP
    HH:MM                       Your Library Name

                   HOUSEBOUND PATRON CHECKOUT HISTORY CLEAR




                         (1)  All patrons

                         (2)  Selective patron



            Enter selection, or (E)xit :
```

Select 1 to clear the lists for all patrons, or 2 to clear the list for one particular patron.

If you select 2, the system prompts:

Enter Patron Name or Barcode:

Identify a patron by barcode, name, or ID, or use LST to retrieve the last accessed patron in Circulation. If you identify a housebound patron, the system displays a screen similar to the HOUSEBOUND PATRON HISTORY DISPLAY screen, except for a *Delete* option.

If you answer 1 to clear all patron lists, or answer 2 and select a patron and then select the *Delete* option to clear a specific patron's list, the system displays the HOUSEBOUND PATRON CHECKOUT HISTORY CLEAR

screen. For a specific patron clear, the screen shows the patron barcode. If the *all patron* option was selected the system will display the note

******** All patrons ********

in the same place on the screen.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)           IIIII PP
  HH:MM                       Your Library Name

                HOUSEBOUND PATRON CHECKOUT HISTORY CLEAR



                   Patron ID = 20000002003377

                   (1)  Clear by date
                   (2)  Clear by number of checkout items

             Enter selection, or (E)xit :
```

Answer 1 to clear the list(s) by checkout date, or 2 to clear the list(s) by number of items.

If you answer 1, the system prompts:

```
Enter a date such that all checkout histories prior to
this date will be cleared.



Enter date or <cr> for ALL histories :
```

If you answer 2, the system prompts:

```
Enter number of latest checkout records to be kept for
a patron :
```

Leave the field blank to clear the complete list(s), or enter the number of most recently borrowed items to keep.

In either case the system then prompts:

```
*** Patron checkout history will be cleared except for
the latest X records ***
```

```
Are you sure ? (Y/N)
```

X represent the number you entered in the preceding prompt.

Answer Y to clear the items, or N to cancel the clearing. If you are clearing all patron lists, the system exits the function with the message,

```
Checkout history not cleared, press <cr> to continue.
```

 If you are clearing a particular patron's list, the system returns to the *Enter Patron Name* or *Barcode* prompt.

4

Checkout

Checkout is the central function of the Circulation system (module). It is also the largest function, with a variety of options covering all aspects of checking out library items.

This chapter discusses:

- The initial screen of Checkout.

- Checkout options that are available before a patron is identified.

- Checking out items.

- Checkout options that are available at the Checkout screen.

- Exception conditions at checkout.

- Checkout functions are controlled by the parameters such as loan periods. These parameters are defined and discussed in the *Circulation Management Guide*.

- Telephone Renewal Service (PHONER).

Initial Checkout Screen

The initial checkout screen below is reached by entering COUT for CHECKOUT, from the STANDARD CIRCULATION MENU.

```
HH:MM                   CIRCULATION CHECKOUT                   DD MMM YYYY

 Enter Patron Name or Barcode : _____
```

Entering a single question mark (?) will cause the system to display all valid options.

```
                        VALID OPTIONS
                        --------------
            1) Enter Patron Name.

            2) Enter Patron Barcode.

            3) Enter ID=Patron Personal ID.

            4) Enter CD to change the checkout date and/or time
               for all Items checked out until returning to the menu.

            5) Enter DUE to change the due date of all Items checked
               out until returning to the menu.

            6) Enter NEW to register a new patron.

            7) Enter DT to toggle between detailed and simple display.

             Please press <ENTER> to continue:
```

You can return to the previous screen by <ENTER> without selecting an option.

Patron Name

When the patron does not provide an ID number, enter the patron's name in the format **last name, first name** at the prompt `Enter Patron Name or Barcode`.

There is no need to enter a whole name; even with a partial name, the automatic browsing function can identify a patron who is registered in the system. The system displays its best possible match of the name you entered on line number 2.

You may enter LST to access the last patron retrieved in Circulation.

Use the line number command (*Line #*) to select the appropriate name.

```
 HH:MM                    CIRCULATION CHECKOUT                   DD MMM YYYY

  Enter Patron Name or Barcode : SMITH


  1. SMILEY, WILLIAM E                                  20000002003138
  2. SMITH, AMY JOANNA                                  20000002004002
  3. SMITH, ARTHUR LAIRD                                20000002009125
  4. SMITH, BRADLEY G                                   20000002003162
  5. SMITH, BRETT WILLIAM                               20000002004046
  6. SMITH, CHRISTOPHER FREEMAN                         20000002002468
  7. SMITH, CINDY LEE                                   20000002004282
  8. SMITH, CLAYTON NOWLIN                              20000002008542
  9. SMITH, CYNTHIA RENEE                               20000002003900
 10. SMITH, DANIEL ERNEST                               20000002003115


 Options: _
   ? help   # Line   Backward   Forward   New Search   Exit   Search Jump
```

If you require maximum checkout speed, you can bypass the browsing feature by entering the patron's name exactly as it is in the system's database. The system will find the patron's barcode and display it with the patron's name without presenting a browse list.

If you have made an error in your entry, the following message is displayed:

`This is an invalid barcode/check digit...press <ENTER>.`

Patron Barcode

Enter the patron's barcode when a patron provides his/her ID card with a barcode. Barcodes can be entered either with a barcode reader wand or a laser scanner wand or the barcode can be manually entered.

```
12:09PM                 CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : 20000002003138
```

Update Message   Under some conditions the following update status message appears:

```
Patron record last updated on MM/DD/YY
Please press <ENTER> : _____
```

This message will appear before the completion of patron identification if the patron's record has not been updated recently. The library can control how often this message appears in the Patron Group Codes (CPGC) field *Frequency to check patron*. See the *Circulation Management Guide.*

Patron Personal ID

If a patron cannot provide his/her ID card, the patron's Personal ID number can be manually entered at the prompt. The patron's Personal ID number is taken from the *Personal ID* field on the PATRON REGISTRATION screen. This field contains a unique combination of letters and numbers associated with the patron. The Personal ID number can be the patron's driver's license number, social insurance number, social security number, or any other alphanumeric sequence unique to a particular patron. When the ID is entered, it must begin with ID= and it must be an exact match on the ID number in the patron's record. No browse screen is provided for an ID number entry.

```
12:09PM                    CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : ID=SMIT-1234-5678-1234
```

If you have made an error in your entry, the message displays:

```
 Personal ID not found. Press <ENTER>. _
```

<ENTER> will redisplay the patron prompt. Try re-entering the ID number.

Added Borrowers

An *added borrower* is someone the patron wants added to his/her patron record (i.e., a child, or a professor's assistant). This option is only available when the system has been set up to give the Patron Type the privilege of additional borrowers. See *Circulation Management Guide: Loan Periods*.

Generally *Added borrowers* are attached to a patron's record during the Patron Registration process. (See *Patron Registration* on page 3-1.) However, *Added borrowers* can also be attached at the point of checkout. When the barcode or name of patron with *Added Borrower* privileges is entered during the Checkout process the system provides a list of current *Added borrowers*.

```
  12:47PM                        CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : -000043  Jordan, William
 Blocks : 0   Fines : 27.00    Items out : 18    Holds : 3

                  << INSTITUTIONAL or ADDED BORROWER >>

1.  Ackerman, Susan                    999864321-SSN
2.  Milligan, Jean                     999837600-SSN
3.  Wilson, Francis                    N4452677 - California Driver's









 Options:
  Add item    Retrieve #   Delete #   Forward   Backward   File    Exit
  ? help
```

A new added borrower can be created by selecting the *Add item* option,
or a current added borrower can be deleted by selecting the *Delete #*
option. By choosing Exit, the system will return to the *Item prompt* and
continue with checkouts to the registered patron. The *Retrieve #* option
allows checkouts to the selected added borrower.

As items are checked out the added borrower's name appears in paren-
theses next to the name of the registered patron.

```
 12:47PM                        CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : -000043  Jordan, William (Ackerman, Susan)
 Blocks : 0   Fines : 27.00    Items out : 18    Holds : 3

      ITEM              TITLE                                       DUE


  1.
```

Added borrowers do not need to be registered in the system (i.e., they do not have to have separate patron records and barcodes). The name of the added borrower will display on all notices sent to the registered patron, however all checkouts and obligations are the responsibility of the registered patron and remained attached to that record.

Change Date/Time

Entering CD, for Change Date, at the Checkout Patron prompt, enables you to change temporarily the checkout date and/or time for items to be checked out. Entering CD at the Patron prompt produces the CIRCULATION CHECKOUT screen.

```
 12:09PM                    CIRCULATION CHECKOUT                    DD MMM YY

  Enter Patron Name or Barcode : CD




      Checkout Date : _____

```

The first line of the screen displays the default checkout date and time. This is the current system date and time at the moment of checkout. Enter a new date from the past or in the future at the Checkout Date prompt. This prompt appears on the next line:

　　　Checkout Time : _____

Enter the new time. When the new time is entered, the new checkout date and time will be shown on the first line of the screen surrounded by parentheses.

```
(12:00PM)                    CIRCULATION CHECKOUT                    (DD MMM YY)

 Enter Patron Name or Barcode :
```

If the *Change Date* option is used before the patron ID or name is entered, the date and time parameters are changed for the duration of the checkout session (i.e., until checkout is exited).

If the *Change Date* option is executed after the patron ID has been entered, the parameters are changed only for the **next** item checked out.

If the *DUE* option is used before the *Change Date* option, the due date entered takes priority. This due date priority will mean the new checkout time will be governed by the new due date. For example, the checkout date cannot be later than the due date.

Change Due Date

You can change the due date for items to be checked out by entering DUE, at the *Patron* prompt. Normally, the due date for a given item is calculated automatically by the system based upon pre-defined policy criteria. These criteria are governed by the holding institution, subloca-tion, the collection type, and the patron category.

The *DUE* command is used when it is necessary to override the default due dates. Entering a new due date is similar to the step required by option 4, *Change Date*, except that the prompts look slightly different.

```
Checkout Due Date : 15 NOV 92

Checkout Due Time : _____
```

Session Due Dates

If the *DUE* option is executed prior to identifying the patron, the new due date will remain in effect until a new checkout session is begun (i.e., when the present checkout session is ended).

```
12:00PM                    CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode :

              Due Date : 11/20/92         Due Time : 12:00AM
```

Single Item Due
Dates
If the *DUE* option is executed after the patron is entered, the new due date applies to the next transaction or single item only.

```
10:03AM                    CIRCULATION CHECKOUT                    (DD MMM YY)

Enter Patron Name or Barcode : -000043  Smith, Marcia E.
Blocks : 4    Fines : 10.00     Items out : 1     Holds : 0
Due Date : 04/05/93   Due Time :
     ITEM                TITLE                                     DUE


  1.
```

When you have entered the item which required the new due date, the system will return to using the automatic due date setting policy.

Register New Patron

You can register a new patron by entering NEW (or just N), at the Patron prompt.

```
12:00PM                    CIRCULATION CHECKOUT                 DD MMM YY

 Enter Patron Name or Barcode : NEW

 Enter Patron name - Surname, Firstname _____
```

> Enter the patron's name in the order indicated. A blank patron registra-
> tion screen appears with a system-assigned negative patron barcode
> number.

```
                       PATRON REGISTRATION


    Patron Barcode..: -000054                       Last Update:
                                                     Last Trans.:
 1. Name (Last, F M): James, Nancy                   Registered :
 2. Address........:

 3. Zip/Postal Code.:
 4. Phone Number(s).:
 5. Address 2.......:

 6. Zip/Postal Code.:            14. Password...:
 7. Personal ID.....:           15. Home Inst..:
 8. ID Type.........:           16. Home Subl..:
 9. Patron Code.....: -
10. Expiration Date.:           17. Housebound (Y/N) ? : N
11. Comments........:

12. Rte. Recipient..: N
13. Rte. Location...:
 Options: _
   # line   Line by line   Added borrowers   Delete   File   Update barcode
  Second screen   Item list   Exit   ? help
```

> You must make entries in fields 2, 7, 9, 15, and 16. Other fields can be
> completed at another time, along with updating the barcode.

The system will automatically calculate and enter an *Expiration Date* at field 10. You can override the expiration date by over-writing the system's calculated date.

At a later date, you can search for this patron using the negative barcode, but you must include the negative sign (-) for a successful search.

Use the file option to save the new patron record and return to the checkout screen.

Displaying Checkout Details

You can switch between two different Checkout screen displays by entering DT, at the Patron prompt:

• a detailed display of checked out items, including the item's title, or

• a simple display of checked out items.

Either of these two displays appear on the CIRCULATION CHECKOUT screen as you enter item barcodes. The first screen shows the **simple** display.

```
 04:11PM                    CIRCULATION CHECKOUT                  DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 2      Holds : 1


      ITEM                DUE

  1.  01234567890        01-06-91 09:00PM
  2.  01234567341        01-02-91 11:00PM
  3.  _
```

The second screen is the **detailed** display. This screen includes the checked out item's title.

```
04:11PM                    CIRCULATION CHECKOUT                  DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00     Items out : 0     Holds : 1


      ITEM               TITLE                               DUE

  1.  01234567890        Stages and stages to Saturn        01-06-93
                                                            09:00PM
  2.  01234567341        Journey North                      01-02-93
                                                            11:00PM
```

The system administrator/circulation supervisor can establish the detailed, or simple, display as a system wide default in the CIRCULATION CONTROL TABLE (CCT), under the CONFIGURATION CODES MENU (CCCM). Each operator can, however, change the current default display using the methods described.

Patron Status Line

When a patron's identification information is displayed, the system will automatically display a status line. The patron's status line is immediately under the patron's barcode number and name. This line indicates the status of a patron's record for *Blocks, Fines*, *Items out*, and *Holds*. The status line is intended as a convenience by providing a summary of the key parts of a patron record.

```
04:11PM                 CIRCULATION CHECKOUT                 DD MMM YY

Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
Blocks : 1    Fines : $19.00    Items out : 0    Holds : 1

    ITEM                DUE

1   _
```

To get complete information, enter a question mark (**?**) to display the Checkout options. These options will enable you to display detailed information about each of the status line items. See *Checkout Options* on page 4-16.

Checking Out Items

Checking out items can begin when you have a patron name displayed after one of the following conditions is met:

- A valid patron barcode is wanded or keyed in.

- A patron ID code is entered.

- A patron name is identified through searching the patron database.

- A patron's name is correctly entered.

- LST is entered to retrieve the last accessed patron.

At this point you are ready to check out items.

Item Barcode   The simplest way to Checkout items is to enter the **item barcode** by wanding or keying the barcode's number using your workstation's keyboard. Entering the item barcode is the most common method for checking out items. As the barcode is entered, the system will display the item's barcode and each item's due dates and times.

```
 04:11PM                    CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 0     Holds : 1

     ITEM                 DUE

  1   39999000127758      09-06-93  09:00PM
  2   _
```

Continue entering barcodes for all items to be checked out. When all items for the current patron are entered, <ENTER> and the system returns to the initial checkout prompt.

When the barcode for an item already checked out is entered, the system either displays an error message or suggests a further action. If the item is checked out to another patron, it must be checked in before it can be

checked out again. If the item is checked out to the same patron, the system displays the following message:

```
This Item is currently checked out to this patron.  Renew
Item? (Y/N) : ____
```

Choose Y or N.

Checkout Options

There are a number of options available at the *Checkout item* prompt.
Entering a single question mark (?) displays a help screen.

```
        1) Enter item barcode to checkout an Item  to this patron.

        2) Enter SEARCH to search and retrieve Item from the database.

        3) Enter CD to change the checkout  date/time for only the next
           transaction.

        4) Enter DUE to change the due date/time for only the next
           transaction.

        5) Enter ITEM or LIST to display all the Items checked out
           by this patron.
        6) Enter H to display all holds placed by this patron.

        7) Enter BLOCKS to display all patron transactions.


   Press <ENTER> to continue:
```

Scroll-up the screen to view the entire message.

```
         8) Enter PATRON to display/edit the patron's record.

         9) Enter IN to check in an Item.

        10) Enter NOTE to enter a checkout note for the last item
            checked out.

        11) Enter AP to accept a fine payment.

        12) Enter a patron barcode to continue checkout function
            under another patron.




   Press <ENTER> to continue:
```

Search Item

When barcodes are obliterated or unreadable, or if you are not using barcodes in a particular situation, SEARCH enables you to search the database and retrieve items for checkout.

After searching the Online Catalogue, you must use the *Retrieve number (R.#)* option to retrieve items for checkout. The *Retrieve (R)* option is not a valid checkout option.

Change Date/Time

Entering CD changes the checkout date and time for the next item to be checked out.

```
 04:11PM                    CIRCULATION CHECKOUT                    DD MMM YY

  Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
  Blocks : 1    Fines : $19.00     Items out : 0     Holds : 1

       ITEM                 DUE

  1.  01234567890        01-06-91 09:00PM
  2.  01234567341        01-02-91 11:00PM
  3.  CD




     Checkout Date : _____
```

Note the difference between the CD option at this point in the checkout process and the *Change Date* option at the patron prompt.

At the patron prompt *CD* option changes the checkout date and time for all transactions for **that** patron's session. On the screen above, the *CD* option changes the checkout date and time for only the **next item** to be checked out.

Change Due Date

DUE operates in the same way as *CD*, except that the command *DUE* changes the due date and time instead of the checkout date and time.

DUE is effective only for the next item to be checked out.

Display Items

Entering IT, ITEM, or LIST at the *Checkout Item* prompt displays all the items currently checked out to the patron. This display will include the items' call numbers, titles, and due dates, and special statuses or conditions.

This command is always available from Checkout, even for **delinquent** or **expired** patrons. The system will not allow the checkout of items to these patrons.

If the command IT, ITEM, or LIST is entered, the CIRCULATION CHECKOUT screen is displayed.

```
 04:11PM                    CIRCULATION CHECKOUT                  DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne

 ITEMS CHECKED OUT by Smith, Yvonne                        2 of 2 displayed
 Num  Call number          Notices  Title                          Date due
 ──────────────────────────────────────────────────────────────────────────
 1)   CAM2 DF89 .C6           0    Les institations militarires  R22 APR 93
 2)   CAM2 QC16.E5 S32 1979   1    Einstein for Beginners        *DUE* 10 Apr 93




 Options: _
 Note #   ? help   # line   Renew line(s)#   Renew all   Claim return #
 Lost item #   Backward   Forward   Print   Exit   Full details #
```

The column *Notices* indicates the number of notices produced by the system for this item/patron.

Under *Date due* the system displays the due date/ time of the item. If the item has been renewed, the Due date will be prefixed with **R**. Note that this is the new due date, not the date of the renewal. If the item has a note associated with it will be indicated by a ***N*.** Overdue items are indicated by the word ***DUE***.

You have a number of options or actions available, see Table 4.1.

Fast Fine Payment

If your terminal is set to allow quick fine payment, you can enter the command PAY at the *Checkout Item* prompt. The FAST FINE PAYMENT screen appears.

```
DD MMM YY            Geac ADVANCE Library System (#.##)         DEFAULT  AU
   HH:SS

                           FAST FINE PAYMENT


Patron barcode   : 29999000557788
Patron name      : SMITH, BECKY
Patron address   : 11 VISTA DRIVE




 Amount : 115.00        ("#" to quit)

```

To pay the full amount, <ENTER>. To pay a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without paying any amount.

Fast Fine Waiving

If your terminal is set to allow quick fine waiving, you can enter the command WAIVE at the *Checkout Item* prompt'. The FAST FINE PAYMENT screen appears.

```
DD MMM YY           Geac ADVANCE Library System (#.##)        DEFAULT  AU
   HH:SS

                          FAST FINE PAYMENT


Patron barcode   : 29999000557788
Patron name      : SMITH, BECKY
Patron address   : 11 VISTA DRIVE




 Amount : 115.00        ("#" to quit)
```

To waive the full amount, <ENTER>. To waive a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without waiving any amount.

Checkout Screen Options

Checkout Screen Options

Option	Command	Description
? help	?	Displays a help screen if available.
# line	#	Provides a detailed item record when the line number is entered.
Backward	B	Displays the previous page or screen.
Claim return #	CR.#	Creates a status of *Claimed Returned* of the item indicated by the line number.
Exit	E	Exits from the screen displayed and returns to the previous menu screen.
Forward	F	Displays the next page or screen. Displays a list of Lost Items. The system can be set up to remove items from the list if they have been found and checked in; otherwise the entries will be retained until the library decides to delete them (note, however, that full details of such transactions are no longer available). This screen is marked as ITEMS CHECKED OUT AND LOST. (See example 1)
Full details #		Produces a screen with full details of the checkout record. This is particularly useful as a support tool for the system administrator and Geac. However, it is useful in allowing you to look at a NOTE without going into the Note Update process. The *Full Details* option is available for current checkouts, as well as lost books (unless the lost book has been checked in as noted above), (See example 2.)
Lost item #	L.B. #	When an item is marked as lost, a charge may be calculated and it appears in the *Patron Blocks* display. In addition, such items are removed from the list of *Items Checked Out* and added to the *Items Checked Out and Lost* list. Such items are displayed as continuation screens of the *Items Checkout Display*. Such items remain on the list regardless of whether the charges for such items have been paid or, depending on how the system is set up, whether they have been found and checked in. The list is an historical one indicating that at some point (regardless of present conditions) the item was lost. These items can be manually removed by using the *Delete* option on the *Items Checked Out and Lost* display.

Checkout Screen Options

Option	Command	Description
Note #	N. #	Adds a note to the item record indicated by the line number, e.g. item damaged, piece missing, etc. This note will display during, and be retained after, a Renewal. The note is also accessible from the Full details screen.
Print	PRT	Prints the displayed screen on an attached screen printer.
Renew all	R	Renews all items listed for this patron.
Renew line(s) #	R.N. #	Renews the item on the line selected. To renew more than one item enter the line numbers separated by commas or a range of line numbers separated by a dash. For example, enter 1,2,4 or 1-4 or 1, 3-4.

Example 1: Items Checked Out and Lost

Use the Forward option to display a list of items checked out and lost.

```
 10:07AM                  CIRCULATION CHECKOUT                 DD MMM YY

 Enter Patron name or barcode : 29999000111222  MACROY, RON


ITEMS CHECKED OUT AND LOST by MacLeod, Diana          2 of 2 displayed
Num  Call number          Notices  Title                        Date due
-----------------------------------------------------------------------------
1)  CAM1 SB352 .N726               Starting early vegetable and f     31 JAN 94
                         0  Nissley, Charles Hebron       Billed as Lost
2)  CAM2 GV837 .G78               The aquatic art book of water      *LOST ITEM
                         1  Gundling, Beulah, ed          No details avail







 Options:
  ? help   # line   Backward   Forward   Delete #   Exit   Full details #
```

Example 2: Full Details

Use the Full Details option to display the full details screen.

```
Item    : 39999000112436
Title   : Scottish jests and anecdotes
Author  : Chambers, Robert, 1802-1871, ed

Port       : MEM      User ID : MEM      Date   :  12 APR 93 12:15
Agency     : AU       Subloc  : CAM3     Renewals:  1
CO key     : CO*P3*GEN1*DCGC
Due        : 22 APR 93 12:15                Grace  :  22 APR 93 13:15
Charge     : 25.00
Next ntc   : CND 21 APR 93
Notices    :
Dates      :
Notes      : 04-11-93 03:22PM Scottish jests and anecdotes}patron reported item
lost.
```

Recall   If the item has been recalled, a Recall field is shown below the Grace
                          field. The Recall field shows the date and time the item was recalled and,
                          in parenthesis, the original due date.

Placing or Displaying Holds

Entering HOLDS displays the HOLDS PROCESSING screen. It is also possible to place a hold on a title or item for the patron at this point. See *Holds, Recalls or Traces* on page 6-1.

```
  DD MMM 19YY          Geac ADVANCE Library System (#.##)        IIIII PP
  14:09                        Your Library Name

                             HOLDS PROCESSING

 Enter Patron Name or Barcode : -000043  McLaughlin, Marjorie E.

 Blocks : 1    Fines : $25.00     Items out : 2    Holds : 2

 Enter command :


 - Type in a statement to search the database
 - Type 'S' to get to the OPAC search screen
 - Type 'B' to check the patrons blocks
 - Type 'IT' or 'LIST' to view checked out items
 - Type 'P' to update the patron record
 - Type 'SH' to show the holds for this patron
 - Type '?' for a more detailed help screen
```

Invoking the *Show Holds* option will display all holds for the current patron.

```
 02:11PM                    HOLDS BY PATRON                      DD MMM YY

 PATRON BARCODE: -000043
 PATRON NAME: McLaughlin, Marjorie E.           TOTAL NUMBER OF HOLDS: 2

     TYPE CALLNO/BARCODE TITLE/AUTHOR               STATUS       ACTION
     ---- -------------- ---------------------------- -------------- --------
 1. T                    Good and mad women : the his+
                           Matthews, Jill Julius
 2. T                    Gone to earth
                           Webb, Mary Gladys (Meredit+




 Options:
  Queue display #   # line   Cancel hold #   Cancel all   Exit   ? help
```

Display Blocks

Entering BLOCKS at the *Checkout Item* prompt displays all patron trans-
action blocks for the current patron ID.

```
 14:24                      PATRON BLOCKS                      DD MMM 19YY

 Enter Patron name or barcode : 20000002003377  SMITH, YVONNE

 #.#              PATRON TRANSACTIONS              AMT.   CNT    DATE
 1     *** Item Waiting from Hold ***
   1   New book march 16th                                     09-19-90
  ---  ----------------------------------------  -------  ---  --------
 2     *** Late Return Fines ***
   1   Humbug; the art of PT Barnum                  16.50       08-22-90
  ---  ----------------------------------------  -------  ---  --------




   ** LAST SCREEN **
 Options:  _
  Toggle barcodes   Accept payment   Add item   On/off display   Page #
  Del # range (#.#)   Forward   Backward   Exit   ?help
```

Blocks may be partial or full. Blocks are defined by the library during
circulation setup. *Administrative hold*, *expired card*, *delinquent,* etc. are
full blocks. Most are partial blocks.

Use the *Toggle barcodes* option to show or hide item barcode numbers in
front of the titles on this screen.

Examples of common blocks are displayed on the CIRCULATION TRANS-
ACTION screen.

```
                  CIRCULATION TRANSACTION

   Number of records = 16
        Codes   Description of codes
        ───    ────────────────────────
    1. 1         ADMINISTRATIVE HOLD
    2. 10        Messages
    3. 11        Item Waiting
    4. 14        Late Return Fines
    5. 2         Lost Books
    6. 25        Damaged Book
    7. 3         Claimed Returned
    8. 30        Lost Card
    9. 4         Mail Returned
   10. 5         Charges
   11. 6         Overdue Items
   12. 7         Expired Card
   13. 8         Family Block
```

When a **full** block is imposed on a patron, no further checkout transactions are allowed until the problem is fixed. Your system may be set up to override an ADMINISTRATIVE HOLD.

Partial blocks inform patrons about their outstanding transactions or status (e.g., fines owed, items held, items overdue, messages), and do not prevent item checkout.

Display Patron Record

By entering PATRON on the PATRON REGISTRATION screen you can update the patron record during checkout.

The most frequently changed field is expiration date. When the default expiration date is reached, the system does not allow the patron to check materials out. The date must be updated from this screen.

If a patron has a full block against their Patron ID, the message <FULL BLOCK> is displayed beside the patron barcode at the top centre of the screen.

```
                        PATRON REGISTRATION

   Patron Barcode..: -000043 <FULL BLOCK>          Last Update: 04/11/93
                                                   Last Trans.: 04/12/93
 1. Name (Last, F M): McPherson, Sharon E.        Registered : 04/06/93
 2. Address........: 1234 Shady Lane

 3. Zip/Postal Code.: SAN DIEGO, CA  92116
 4. Phone Number(s).: 616-321-5678
 5. Address 2.......:

 6. Zip/Postal Code.:                14. Password...: #####
 7. Personal ID.....: 445891212      15. Home Inst..: AU-University of Qualit
 8. ID Type.........: SSN            16. Home Subl..: CAM1-Main University Li
 9. Patron Code.....: G-Graduate Stud
10. Expiration Date.: 01 JAN 1999    17. Housebound (Y/N) ? : N
11. Comments........:

12. Rte. Recipient..: N
13. Rte. Location...:
 Options:
  # line   Line by line   Added borrowers   Delete   File   Update barcode
  Second screen   Item list   Exit   ? help
```

To make changes, use the optional commands at the bottom of the
screen. See *Patron Registration* on page 3-1.

You have a number of options or actions available, see Table 4.2.

Patron Registration Options

Option	Command	Description
? help	?	Displays a help screen if available.
# line	#	Moves the cursor to the line indicated by the entered line number, where you can enter new information or edit existing information.
Added borrowers	AB	Adds other borrowers to a patron's record; for example, a patron's child, or a faculty members assistant.
Delete	DEL	Deletes the patron record only if all outstanding transactions are cleared.
Exit	E	Exits from the screen currently displayed, and returns to the previously displayed screen.

Patron Registration Options

Option	Command	Description
File	FI	Updates the system's database with the changes or additions made during the current editing session. The *File* option must be used if you want to save changes made during an editing session.
Item list		Provides access to items currently checked out, and to items checked out and lost, as noted in the IT, ITEM, LIST options. Note, however, that not all of the update options are available from this prompt.
Line by line	L	Moves the cursor line by line, starting at the first numbered field. Use this option when you need to change more than one or two lines of the patron record.
Second screen	S	Accesses the second screen of the patron's record.
Update Barcode	UB	Provides access to a screen where the patron can have a new barcode assigned or a current barcode changed.

Checkin Item

Entering IN allows you to check in items from the checkout screen. This option is particularly useful when unwanted items are checked out for some reason. Using the IN option enables you to check in the unwanted items immediately.

You can also use IN to check in an item that was previously checked out. The IN option eliminates the need for moving back and forth between screens within the Circulation system. You can easily access the checkin screen while you are doing checkout.

Entering IN at the checkout screen prompt will produces the *Checkin* screen. The screen functions exactly the same way the *Checkin* screen functions from the *Checkin* option.

```
01:03PM                    CIRCULATION CHECKIN                    DD MMM YY

                                                      Charging Fines : Yes
 Command or Item barcode:  __
                                                      Amount: $
```

Wand or enter the barcode of the item to be checked in. The system will automatically update all related files.

This *Checkin* screen accesses the same functions as the *Checkin* screen found within the STANDARD CIRCULATION MENU option of the same name. This means all of the information in *Checkin* is applicable within the IN option of Checkout.

Note

Entering NOTE on the *Checkout* screen allows you to attach notes to items being checked out. For example, if a book has spine damage when it is being checked out, a note can be added to the item record. The note would be available at checkin to protect the patron from being charged the repair cost.

Open a note window by entering NOTE on the next line below the item that requires a note. Attaching a note to a *Checkout* item can only be done with the most recently checked out item.

```
04:11PM                    CIRCULATION CHECKOUT                  DD MMM YY

Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
Blocks : 1    Fines : $19.00      Items out : 1     Holds : 1

     ITEM                DUE

1   39999000127758      09-11-92  11:00PM
2   NOTE
        ###############################################################
        # 09-08-93 04:31PM Einstein for beginners                    #
        #                                                            #
        # This book has spine damage.                                #
        #                                                            #
        #                                                            #
        #                                                            #
        ###############################################################
```

The system automatically provides the date and time the note window
was created, and the name of the attached checkout item. This informa-
tion is provided at the first line of the window.

The note window is a free text field, which means any kind of informa-
tion can be entered. Edit and add notes by using the commands found in
Appendix B, Window Edit Commands. Exit the note window by entering
Escape E. When exiting a note window, the following message will
appear:

```
 Do you want to save changes to note (Y/N)? _
```

Enter your response. Either a Y or a N will close the note window and
return you to the Checkout screen. Answering Y, saves the note by filing
it. Answering N, deletes the note.

Notes can also be added subsequent to checkout from the *Note #* option
on the patron's item list. See the *IT, ITEM, LIST*.

Accept Fine Payment

You can accept a fine payment for the patron while checking out items by entering AP (ACCOUNTS PAYABLE), on the checkout screen.

```
02:54PM                    ACCOUNTS RECEIVABLE                  DD MMM YY
                                                                 1_CIRC9
-000043         McPherson, Sharyn E.            216-852-0909
                4754 Vista Lane
                SAN DIEGO, CA  92116

Description              Code   Invoice/Date Due.date Ret.date    Due     Paid

Scottish jests and anecdot RL    04/12/93    03/11/93 04/12/93   25.00
Scottish jests and anecdot LB    04/12/93                        25.00




                                                               ------- -------
 ** LAST SCREEN **                                              50.00    0.00

 Options:
  Dollar amount   Partial payment   Print last receipt   Backward   Forward
  ? help   Exit
```

See *Fine Payment* on page 9-8.

Next Patron Barcode

Entering new **Patron Barcode** at an item checkout prompt on the checkout screen, allows you to select another patron from the checkout screen. This procedure saves returning to the original patron ID prompt.

To use this option, enter another patron's barcode, instead of an item barcode, at the checkout prompt. The new patron barcode will cause the system to switch to that patron's record. All items subsequently checked out, will be charged against the new patron's record.

Displaying Checkout Details

Entering DT, at the patron name or barcode prompt, enables you to switch between two different checkout screen displays. The choices are:

• a detailed display of checked out items, including the item's title, or

• a simple display of checked out items.

Either of these two displays appear on the CIRCULATION CHECKOUT screen as you enter item barcodes.

Simple Display

```
04:11PM                  CIRCULATION CHECKOUT              DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 2      Holds : 1

      ITEM               DUE

  1.  01234567890        01-06-91 09:00PM
  2.  01234567341        01-02-91 11:00PM
  3.  _
```

Note the difference between the two types of displays. The detailed display screen includes the checked out item's title.

```
04:11PM                  CIRCULATION CHECKOUT              DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 0      Holds : 1

      ITEM               TITLE                            DUE

  1.  01234567890        Stages and stages to Saturn      01-06-93
                                                          09:00PM
  2.  01234567341        Command of the language          01-02-93
                                                          11:00PM
```

The system administrator/circulation supervisor can establish either the detailed or simple display as a system wide default in the CIRCULATION CONTROL TABLE (CCT), under the CONFIGURATION CODES MENU (CCCM). Each operator can change the current default display using the methods described.

Fast Add

Fast Add is available if your library has been set up to use this function.

Fast Add allows libraries to circulate materials of various formats which will never be catalogued. Enter FA at the item prompt to display the Fast Add Type screen. Select a type of material from the list. The EXISTING FAST ADDS screen appears, displaying the barcode of the piece (selected by ADVANCE). Update the temporary title field, and the Circ Code field. *File* to checkout the Fast Add piece.

Note: Fast Add Types are defined by using the FAT keyword at the ADVANCE MAIN MENU.

Entering LST   If you enter Fast Add (FA) at the Command or Item Barcode prompt on the Checkin screen, the Enter Patron Name or Barcode prompt appears. Enter LST to display any Fast Add items for the last patron accessed in Patron Registration (CPR), Checkout (COUT), etc.

Checkout Exceptions

There are a number of exception conditions that may arise when checking out items. The following are the most important:

1. Item already checked out to another patron

2. Item already checked out to current patron

3. Item is overdue

4. Item recalled

5. Checkout/renewal limits exceeded

6. Loan period changed due to holds

7. No loan period attached to the item

8. Item not catalogued or linked

9. Wrong location

10. Original port checkin

11. Expired patron record / administrative hold

12. Serial Identifier

Strategies for handling each condition are provided.

Already Checked Out to Different Patron

Occasionally, patrons ask to check out items that are already checked out. This may happen when an item was not properly checked in to the system and was reshelved. When the system detects that the item is checked out already, this message is displayed:

```
04:11PM                    CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 0      Holds : 1

       ITEM                  DUE

 1    30000007121


 The  Item "30000007121"  is checked out to (Patron Name)
  Checkin the item Y/N?
```

Alternatively, if there are special statuses attached to the item, the exception message may read:

```
 The Current Status for the item is: In Transit
 This item may NOT be checked out... Press <ENTER>:
```

In either case, <ENTER> to acknowledge the exception message and return to *Item* prompt.   The conditions which will prevent checkout of an item are controlled by the system administrator/circulation supervisor from the Item Status Control Codes *(CIS)* in the Item Control Codes Menu (CICM) under Circulation Codes Menu (CCM).

Checked Out to Current Patron

When a patron tries to check out an item that is already checked out, the transaction is treated as a renewal. The system prompts for confirmation.

```
03:48PM                       CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : 20000002004002   SMITH, AMY JOANNA
 Blocks : 1    Fines : 0.00     Items out : 3    Holds : 0

      ITEM                TITLE                                       DUE


  1. 39999000114647       Peter and the wolf, op. 67






This item is currently checked out to this patron on 12 APR 93 at 15:48
                                 Renew Item (Y/N) ?
```

Answer Y to renew. The system recalculates the due date and updates related checkout transaction records, just as in a regular checkout.

Answering N produces no changes to any conditions associated with the item and returns the cursor to the Item prompt.

Overdue Item

When a patron tries to check out an item that is overdue the system prompts for confirmation.

```
 03:41PM                    CIRCULATION CHECKOUT                    DD MMM YY

Enter Patron Name or Barcode : 20000002004002   SMITH, AMY JOANNA
Blocks : 1    Fines : 0.00     Items out : 3    Holds : 0

     ITEM                TITLE                                      DUE


 1. 39999000114647       Peter and the wolf, op. 67







This Item is OVERDUE and must be checked in. Checkin and Renew ? (Y/N) :
```

Answer Y, to checkin the item and renew. The system calculates the associated overdue charges.

Answer N to abort the transaction.

Item Recalled

Patrons may try to check out items that have been recalled. If the recall was placed by another patron, the following message is displayed:

```
The Item "(item barcode)" is checked out to (Patron name).
Checkin the item Y/N?
```

The system does not allow recalled items to be checked out to patrons other than those who placed the recalls. If the operator proceeds with the checkin the following message is displayed:

```
This item was recalled by the library. Please enter Y
to continue.
```

The operator is advised of pending action:

```
Pending Actions --> On Hold/PATRON JAMES, WILFRED
MARTIN  Phone 7545464

          Address 604 MCNARY HALL
```

Please enter Y to continue.

In the unusual case where the item was recalled by the same patron, the message that appears will depend upon how the *Item Status Control Table* (CIS) has been defined.

NOTE: See the *Circulation Management Guide* for more information about the CIS table.

If the CIS setup **enables** checkout under these conditions, this message appears:

```
This Item is currently checked out to this patron.
Renew Item? (Y/N) ___
```

If the CIS setup **disables** checkout under these conditions, the message displayed is:

```
Current status = Recalled
Renewal not allowed. Do you want to checkin?
(Y/N) : _____
```

Enter Y to checkin the recalled item. The system updates the related notice, statistics, and transaction files.

If N is entered, the cursor returns to the *Item* prompt.

Checkout/Renewal Limits Exceeded

The system allows you to set limits on the

- maximum number of items a patron can checkout at one time

- maximum number of items in a patron's possession

- maximum number of times specific items can be renewed.

If the first limit is exceeded the system displays the following message:

```
Limit of XX GEN1 items just checked out to this
patron. Continue Y/N?
```

If the second limit is exceeded the system displays the following message:

```
Too many items for this Patron Group/Circ Code.
Continue Y/N?
```

If the third limit is exceed the system displays the following message:

```
Maximum renewals for this item have been reached.
```

No override of this limit is offered.

The system administrator/circulation supervisor can establish these limits in PATRON GROUP CODES (CPGC) accessed through LOAN PERIODS MENU *(*CLPM) under the CONFIGURATION CODES MENU (CCM. In the PATRON GROUP CODES (CPGC), these limits can be set at both the Patron Type and Circulation Codes levels. See *Circulation Management Guide*.

Overriding Holds

Patrons may try to check out items that are on hold. If an item is on hold for another patron, the system displays a message.

```
 04:11PM                 CIRCULATION CHECKOUT               DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 1      Holds : 1

     ITEM                DUE
 1   30000007297




 Item "30000007297" is held for another patron.
```

The override option is no longer available.

No Loan Period

Some library materials may not be allowed to circulate: e.g., reference, periodicals, maps. In circulation setup, the loan periods for the non-circulating collections are set to zero days or hours. However, this setup may be overridden at checkout.

```
04:11PM                    CIRCULATION CHECKOUT                    DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00     Items out : 0     Holds : 1

        ITEM                  DUE

  1.   123456789



 This Item has no loan period.
 Do you wish to check out this Item? (Y/N) : _____
```

This message can also indicate that the original setup for the checkout item was incomplete. The circulation code for this item type was not attached to the patron group code.

Enter N to continue checking out other items. Enter Y to override and check out the item. The system administrator will need to complete the setup, but answering Y at this point allows the item to be checked out on this occasion. The system will prompt for additional information:

```
Please enter a use period code :
Valid entries:  (C)ontinuous, (D)ays, (H)ours, (M)inu
tes
```

Enter the unit of the new loan period. Note that both *C* and *M* mean minutes. Enter the length of the new loan period at next prompt:

```
Numeric value : 1 - 9999
Please enter use period units : _
```

The system asks for confirmation of the due date:

```
Loan period : D28       Date Due : 02 AUG 1988   Due
 Time : 09:00PM
Do you wish to override this due date? (Y/N/
(A)bort) : _
```

<ENTER> or N to use the date shown, A to abort checking the item out, or Y to repeat the above process. This process must be repeated each time items with no loan periods are checked out. To complete the setup and

prevent the `no loan periods` message from appearing, see the *Circulation Management Guide*.

System Administrator: Consult the setup procedures under the *Circulation Codes Menu (*CCM*): Loan Periods Menu (*CLPM*); Circulation Codes* (CCC); and *Patron Group Codes* (CPGC).

Item Not Catalogued

When items presented for checkout are not catalogued or have no bibliographic record, a brief bibliographic record must be created to permit an item to circulate. The creation of brief bibliographic records is called **conversion-on-the-fly**.

Conversion-on-the-fly permits in-demand items to circulate immediately, without going through the formal cataloguing process. The conversion-on-the-fly record will typically contain the item title, publisher, publication date and call number but can contain anything deemed necessary by your library.

This record is intended to provide enough information to identify the item, while limiting the amount of information you must enter at checkout. The conversion-on-the-fly item can only circulate once. When the item is checked in, a message appears on the screen stating that the item is to be sent to cataloguing. There, the item record is completed to enable the item to be circulated a second time.

When an item barcode without a bibliographic record is entered at the checkout working screen, the system will automatically display a screen for *Conversion on the Fly.*

```
                         CONVERSION ON THE FLY
                                              Item ID : 30000000011
    1) Format Type : BK
    2) Sublocation : ALII
    3) Collection  : _____
    4) Circ Code   : GEN1



                 Conversion on the fly is used to create
            brief Bibliographic and Item records.  However,
            a Bibliographic record may already exist and
            need only  be linked  to an  Item record with the
            Item ID displayed above.  Both conversion on the
            fly  and linking  can be  performed from this screen.



    Options:  _
     ? help   # Line    Search Link   Continue   Exit
```

Line #	Enables modifications of the numbered lines on the above screen.
Search Link	Enables access to the online catalogue search function and links to existing records.
Continue	Enables you to proceed with the *Conversion-on-the-Fly* function.
? help	Displays help messages provided by the system manager, if there are messages for this screen.
Exit	Stops the *Conversion-on-the-Fly* function and returns you to the previous checkout screen.

Search Link

When you enter a new barcode number at the checkout prompt, the CONVERSION ON THE FLY screen appears. If you use *Search Link* to search the Online Catalogue, you can select:

- *Retrieve* to obtain the holdings record, and create a new piece with the new barcode you entered.

- *Retrieve #* to obtain the bibliographic record, and replace the barcode with the new barcode you entered.

NOTE: See the *Online Catalogue Guide* for information about searching.

Search Link can be used when the new item is an additional copy of an existing title or when the item exists in the library but has not been linked to its MARC record (that is, when the library has not completed its conversion to ADVANCE).

The *Search Link* option can be used when *Conversion-on-the-Fly* is invoked by a new barcode. The *Search Link* process helps to prevent duplicate records. However, you may find it easier to fix duplicate records than to find incorrectly-linked Pieces records.

Continuing   When you have determined that there are no existing records available for linking, invoke the *Conversion-on-the-Fly* work screen by entering the Continue option. At least one of the fields, most often the title field, must be filled in.

```
                    CONVERSION ON THE FLY

                                       Item ID : 30000000011
  1) Format Type : BK
  2) Sublocation : ALII
  3) Collection  : _____
  4) Circ Code   : GEN1
1)  Author/editor       :
_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

2)  Title               : The coming of world crisis
_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

3)  Pub. or copyright date : 1980
_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _

4)  Call number         : FX45
_ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _ _
```

The screen or template layout for *Conversion-on-the-Fly* is customized by your cataloguing supervisor.

Cataloguing the Item   When information has been entered in each field, <ENTER> and the following options appears:

```
 Options:
  ? help    # line    Line by Line   Backward   File   Exit
```

Use the `File` command to save the temporary bibliographic record and check the item out. The system automatically returns to the checkout item prompt.

```
04:11PM                    CIRCULATION CHECKOUT                  DD MMM YY

 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 1     Holds : 1

     ITEM                 DUE

 1.  01234567890         01-06-91 09:00PM
 2.  01234567341         01-02-91 11:00PM




 Loan period : D28     Date Due : 02 JAN 1993    Due Time : 11:00PM
 Do you wish to override this due date? (Y/N/(A)bort) :  _____
```

The system will ask you to confirm the loan period for the converted item. Answer Y, N, or A to abort. The appearance of the message is dependent on definitions made in `Patron Group Codes` (CPGC) in the `Loans Period Menu` (CPLM).

Wrong Location

Items in the ADVANCE system can be designated for checkout only in specific locations. This may be done at institution, sublocation, and collection levels. For example, a special collection can be set up to allow materials to be checked out only at the terminal in the special collections room, or items in a branch library may be allowed to be checked out only at the circulation counter in that library.

When items in a given collection, sublocation, or institution are set up to be checked out only at their respective locations, and when patrons come to check out items that do not belong to that collection, sublocation, or institution, a message is displayed:

```
 *** NOT ALLOWED TO CHECKOUT FROM THIS LOCATION ***
 Checkout at: HU LIBRARY, University Campus #1
```

The second line indicates the appropriate checkout location for the item. <Enter> to acknowledge the message and return to the item prompt.

Original Port Checkin

Sometimes the library will want items returned to the original checkout location. For example, if videotapes are checked out, the library may require the patron to check in the tapes at the videotape counter. When this restriction has been used at checkout, the system will display the following message when the item is checked in at another terminal:

```
*** RETURNING TO INCORRECT PORT ***
Port Num : (current port number)
Return To : (authorized checkin ports)
```

When this message occurs, the patron must return the item to the terminal where the original checkout occurred. <ENTER> to acknowledge the message and return to the checkout function.

Expired Patron Record / Administrative hold

Each time a patron barcode is entered, the system automatically checks the patron's record. If the patron's record is expired, a message is displayed at the bottom of the Checkout screen.

```
04:11PM                    CIRCULATION CHECKOUT                    DD MMM YY
 Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
 Blocks : 1    Fines : $19.00      Items out : 0      Holds : 1

     ITEM                DUE




 This patron card expired on: 13 APR 93, and must be renewed.
Enter (P)atron update or <ENTER> to exit :
```

Any attempt to use the expired patron record will result in the following message:

```
[NO Checkout or renewal allowed]
```

Enter PATRON, to update the patron information. The PATRON REGISTRA-TION screen appears.

Update the expiration date. Enter the line number of the Expiration Date field (i.e., 10) and enter the new date.

```
                    PATRON REGISTRATION

   Patron Barcode..: 20000002003377              Last Update: 04/12/93
                                                 Last Trans.: 04/12/93
 1. Name (Last, F M): Smith, Yvonne              Registered : 04/06/93
 2. Address........: 4321 Mira Mesa Lane

 3. Zip/Postal Code.: SAN DIEGO, CA  95666
 4. Phone Number(s).: 212-777-1234
 5. Address 2.......:

 6. Zip/Postal Code.:               14. Password...: #####
 7. Personal ID.....: 7654321       15. Home Inst..: AU-ADVANCE University
 8. ID Type.........: SSN           16. Home Subl..: CAM1-Main University Li
 9. Patron Code.....: G-Graduate Stud 17. Housebound (Y/N) ? : N
10. Expiration Date.: 12 APR 1993
11. Comments.......:

12. Rte. Recipient..: N
13. Rte. Location...:
 Options:
  # line   Line by line   Added borrowers   Delete   File   Update barcode
  Second screen   Item list   Exit   ? help
```

After you have updated the expiration date, entering File will update the system's database and return you to the checkout screen.

If the patron is on administrative hold the following message displays:

```
This patron is on administrative hold. Do you wish to
override? (Y/N) :
```

The ability to override the administrative hold will depend on the author-ization level of the operator as previously defined in circulation setup, see the *Circulation Management Guide*.

Serial Identifier

The SERIAL IDENTIFIER prompt appears when you attempt to check out an item that has the Placeholder flag set to Y, on the *Holdings*

Display screen. The placeholder flag allows items that do not have barcodes to be checked out.

The primary purpose of the SERIAL IDENTIFIER function is for circulation control of serial items that have not been bound or barcoded. Your library may allow patrons to borrow the unbound issues of periodicals, but may have a policy of not barcoding individual issues of its periodicals.

Circulation control of unbound unbarcoded issues can be done by assigning temporary barcodes to individual magazines. Temporary barcodes are assigned by setting the placeholder flag to yes on a serial item's HOLDINGS DISPLAY screen. The placeholder flag is intended for use with serial items, but is applicable to any item that requires a temporary barcode.

There are two ways to take advantage of the SERIAL IDENTIFIER function. You can:

• Temporarily assign real barcodes, or,

• Allow the system to assign negative or "**N**" barcodes.

The method you use will depend upon your library's policy.

This screen is an example of a *Holdings Display* screen with field 15) Placeholder flag set to yes. Set the flag to yes by entering Y at the 15) Placeholder field.

```
                     HOLDINGS DISPLAY  Local Control Number:  10027177

 Status     : Available                              Format  : SE
 Title      : Journal of aquariculture
 Author     :
 Updated By : Master          Patron  :             Last out:
 Update Date: 04/12/93  05:18PM Due Date:            Created :3/07/92
 Inventory  :                   Due Time:            Circ Cnt:

 1) Barcode      : 39999000121070          Owning Data  : AU,ALII,,,SH151
 2) Institution  : AU = ADVANCE University 11) Pend. Action :
 3) Bldg/subloc  : ALII = Music Library    12) Circ Code    :
 4) Collection   : DOCS                    13) Statistics   :
 5) Call# Prefix :                         14) Actual Cost  : $
 6) Call Number  : SH151 .J87              15) Placeholder  : Y
 7) Copy Number  : c.1
 8) Volume\Part# :                         Current PO#  :
 9) Call#Suffix  :                         Serial Identifier: Vol. 1, iss.2
 10) Preserve not:

 Options:
  ? help   # line   Line by line   Circ usage   Print   Binding entry
  Card Print   Status   Delete   File   Exit   Additional parameters
```

Setting the Placeholder flag to Y, on non-serial items, will cause the *Serial Identifier* prompt to appear. You can use this field for special information or you can edit the *Holdings Display* screen and set the placeholder flag to no.

Temporary Real Barcodes

If your library policy requires the use of temporary real barcodes, you will need to do the following:

• Set up item records for as many temporary barcodes as a serial item may require.

• Set the Placeholder flag to yes on each of the item's *Holdings Display.*

• Set the temporary barcodes, at the circulation desk, in such a way that you can quickly obtain the barcodes during the checkout process. These barcodes will be specific to the particular serial copy set.

The number of barcodes assigned will depend on how popular the magazine is with your patrons. Infrequently-borrowed magazine copy sets

may have only one temporary barcode. At the other extreme, frequently-borrowed items may have many temporary barcodes.

The advantage of using temporary barcodes is that they can be associated with the copy set and not attached to the individual copy set items. For example, your library may assign 14 temporary barcodes to the *Equinox* magazine subscription (even though there are only six issues a year for this periodical). This large number of barcodes would be employed if there is a high circulation volume for this periodical and a number of copies of each issue.

As new issues come in, the older issues can be withdrawn from circulation. No new barcodes need to be assigned, because the temporary barcode can be assigned to any issue, old or new. The same 14 barcodes can be used for years, accommodating new issues as well as old issues.

Enter the barcode by wanding or by hand entering the barcode number. If the barcode has been already used for a checkout, the system will display a message saying that the item has been checked out. Wand your collection of temporary barcodes until you find an unused code. When you find an open barcode, the system will prompt you with the message on the *Circulation Checkout* screen.

```
12:41PM                    CIRCULATION CHECKOUT                    DD MMM YY

Enter Patron Name or Barcode : 20000002003377 Smith, Yvonne
Blocks : 1    Fines : $19.00      Items out : 0      Holds : 1


        ITEM              DUE DATE

1    39999000345362






        SERIAL IDENTIFIER: _____
```

Enter free text information about the magazine or serial item. Describe the serial item as simply and accurately as possible. A serial might be described:

```
Vol.1, Issue 2, Mar. 1991
```

The information entered at the Checkout screen's SERIAL IDENTIFIER prompt can be seen in three places within the system.

- At the SUMMARY HOLDING DISPLAY screen, under the BARCODE/ ISSUE NUMBER column.

- At the lower right on the HOLDINGS DISPLAY screen, in the Serial Identifier field.

- On the second line of an ITEM listing on the checkout screen.

- On the ITEM/TITLE listing on the checkin screen.

When the item is checked back into the library, the system automatically deletes the serial identifier. The temporary barcode will then be available for checking out other items belonging to the copy set.

At some point, your library may withdraw the serial items from temporary circulation. The serial items may then be compiled and bound into a volume and a permanent barcode attached.

System-Assigned Temporary Barcodes

If your require system-assigned temporary or negative barcodes:

- Set up HOLDINGS DISPLAY screens (holdings records) for as many temporary barcodes as required. This means creating a number of holdings records where you do not assign real barcodes. Instead, the system will create negative barcodes when you use the File command. The system automatically creates barcodes for holdings records that do not have barcodes entered at field 1, the Barcode field. The system inserts negative or "**N**" barcodes in the Barcode field (e.g., N10000983).

- Set the Placeholder flag to yes when you are setting up each of the holdings records.

- On the SUMMARY HOLDING DISPLAY two examples of serial items with negative barcodes are shown. Only serial item number one is available for checkout.

```
                     SUMMARY HOLDING DISPLAY     Local Control#: 10029903

  TITLE      :EQUINOX MAGAZINE
  CAMPUS : Acad                    LIBRARY : CAM1            COPY # : 1


  Library holds:
         vol.130:no.1001(1991:MAR)-
    Index. -vol.130:no.(1991)

  Last rec'd:  /                                          03/07/91
     BARCODE/ISSUE NUMBER                                 STATUS/DATE
     ──────────────────────────  ─────────
   1  N10000612/Vol.2, Iss.1                              In Library
   2  N10000983/Vol.1, Iss.4                              DUE: 04/08/91



     ** Last screen **
  Options:
   Retrieve #   # line   Add piece   Checkin history   ? help   Exit
```

Using a Negative Barcode

1. Enter the SEARCH on the Checkout screen.

2. Search for the serial item title you require.

3. Retrieve the serial item.

When the retrieved serial item appears on the Checkout screen, the SERIAL IDENTIFIER prompt appears. Enter free text information about the magazine or serial item. Describe the serial item as simply and accurately as possible.

```
 Vol.1, Issue 2, Mar. 1991
```

```
                    HOLDINGS DISPLAY   Local Control Number:  10029903

Status    : Checked Out                                 Format  : SE
Title     : EQUINOX MAGAZINE
Author    :
Updated By : Librarian, Master Patron  : ABBOTT, MARK RIC Last out: 03/25/91
Update Date: 03/25/91  11:16AM Due Date: 04/08/91       Created : 03/07/91
Inventory :                    Due Time: 11:00PM        Circ Cnt: 3

1) Barcode     : N10000983            Prior Locat  :
2) Institution : AU = ACADEMIC LIBRARY   11) Pend. Action :
3) Bldg/subloc : CAM1 = Academic Librar  12) Circ Code    :
4) Collection  : DOCS                    13) Statistics   :
5) Call# Prefix :                        14) Actual Cost  : $50.00
6) Call Number : gg mc
7) Copy Number : c.1                     15) Placeholder  : Y
8) Volume/Part# : vol  no                    Current PO#  : 19902
9) Call# Suffix : reading room           Serial Identifier: Vol.1,  +
10) Preserve Not:

Options:
 ? help   # line   Line by line   Circ usage   Print   Binding entry
 Status   Delete   File   Exit
```

When negative barcodes are used, the information entered at the Checkout screen's SERIAL IDENTIFIER prompt can be seen in various places within the system:

- At the SUMMARY HOLDING DISPLAY screen, under the BARCODE/ISSUE NUMBER column.

- At the lower right on the HOLDINGS DISPLAY screen, in the Serial Identifier field.

- On the second line of a checked out ITEM listing on the Circulation checkout screen.

- On the ITEM/TITLE listing on the checkin screen.

Telephone Renewal Service (PHONER)

The initial telephone service checkout screen is reached by selecting Telephone Renewals (PHONER) on the STANDARD CIRCULATION MENU. Use this function if you are renewing an item for a patron who has requested it via telephone.

```
 HH:MM                      CIRC.CHECKOUT (PHONE)               DD MMM YYYY

  Enter Patron Name or Barcode: _____
```

This function is the same as Checkout (COUT) except that:

•   Renewals are logged as renewal type *Phone*.

•   Remote renewal limits are applied (assuming that the library has set these in the Circulation Control table [CCT] and in Patron Group Codes [CPGC] or Membership Codes [CPMC]).

5

Checkin

This chapter discusses how to:

- Access the *Checkin* screen
- Search and retrieve an item from the database
- Change the checkin date and/or time for checkin session
- Activate the detailed display of all items checked in
- Reset the fine *Amount* field
- Accept payment from the patron
- Change *Charging Fines* field
- Item status query.

Start Checkin

The only required input for Checkin is the item barcode. When an item barcode is entered at the Checkin prompt, `Command or Item barcode:`, the system:

- Checks to determine whether the port (terminal) is a valid location for checking in the item. If not, the system displays the correct location for the item to be checked in.

- Checks to determine whether the incoming item is overdue. If it is, fines are assessed according to predefined rules. Meanwhile, checkout, patron block, and notice files are updated.

- Checks for hold/recall/trace. If the item is held/recalled/traced, the system alerts you by sounding a tone and displaying the item status or pending actions.

- Updates Checkin statistics and related transaction files.

- If the item has already been checked in, the item's status will be displayed.

You can also check in items by searching the system's database. See *Checkin Options* on page 5-3.

In-House Use Statistics
In-house statistics for a piece are incremented any time a piece which is not checked out is checked in. To view these statistics, select the *Circ Usage* option on the Holdings Display screen, and select `I` for In-House use.

Checkin Screen
The Checkin function can be invoked either by entering `CIN` from the Standard Circulation Menu, or from the checkout screen by entering `IN` command.

```
 02:19PM                    CIRCULATION CHECKIN                      DD MMM YY

                                                          Charging Fines : Yes
  Command or Item barcode:  __
                                                          Amount: $



```

Checkin Options

Entering a question mark (?), or HELP, displays the checkin options screens.

```
                    HELP OPTIONS FOR CHECKIN


     1) Enter the item barcode number to be checked in.

     2) Press <ENTER> to exit.

     3) Enter S to search and retrieve an item from the database.

     4) Enter CD or BDT to change the checkin date and/or time for
        all items to be processed.

     5) Enter D or DT to activate the detailed display of all items
        checked in.  Entering this command again deactivates the
        detailed display.

  Please press <ENTER> to continue :
```

```
     6) Enter R to reset the fine "Amount" to blank.

     7) Enter AP to accept payment from the patron.

      8) Enter F to change "Charging Fines" from Yes to No
         or from No to Yes.

      9) Enter FA to checkin in Fast Add items.

  Please press <ENTER> to continue:
```

Barcode   Check in items by entering their barcodes at the Command or Item
barcode: prompt. Barcodes can entered by scanning with a laser

scanner, reader, or barwand. Barcodes can also be manually entered by keying in the barcode's number.

Exiting Checkin `<ENTER>` to exit the Checkin screen when the cursor is at the `Command or Item Barcode:` prompt.

Searching `S` allows you to search the database to find items to check in. Items are selected by using the `Retrieve number` option (`R.#`).

Note that when searching the Online Catalogue (`OPAC`), you must use the `Retrieve number` (`R.#`) option to retrieve items for checking in. The `Retrieve` (`R`) option is not a valid Checkin option.

See *Online Catalogue User's Guide*.

Changing Dates and Times You can change the default Checkin date and time for the whole Checkin session by entering `CD` or `BDT` at the Checkin prompt. The default date and time is established by the system at the point of Checkin. Note that the change will remain effective until the present Checkin session is exited.

Within Checkin, `CD` means *Change Date* and `BDT` means *Back Date Time*. These can be used interchangeably. The system will not accept a date greater than today's date.

`CD` might be used to check in items returned via the Book Drop. You may need to check in these items with the previous day's date.

Displaying Item Details Entering `D` or `DT` will activate the `Detailed Display Mode`. This mode will list each item subsequently checked in. Items checked in during the current Checkin session, but before you entered this command, will not appear on the list. You can deactivate the `Detailed Display Mode` by entering this command again or exiting the session.

```
 02:19PM                    CIRCULATION CHECKIN                   DD MMM YY

Name : SMITH, BECKY - Previous charges : 115.00
                                                      Charging Fines : Yes
 Command or Item barcode:                               This session : 5.00
                                                                Amount: 5.00
 (Detailed Display Mode)

 ITEM                 TITLE
 39999000127634       Winter palace: decent into revolution




 Pending Actions —> Route to:CAM1, Return to Cataloguing
 Please enter "Y" to continue.   Y
 39999000127634 accepted.
```

Reset Amount Field
: You can reset the Amount field to zero by entering R. When R is entered, zero is represented by a blank field.

Accept Payment
: Enter AP to accept payment from the patron. This will cause the system to display the Accounts Receivable screen. See *Accounts Receivable* on page 9-1. Make a note of the patron(s) for whom you want to accept fine payments. Accounts Receivable requires you to identify the patron by name, barcode, or ID number.

Quick Fine Payment
: If your terminal allows quick fine payment, enter PAY after checking in at least one item to the patron. The QUICK FINE PAYMENT screen appears.

```
DD MMM YY            Geac ADVANCE Library System (#.##)        DEFAULT  AU
   HH:SS


                          FAST FINE PAYMENT


Patron barcode   : 29999000557788
Patron name      : SMITH, BECKY
Patron address   : 11 VISTA DRIVE





 Amount : 115.00         ("#" to quit)
```

To pay the full amount, <ENTER>. To pay a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without paying any amount.

Quick Fine   If your terminal allows quick fine waiving, enter WAIVE after checking
Waiving   in at least one item to the patron. The QUICK FINE PAYMENT screen appears.

```
DD MMM YY              Geac ADVANCE Library System (#.##)          DEFAULT  AU
   HH:SS

                             FAST FINE PAYMENT


Patron barcode   : 29999000557788
Patron name      : SMITH, BECKY
Patron address   : 11 VISTA DRIVE




 Amount : 115.00         ("#" to quit)
```

To waive the full amount, <ENTER>. To waive a partial amount instead, change the amount and then <ENTER>. The system confirms payment and then, if set to do so, prompts you for printing a receipt.

Otherwise, enter # and <ENTER> to exit without waiving any amount.

Charging Fines   Entering F changes the Charging Fines field from Yes to No or from No to Yes.

When this field shows a Yes, the system will check to see if there are fines due on each checkin item. When fines are found, the system will display an appropriate message. You can pay fines as they appear or defer the fines until a later date.

When this field shows a No, the system will check in each item and will waive any fines against the patron.

Checkin Information Messages

Messages and instructions appear at the bottom left of the CIRCULATION CHECKIN screen. The messages provide you with information about what the system is doing with an item's checkin data. The messages and instructions can appear individually, on a single line at the bottom left of the screen, or on more than one line, in combination with other messages and instructions.

Barcode Accepted

The system confirms that the item has been checked in by displaying the message, [*barcode number*] accepted. This message means that the system has recognized the barcode and has checked in the item. If you do **not** see this message, the system has **not** accepted the item as checked in.

```
01:46pm                    CIRCULATION CHECKIN                    DD MMM YY

Name : SMITH, BECKY - Previous charges : 115.00
                                              Charging Fines : Yes
Command or Item Barcode:                        This session : 5.00
                                                      Amount: 5.00




 39999000123456 accepted.
```

If there is an **overdue fine** against an item, the amount of the fine will be displayed in the Amount: $ field if the Charging Fines: field has been set to Yes.

The fine can be paid at Checkin, by using the *Accounts Payable* option, or the patron can pay the fine at Checkout.

Continue Prompt

The system provides the following *Continue* prompt if there are messages caused by the checked in items.

Please enter "Y" to continue.

Continue enables you to read the displayed message before further processing. Reading the messages is particularly important when further processes clear the screen.

If the checked in item causes no blocks when its barcode has been entered, then the *Continue* prompt will not appear. Instead, the system will display the *Barcode Accepted* message.

Overdue   When an item is overdue in addition to having other statuses attached, this message appears.

```
This Item is overdue.  Do you wish to apply this fine? (Y/N)
```

The *Barcode Accepted* message will appear below this overdue message. The money owing on each overdue fine will appear in the `Amount: $` field.

NOTE: The figure shown in the *Amount* field is not cumulative, it only represents the fine amount for the item currently being checked in. Each fine amount can be cleared, as it appears, by entering `R` at the command or `Item Barcode` prompt.

If you enter `Y` the system applies a fine to the patron's record.

If you enter `N` the system drops the fine and **does not** apply the fine to the patron's record.

Each fine, if not paid at Checkin, will be added to the patron's Accounts Receivable. Use the *AP* option to pay the fines at Checkin. Otherwise, the fines may be paid at Checkout.

Clearing   When an item requires routing, the following message appears.
Route To
```
Pending Action —> route to CAM2.
```

The system automatically determines if the checkin item requires routing by referring to the related setup tables. In the above example, a CAM2 item has been checked in at CAM1. The item will have a status of `On Route`. The routing information is: `Route to CAM2`. This information means the item is now in the library system and is being routed to the CAM2 location.

Under these conditions, you can remove the routing status by checking in the item a second time, after it has arrived at the correct sublocation within the library system. You can perform the second checkin by wanding the barcode again, or by re-entering the barcode number.

If the sublocation of the checkin terminal matches that of the item's Route-to location, the `Status` will be automatically updated to `In Library`. The system will then clear the Pending Action `Route to` status assigned at the original checkin sublocation.

On Hold   The following message appears when a checked in item has a hold attached.

```
Pending Actions --> On Hold/PATRON SMITH, AMY JOANNA  Phone
752-8228  Address OXFORD HOUSE 511

Please enter "Y" to continue.
```

Depending on your set up, an insert may be printed which can be placed into the book as it is sent to the hold shelf.

If the hold pickup location is different than the checkin location (institution and/or sublocation), then the item needs to be routed. With routing, the following message will appear:

```
Pending Actions --> Route to:Branch 5, On Hold/PATRON  SMITH,
AMY JOANNA  Phone 752-8228  Address OXFORD HOUSE 511

Please enter "Y" to continue.
```

Recalled   The following message appears when a checked in item has been recalled. If the recall also included a hold, the second message will also display.

```
This item was recalled by the library. Please enter "Y" to
continue.

Pending Actions --> On Hold/PATRON MACK, PATRICK VINSON
Phone 758-9620  Address 208 FINLEY HALL

Please enter "Y" to continue.

39999000101853 accepted.
```

Traced   The following message appears when a checked in item has had a trace placed on it. Since this indicates that the item was declared missing, the book's status needs to be updated, or a patron advised if a hold had also been placed.

```
This item will satisfy a hold or booking.
However item listed as on search.
Enter Y to proceed, clearing this condition or N to retain it
```

If you respond Y to proceed to the prompt above, the following message appears:

```
   This item will satisfy a hold or booking.
   Pending Actions --> Route to: -  , On Hold/PATRON VINSON,
   JOHN CRAIG  Phone 726-9845  Address 1420 NW WORDEN CIRCLE

   Please enter "Y" to continue.
```

If you respond N to the initial prompt above, the following message appears:

```
Item is listed as on search.  Do you want to remove the
trace ? (Y/N)
```

It is possible that the library's policies require that supervisory staff review the record before removing the missing/on search status. By responding no to the first two prompts the condition of the record remains intact pending further action.

Not In System   When an item's barcode is **not** in the system's database, the message Check Digit Program appears and means that the system has recognized the barcode as being valid but without an item record attached.

NOTE: The *Check Digit Program* checks every barcode entered. The program makes a series of calculations based on each barcode's numeric representation. These calculations can usually determine if the barcode has been issued by the system.

Common reasons for this message are:

- the barcode has been entered incorrectly,

- the item is missing from the database,

- the item may not belong to the system.

Enter the barcode again when this message appears.

```
The Item "39999000123457" is NOT in the system.
Please try again.
```

Invalid Barcode   When an item's barcode is **not** recognized (validated) by the system's check digit program, a message appears. This may occur for a number of reasons: a barcode is damaged or has deteriorated to the point where it is illegible to the barcode reader or wand; the barcode's number was keyed incorrectly. Re-enter the barcode.

```
The Item "3999900123457" has an invalid barcode.
Please try again.
```

After a number of tries, if the system will not accept the barcode, you may be obliged to provide a new barcode for the item.

Already Checked In   When a checked in item has a barcode that is identical to a barcode in the system's database, a message appears indicating that the item is not currently checked out.

```
This Item "39999000333334" is already checked in.
```

This occurs when an item has been inadvertently wanded a second time, after the item has been checked in. It can also occur when an item has missed the checkout process and the system does not know the item has left the library.

Producing Inserts

All of the following statuses provide the option of printing an insert at the point of checkin. This printout can be put into the book and used to convey processing information, e.g. as the item is placed on the hold shelf.

The system administrator/circulation supervisor can determine which conditions warrant inserts by means of the `Status Control (CIS)` or `Action Control (CIA)` codes, found in the `Item Control Codes Menu (CICM)` under the `Circulation Codes Menu (CCM)`.

Missing

When a checked in item has a missing status attached, it means the item is not in the library and has not been checked out to a patron.

```
This item was listed as missing.  Please enter "Y" to
continue.
```

Lost Item Found

An item with the status of `Lost Book` in Checkout, has been subsequently found and returned to Checkin.

If the item is overdue, as well as Lost, the system displays the message:

```
Billed as Lost - $15.00
This item is overdue. Do you wish to apply the fine (Y/N)?:
```

The dollar amount highlighted is the overdue fine, not the lost book **billed amount**. If you enter Y, the system will attach the fine to the patron's record. If you enter N, the system will waive the fine and not attach it to the patron's record.

Following the overdue message and your action, the system will then alert you about the Lost Book status:

```
Item was marked as lost by patron 20000200000000 : Smith,
Yvonne

Do you want to waive the replacement charge now ? (Y/N)
```

Entering Y removes the replacement charge and, if this was the only outstanding charge, automatically clears the patron's *Lost Book block*.

The system might be set up to automatically remove the item from the *ITEMS CHECKED OUT AND LOST* list. If the system is set up to leave the item in the list, the *Full Details* of the original checkout are still cleared.

Claimed Returned

Claimed Return status message indicates that an item, with the barcode 39999000122157, is listed by the system as still checked out to a patron with the barcode ID of 200000020008990, but that the patron has claimed that the item has been returned. This situation can occur when items have been returned to the library but have not gone through the checkin procedure.

```
02:46PM                    CIRCULATION CHECKIN                  DD MMM YY

Name : SMITH, BECKY - Previous charges : 115.00
                                                 Charging Fines: Yes
Command or Item Barcode: 39999000122157           This session : 5.00
                                                        Amount:






Item was claimed returned by patron 20000002000899.
Do you want to remove the block ? (Y/N)
```

The second line of the message enables you to remove or maintain the Claimed Returned block on this patron's record.

Entering N will maintain the block on this patron's record.

Entering Y removes the claimed returned block from the patron's record and modifies the message:

```
Item was claimed returned by patron 20000002000899.
Do you want to remove the block ? (Y/N) Y

39999000122157 accepted.
```

The message indicates that the item (barcode number 39999000122157), associated with the Claimed Returned message, has been accepted.

If the item is overdue a message appears. The amount is the overdue charge.

```
Claimed Returned - $10.00
This item is overdue. Do you wish to apply the fine (Y/N) ? :
```

Whether or not the fine is applied to the patron's record, the system prompts:

```
Item was claimed returned by patron -000043.
Do you want to remove the block ? (Y/N)
```

Entering N maintains the block on this patron's record.

Entering a Y removes the claimed returned block from the patron's record and modifies:

```
Item was claimed returned by patron -000043
Do you want to remove the block ? (Y/N) Y

39999000122157 accepted.
```

Circulation Notes
If a note was attached to an item at Checkout, the system will display this note immediately when the item's barcode is entered at Checkin.

```
02:46PM                    CIRCULATION CHECKIN                    DD MMM YY

 Name : SMITH, BECKY - Previous charges : 115.00
                                              Charging Fines: Yes
 Command or Item Barcode: 39999000122157      This session : 5.00
                                                     Amount:




*** NOTES: 04-05-91 03:20PM Intimate relations
          Spine damaged at Checkout.
          Do not charge repair costs at Checkin.
More of this note - press <RETURN> _
```

Only three lines are displayed at a time. The first line of the note has the date and time that the note was entered, along with the title of the item. <RETURN> to scroll the note up. The system does **not** save the note for re-display.

When the end of the note is reached, a message appears.

```
End of note - press <RETURN> _
```

At this point the whole note has been displayed. <RETURN> deletes the note and returns you to the Checkin prompt. The note is **not** saved by the system.

Outstanding
Charges

After checking in items to a patron who owes charges, if you then checkin an item for a different patron (at a terminal that allows quick fine payment or quick fine waiving), the system displays a reminder to pay or waive the charges for the first patron.

```
Outstanding charges of : 120.00  for previous borrower : SMITH, BECKY
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :
```

You can enter PAY to accept payment, enter WAIVE to waive an amount, or <ENTER> to continue without paying or waiving.

6

Holds, Recalls or Traces

This chapter discusses two options on the STANDARD CIRCULATION MENU:

- `Holds by Patron (HRT),` and

- `Hold Queue by Title (CHQ).`

The related functions available through these menu options are:

- Holds

  a facility for placing, editing or viewing the holds for a patron. This feature can also be accessed from within the *Checkout* (COUT) function.

- Recalls

  used to obtain the early return of a currently checked out item.

- Traces

  placed when an item has been checked in but cannot be found at its designated location in the library.

- Check the Hold Queue Status

  used to view or edit the current hold queue for a particular title.

Introduction

Holds is a facility for reserving items for a patron. Whenever an item on hold is checked in, the system displays a message and alerts the operator. The item is routed to the hold shelf and the item status is changed from *checked out* to *on hold*.

There are two types of holds:

- Title holds

When multiple copies of the same title are available from the library, and any copy will meet the patron's needs, a title hold is placed. Title holds are usually preferable to item holds because they provide the patron a greater chance of getting the requested title in a timely manner.

• Item holds

Requests for a specific copy are item holds. When only one copy of a title is held in a library, there is no real difference between item and title holds.

Recall is used to request the early return of a currently checked out item. The item is usually needed within a short period of time. A recall notice is produced and a new due date can be calculated. See *Recalls* on page 7-1.

Traces are performed for an item or title when the ADVANCE system shows the item or title has been checked in but cannot be found at its designated location in the library. The system generates a search list for staff, and alerts Checkin and Checkout staff if they encounter the item.

Placing Holds

To place a hold for a patron, enter HOLDS BY PATRON (HRT) from the STANDARD CIRCULATION MENU. The HOLDS PROCESSING screen is displayed.

```
DD MMM YYYY           Geac ADVANCE Library System (#.##)          IIIII PP
   HH:MM                        Your Library Name

                             HOLDS PROCESSING

Enter Patron Name or Barcode:
```

Scan or enter the patron barcode or enter the patron's name in whole or part to browse the patron file.   You may enter the patron's personal ID using the ID= command, however, the ID must be entered in full as it appears in the patron's record. No browse screen is offered for personal ID. Alternately, you may enter LST to access the last patron retrieved in Circulation.

For more information about browsing the patron file see *Checkout* on page 4-1

After the patron barcode has been entered or a particular patron is selected by browsing the patron file, the HOLDS PROCESSING screen is displayed. (This screen, and all subsequent hold functions, is also accessible from the Checkout [COUT] function by using the H command).

```
  DD MMM YYYY           Geac ADVANCE Library System (#.##)          IIIII PP
    HH:MM                        Your Library Name

                              HOLDS PROCESSING

 Enter Patron Name or Barcode : 20000002003377   SMITH, YVONNE


 Blocks : 0    Fines : $0.00     Items out : 2    Holds : 0


 Enter command :

 - Type in a statement to search the database
 - Type 'S' to get to the OPAC search screen
 - Type 'B' to check the patrons blocks
 - Type 'IT' or 'LIST' to view checked out items
 - Type 'P' to update the patron record
 - Type 'SH' to show the holds for this patron
 - Type '?' for a more detailed help screen
```

Holds Processing Options

At the Enter command: prompt you may enter one of the following options, or ? for a help screen.

- If you know the title on which the patron wants to place a hold, enter T= and the name of the book at the prompt. All other online catalogue search commands are also available from this prompt (e.g. A= for author, S= for subject, etc.).

- Enter S to produce the *Online Catalogue* search screen. See *Online Catalogue User's Guide.*

- Enter B to access the patron's block record. If a blocks record exists, you may accept payments, add new blocks and perform functions just as you would in Circulation Transaction Update (CTU) or Checkout (COUT).

- Enter IT, ITEM or LIST to view a list of the patron's current check-outs, and/or Lost items. You cannot perform the functions available from such a list in Checkout (COUT), (e.g. you cannot declare an item lost, nor renew it); the list in HRT is for display only.

- Enter P, or PATRON, to access the patron's registration screen. All update functions are available when the patron's record is accessed from HRT.

- Enter SH to display the current holds for this patron.

Placing Holds

Access the `Holds by Patron` (`HRT`) function and identify a patron and a title as described.

```
                    BRIEF DISPLAY
                                        Number of holdings  :  1
AUTHOR          :Tregear, Mary
TITLE           :Chinese art
SUBJECT         :Art, Chinese
SERIES          :World of art;
LANGUAGE        :ENGLISH

    Inst   Branch Loan   Collection / Call number         Status / Due date
    ------ ------ ------- -------------------------------- -----------------
 1. Univ   Main           N7340 .T73                       DUE: 04/30/93


 ** Last Screen **
Options:
 # item   Full display   Prior screen   Extend search   Search copy   Output
 Retrieve   MARC   Holds   New search   ? help   Order display
```

By selecting the *Retrieve* option the system will present the HOLD DETAIL SCREEN with bibliographic and patron data, and default hold parameters.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          IIIII PP
   HH:MM                      Your Library Name

                        HOLD DETAIL SCREEN

Author  : Tregear, Mary
Title   : Chinese art

Patron  : SNELLING, JOHN CRAIG          Id : 568625570   Bar :20000002003070
Address : 1420 NW WORDEN CIRCLE         Group : Faculty

Placed  : 15 APR 1993   16:47           Active : 15 APR 1993   16:47
Expires : 14 APR 1994   23:59

Pickup   : AU  CAM3
Scope    : ALL - ALL ITEMS IN SYSTEM    Hold code    : HCD
Circ code:                              Hold Level   : 60

Notes :

Options:
 Commit hold   Exit   Date   Pickup location   Hold level   Scope
 Copy hold   Notes   Activation info   Hold code   Second screen   ? help
```

If all information is accurate, place the hold by selecting the *Commit hold* option. This option will file a new hold, or file any changes you make to an existing hold.

NOTE: Release 5 allows a patron to have more than one hold on a title. A warning is given when a staff member is placing a subsequent hold for a patron.

```
*** Patron already has a hold on this title.

Continue (Y/N)?
```

This is not allowed when the hold is placed from OPAC (e.g. if your library has selected the patron-placed holds feature).

Holds Detail Data Fields and Options

Author and Title   These fields are retrieved from the selected bibliographic record.

Patron, Address, ID,   These descriptions are retrieved from the patron record.
   Barcode, and Group

Placed   The date and time the hold is placed. This defaults to the current date and time.

Expires   The date and time the hold expires. If the hold has not been filled by then, the system automatically cancels it. For a new hold, this field defaults to the expiry date or period defined in the `Hold Codes` (CHC) table. You can use the `Date` option to change the default date and time.

Active   The date and time the hold will be activated. The system does not attempt to fill the hold before this date and time. For a new hold, this field defaults to the date and time the hold is placed. You can use the *Activation Info* option to change the date and time, should the patron not wish the hold activated until sometime in the future. Setting this to a future date gives the hold a condition of *Pending*.

Other fields   The sample screen shows a hold which has not been filled. For holds for which an item is in transit, held, or which have lapsed or been cancelled, the Expires and Active dates are replaced by more relevant dates, e.g. the Held date or the Lapse date for items on the hold shelf. If an item has been captured, its barcode is displayed beneath the Active date field. Possible alternate date fields are:

Filled   The date and time the item was actually checked out to the patron. This remains on the record only until the system completes the background process to update all necessary files as defined by the system administrator (usually daily). See the *Circulation Management Guide* for more information on the `Output Production Menu` (OCM), `Calendar Processor` (OCP).

Routed   The date and time the item was routed to the pickup location at which the hold will be filled.

Lapses   The date and time when the hold will lapse from the hold shelf, (i.e. if the patron does not pick up the captured item). This length of time is calculated according to the library-set parameter in the `Hold Codes` (CHC) table. If no time period is set by the library (i.e., the field in the Hold Codes table is blank), the system will default to a lapse period of 7 days.

Held   The date and time the item was captured to the hold shelf.

Item   The item barcode displays when the piece is routed, held or filled.

Pickup

The Institution and Sublocation description of the place where the hold is to be picked up by the patron. When the item is checked in, the system routes the item to this location. For new holds, the default can be the patron's home institution and sublocation (as defined in the patron record). If no home institution or sublocation is defined for the patron, the port's institution and sublocation can be used (i.e., where the hold is placed). Alternatively, the default might be set to the location where the hold is captured – this displays as (`Pickup where held`) until the item is captured. The default locations are defined in `Hold Port Control` (CPH). Use the Pickup location option to change the default.

Scope

Defines what items can fulfil the hold. Use the *Scope* option to change the default. The hold scope defines the locations of copies of a title that are to be considered when filling the hold. Copies that do not fall within the scope will be ignored. Default data is defined in `Hold Port Control` (CPH).

Systemwide

If any item, from any location in the system, can satisfy the hold then the hold qualifier can be ALL, or "*". This will be the default for libraries that do not wish to use the full hold scope capabilities.

Copy specific

Item holds are treated as a special kind of hold scope, i.e. the *Scope* of the hold is that one copy. Copy specific holds are not given priority over title holds unless the Hold Level is higher. Use the *Copy hold* option to set a copy specific hold. Once the hold is committed the *Scope* field will display the item barcode.

Scope

The library can define hold scopes using codes from a table, `Quali-fier Codes` (CQUAL), set up under the CONFIGURATION CODES MENU (CCCM). Typically this would be used to apply *geographical* limits to the hold, e.g. only items belonging to *this branch*, or *this district* can satisfy the hold.

Hold Code

The Hold Code determines how long the item will remain on the hold shelf once it is captured for the patron (see lapsed holds) and which notices are required for the item. A default code might be supplied from the patron's patron group. If the group does not have a default set up, a default might be supplied from the port. Use the *Hold code* option to change the default.

Hold Level

Determines the priority for filling the hold. It can come from the Patron Type code, (Patron Type Codes (CPC), found under the LOAN PERIODS MENU [CLPM]), or be set for the location (i.e. the port) using Hold Port Control (CPH), found under the CONFIGURATION CODES MENU [CCCM]). The hold priority entered in CPC takes priority. If not defined in CPC, the value from CPH is used.

Use the *Hold level* option to set or change the hold's default priority; this can change the hold's position in the queue. Alternately, you can use the *Move hold* option at the Hold Queue Display in the Hold Queue by Title (CHQ) function to change the hold's position in the queue. This option can also change the hold's priority: the priority increases if you move the hold above a higher priority level, and decreases if you move it below a lower priority hold. See *Holds Queue by Title* on page 6-19.

Notes

Add any additional, free text, information needed to process this hold for the patron.

Copy Holds, Traces and Recalls

Use the *Copy hold* option to access the PIECES SUMMARY (HOLDS) screen to select a piece for a copy specific hold, or to place a recall, or trace on an item. This screen will also display information such as Institution, location, Circulation Code, barcode number and status.

```
                    PIECES SUMMARY (Holds)

   CAMPUS   LIBRARY  CIRC CODE  COLLECTION/CALL NUMBER       STATUS/DUE DATE
   ------   -------  ---------  ----------------------------  ---------
 1 Univ     CAM1      2 week     A/V  /SB458 .M87             DUE: 04/22/93




 ** Last Screen **
 Options:
  Retrieve #   Prior screen   Trace #   Recall #   ? help
```

Circulation Codes are shown for items that have them defined in their pieces records.

The status column can show such values as:

• On hold - on hold shelf for a patron.

• DUE: - due date for an item currently checked out.

• Recalled - items already recalled from the current borrower.

• Missing - items already on trace.

Use the *Retrieve #* option to place a copy hold. The system returns you to the HOLD DETAIL screen and shows the barcode in the Scope field:

```
 Scope  : Copy hold for 39999000101853
```

At that point you select the Commit hold option to place the copy hold.

Traces and Recalls

The actions taken by the *Trace #* and *Recall #* options will vary with the library's set up in the Hold/Recall/Trace Control Table (CHRT), found in the CONFIGURATION CODES MENU (CCCM), under the CIRCULA-TION CODES MENU (CCM). The choice is whether or not to have the

system automatically place a copy level hold following the trace or a recall of an item.

Trace   Use the *Trace #* option to place a trace on an item. This will include the item on a search list for staff, and Checkin will display a warning if the item barcode is entered or wanded.   After selecting the item to trace, the system will display:

```
Trace placed on item. Press <ENTER> to continue
```

 after <ENTER> you will either return to the HOLD DETAIL SCREEN or remain at the PIECES SUMMARY (HOLDS) screen. Prior screen returns you to the HOLD DETAIL SCREEN.

If the library has set the system to NOT automatically place a hold after a trace, the HOLD DETAIL SCREEN will show a title level hold in the *Scope* field. If you *Exit,* the system will delete the title hold, but leave the trace in effect. If you *Commit* the hold, the system will retain the title level hold for the patron.

If the library has set YES to automatically place a hold after a trace, the HOLD DETAIL SCREEN will show a copy level hold in the *Scope* field. If you *Exit*, the system will delete the copy level hold, but leave the trace in effect. If you *Commit* the hold, the system will retain the copy level hold for the patron. If a hold is placed on a traced item, checkin will provide informative messages and prompts.

Recall   Use the *Recall #* option to recall an item currently checked out. The system will generate a recall notice for the current borrower. Depending on parameters set for the patron type, the system will assign a new due date which will print out the recall notice.

If the library has set the system to **NOT** automatically place a hold after a recall, the HOLD DETAIL SCREEN will show a title level hold in the *Scope* field. If you *Exit*, the system will delete the title hold, but leave the recall in effect. If you Commit the hold, the system will retain the title level hold for the patron.

If the library has set YES to automatically place a hold after a recall, the HOLD DETAIL SCREEN will show a copy level hold in the *Scope* field. If you *Exit*, the system will delete the copy level hold, but leave the recall in effect. If you *Commit* the hold, the system will retain the copy level hold for the patron.

Checkin will alert the operator to the recall and hold.

Second Screen

From the HOLD DETAIL SCREEN you can access a *Second Screen* which shows most of the details associated with a given hold. For example, while the HOLD DETAIL SCREEN shows the **MOST** relevant dates concerning a hold, the HOLDS FULL DETAIL SCREEN shows **ALL** the dates. In addition, it is used to set, or change, some of the less commonly used *Hold* fields.

For example, if an item has been automatically recalled, the screen shows three additional display-only fields below the Filled field: Recall Item (barcode of the recalled item), Recalled (date and time the item was recalled), and Recall Due (new due date and time for the recalled item).

```
DD MMM YYYY            Geac ADVANCE Library System (#.##)          IIIII PP
    HH:MM                        Your Library Name

                          HOLDS FULL DETAIL SCREEN
 Author  : Prebble, John, 1915-
 Title   : The Highland clearances

 Patron  : SNELLING, JOHN CRAIG            Id :  568625570   Bar :20000002003070

 Placed  :  16 APR 93 13:28           At       :  AU CAM3
 Active  :  16 APR 93 13:28           Expiry   :  15 APR 94 23:59
 Captured :                           Held     :
 Lapses  :                            Filled   :
 Held item:
 Pickup  :  AU CAM3
 Scope   :  15
 Hold code:  HCD                                   Priority :   75
 Fill Rules :H         Circ code :             Autocancel : YES

 Options: _
  ? help   Prior screen   Pickup location   Fill qualifier   Autocancel
  Cancel hold
```

Prior Screen   Returns you to the Holds Details Screen

Fill Qualifier   Parameters can be set on a hold that determine which holds are filled first. These are known as *Fill Qualifiers*. By setting these you may customize the holds function to suit your library. These *Fill Qualifiers* are particularly useful in a multi-agency, or multi-library system where books from several locations could satisfy holds.

Defaults are established in `Holds Control Codes` (CHLDC), under the `Holds Control` (CHOLD) menu. Allowed values are:

- Blank: no fill qualifier.

- P: *Pickup* qualifier.

  Holds with a *P* qualifier will take priority over other holds when the current checkin location is the same as the pickup location. This is to prevent items being routed from one location to another and then back again in order to satisfy holds.

- H: *Home* qualifier.

  Holds with an *H* qualifier will take priority over other holds when the current checkin location is the same as the patron's home location. When an item is checked in, patrons belonging to the same location as the item get priority.

- F: Fast Track.

  Items of the appropriate Circulation Code will satisfy such holds preferentially. Only when there are no further Fast Track holds will such items be allowed to fill *normal* holds. There is no default setting for Fast Track holds.

Once set, the special *Fill Qualifiers* will display under the *TYPE* field in `Hold Queue` (CHQ) by Title. Note that the qualifier will not display when the hold queue status is checked from `Holds by Patron` (HRT).

Autocancel

This option is used to determine whether a hold may be considered for cancellation (as opposed to having a user-specified cancellation date). The background program which updates holds information overnight, can check to see if a given hold cannot be filled (e.g. no copies exist which can fill the hold). If the *Autocancel* flag in the individual hold record is set to `Y`, **and** if the library has opted for the *Flagged Hold Cancellation,* the system will produce a report. The library can inquire on these unfillable holds and cancel them. This report is accessed from `Flagged Hold Cancellation` (CFHC), in the `Item Control` (ICM) menu. In certain cases the library may wish to prevent certain holds from being automatically cancelled and reported by the system. In this case the *Autocancel* field may be set to no.

This option is set by an on/off toggle. Enter `A` (`Autocancel`) to change the field from *yes* to *no*, or *no* to *yes*.

Note: if a hold cannot be filled at the time of hold placement, the system will warn you, and allow you to stop placing the hold, or continue anyway. If you continue anyway, the Autocancel flag is automatically set to No.

(See the *Circulation Management Guide*, CONFIGURATION CODES MENU [CCCM], Holds Control [CHOLD] table, Holds Reports [CHLDP]control codes, to determine whether or not the system should produce such a report. See the *Circulation Management Guide*, Output Control Menu [OCM], Calendar Processor [OCP] for information on production on the flagged hold cancellation list. See the *Flagged Hold Cancellation* on page 11-60.

• Holds can be cancelled from the HOLDS FULL DETAIL SCREEN. For information about other screens which permit cancelling of one, or all holds for a title, or a patron, see *Holds by Patron* on page 6-15.

Holds by Patron

The SH command at the initial holds screen will display all current holds for the patron. From this screen you can cancel holds, display the hold queue for a particular title, and access the HOLD DETAIL SCREEN.

```
02:36PM                    HOLDS BY PATRON                      DD MMM YY

PATRON BARCODE: 20000002003377
PATRON NAME: SMITH, YVONNE                    TOTAL NUMBER OF HOLDS: 3

     TYPE CALLNO/BARCODE TITLE/AUTHOR              STATUS        ACTION
     ---- -------------- --------------------------- -------------- --------
  1. I    AU CAM2 SPECN+ Chinese art: symbols and ima+
                         Loehr, Max
           39999000121596                            Due 22 APR 93
  2. T                   Japanese gardens            - Cancelled -
                         Murphy, Wendy B.
  3. I    AU ALII SPECT+ The Japanese pottery handbook
                         Simpson, Penny
           39999000121180                            Recalled


 Options:
  Queue display #   # line   Cancel hold #   Cancel all   Exit   ? help
```

Holds by Patron Data Fields

TYPE   Displays either a T for a title level hold, or an I for an item, or copy-specific hold. If the hold is copy-specific the item barcode will display, along with the sublocation and call number.

The specific condition of the hold is displayed on the first line of the hold's display, and is set off by hyphens, e.g., - Cancelled -. These conditions are listed below. These conditions are updated, changed or removed regularly by the system's background processor. In addition, if the hold is copy-specific, or when a specific item has been captured for the hold, the current status and action of that item are displayed (e.g., the due date of a checked out item, or a recalled status). These are listed under the STATUS and ACTION columns, display without hyphens, and will be on the last line of the item's display.

STATUS/ACTION
- Blank: the hold is still active.

- – Cancelled –: the patron requested that the hold be cancelled, or a pre-set cancellation date has been reached.

- – Pending –: the hold's activation date is sometime in the future.

- – Lapsed –: the hold was filled and the item was placed on the hold shelf, but the hold lapsed because the patron never picked up the item.

- – Held –: the item has been captured to the hold shelf and is awaiting pickup by a patron.

- – Filled –: a held item has been checked out to the patron.

Note that, in place of – Held –, the library might have set the system to show different statuses such as the following:

- – Pickup by *[date]* –: the item has been captured to the hold shelf and is awaiting pickup by *this* patron.

- – Held until *[date]* –: the hold is still active; the item has been captured to the hold shelf and is awaiting pickup by *another* patron.

Holds By Patron Options

Hold Queue Display
Access the queue for a particular hold using Queue Display #. (Note that this hold queue display, accessed from HRT, differs from the hold queue display screen accessed from Hold Queue by Title (CHQ). See *Holds Queue by Title* on page 6-19).

Bibliographic data on this screen includes the LCN (Local Control Number), title, author and call number. If item specific actions have been taken the item ID will display, along with appropriate status and action codes.

PR
The priority level of the hold. The hold level determines the priority for filling the hold. It can come from the *Patron Type* code, (Patron Type Codes [CPC], found under the Loan Periods Menu [CLPM]), or be set for the location (i.e. the port) using Hold Port Control (CPH), found under the CONFIGURATION CODES MENU (CCCM). The priority level can be changed from the Hold Queue by Title (CHQ), *Move hold* function, or by changing the *Hold level* when placing the hold. (See HOLD DETAIL SCREEN).

Patron barcode, name and patron group display, along with the date/time the hold was placed, and the expiration date (if any).

```
 04:29PM                     HOLD QUEUE DISPLAY                    DD MMM YYYY

 LCN.....: 10013100                            ITEM ID: 39999000101853
 TITLE...: Japanese gardens                    STATUS.: Recalled
 AUTHOR..: Murphy, Wendy B.
 CALL NO.: AU CAM1 A/VSB+                       ACTION.:

    TYPE PR   PATRON ID       PATRON NAME          GROUP HOLD DATE EXP.DATE
    ---- --   ---------------  ----------------------------  --------- --------
 1. T   70   20000002000057  MACK, PATRICK VINSON    P1    04-15-93  04-14-94
                                                           03:21PM   11:59PM
 2. I   60   20000002003377  SMITH, YVONNE           P1    04-15-93  04-14-94
                                                           03:23PM   11:59PM
 3. I   55   20000002003070  SNELLING, JOHN CRAIG    P2    04-16-93  04-15-94
                                                           03:24PM   11:59PM
 4. T   55   20000002004852  JONES, BENJAMIN EINAR   P1    04-15-93  04-14-94
                                                           03:24PM   11:59PM



 Options:
  # line   Cancel hold #   Cancel all   Forward   Backward   Exit    ? help
```

Cancelling holds   Holds may be cancelled from this screen, or from, HOLDS BY PATRON screen. The *Cancel all* function on this screen will cancel all holds for the *title*. The *Cancel all* function on the prior screen cancels all holds for the *patron*. The *Cancel hold #* option will cancel one of the title's holds in the same manner described for patrons.

• The *Cancel hold #* cancels one of the title's/patron's holds. The system prompts:

```
 Are you sure you want to CANCEL hold for patron
 20000002003377 (Y/N)?
```

and offers a window for you to enter a cancellation note for the cancellation notice.   The *Cancel all* option cancels all of the title's/patron's holds. The system prompts:

```
Are you sure you want to cancel all holds for this
patron (or title)? (Y/N)
```

and offers a window for you to enter a note for the cancellation notice.

- Holds can also be cancelled from the Second Screen of the Hold Detail Display, i.e. the HOLD FULL DETAIL DISPLAY screen.

Hold Detail Screen

Display the HOLD DETAIL SCREEN by selecting the *#line* option. This screen can also be accessed from Hold Queue by Title (CHQ). Use this screen to place a new hold for a patron, or to display or change a patron's existing hold. The HOLD DETAIL SCREEN is displayed after a title is retrieved at the beginning of the holds process.

```
DD MMM YYYY              Geac ADVANCE Library System (#.##)          IIIII PP
   HH:MM                         Your Library Name

                           HOLD DETAIL SCREEN

Author  : Murphy, Wendy B.
Title   : Japanese gardens

Patron  : SNELLING, JOHN CRAIG          Id :  568625570   Bar :20000002003070
Address : 1420 NW WORDEN CIRCLE         Group : Faculty at

Placed  : 15 APR 1993   15:23           Active : 15 APR 1993    15:23
Expires : 14 APR 1994   23:59

Pickup   : AU  CAM3
Scope    : ALL - ALL ITEMS IN SYSTEM    Hold code    : HCD
Circ code:                              Hold Level   : 60

Notes :

Options:
 Prior screen   Date   Pickup location   Hold level   Scope   Copy hold
 Notes   Activation info   Hold code   Second screen    ? help
```

Holds Queue by Title

To check the hold queue status, select `Hold Queue by Title` (CHQ) on the STANDARD CIRCULATION MENU.

```
DD MMM YYYY            Geac ADVANCE Library System (#.##)        IIIII PP
   HH:MM                        Your Library Name

                         CHECK HOLD QUEUE STATUS


   Enter search command :
```

You may:

- select a title by entering a search command, e.g. `T=_____`, to browse and retrieve a title from a browse list. All appropriate search commands, e.g. Author, Title, Subject, etc. may be used.

- enter `S` to go to the Online Catalogue and search for a title.

- enter an item barcode. If you uniquely identify a title, e.g. by a barcode search, the system will display the HOLD QUEUE DISPLAY screen directly. If you access the queue from a search, the system will first provide a BRIEF DISPLAY. Select the *Holds*, or the *Retrieve,* option to access the HOLD QUEUE DISPLAY. (Note: authorized staff may access all associated functions from either *Retrieve*, or *Holds*, options. The *Holds* option is the one which permits patrons to access limited HOLD QUEUE DISPLAY in OPAC).

```
                        BRIEF DISPLAY
                                        Number of holdings  :  1
 AUTHOR          :Murphy, Wendy B.
                 Time-Life Books
 TITLE           :Japanese gardens
 SUBJECT         :Gardens, Japanese
 LANGUAGE        :ENGLISH

    Inst   Branch Loan    Collection / Call number          Status / Due date
    ------ ------ ------- -------------------------------- ----------------
  1. Univ   CAM1           A/V / SB458 .M87                  Recalled




  ** Last Screen **
 Options:
  # item   Full display   Prior screen   Extend search   Search copy   Output
  Retrieve   MARC   Holds   New search   ? help   Order display
```

```
 15:32                    HOLD QUEUE DISPLAY DD MMM 1993

 LCN.....: 10013100            No. of holds : 4          No. of pieces : 1
 TITLE...: Japanese gardens
 AUTHOR..: Murphy, Wendy B.

    TYPE PR   HOLD ITEM/TYPE  PATRON ID / NAME        GROUP HOLD DATE EXP.DATE
    ---- --   --------------- ---------------------------- --------- --------
 1. H   70   Title Hold      20000002000057          P1    04-15-93  04-14-94
  ALL                        MACK, PATRICK VINSON           15:21     23:59
 2. H   70   Title Hold      20000002004852          P1    04-15-93  04-14-94
  CAM1                       JONES, BENJAMIN EINAR          15:24     23:59
 3. H   65   39999000101853  20000002003377          P1    04-16-93  04-15-94
  CAM2                       SMITH, YVONNE                  11:29     23:59
 4. H   60   39999000101853  20000002003070          P2    04-15-93  04-14-94
  ALL                        SNELLING, JOHN CRAIG           15:23     23:59
    *** End of list
 Options:
  Backward   Forward   Prior screen   New search   ? help   Move hold
  # line
```

No of Holds/Pieces	The total number of holds and pieces for the title are shown at the top of the screen.
TYPE	Displays an H, if this is a hold, or B if this item has been booked for a future date thought the *Materials Booking* module.

PR	Displays the priority level of the hold. The hold level determines the priority for filling the hold. It can come from the *Patron Type* code, (`Patron Type Codes` [CPC], found under the `Loan Periods Menu` [CLPM]), or be set for the location (i.e. the port) using `Hold Port Control` (CPH), found under the CONFIGURATION CODES MENU (CCCM). The hold priority entered in CPC takes priority. If not defined in CPC, the value from CPH is used.
Move hold	Moves a hold up or down the queue. This option can change the hold's priority: the priority increases if you move the hold above a higher priority level, and decreases if you move it below a lower priority hold. When you move a hold from one position to another in the queue, its priority and its Activation Date and Time are changed to reflect its new position in the queue.
PATRON ID/NAME GROUP	The patron's barcode, name, and patron group code are displayed.
HOLD DATE/EXP.DATE	The date the hold was placed, and its expiration date, if any, are displayed.
line #	This option causes the HOLD DETAIL SCREEN to display. All functions described for the HOLD DETAIL SCREEN and Second Screen can be performed from this function. A patron's hold can be cancelled from the Second Screen display.

Hold Fill Sequence

Since there may be several holds on the same title/item, when an item is checked in, the system must decide which patron's hold to fill.

In general, holds that are higher in the HOLD QUEUE DISPLAY are filled before holds that are lower in the queue. When you place a hold, the system inserts it into the queue as follows:

- a higher priority hold is placed above lower priority holds

- a new hold is placed below older holds of the same priority. (See *Holds by Patron* on page 6-15, and *Holds Queue by Title* on page 6-19, for more information on where priority defaults are established)

You can use the *Move hold* option in either of these functions to move holds higher or lower in the queue, or change the hold level (priority) at the time the hold is placed. This will cause their priority level to change accordingly.

Holds may be filled out of queue sequence in these situations:

- If the Scope of the hold is such that the piece being checked in does not fall within the scope

- The action of the Fill Qualifier causes another hold to take priority.

- The activation dates have been adjusted. For holds of equal priority, those with the earlier activation date or time will take priority.

7

Recalls

Recalls are used to inform patrons that checked out item(s) are needed by other patrons. Items may also be recalled for library purposes such as repair or course reserve. Recalls may be placed only on items, titles are not recalled. Only items checked out can be recalled.

ADVANCE offers two methods for placing a recall:

- Directly invoke a recall on an item by entering CREL from the STANDARD CIRCULATION MENU. This recall is placed by the library rather than by, or for, a specific patron as is done by Holds, Recalls or Traces (HRT).

- Invoke a recall indirectly while placing a hold on an item. Indirect recall is done by entering Holds, Recalls or Traces (HRT) on the STANDARD CIRCULATION MENU. This function is also accessible from Checkout (COUT), by the *hold* option.

Direct Recalls

When recalling an item directly, enter CREL from the STANDARD CIRCU-
LATION MENU.

```
DD MMM YYYY        Geac - Library Division - ADVANCE (#.##)        iiiii  pp
   HH:MM                        Your Library Name


                         RECALL CHECKED OUT ITEMS

                                                                  NEW DUE
       BARCODE               TITLE                                DATE/TIME
    _____        _____      _____
  1)  _____
```

Two options are available:

1. Scan or manually enter the item barcode.

2. Use the *search* option to access the *Online Catalogue* to find the
   item.

Entering Barcode

When an item barcode is entered, the RECALL CHECKED OUT ITEMS
screen is displayed.

```
  DD MMM 19YY           Geac ADVANCE Library System (#.##)          IIIII  PP
    17:03                        Your Library Name


                         RECALL CHECKED OUT ITEMS

                                                     CHECKOUT   NEW DUE
       BARCODE               TITLE                   DATE/TIME DATE/TIME
    ---------------  -----------------------------------  --------- ---------
  1) 39999000108147  Correspondence of King James VI. of  04/13/93  04/18/93
                                                          05:02PM   11:59PM
```

The barcode, title and current checkout date/time are displayed. The NEW DUE DATE/TIME column highlights the item's new due date. The new date is set by the system using default information based on the patron group circulation codes. If you require the item at a time that is different (either earlier or later) than the date assigned by the system, you can enter the new date in the highlighted area. Use the same date format as the original date.

After you have decided on the date, <ENTER> moves the highlighting to the time field. Alter the time in the same way as the date was altered.

Use this option with *Reserve Book Room* items or any items with a shorter checkout time than the default recall (usually less than seven days).

Exceptions
- If you enter a barcode, or search for an item that is in the library, the system will prompt:

```
*** 39999000100651 has not been checked out.
```

An item not checked out cannot be recalled.

- If you enter a barcode, or search for an item already on recall, the system will prompt:

```
*** Item 39999000104153 has already been recalled.
```

Search Item

To search the database for an item to be recalled, use SEARCH at the barcode prompt.

See *Holds, Recalls or Traces* on page 6-1 for information on recalling items for particular patrons.

8

Renewals

Renewals extend the time a patron has for using an item. Renewals are usually executed on or before the due date of the patron's item.

Renewals are accessed from the CHECKOUT screen by entering COUT from the STANDARD CIRCULATION MENU.

Starting Renewals

To renew an item, you must follow the same preliminary procedures as for checking out items. Enter the patron ID, barcode, or name. For example, if Smith, Yvonne is entered at the patron prompt, the CIRCULATION CHECKOUT screen appears

```
HH:MM                    CIRCULATION CHECKOUT                    DD MMM YYYY

 Enter Patron name or ID : 20000002003377 Smith, Yvonne

 #        ITEM          TITLE                         DUE DATE

 1
```

There are two ways to renew items for a patron.

• Enter the item's barcode at the Item prompt.

• Enter ITEM at the Item Barcode prompt to see a list of all items checked out to the patron.

Renew with Item Barcode

Enter the item's barcode at the Item prompt. If the patron has this item checked out already, and the item is not overdue, the system displays a message.

```
14:24           CIRCULATION CHECKOUT DD MMM YYYY
Enter Patron name or ID : 20000002003377 Smith, Yvonne

# ITEM                   TITLE                                        DUE
DATE
1  39999000127634        Gross yields for even aged stands of Dou     08-
24-92

04:00PM
2. 39999000110879


This Item is currently checked out to this patron. Renew Item? Y/N/yes to All :
```

Enter Y to confirm the renewal of the item. The system displays the new due date, just as in a regular checkout transaction.

Enter N, if you are not renewing the item.

Enter A to confirm the renewal of this item and suppress this message for the remainder of the patron's renewals.

Repeat either process until all items are renewed.

Renew with Renew Option

To renew using the *Renew* option, enter ITEM at the item barcode prompt to see all items checked out to the patron.

```
 04:09PM                     CIRCULATION CHECKOUT                      DD MMM YY


 Enter Patron name or barcode : 29999000461152  Collins, Betsy E.


ITEMS CHECKED OUT by Collins, Betsy E.                          1 of 1 displayed
Num  Call number          Notices  Title                              Date due
--------------------------------------------------------------------------------
1)  CAM3 PN6178.S4 S4              Scottish jests and anecdotes        13 APR 93
                                0  Chambers, Robert, 1802-1871, e         17:01








 Options:
  Note #   ? help   # line   Renew line(s)#   Renew all   Claim return #
  Lost item #   Backward   Forward   Print   Exit   Full details #
```

Use the *Renew line(s) #* or the *Renew all* command. Any checkout notes associated with the item(s) will be displayed on renewal. The note is also preserved by the renewal. Notes will display:

RENEWAL NOTES: 04-10-93 09:58AM Scottish jests and anecdotes

               Notify patron of mail returned

End of note - press <RETURN>

Renew Overdue Item

```
   04:35PM                    CIRCULATION CHECKOUT                   DD MMM YY

  Enter Patron name or barcode : 20000002001234  Ackerman, Susan


 ITEMS CHECKED OUT by Ackerman, Susan                      2 of 2 displayed
 Num  Call number           Notices  Title                        Date due
 ----------------------------------------------------------------------------
 1)  PUB MAIN Z99 .B12           Canadian History            *DUE* R12 FEB 93
                             1  Smith, James                           23:00
 2)  PUB TL787 .F5 1983          The First 25 years in space :      R10 MAY 93
                             0  Needell, Allan A.                    *N*23:00


     Select Forward for display of lost items
  Options:
   Note #   ? help   # line   Renew lines(s)#   Renew all   Claim return #
   Lost item #   Backward   Forward   Print   Exit   Full details #
```

If an item is marked *DUE* next to its *Date due*, it is overdue. If it is selected for renewal, this message appears:

```
This Item is OVERDUE and must be checked in. Checkin and
Renew? (Y/N):
```

If the item is overdue and has a hold on it, the following message appears instead:

```
This Item is OVERDUE and HELD. Checkin and Renew? (Y/N):
```

Answer Y to checkin the item and renew it. The system will calculate associated overdue charges.

Answer N to abort the transaction, leaving the item overdue with the original due date.

Maximum Renewal Limits

The system will allow the library to set the maximum number of times that specific items can be renewed.

If the limit is exceeded the system displays the message:

```
Maximum renewals for this item have been reached.
```

The system administrator/circulation supervisor can establish this limit in Patron Group Codes (CPGC) which is accessed through Loan

Periods Menu (CLPM) under the *Configuration Codes Menu* (CCM). In the Patron Group Codes (CPGC), this limit can be set at both the *Patron Type* and *Circulation Codes* levels. See *Circulation Management Guide*.

Renew Item On Hold

If you attempt to renew an item that has an outstanding hold, the system displays the message:

```
Item 39999000101492 is due 10 FEB 2000 20:55
- renewal count : 1 (Max : 3)

This item is on hold. Renew (Y/N) or H to show holds:
```

You can enter H to display the HOLD QUEUE DISPLAY screen, or enter Y to renew the item even though there is a hold on it (leaving the hold queue as is), or enter N to checkin the item (and fill the hold or not, as you indicate).

9

Accounts Receivable

This chapter discusses the ADVANCE system's online control of patron fines and the money collected using the `Accounts Receivable` functions. The system tracks all of the fines attached to a specific patron and provides access to an online cash register system for accepting payment and to control funds at the circulation desk. Instructions for opening and closing of the online cash registers are also described.

Accessing

To access Accounts Receivable functions, select `Accounts Receiv-able` (CAR) from the `Patron Control Menu` (PCM), which is available from the GENERAL CIRCULATION MENU (GCM).

```
DD MMM YYYY        Geac - Library Division - ADVANCE (#.##)        IIIII  PP
   HH:MM                      Your Library Name

                      PATRON CONTROL MENU


                    1. CPR    Patron Registration

                    2. CTU    Transaction Update

                    3. CAR    Accounts Receivable

                    4. CPSS   Patron Second Screen Definition


        Enter  the  number  of  your  selection  and press <ENTER>
                  or   ?    followed by  <ENTER>  for Help.
               Press <ENTER>  to  return to  previous level: _
```

You can also access the ACCOUNTS RECEIVABLE screen by selecting the *Accept payment* option on the Patron Blocks screens of Transaction Update, Patron Registration, and Checkout.

Online Cash Register

Before handling a patrons accounts receivable, you must open an online cash register. The cash register must be assigned to your port in order to access the ACCOUNTS RECEIVABLE screen. If you do not open the correct register the system will return you to the Patron Control Menu.

Open a Register

Selecting `Accounts Receivable (CAR)` on the `Patrol Control Menu` produces the ACCOUNTS RECEIVABLE screen.

```
HH:MM                      ACCOUNTS RECEIVABLE              DD MMM YY
                                                            4_CIRCO


   Enter patron name or barcode :  _____

     To open/close the cash register type : OPEN or CLOSE
```

1. Enter OPEN at the barcode prompt.

2. The OPEN/CLOSE REGISTERS screen appears.

```
                       OPEN/CLOSE REGISTERS

                       Open/Close    $      $      $      $      $
  Status   Register    Date   Time  Open   Cash   Check  Waived Other
  ------------------------------------------------------------------------
  OPEN     CIRC0       03/31/93 11:51 100.00 735.46 13.33  3216.15 0.00

  OPEN     CIRC1       03/17/93 01:20 100.00 113.18 56.20  0.00   0.00

  CLOSED   CIRC9       04/07/93 11:25        3900.00 0.00  0.00   0.00








  Options:
   ? help   Open   Close   Reports   Backward   Forward   Exit
```

3. Select the *Open* option.

4. Enter register name (i.e., CIRC1) or end the register opening process by <ENTER>.

5. Enter opening balance of the funds in the till.

6. You will be prompted with a message similar to the following:

```
Opening balance = 85.00
Do you still wish to open register CIRC0? (Y/N) : __
```

   Enter Y or N.

7. The OPEN/CLOSE REGISTER screen re-appears. Command options and the register(s) with its (their) Status listed as OPEN are displayed. Enter Exit if you are ready to collect fines.

Close a Register

To close an online cash register, begin at the same ACCOUNTS RECEIV-ABLE screen where you started the cash register opening process.

1. Enter CLOSE on the first line of the ACCOUNTS RECEIVABLE screen.

```
                     OPEN/CLOSE REGISTERS

                    Open/Close    $       $       $       $       $
  Status   Register    Date   Time   Open    Cash    Check   Waived  Other
  ----------------------------------------------------------------------------
  OPEN     CIRC0     03/31/92  11:51  100.00  735.46  13.33   3216.15 0.00

  OPEN     CIRC1     03/17/93  01:20  100.00  113.18  56.20   0.00    0.00

  CLOSED   CIRC9     04/07/93  11:25          3900.00 0.00    0.00    0.00
                     04/14/93  04:54  0.00




  Options:
   ? help   Open   Close   Reports   Backward   Forward   Exit
```

2. Select *Close*. A message similar to the following will be displayed.

```
 Current register = CIRC0
 Enter register name or <ENTER> to exit : _
```

3. Enter register name (i.e., CIRC0) or end the register closing process by <ENTER>.

4. Enter a closing balance or accept the Default = 25.00 by <ENTER>.

5. The system prompts:

```
 Opening  balance = 85.00
 Do you wish to close register CIRC0? (Y/N) :  __
```

Enter Y or N.

6.   The system displays the CLOSED REGISTER REPORTS screen. You
     may select one of three printouts.

```
                  CLOSED REGISTER REPORTS


        1) Print Bank Deposit Attachment

        2) Print Brief Transaction Summary

        3) Print Detailed Transaction Summary




Options:
 ? help   # line   Exit
```

7.   Select a report by using the *# line* option; a message appears:

```
Print to:  (1) Library system printer, (2) Auxiliary printer
 :  __
Enter 1 or 2 as you require.
```

8.   When the command options re-appear, select Exit to return to the
     previous screen. Select Exit twice more to return to the PATRON
     CONTROL MENU.

Fine Payment

After opening a register, use *Exit* to move back to the ACCOUNTS RECEIV-ABLE screen. At this point, the ADVANCE system accepts fine payments using the following steps.

1. Enter patron's name, barcode, or personal ID (ID=*personal ID*), or enter LST (to access the last patron retrieved in Circulation) at the prompt. The ACCOUNTS RECEIVABLE screen appears.

```
04:59PM                      ACCOUNTS RECEIVABLE                 DD MMM YY
                                                                  2_CIRC9
29999000112436   Smith, Yvonne E.              609-826-9876
                 5476 Ridgewood St.
                 Oakland, CA  94116

Description              Code  Invoice/Date Due.date Ret.date   Due    Paid

Scottish jests and anecdot RL   04/13/93    04/04/93 04/13/93  10.00
Invoice Production Charge  PRO   04/14/93                       2.00
French chansons and dances LB   04/14/93    04/09/93           25.00
McLoughlin and old Oregon  DM   04/14/93                       15.00
Correspondence of King Jam LB   04/14/93    04/12/93           25.00


------- -------
 ** LAST SCREEN **                                            77.00   0.00

 Options:
  Dollar amount   Partial payment   Account history   Backward   Forward
   ? help    Exit
```

You can also access the ACCOUNTS RECEIVABLE screen by selecting the *Accept payment* option on the Patron Blocks screens of Transaction Update, Patron Registration, and Checkout.

2. Select Dollar amount and the system prompts you to enter amount of payment:

If you enter an amount less than the full balance owed the system will apply that to the first (and oldest) item(s) listed, up to the amount of the payment. The *Partial payment* option allows you to apply a payment to a specific item, even if it is not the oldest outstanding obligation. This method is described in, *Partial Fine Payment*.

3. A PAYMENT METHODS screen will appear on the lower portion of the
    ACCOUNTS RECEIVABLE screen.

```
 04:59PM                    ACCOUNTS RECEIVABLE                 DD MMM YY
                                                                  2_CIRC9
 29999000112436   Smith, Yvonne E.               609-826-9876
                  5476 Ridgewood St.
                  Oakland, CA  94116

 Description                  Code   Invoice/Date Due.date Ret.date    Due    Paid

                           PAYMENT METHODS

              1) CASH
              2) CHECK
              3) DCARD
              4) TCHECK
              5) WAIVE


 Enter payment methods or (E)xit :
       Use a , to separate each different payment type.
```

4. Enter payment method (cash, check, debit card, traveller's check, or
    waive) at the prompt by typing the option number (i.e.; CASH or
    DCARD). You may accept more than one type of payment by entering
    the options separated by a comma (e.g.1,2 for a payment partially in
    cash and partially by check).

5. Enter the amount tendered. The payment method will also be indi-
    cated at the prompt, as in the following example for (CASH).

    ```
    Enter amount tendered (CASH) :   _____
    ```

    If more than one payment type was specified the system will prompt
    for each type until the total payment is entered. If the full amount is
    not entered the system will prompt:

    ```
    Full payment is required. Enter (R)eenter or
    (E)xit:
    ```

6. Once the full amount is entered the system prompts:

    ```
    Do you wish to process this transaction? (Y/N) : _
    ```

7. Enter Y for yes to complete the payment. You will be returned to the first ACCOUNTS RECEIVABLE screen with the outstanding balance changed to reflect the payment just made.

8. Select *Print* last receipt, to print a receipt for the patron.

Partial Payment

The ADVANCE Circulation system allows you to accept partial payment of a patron's outstanding fines. This means a patron can pay a portion of the amounts owing on each item, or complete payment on selected items. You may also use this feature to waive selected fines/charges.

1. Follow steps 1 and 2 described in *Fine Payment* on page 9-8. The ACCOUNTS RECEIVABLE screen appears.

2. Select the *Partial payment* option.

3. Enter one or more *payment methods* from the list presented on the screen. If using more than one method, separate the methods with a comma. When the methods are entered, the screen ACCOUNTS RECEIVABLE appears.

```
05:59PM                    ACCOUNTS RECEIVABLE                  DD MMM YY
                                                                 2_CIRC9
29999000112436   Smith, Yvonne E.            609-826-9876
                 5476 Ridgewood St.
                 Oakland, CA  94116


Description              Code  Invoice/Date Due.date Ret.date   Due    Paid

Scottish jests and anecdot RL    04/13/93    04/04/93 04/13/93  92.00
Invoice Production Charge  PRO   04/14/93                        2.00
French chansons and dances LB    04/14/93                       25.00
McLoughlin and old Oregon  DM    04/14/93                       15.00
Correspondence of King Jam LB    04/14/93                       25.00


                                                             ------- -------
 ** LAST SCREEN **                                           159.00    0.00

     <SPACE>  Exit         (.)  Back          $  Amount of Payment
     <ENTER>  Forward      (=)  Full Payment
               Please press <ENTER> after each selection.
```

4. The cursor appears to the right of the first fine. There are special command options available under the *** LAST SCREEN *** line. The options are:

   • <SPACE> Exit

   Entering a space, exits the current line.

- <ENTER> Forward

  <ENTER> key moves the cursor to the next line. This will allow you to select the item on which you wish to make full or partial payment/waive.

- (.) Back

  Entering a period (.) moves the cursor to the previous line.

- (=) Full Payment

  Entering an equal sign (=) will indicate to the system that you have changed your mind and want to make a full payment.

- $ Amount of Payment

  Enter the dollar amount of the partial payment. In the example, the five dollar (5.00) partial payment could have been entered in one of the following formats: -5, 5, 5.0, 5.00, or $5.00. The dollar sign ($) is not necessary.

5. Enter amount of *Partial Payment* for each fine.

6. After entering a partial amount for each item, press SPACE BAR and <ENTER> to *Exit.*

7. Enter amount of payment (i.e., 20.00). The system prompts:

   ```
   Do you wish to process this transaction? (Y/N): _
   ```

   Enter Y, to process the payment.

   Enter N, to stop the payment processes.

8. Print a receipt by selecting the *Print last receipt.*

   If the payment method selected was *Waive*, the system requires a *Waive* comment before prompting:
   ```
   Do you wish to process this transaction? (Y/N): _
   ```

   Though the waive comment is required, you may override by entering spaces, followed by <ENTER>.

Account History

You can view the full accounting history for the patron.

1. Follow steps 1 and 2 described in *Fine Payment* on page 9-8. The ACCOUNTS RECEIVABLE screen appears.

2. Select the *Account history* option. The screen that appears lists the most recent transactions first.

```
09:46am                    ACCOUNTS RECEIVABLE                    DD MMM YY
                                                                  25_CIRC0
29999000557788  SMITH, BECKY                        555-4163
                11 VISTA DRIVE


 Description        Code   Invoice/Date Due.date Ret.date Amount   Paid    Owing

 28  Water dama+  DM     117410000022                    15.00           15.00
 29  Notice Pro+  PRO    117410000022                     2.00            2.00
 30  Database m+  RL     117410000022 07/06/99 11/23/99  25.00           25.00
 31  My garden +  RL     117410000022 07/01/99 02/16/00  25.00           25.00
 32  My garden +  RL     02/22/00     07/01/99 02/22/00  25.00           25.00




                                                        ------- ------- -------
 ** LAST SCREEN **                                      498.64  373.64  125.00

 Options:
  Backward   ? help   Exit   # line
```

3. For details about a transaction, enter a line number.

```
 09:46am                    ACCOUNTS RECEIVABLE                   DD MMM YY
                                                                   25_CIRC0
 29999000557788  SMITH, BECKY                        555-4163
                 11 VISTA DRIVE

 Bill : 19    Date created : 25 MAY 99    Invoice :


 Status : Paid      Item/Desc : 39999000112339
 Title  : The Gourman report : a rating of undergraduate programs in American an+
 Issued : 20 MAY 99  Due : 23 MAY 99 : 17:00

      Date/Time        Charge    Paid     Type    Owing   Receipt No.
    ---------------    -------   -------   -------  -------  -----------
  -  25 MAY 99 14:38    1.50      0.00       14     1.50
  1  25 MAY 99 15:07              1.50     CASH     0.00  19_CIRC0.1




 Press <ENTER> to continue :
```

10

Reserve Book Room

The Reserve Book Room function (RBR) allows the library to set aside a group of items out of general circulation.

This chapter provides directions on:

- What details you should know before using the RBR option.

- How to enter information about instructors who want to use the RBR and how to enter information about the courses for which the instructor requires items to be held in reserve.

- How to link titles to RBR Course/Instructor records.

- How to remove titles from RBR Course/Instructor records.

Preparing To Use RBR

Adding Items to RBR

When the items are assembled or a picking list has been created, use `CRLM — Move Items into RBR` to link and move them into the RBR.

Removing Items from RBR

Select `CRUM — Move Items out of RBR` to remove items temporarily from the *Reserve Book Room*. Unlink the item by entering the RBR location, the course and the barcode. The item displays on the RBR Course Processing screen with a status of *Off*. At a future date, the item can be re-linked to RBR using CRLM. To withdraw the item completely from RBR, use the *Delete* option from the ITEM MAINTENANCE screen.

Accessing RBR

Starting RBR

To initiate the `Reserve Book Room` (RBR) function, enter:

1. `CIRC` to access the CIRCULATION MASTER MENU.

2. Select the `RBR Circulation` Menu.

Reserve Book Room Menu

The RESERVE BOOK ROOM MENU provides access to Reserve Setup
Menu (CRSM), Reserve Processing Main Menu (CREM), Move
Items into RBR (CRLM), and Move Items out of RBR (CRUM).

The Reserve Book Room Reports are available on the CIRCULATION
REPORTS MENU (CCR).

```
DD MMM YYYY         Geac ADVANCE Library System (#.##)        DEFAULT  AU
   09:54                     Your Library Name

                        RESERVE BOOK ROOM MENU


                  1. CRSM  Reserve Setup Menu

                  2. CREM  Reserve Processing Main Menu

                  3. CRLM  Move Items into RBR

                  4. CRUM  Move Items out of RBR




          Enter the number of your selection and press <ENTER>
                  or  ?  followed by <ENTER> for Help.
             Press <ENTER> to return to previous level :
```

Reserve Setup Menu

Enter CRSM to select the Circulation Reserve Setup Menu from the Reserve Book Room Menu. This menu provides functions with which you create temporary RBR location codes, and create and maintain course and instructor records. The third and fourth options are utilities to build, and verify, the indexes between RBR instructors, courses and titles. The final option provides reports of items to be placed on, or removed from, Reserve.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          IIIII  PP
   HH:MM                      Your Library Name


                     CIRCULATION RESERVE SETUP MENU


              1. CRLC    Temporary Location Codes

              2. CRBNI   Add a new Instructor record

              3. CRBNC   Add a new Course record

              4. CRBI    Rebuild RBR indexes

              5. CRBC    Check RBR file consistency


        Enter the number of your selection and press <ENTER>
               or  ?  followed by <ENTER> for Help.
            Press <ENTER> to return to previous level :
```

Temporary Location Codes

Libraries may define a number of temporary location codes for each reserve collection, based upon the location of the Reserve Material. The example TEMPORARY LOCATION CODES screen displays a sample browse list of RBR locations and their temporary location codes. Other locations can be added as necessary by using the *Add* command. Any number of temporary location codes can be assigned.

```
                    TEMPORARY LOCATION CODES

     Number of records : 4
     Code           Description of code
     -------------  ------------------------------------------------
  1. CAM1RBR        CAM1 Reserve Reading Room
  2. CAM2RBR        CAM2 Reserve Reading Room
  3. CAM3RBR        CAM3 Reserve Reading Room
  4. ENG1RBR        ENG1 Reserve Reading Room










 Options:
  ? help   Add item   # line   Print   Forward   Backward   Search jump
  Exit
```

Location Code Setup Table

Choosing one of the codes from the browse list displays the setup screen for that code.

```
                    TEMPORARY LOCATION CODES

        TEMPORARY LOCATION CODE : CAM1RBR
        -------------------------------------------------------------------
    1. Description                  : 24 HOUR ITEMS
    2. New Institution              : AU = University of Alameda
    3. New Sublocation              : CAM1 = Main University Library
    4. New Collection               : RBR = Reserve Book Room
    5. New Call Number Prefixes     :
    6. New Call Number Suffix       : ON RESERVE



   Options:
    ? help   # line   Line by line   Copy   Print   Delete   Exit
```

Line 1   Lists a description of the location code.

Line 2   Allows entry for another institution's code (see *Circulation Codes*,
                        Circulation `Holding Set-up Menu [CHSM]`). Circulation Codes
                        are explained in greater detail in the *ADVANCE Circulation Management
                        Guide*.

                        This field is used if the material being placed on reserve belongs to a
                        different institution.

Line 3   Lists the new sublocation code for items moved from one location to
                        another, within an institution.

Line 4   Indicates the new collection within a location, commonly RBR.

Line 5   Allows reassignment of the call number prefix.

Line 6   Allows reassignment of call number suffix.

Instructor Record Entry

By selecting `Add a new Instructor record (CRBNI)`, from the `Reserve Setup Menu (CRSM)`, the system displays the RBR INSTRUCTOR RECORD MAINTENANCE screen:

```
  12:26PM                RBR Instructor Record Maintenance           DD MMM YY


   Instructor Id  :

    1.  Surname      :
    2.  Forename     :
    3.  Middle Initial :
    4.  Generation   :
    5.  Honorific    :
    6.  Department   :
    7.  Phone no.    :                              Creation :
    8.  Extension    :                              Last Updated  :
    9.  Email address  :
   10.  Notes        :
        Courses      :




  Enter an ID code for the instructor (RETURN for default) :
```

Instructor Record Fields

Instructor ID: Enter a unique ID for the instructor. This alpha/numeric field is used to search for instructor records. In addition, the instructor's name is indexed for searching purposes. If you do not assign an ID, the system will default to a sequential Instructor ID number beginning with 1. Though you are able to browse these IDs, these system assigned defaults will not have significance to patrons or staff. This field has a limit of 188 characters but only 7 display in a browse search.

The Instructor ID will remain at the bottom of the screen, just above the option line for the field being currently edited, until the record is completed and ready to be filed. If it has been entered incorrectly the record can be exited.

Surname: Enter the instructor's last name.

Forename:	Enter the instructor's first name.
Middle Initial:	Enter the instructor's middle initial. (optional)
	The surname, first name, and initial will be used to create an index entry for Instructor name searches.
Generation:	Enter a generation, e.g. 3rd, or Jr. (optional)
Honorific:	Enter the Instructor's Title. (optional)
Department:	Enter the name of the instructor's department. When the instructor's ID is added to the course record, this department name will be a default entered into the course record.
Phone no.:	A free text field for the instructor's departmental, or university, telephone number.
Extension:	A free text field for the instructor's telephone extension.
Email address:	A free text field for the instructor's email address.
Notes:	A free text field for additional information concerning the instructor and/or this record.
Creation: and Last Updated:	Once the record has been filed the system will assign the date the record was created, or the last time the record was updated.
	Once all fields have been entered, an option line will appear at the bottom of the screen to permit updating, or filing, of the new instructor record.
	NOTE: The Add a new Instructor Record (CRBNI) option **MUST** be selected for the first Instructor record added to the system. This program establishes the indexes and files for instructor records. After the first record is filed you may use this program, or add new instructors from the Reserve Processing Main Menu (CREM).
	The same screen and options will appear when an existing instructor record is accessed by using *Instructor ID* or *Instructor Name* from the Reserve Processing Main Menu (CREM). A new instructor record

can be also be created by selecting the *Add item* option from the Reserve processing browse lists.

```
Options:
  # line   Line by line   Courses   Delete   Prior screen   File   ? help
  Exit   Print
```

Select the *Courses* option to see a list of all courses attached to this instructor's record. If none exist the system prompts:

```
There are no courses defined for this instructor
```

```
Press <RETURN> to continue
```

Instructors are linked to courses when you create/update course records.

Course Record Entry

Select `Add a new Course record (CRBNC)`, from the `Reserve Setup Menu (CRSM)`, the system displays the `RBR Course Record Maintenance` screen:

```
 11:58AM                   RBR Course Record Maintenance            DD MMM YY


   Course Code:


   1.   Course name     :
   2.   Instructor Id   :
   3.   Department      :
   4.   Meets           :
   5.   Term            :
   6.   Year            :                   14. Number of students :
   7.   Course Id       :                   15. Date into OPAC     :
   8.   Course section  :                   16. Date out of OPAC   :
   9.   Default date in :                   17. Record expiry date :
   10.  Default date out :                       Created           :
   11.  Default RBR Locn :                       Last Updated      :
   12.  Default Circ Code:
   13.  Notes           :


 Enter a code for the course (<RETURN> for default) :
```

Course Record Fields

Course code and
  Course name:

To create a new course record enter a unique course identifier. Patrons and staff will be able to search for the course record by *Course code* or *Course name*. The *Course code* could be the number which appears in the school catalogue, e.g. ENG 101. If you do not assign a code the system will default to a sequential course code number beginning with 1. Since you are able to browse these course codes from OPAC, and other RBR functions, it is important that the codes be descriptive. The system assigned defaults will not have significance to patrons or staff. This field has a limit of 188 characters.

If you enter a course code already in use the following message will display:

```
Enter a code for the course (<RETURN> for default):
HUM 202
```

```
This code is already in use
```

It is recommended that input standards be developed for *Course codes* (e.g. use of upper and lower case, spacing, abbreviations etc.)   The system is not case-sensitive when you browse *Course codes*, however, when the course record is being created, use of spaces and upper/lower case can cause new records to be added inadvertently.

The *Course code* you enter will remain at the bottom of the screen, just above the option line for the field being currently edited, until the record is completed and ready to be filed. If it has been entered incorrectly you can exit the record and begin again. If you do not enter a *Course code* and allow the system to assign a default value, it will not display until after the record has been filed.

Course name	**Required.** This field is a free text description of the department and number of the course. Since it will be indexed, care must be taken in the entry of this data. Unlike the *Course code*, this field can be updated and re-indexed.
Instructor ID:	Enter the ID of the instructor from the table created in `Add a new Instructor record` (CRBNI). This will link the instructor to the course record. If you enter ??, do not enter a valid Instructor ID, or if you are unsure of the instructor's name, the system will prompt:

```
 Instructor not found - do you wish to browse?
```

Department:	The Instructor's department will default from the Instructor's record. This field can be changed, e.g. if the faculty member teaches in more than one department.
Meets:	Enter a description of the place/location/building where the class meets. This is not a required field.
Term:	Enter the term/semester when the class is scheduled. This can be more than one semester. This field is not required for processing.
Year:	Enter the year for which the course meets. This is a 4 character field. If the class meets every year in the Fall semester, this field could be left blank. This field is not required for processing.

Course ID: This field can be used for a local ID number different from the Course Code entered above.

Course Section: Enter free text information describing multiple sections of the same course. Multiple sections must be treated as separate courses, with different Course IDs.

Default date in: Default date out: These required fields are used to define the times when items are moved into, and out of, temporary RBR locations. When a course is repeated (e.g. annually) you can use these default dates to set the Date in and Date out on all items for the course. By changing the defaults for the course, the new dates are applied to all the items attached to that course that are set to have default values. See *Course Processing Screen* on page 10-21 for further information on setting item defaults.

Default RBR location: In the same manner as the dates, the default RBR location can be used to enter, or change, the temporary location of all items attached to a course. By using ??, or if an invalid code is entered, the system will prompt:

```
Invalid code. Do you wish to BROWSE (Y/cr=N)?
```

Default Circ Code   This defines a Circulation Code to be attached to items when they are physically moved into the RBR location. This is a default value for all pieces/titles associated with the course and may be overridden when linking a specific piece to the course.

Notes: Use this free text field for any processing information, or local notes required for the course.

Number of Students: This is an optional field which can be used to indicate the anticipated level of demand for items.

Date in *OPAC*; Date off *OPAC:*   These fields determine when the course will be visible in OPAC.

Date of expiry: By leaving the course expiry date blank the course record may be retained for an indefinite time (e.g. for courses which are repeated on a regular basis). This field is for informational purposes and not used for processing.

Created: and Last
   Updated:

Once the record has been filed the system will assign the date the record was created, or the last time the record was updated.

Once all fields have been entered, an option line will appear at the bottom of the screen to permit updating, or filing, of the new course record.

NOTE: The `Add a new Course record` (CRBNC) option **MUST** be selected for the first course record added to the system. This program establishes the indexes and files for course records. After the first record is filed you may use this program, or add new courses from the `Reserve Processing Main Menu` (CREM).

The same screen will appear when an existing course record is accessed by using *Course code* or *Course name* from the `Reserve Processing Main Menu` (CREM*),* and the *update* option is selected.

```
Options:
  # line   Line by line   Prior screen   Delete   Print   File   ? help
  Exit
```

Adding Items to RBR Courses/Instructors

Once locations, courses and instructors have been set up the system is ready to add items to courses. Select Reserve Processing Main Menu (CREM) from the Reserve Book Room Menu the to display the following screen.

The Course Processing screen, which can be accessed by any of the five methods listed on the RBR FUNCTION SELECTION screen, is the most important screen for all RBR functions. For details, see *Course Processing Screen* on page 10-21.

```
03:00PM                    RBR Function Selection              DD MMM YY


                    1.  Instructor Id
                    2.  Instructor Name
                    3.  Course Code
                    4.  Course Name
                    5.  List of Titles in RBR
        Enter your selection
```

Searching by Instructor ID or Instructor Name

If the Instructor ID, or name, entered does *not* match one on file, the INSTRUCTOR SEARCH screen is displayed. The search screen will be in sequence by ID or name, depending on the search type selected.

ID Search

```
          RBR Instructor search                    DD MMM YY

      Id        Name                        Course(s)
    --------  ------------------------      -------------------------------
 1.  CARTER    CARTER, SONJA M             HIST100,HIST344,MCTEST,ENGL330
 2.  FRENCH    FRENCH, JACQUES E           FRE100,FRE200,FRE300,FRE495
 3.  GREEK     GREEK, STAVROS K            CLASS100
 4.  MCL01     McLaughlin, Keith R         1,hum 202
 5.  SMITH     SMITHSON, J.C. C            MATH1003,MATH4000
 6.  WATS.FW   WATSON, FRANK W             ENGL102




 ** Last Screen **
 Options:
 # line   Forward   Backward   Search jump   Exit   New search   ? help
 Course#   Add item
```

Instructor Name Search

```
 12:30PM                 RBR Instructor name search         DD MMM YY

     Name                            Id       Course(s)
    -------------------------------- -------  -------------------------
 1.  FRENCH, JACQUES E               FRENCH   FRE100,FRE200,FRE300,FRE495
 2.  GREEK, STAVROS K                GREEK    CLASS100
 3.  McLaughlin, Keith R             MCL01    1,hum 202
 4.  SMITHSON, J.C. C                SMITH    MATH1003,MATH4000
 5.  WATSON, FRANK W                 WATS.FW  ENGL102




 ** Last Screen **
 Options:
 # line   Forward   Backward   Search jump   Exit   New search   ? help
 Course#   Add item
```

Forward and Backward	Browses the Instructor list.
line #	Selecting an Instructor record by *line #* takes you to the RBR INSTRUCTOR RECORD MAINTENANCE screen.
Add item	Creates a new instructor record.
Course #	Produces the COURSE PROCESSING screens for the Instructor corresponding to the *line #*.

If the Instructor ID *does* match one on file, the RBR INSTRUCTOR RECORD MAINTENANCE screen is displayed.

```
03:14PM              RBR Instructor Record Maintenance         DD MMM YY



Instructor Id  :    MCL01

1.  Surname        : McLaughlin
2.  Forename       : Keith
3.  Middle Initial : R
4.  Generation     :
5.  Honorific      : Prof.
6.  Department     : English
7.  Phone no.      : 642-1111                    Creation : 18 APR YY
8.  Extension      : x1056               Last Updated  :18 APR YY
9.  Email address  :
10. Notes          :
    Courses        : 1,hum 202

Options:
 # line   Line by line   Courses   Delete   Prior screen   ? help   Exit
 Print
```

Use the *# line*, or the *Line by line* options to edit the RBR INSTRUCTOR RECORD MAINTENANCE record.

The *Courses* option will display a list of courses associated with this instructor. If only one course is entered in RBR then the COURSE PROCESSING screen appears.

```
03:15PM                    RBR List of Courses              DD MMM YY

      Code     Course name for Instructor McLaughlin, Keith R (Prof.)
      -------  ----------------------------------------------------------


1    HUM204   Humanities 204
2    HUM202   Humanities 202




 Options:
  # line   ? help   Exit   Prior screen
```

Select the *# line* option to access the COURSE PROCESSING screen.

Searching by Course Code or Course Name

If the Course code, or name, entered does not match one on file, the RBR
COURSE SEARCH screen is presented. If the *Course code* option is
selected the list will be sorted by ID. If the *Course name* option is
selected the list will be sorted by course name.

```
03:37PM                     RBR Course search                DD MMM YY

      Id       Course name                          Instructor
      =======  ==================================   ========================
 1.  HUM 202  Humanities 202                       McLaughlin
 2.  HUM 204  Humanities 204                       McLaughlin
 3.  CLASS100 CLASSICAL CIVILIZATION               GREEK
 4.  ENGL102  SURVEY OF ENGLISH LITERATURE         WATSON
 5.  ENGL330  THE ROMANTICS                        CARTER
 6.  FRE100   BEGINNING FRENCH                     SMITH
 7.  FRE200   SURVEY OF FRENCH LITERATURE          SMITH
 8.  FRE300   CONTEMPORARY FRENCH LITERATURE       Anderson
 9.  FRE495   19TH CENTURY FRENCH POETRY           Anderson
10.  HIST100  HISTORY OF CIVILIZATION              CARTER
11.  HIST344  19TH CENTURY LATIN AMERICA           CARTER



 ** First Screen **
 Options:
  # line   Forward   Backward   Search jump   Exit   New search   ? help
  Add item
```

Use the *Add item* option to create new course records.

Select the *# line* option to access the COURSE PROCESSING screen. From that screen it is possible to update the course record itself.

Searching a List of RBR Titles

If the title is already on file in RBR you may select List of Titles in RBR from the RBR Function Selection screen. You are prompted to enter the RBR title. You can enter the LCN, RBR LCN (for personal copy material), or the first words of the title. A browse screen is displayed.

```
 05:12PM                   RBR Master File search              DD MMM YY

     Id      Title                                       Course(s)
     ======  =========================================== ===================
  1.  10004294 The addict and the law                     SOCIO210
  2.  10004774 Beowulf                                    ENGL101
  3.  10029924 The body in the library : a Miss Marple my+ ENGL103
  4.  10011179 Childe Harold's pilgrimage                 ENGL205
  5.  10022222 Chinese art                                HUMA201
  6.  10009019 Classical aspects of partial differential + MATH351
  7.  10025997 Die Mathematik des Naturforschers und Inge+ MATH351
  8.  10014500 Die mathematischen Hilfsmittel des Physike+ MATH351
  9.  10005185 History and criticism                      HUMA202



 Options: _
  # line   Forward   Backward   Search jump   Exit   New search   ? help
  Course#
```

The *Course#* option will take you directly to the Course Processing screen for that title.

The *# line* option will present a brief RBR title display. You may *Update* the Title, Author, Journal Title, Journal Detail, or Format for this record. This feature is intended for personal copy materials which are not on file in the system as MARC records. From this screen you can also access the COURSE PROCESSING screen for this title.

```
05:17PM                      RBR Title display              DD MMM YY


 RBR Title LCN :10005682    Title        :John Keats: Odes: a casebook
       Format :BK           Author       :Fraser, G. S. (George Sutherland)+
                            Journal Title :
                            Journal Detail:



 Options: _
  ? help   Update   Exit   Prior screen   Courses
```

Course Processing Screen

The COURSE PROCESSING screen is the heart of the RBR system. It displays information for a course, including defaults for the date in, date out, and RBR location. Also displayed is a list of *Titles/Items* assigned to this course. These titles/items may be included in RBR or as part of a reading list for this course. An alternate display of the same items can be accessed which will give current locations and status. Most of the other RBR maintenance functions can be accessed directly, or indirectly, from this screen.

```
 03:55PM                    RBR Course Processing              DD MMM YY

 Course Code   : HIST100             Course name : HISTORY OF CIVILIZATION
 Course Id     : HIST100                 Section : 01,02,03,04,05
 Instructor    : CARTER, SONJA M            Dept : HISTORY
 Meets         : HUMANITIES                 Term : WINTER
 Date in OPAC  : 16 JAN YY          OPAC Date out : 31 JAN YY
 Default Date in : 16 JAN YY            Date Out : 31 JAN YY
 Default RBR Location : ACARBR         Circ Code : RESD

     Sts   date in    date out   barcode         RBR    Title/Note
 --- ----- --------  -------- --------------    ----- ------------------------
 1. In  *16 JAN YY  31 JAN YY 39999000121534  *ACARBR History, guilt, and habit
 2. In  *16 JAN YY  31 JAN YY 39999000114979  *ACARBR A history of Greece to th+
 3. In   20 JAN YY  31 JAN YY 39999000120162  *ACARBR A history of British gard+
 4. Pnd  26 MAY YY  31 JAN YY 39999000103162   ACARBR History and criticism



 Options:
  # line   Add item   Quick add   Update   Location   Instr   Forward
  Backward   Sort   Prior screen   Print   ? help   Exit
```

NOTE: Asterisks indicate that default information for dates and locations is taken from the course record.

STS

Status (STS) may be one of many codes:

- *Pnd* Title or item is scheduled for RBR at some time in the future.

- *Due* Title or item is now due to be moved into RBR.

- *In* Item has been moved into RBR.

- *Off*   The item has been removed from RBR. The *off* status is changed to *Due* or *Pnd* if the Date in field (or its default) is amended.

Screen Options

Note: several of these options take you to screens which are discussed in detail in other sections of this chapter.

line

Displays the RBR ITEM MAINTENANCE screen.

Add item

Displays the RBR ITEM SELECTION screen.

Quick add

Moves items directly into RBR as you add them, thus skipping the RBR Item Maintenance screen.

Update

Displays RBR COURSE RECORD MAINTENANCE screen for this course.

Location

Displays the additional location detail, including the items' current Location, Collection, Call number, Circulation code, barcode number, and Status.

Instr

Displays the Instructor Record for this course and permits updates to that record. This option will also allow you to move back and forth between various COURSE PROCESSING records for this instructor.

Sort

Changes the display of items on reserve for this course by either Title or Date with the most current *date in* displaying first.

Prior Screen

Returns you to the COURSE SEARCH screen to browse through additional course records.

RBR Item Selection

The RBR ITEM SELECTION screen allows you to add items to course records using several methods.

```
01:42PM                    RBR Item Selection                 DD MMM YY

 Course Code : ENG106            Course name : ENG106
 Course Id   :                       Section :
 Instructor  : Smith, John J         Dept : ARTS
 Default Date in     :            Date out :
 Default RBR Location : ACARBR       Circ Code: 7DAY
 Move items into RBR : No                Mode: Quick

 Select an Item :

     Enter an RBR Title (or the first few characters)
       or read in an item barcode
       or enter a local control number
       or enter an Expert Search command
       or enter N to create a new Title
       or MO to toggle moving items to RBR
       or DT to toggle Detailed / Quick mode
       or S to go the the OPAC Search Screen
       press <ENTER> to return to last level
```

Move items into RBR	Displays *Yes* or *No*. Indicates whether items will be moved into RBR as they are added.
Mode	Displays *Detailed* or *Quick*. In quick mode, items are moved to RBR as they are added and the ITEM MAINTENANCE screen is skipped. Detailed mode always stops at the ITEM MAINTENANCE screen.
Select an Item	All of the options described below are available in both quick and detailed mode.
RBR Title	Enter a title or the first few characters. The OPAC search screen appears.
Item Barcode	Enter an item barcode to access the ITEM MAINTENANCE screen with all the details for that particular item, or, to add the item immediately if in quick add mode. It also displays a message if this item is already on reserve, or pending, for another course:

```
This item is scheduled for course: HUM 202 - Humanities 202
```

```
At location: CAM1RBR From 01 SEP YY to 30 SEP YY

Do you want to continue adding this title (Y/N/yes to All)?
```

Answer A to suppress the prompt for subsequent items.

LCN   Enter a Local Control Number (LCN) or RBR Local Control Number (assigned to personal copy material not part of the regular collection), to see a list of items for that title.

Expert Search   Enter Expert Search command to access the Online catalogue. All search options available to your library (e.g. a= for author, t= for title, s= for subject, or keyword searches aw= for keyword in author, tw= for keyword in title, etc.) access the browse lists for those indexes. When a title or an item is *Retrieved,* it will be entered into the RBR system, and into the course currently selected. The ITEM MAINTENANCE screen will be displayed with relevant details extracted from the main database.

N   Creates a new RBR title. These records are not MARC records (they may be accessed by RBR Title LCNs or by the RBR title index) and are intended for direct entry of personal copy material from instructors. RBR Title LCNs will be assigned, and title, author, journal title, or journal detail information can be entered.The Item Maintenance screen allows you to update RBR details for a particular item.

MO   Available only in quick mode. Toggles the *Move items into RBR* field between yes and no. When this field is set to yes, items will be automatically moved into RBR as they are added.

DT   Toggles between quick and detailed mode.

S   Displays the main OPAC search screen.

RBR Item Maintenance

```
02:30PM                    RBR Item Maintenance               DD MMM YY

 Course Code : ENG106                  Course name : ENG106
 Course Id   :                             Section :
 Instructor  : Smith, John J                  Dept : ARTS
 Default Location : ACARBR              Circ Code : 7DAY
 Default Date in  : 03 AUG 95           Date out  : 31 DEC 96

 RBR Title LCN :10006604    Title      :Art of the ancient Near East
        Format :BK          Author     :Amiet, Pierre Art antique du Proc+
                            Journal Title :
                            Journal Detail:

1. Item barcode   : 39999000107404   2. Location : *ACARBR
3. Date in        : *                4. Date out : *
5. Note to Student :
6. Note to Library :
7. Note to Instr.  :
8. Reading list    :                 9. Circ Code: *7DAY

Options:
 # line   Line by line   Delete   File   Update   ? help   Exit
 Display bookings
```

Fields

Item Barcode

A specific item to be moved into RBR. This field may be blank if you used the *Retrieve* option (title) rather than the *Retrieve #* option (item) to define the title. If blank, a specific item may be allocated later. Note that changing this field implies that a different item is to be moved into RBR. It does not mean that this is a new barcode being allocated to that piece (use CEH for this). If you enter a new (previously unused) barcode, the system prompts for appropriate details.

NOTE: You cannot enter a new RBR title and a new barcode as one operation. The bibliographic details must be *Filed* before the new barcode can be assigned. You may then select the item from the course list to assign the barcode.

Location, Date in, Date out, Circ. Code

These fields may be blank, an asterisk, or hold a valid RBR location, valid Circ. Code, or date. An * by itself indicates that the default value will be used. For example the *Default Date in* and *Date out* values at the top of the screen will be used for the *Date in* and *Date out* fields at the

lower half of the screen. A value prefixed by a *, for example *ACARBR, indicates a default value that will be used. If blank, staff will need to enter valid values before moving the item into RBR.

Note to Student,
Library, Instr.

Enter text. This information is for display on this screen only.

Reading list

By default, all titles associated with the course are displayed in OPAC. An entry with no *Date in* or *Location* implies that the entry exists for information only, that is, it is perhaps only on the *Reading List* for the course, and may not be required for RBR. In this case, it will be shown as *Reading List* in OPAC. The display of such entries (in their entirety) may be suppressed by entering N in the *Reading list* field. (This may be required when the entry is in the process of collation, e.g., when the dates associated with the course are not yet known.)

Options

line

Edit a specific numbered field.

Line by line

Edit the numbered fields for this item, one by one.

Delete

Deletes this item from the RBR system. If this is the last or only item, the system also deletes the title from RBR. The system checks whether the item is in RBR and, if it is, prompts:

```
Are you sure you wish to delete this Entry (Y/N):
```

Enter Y to withdraw the item from RBR.

File

Saves the changes. When you file an item from the ITEM MAINTENANCE screen, the system prompts:

```
Move the item into RBR now Y/N:
```

Y   Establishes the link between the item and the course, and also performs the processing normally done at the CRLM option. The item appears on the RBR Course Processing screen with the status of *IN. (*There may also be routing or exception messages for you to acknowledge.)

N   Establishes the link between the item and the course. The item appears on the RBR Course Processing screen with the status of *Pending. (*There may also be routing or exception messages for you to acknowledge.)

Update   Updates the details within RBR for this item, such as, Title, Author,
                                Journal Title, Journal Detail, Format. This updates only the data as it
                                appears within the RBR subsystem. It does not affect catalogued material.

Display bookings   This option is mainly intended for Geac support staff.

Moving Items into RBR

All information entered into the RBR system in the previous functions can be done from instructors' request lists, for items which will be placed on reserve at a future date. Most lists are processed before the start of the term without the items in hand, that is, the *Date in* is in the future. Once these items have been added to course lists and have been retrieved from the current collection/borrower, they must then be linked to RBR. This process will change the location and circulation information based on the codes in the Temporary Location.

To facilitate retrieving items from the shelves, you may want to generate a Picking List. Select RBR Picking List from the Reserve Book Room Reports menu from the Circulation Reports Menu (CCR).

Once a course is set up, items can be linked to RBR in a single step. If you have retrieved the items from the shelves or if you have a list of barcodes, use the *Quick add* option combined with the automatic move to RBR to add the items to the course and move them into RBR.

Select MOVE ITEMS INTO RBR *(CRLM)* from the main RBR Circulation Menu.

This function maps RBR courses to locations, and then asks which RBR temporary location code to update. Items from various courses can be moved together based on their Temporary Location/Circulation Code.

```
DD MMM 19YY              Geac ADVANCE Library System (#.##)            IIIII PP
  10:45                        Your Library Name

      ** Mapping RBR courses to locations. Please be patient **
```

```
09:09A                    MOVE ITEMS OUT OF RBR              DD MMM YY



   Which RBR location ? :

   Which RBR course   ? :

   Default Circ code  ? :
```

Which RBR location?   Enter an RBR location or enter ?? for a browse list of Temporary Loca-
                       tion Codes. After selecting a location, you are prompted for a specific
                       course.

Which RBR course?   <ENTER> to link items to multiple courses, or enter the *Course code,* or
                       enter a ?? for a list of RBR courses. If you enter a course code incor-
                       rectly, the list will be displayed automatically.

Default Circ code?   Enter a Circ Code or enter ?? for a browse list. <ENTER> if no default
                       Circ code is required.

```
03:58PM                    RBR linking Course Search            DD MMM YY


       Id      Course name

       =======  ===================================
   1.  AGR331   Animal Husbandry
   2.  ATH103   Athletics
   3.  ATH400   BASKETBALL COACHING
   4.  CLASS100 CLASSICAL CIVILIZATION
   5.  ENGL102  SURVEY OF ENGLISH LITERATURE
   6.  ENGL330  THE ROMANTICS
   7.  FRE100   BEGINNING FRENCH
   8.  FRE200   SURVEY OF FRENCH LITERATURE
   9.  FRE300   CONTEMPORARY FRENCH LITERATURE
  10.  FRE495   19TH CENTURY FRENCH POETRY
  11.  HIST100  HISTORY OF CIVILIZATION
  12.  HIST344  19TH CENTURY LATIN AMERICA



 Options:
   # line   Forward   Backward   Search jump   Exit   New search   ? help
```

The system then displays the MOVE ITEMS INTO RBR screen. Begin entering item barcodes for all items that need to be linked to RBR.

```
 10:56A                     MOVE ITEMS INTO RBR                DD MMM YY

Change for RBR  Institution       Y to : AU           RBR location : CAM1RBR
                Sublocation       Y to : CAM1         RBR courses  : CLASS100

                Circulation code  Y to : RESD

                Collection code   Y to : RBR
                Classification    N to :
                Call # prefix     N to :
                Call # suffix     Y to : ON RESERVE

  Item Barcode:
```

The default information for the temporary location is displayed in the *RBR location* field. If you did **not** enter a course code, then **all** RBR courses which have items to be linked will be listed on the screen; otherwise, only the selected course will be displayed.

Various messages will display as barcode numbers are being entered, for example,
```
Item not requested for any of these courses. <ENTER> :
39999000104153 Item location not updated for RBR
```

After you have entered all item barcodes, <ENTER>. The system displays the following a summary screen:

```
Items entered   : 18
Items updated   : 16
Items unchanged : 1      Press <ENTER> :
Items rejected  : 1
```

Moving Items Out of RBR

At the end of the term, if items are to be returned to their permanent location, you can unlink those items from RBR.

Select MOVE ITEMS OUT OF RBR (CRUM) from the main Reserve Book Room Menu to perform that function. To identify which items need to be removed from RBR, you can print a Picking List in Call number sequence. Once the items are retrieved from the RBR shelving locations, they can be unlinked and reassigned to their permanent locations using the batch process. As with the Reserve Linking process, the system first informs you that it is:

** Mapping RBR courses to locations. Please be patient **.

The system then prompts for the RBR temporary location for which items are to be removed.

```
09:12A                    MOVE ITEMS OUT OF RBR                    DD MMM YY



   Which RBR location ? :

   Which RBR course   ? :
```

Which RBR location?   Enter a location or enter ?? for a browse list of all RBR Temporary Location codes to select from.

Which RBR course?   Specify a course code or <ENTER> without specifying a course. The MASS HOLDINGS REINSTATEMENT screen appears.

```
 12:40P                       MOVE ITEMS OUT OF RBR                         DD MMM YY


                    RBR location : ACARBR
                    RBR courses  : CLASS100
                                   ENGL102
                                   ENGL330
                                   FRE100
                                   FRE200
                                   FRE300
(and more) Item Barcode:
```

Wand or type, the barcode numbers for the items you want unlinked from the course and from RBR. The items will revert to the original location and circulation code.

11

Item Control

The `Item Control Menu` (`ICM`) provides access to

- holdings information

- holdings default definitions which allows you to assign location information automatically for new pieces

- mass updates to holdings information, circulation codes, status and action codes

- revolving collections

If set up in your library parameters, this menu will also allow you to identify an item's previous borrower, and to clear that information when appropriate.

Item Control Menu

```
DD MMM YYYY        Geac - Library Division - ADVANCE (#.##)        IIIII  PP
   HH:MM                       Your Library Name

                          GENERAL CIRCULATION MENU

                      1. CCM   Circulation Codes Menu

                      2. SCM   Standard Circulation Menu

                      3. PCM   Patron Control Menu

                      4. ICM   Item Control Menu

                      5. OCM   Output Control Menu

                      6. CILL  ILL Maintenance

            Enter the number of your selection and press <ENTER>
                   or  ?  followed by <ENTER> for Help.
                Press <ENTER> to return to previous level :
```

Select Item Control Menu (ICM).

```
DD MMM YYYY         Geac - Library Division - ADVANCE (#.##)        IIIII  PP
   HH:MM                        Your Library Name

                            ITEM CONTROL MENU

                     1. CEH   Edit Holdings
                     2. CEHD  Holdings default definitions
                     3. CAHD  Action on Holdings Deletion
                     4. CHMF  Holdings Maintenance functions

                     5. CCA   Change Actions
                     6. CCS   Change Status

                     7. PHYI  Physical Inventory Control

                     8. CLPD  Last Access Patron History Display
                     9. CLPC  Last Access Patron History Clear
                    10. CFHC  Flagged Hold Cancellation

            Enter the number of your selection and press <ENTER>
                   or  ?  followed by <ENTER> for Help.
                Press <ENTER> to return to previous level :
```

Edit Holdings

`Edit Holdings` (CEH) provides quick direct access to holdings records, in the event that you need to make changes to these records. For more complete details on Holdings Maintenance see the *Holdings User's Guide*.

Often, the changes you will need to make to these records will be to the *Action* and *Status* codes. These codes can be changed in the *Edit Holdings* function, although changes to these codes can also be changed by the options, *Change Action* and *Change Status* options. Those functions are used when the same change of action or status code is being made to many item records. When other kinds of changes need to be made, or if only one item record is being updated, the *Edit Holdings* function is used.

This section is divided into the following sections:

- Retrieving Piece Records — describes the methods available to obtain piece information

- Modifying Piece Records — outlines basic editing

- Pieces Detail Single-part Screen Reference — provides descriptions of the fields on the PIECES DETAIL screen

Changes to Holdings Database

The holdings database has been re-design to accommodate the need to:

- conform to USMARC Holdings Standards

- transfer holdings information using the Z39.50 protocol

- define single-parts, multipart, serial holdings information uniformly.

Editing Piece Records

The PIECES DETAIL screen is the primary screen used to display and edit pieces information. Its content is similar to the HOLDINGS DISPLAY screen that was used in previous releases.

You can retrieve a pieces record directly by entering a barcode.

Otherwise you must use the *Holdings edit* option from the OPAC search screen to access holdings information. When *Holdings edit* is used, the system re-displays new choices on the option line. Selecting the *Pieces display* option produces the PIECES SUMMARY screen. This screen lists

all the pieces for the title. When you choose an item, the PIECES DETAIL screen appears.

The PIECES DETAIL screen has two variations, SINGLE-PART, and MULTIPART. The single-part screen describes any item that is complete in one part; multiparts are complete in a finite number of individual physical parts, such as a twenty-volume encyclopedia. Serials that are barcoded are also described by PIECES DETAIL-MULTIPART screen.

The differences between the single-part and multipart PIECES DETAIL screen reflect the need to describe title that consists of more than one part.

Summary Editing Procedure

1. Use the *Holdings edit* option to edit holdings information.

2. Select the *Pieces display* option. The PIECES SUMMARY screen appears.

3. Use the *# item* option to select a piece. The PIECES DETAIL - SINGLE-PART screen appears.

4. Edit the holdings information. *File* to save the changes.

Retrieving Pieces Information

Select CEH, for the `Edit Holdings` option.

```
              RETRIEVE HOLDINGS INFORMATION

Enter item barcode or search command : _____
```

Enter the barcode of the item for which you would like to have holdings information. Or use:

- an OPAC search command, and search for the item in the system's database.

- LST to retrieve the last bibliographic record accessed in Acquisitions, Cataloguing, Serials Control, or Circulation.

Only existing holdings records can be accessed by barcode. If a barcode number is entered that is not in an existing holdings record, the system returns a message indicating that the barcode is not on file.

```
Cannot read 39999000121212 from the PIECES file.
Press <ENTER> : _
```

Retrieving by Barcode Entry (CEH)

Barcodes may be entered on the keyboard, or by wanding or scanning a barcode label. If the barcode is already on file, the system displays the holdings information on the PIECES DETAIL - SINGLE-PART screen. This screen contains much of the same information found on the HOLDINGS DISPLAY screen that was used in previous releases to maintain holdings data. See *Modifying Pieces Records* on page 11-10.

```
            Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                          Format  : BK
Status     : In Processing
Title      : Integrated online library systems : principles, planning, and
Author     : Genaway, David C., 1937-
Updated By :                   Patron  :               Last out:
Update Date: 01/22/98  01:49pm Due Date:              Created : 01/09/98
Inventory  :                   Due Time:              Circ Cnt: 0 (0)

 1. Barcode     : 00017762859
 2. Current Locn : AL CENTRAL GEN-ST c.3
 3. Owning Locn  : AL CENTRAL GEN-ST
 4. Pend. Action :              11. Shelving title  :
 5. Circ. Code   :              12. Physical Cond.  :
 6. Statistics   :              13. Class. Source   :
 7. Actual Cost  : 75.00        14. Retention Policy: 0
 8. Accession #  :              15. Physical Format :
 9. Placeholder  : N                Current PO#     : 971000002/0001
10. Public note 1:

Options:
 # line   Line by line   Notes display   Binding information   File
 Delete   Binding entry   Circ usage   Status   Print   Card print
 Additional parameters   Quit holdings   ? Help   Exit
```

Retrieving by Searching (CEH)

Use an OPAC search statement to access a holdings record:

```
Enter item barcode or search command : tw=library
```

```
                  Online Catalogue - Title Summary
Your Search: TW=ONLINE

    Author.............. Title................................ Type Year
  1. Genaway, David C.,  Integrated online library systems :     am   1984
     1937-              principles, planning, and implementation
                        /
  2. International       Conference proceedings : SIGDOC '93, the am   1993
     Conference on      11th annual international conference,
     Systems Documentatio October 5-8, 1993, Waterloo, Ontario :
     n (11th : 1993 :   getting in touch--staying in touch :
     Waterloo, Ont.)    moving online and multimedia systems
                        into the workplace /
  3. Online (Waterloo,  Online : University of Waterloo poetry.  as   1987
     Ont.)




7 titles in list
Options:    Enter lines (e.g. 1 or 1,2 or 1,2,4 or 1-4 or 1,3-4 etc.)
 # line(s)   Forward   Prior screen   Sort   All    Modify search
 Review search   OPAC parms   New search   Reset   Output #(s)   ? Help
```

From the Title Summary screen, choose a specific bibliographic item to
examine. Depending on which option your library has chosen for biblio-
graphic display, the item information is displayed on the BRIEF or
DETAILED DISPLAY screen.

```
                    Online Catalogue - BRIEF DISPLAY       (1 of 1 titles)
Local Control # :10003333
AUTHOR          :Genaway, David C., 1937-
TITLE           :Integrated online library systems : principles, planning, and
                 implementation
Year            :c1984.
SUBJECT         :Libraries -- Automation
                 Online data processing
SERIES          :Professional librarian series;
LANGUAGE        :English

CURRENT LOCATION & COPIES HELD:
     Location            Collection      Call Number/Copy #      Status / Due
     --------            ----------      ------------------      ------------
 1.  ADVLIB Central      GEN-STAFF       c.3                     In Processing
 2.  ADVLIB Central      GENERAL         c.2                     Available
 3.  WWW                                                         In library
     Access: This document is available in html and text formats. -
     http://info.lib.uh.edu/sepb/sepb.html
3 item(s) in list.
Options:
 # item   Prior screen   Holdings edit   Limit list   Full display   Output
 MARC   Holds   Order display   ? Help
```

Options

# item	Allows you to view the PIECES DETAIL - SINGLE-PART screen. You cannot edit holdings information from this screen.
Holdings edit	Provides access to the holdings maintenance function. The system redisplays the option line with the following options: *OPAC display*, *Pieces display*, *Locations display*, *Bibliographic edit*, *Order display*, and *Exit*.
Holds	Allows you to view the HOLDS QUEUE DISPLAY for this title.
Order Display	Displays information from the Acquisitions system, if your library uses that module.
	If your library has chosen a BRIEF DISPLAY for the initial display of a bibliographic record, a FULL DISPLAY option is provided. This will display all bibliographic data. The MARC option is available to allow access to the cataloguing record.
	See *Modifying Pieces Records* on page 11-10 for information on modifying records.

```
            Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                          Format  : BK
Status      : In Processing
Title       : Integrated online library systems : principles, planning, and
Author      : Genaway, David C., 1937-
Updated By :                 Patron  :              Last out:
Update Date: 01/22/98  01:49pm Due Date:            Created : 01/09/98
Inventory  :                 Due Time:              Circ Cnt: 0 (0)

    Barcode      : 00017762859
    Current Locn : AL CENTRAL GEN-ST c.3
    Owning Locn  : AL CENTRAL GEN-ST
    Pend. Action :                    Shelving title  :
    Circ. Code   :                    Physical Cond.  :
    Statistics   :                    Class. Source   :
    Actual Cost  : 75.00              Retention Policy: 0
    Accession #  :                    Physical Format :
    Placeholder  : N                  Current PO#     : 971000002/0001
    Public note 1:

Options:
 Prior screen   Review search   OPAC parms   New search   Reset   ? Help
```

The holdings record can be viewed by entering the item number. (You cannot edit the record from this screen.)

Modifying Pieces Records

Modifying an existing holdings record can be done directly by entering the bibliographic item's barcode, or indirectly by searching and retrieving a record. Once a record is retrieved, it can be modified or deleted as required.

Often, the changes you will need to make to these records will be to the *Action* and *Status* codes. These codes can be changed:

- in the *Holdings edit* function by using the *Status* option. Use this method when other kinds of changes need to be made, or if only one item record is being updated.

- from *Change Action* and *Change Status* menu selections on the ITEM CONTROL MENU. Use this method when the same change of action or status code is being made to many item records.

Modification
Exceptions

Some *Status* conditions will **not** allow modifications or updates under normal set up parameters; for example, the status *Checked Out*. If an item's holdings display has such a status, attempts to update or edit fields produces a message:

```
This piece can NOT be updated with the current status
...    press <ENTER> :
```

Caution

It is generally **not** recommended, but, if you have a specific requirement for changing a pieces record with such a status, use the Item Control Codes Menu (CICM) option found on the Circulation Codes Menu. From this menu, access *Status Control* table for a status. Manually change the table to enable updates by entering a 0 at field 4. (1=CANNOT update item, 0=CAN update item).

```
                    STATUS CONTROL

   STATUS CONTROL CODE : 130
   -------------------------------------------------------------------
1. Description                   : Out on Loan
2. PIECES display                : Checked Out
3. OPAC display (* = return date)  : DUE: *
4. Can NOT update Item = 1        : 1
5. Can NOT Checkout = 1           : 1
6. Can NOT place a Hold = 1       :
7. Block Code                     :
8. Produce inserts  (1 = YES)     :




Options:
 ? help   # line   Line by line   Copy   Print   Exit
```

File the change. The system will now enable updates to the pieces records displaying the status governed by the above table. If this change is made for a special circumstance, the circulation supervisor/system administrator should change the table back to its *normal* condition.

Steps for Modifications
The system displays the retrieved record on the **PIECES DETAIL - SINGLE-PART** screen.

```
              Online Catalogue PIECES DETAIL - SINGLE-PART
Local Control #:  10003333                          Format  : BK
Status     : In Processing
Title      : Integrated online library systems : principles, planning, and
Author     : Genaway, David C., 1937-
Updated By :                   Patron  :              Last out:
Update Date: 01/22/98  01:49pm Due Date:             Created : 01/09/98
Inventory  :                   Due Time:             Circ Cnt: 0 (0)

 1. Barcode      : 00017762859
 2. Current Locn : AL CENTRAL GEN-ST c.3
 3. Owning Locn  : AL CENTRAL GEN-ST
 4. Pend. Action :              11. Shelving title  :
 5. Circ. Code   :              12. Physical Cond.  :
 6. Statistics   :              13. Class. Source   :
 7. Actual Cost  : 75.00        14. Retention Policy: 0
 8. Accession #  :              15. Physical Format :
 9. Placeholder  : N               Current PO#      : 971000002/0001
10. Public note 1:

Options:
 # line   Line by line   Notes display   Binding information   File
 Delete   Binding entry   Circ usage   Status   Print   Card print
 Additional parameters   Quit holdings   ? Help   Exit
```

1. Use the line edit functions (*# line* and *Line-by-line*) to update fields on the screen. Code tables can be displayed by entering double question marks (??) in the appropriate field. Entries from the code tables can be retrieved by entering the appropriate item line number.

   Note that changes to the *Pend. Action* field are filed to the system's database immediately upon exiting the field. When exiting the Pending Action field, you will be prompted:

   ```
   File this pending action ? Y/N _
   ```

   Entering Y, files the Pending Action regardless of whether you file or exit the PIECES DETAIL screen.

   Entering N stops the Pending Action filing process and discards any changes made during this editing session.

2. The *Owning Data* field reflects the **ORIGINAL** owning Institution, sublocation, collection, etc. of items that have subsequently been moved to RBR, or are part of Revolving Collections. For items that are changed by the Mass Holdings Updates in either of those modules the temporary location is displayed in the **CURRENT Locn** field.

To update all the original locations so that they match the current locations, answer Y to the `Update owning info from current info` prompt that is shown when you file a holdings record that has both types of locations.

See Also *Mass Holdings Update* on page 11-20 and *Revolving Collections* on page 11-26, *Reserve Book Room Menu* on page 10-4, *Moving Items into RBR* on page 10-28, and *Moving Items Out of RBR* on page 10-31.

3. To update the item status, use the *Status* option. The system displays the prompt:

    ```
    Enter new Item status code :
    ```

    Use double question marks (??) to display the codes tables. Entering the item line number will retrieve the code. Entering the new code will cause the above message to be modified to the following:

    ```
    Enter new Item status code : 114
    File this status ? Y/N _
    ```

    Answering Y will file the Item status code regardless of whether you file or exit the PIECES DETAIL screen.

4. To display the circulation statistics for the item, select *Circ usage*. The system displays the usage by circulation or by in-house use.

5. If you have a printer attached to your terminal, you may select the *Print* option to print the screen, or the record.

6. The *Binding Entry* function allows separate bibliographic records to be bound to a single call number. The pieces record displayed when BO is entered becomes the parent record. Any records bound to the parent become known as children records. When a child record for the item is retrieved from the database, the system informs you that this is a child and identifies the parent record and the shared call number.

7. The *Card Print* option sets a flag for Shelf Card Printing.

8. The *Additional parameters* option displays:

    • the RBR course code if the item is in RBR

    • the name of the Revolving Collection if the item is part of such a collection

    • data intended for support staff diagnostic routines

- qualifiers associated with Hold Scopes.

```
Qualifier  Reverse    Description
---------- ---------- -------------------
Main       2          PUBLIC MAIN BRANCH
BRANCH2    14         ALL ITEMS IN BRA2
ALL ITEMS  15         AU}PUB}QA
```

9. To delete a holdings record, select *Delete*. The system displays the prompt:

   ```
   Okay to delete the Pieces record? Y/N:
   ```

   Entering Y, continues with the deletion process. The system returns to the PIECES SUMMARY screen. (If this is the last pieces record, the system warns you.)

   Entering N, stops the deletion process and returns you to the PIECES DETAIL screen.

   NOTE: You can also delete pieces records from the PIECES SUMMARY screen. Use the *Delete item(s)* option to delete specified pieces from the displayed list for the current bibliographic record.

10. To save the updated holdings record, enter *File*. The system performs edit checks on the record and displays any invalid entries. The prompt is placed at the item with the invalid entry, and valid data should be entered.

11. When all entries pass validation, the pieces record is filed and the system returns to the detailed display.

12. To exit the screen **without** saving the contents, select *Exit*. This entry exits the screen and discards any updates made to the record. The system returns to the PIECES SUMMARY screen.

Holdings Default Definitions

The `Holdings Port Control` table defines default holdings values for new pieces/item records added at a particular port. To access this table, enter `CEHD` at any Circulation or Cataloguing menu, or select `Holdings default definitions (CEHD)`, from the `Item Control Menu (ICM)`.

```
                        PORT

     Number of records : 60
     Code            Description of code
     -------------   ------------------------------------------------
  1. 000             System Console
  2. 001             Line 1 - system printer
  3. 002             Line 2 - Staff, circ terminal
  4. 003             Line 3 - Staff, checkin terminal
  5. 004             Line 4 - Staff, cataloging terminal
  6. 005             Line 5 - Staff, cataloging terminal
  7. 006             Line 6 - Staff, Reference
  8. 007             Line 7 - Staff, Reference
  9. 008             Line 8 - Public
 10. 009             Line 9 - Public
 11. 010             Line 10 - Public
 12. 011             Line 11 - Public
 13. 012             Line 12 - SW Branch - staff
 14. 014             Line 14 - SW Branch - public

Options:
 ? help   # line   Print   Forward   Backward   Search jump   Exit
```

This code list reflects the port numbers defined in the PORT table of the System Utilities Module. (See *Utilities Management Guide*).

This same code list is used in other Circulation setup tables:

- Checkout Port Control (`CPCC`)

- Checkin Port Control (`CIPC`)

- Register/Port Codes (`CPRP`)

- Hold Port Control (`CPH`)

See the *Circulation Management Guide*.

Use the #line option to access the setup screen for a particular port.

```
                              PORT

      PIECES defaults for port : 008
      ------------------------------------------------------------------
       Description                        : Line 8
  2. Pieces Institution                   : PUB = PUBLIC LIBRARY
  3. Pieces Sublocation                   : LRC = Learning Resource Center
  4. Pieces Collection                    : CIRC = Circulation Desk
  5. Pieces Circulation code              : GEN1 = GENERAL COLLECTION LOAN+




  Options: _
   ? help   # line   Line by line   Copy   Print   Delete   Exit   File
```

Select *#line*, or *Line by line* to change any of the fields in this record.

In fields 2 to 5, you can specify default values for new pieces added at this port. The codes for these fields come from the Holding Set-up Menu (CHSM) under the Loan Periods Menu (CLPM) in the CIRCULATION CODES MENU. Enter ?? to see a list of the valid codes for a field and select by line number. If you enter a code incorrectly the system will offer you a chance to browse the codes table. If you leave all four fields blank, the system will default the location information from an existing piece when staff add a new piece.

NOTE: For Conversion-on-the-fly items added in Checkout, the system uses the defaults specified in the Checkout Port Control table (CPCC), rather than the defaults specified here.

Action on Holdings Deletion

The ACTION ON DELETING LAST COPY screen defines the circumstances under which the system warns staff that they are deleting the last copy.

To access this table, enter `CAHD` at any Circulation or Cataloguing menu, or select `Action on Holdings Deletion (CAHD)`, from the `Item Control Menu (ICM)`.

```
                    ACTION ON DELETING LAST COPY


     Control Record : ACTION.HOLD.DELETE
     --------------------------------------------------------------------
  1. Location level to flag last copy delete                 : 2
           (0=System Level)
           (1=Institution Level)
           (2=Building Level)












 Options:
  ? help   # line   Line by line   Print   Exit
```

Enter `0` for the last copy in the entire system, `1` for the last copy at an Institution, or `2` for the last copy at a Sublocation.

Holdings Maintenance Functions

To facilitate the movement of items throughout the system, on a temporary basis, (e.g., Reserve Book Room (RBR) or Revolving collections), *Dynamic* collections, which have no permanent location (e.g. mass paperback stock which take on the location of the branch where they happen to be checked in), or permanent updates to batches of item records, the concept of Owning Location and Current Location is important.

Owning location implies the permanent custodianship and responsibility for the item, regardless of any current, or temporary, location codes the item may also have.

Current location implies a temporary location whose loan rules, and shelving information, apply to the item as it is checked out, checked in, routed, or held for patrons.

The system functions which are particularly affected by this concept are Reserve Book Room, Dynamic Stock, Mass Holdings Updates, and Revolving Collections. In addition, the library may have other purposes for Mass Holdings Updates to items on a temporary, or permanent, basis.

Reserve Book Room
The use of Mass Holdings Updates and Mass Holdings Reinstatements for the Reserve Book Room (`Reserve Linking Menu` [CRLM] and `Reserve Unlinking Menu` [CRUM]) are detailed in *Reserve Book Room*.

Dynamic Stock
For set up of the Dynamic Stock feature see the *Circulation Management Guide:* `Circulation Codes Menu` (CCM), `Loan Periods Menu` (CLPM). The `Circulation Codes` (CCC) have a parameter which allows the library to define a Circulation Code as Dynamic Stock. The default is N.

Dynamic stock is defined as material which does not have a permanent, owning location (i.e., its owner is the location where it was last checked in). Pieces records which have this Circulation Code will be considered as Dynamic stock. This is used largely for mass paperback publications. Typically a library might buy many copies, expect them to circulate rapidly, and not have a long shelf life. It is, therefore, more efficient in terms of managing the items to let the book *belong* to whatever location checks it in.

When the item is checked in, it will acquire the Institution and Sublocation codes of the checkin port. All circulation rules, e.g. loan rules, fine rules, and notice production are controlled by the Circulation Code for Dynamic stock. Holds may be placed on these titles/items, however, they will not be routed to other locations upon checkin. Only holds for the checkin location can be satisfied by Dynamic Stock items.

Two functions, available from the `Holdings Maintenance (CHMF)` functions on the `Item Control Menu (ICM)`, provide methods to update holdings information for large numbers of items.

The *Mass Holdings Update* function allows the location and circulation data for pieces to be updated in batch by wanding, or keying, the barcode of the pieces.

The *Revolving Collection* function allows the library to prepare collections of materials that are scheduled to be moved from one location to another. Such collections might be collections of large print books, audio-visual material, or special collections.

```
DD MMM YYYY           Geac ADVANCE Library System (#.##)          IIIII PP
    HH:MM                      Your Library Name

                      HOLDINGS MAINTENANCE FUNCTIONS




                      1. CMHU  Mass Holdings Update

                      2. CRVC  Revolving Collection Maintenance




        Enter the number of your selection and press <ENTER>
                 or  ?  followed by <ENTER> for Help.
              Press <ENTER> to return to previous level :
```

Mass Holdings Update

The `Mass Holdings Update (CMHU)` screen allows you to change, permanently, or temporarily, location and circulation codes for batches of items by wanding, or keying, barcodes. Since these attributes relate primarily to how the system calculates loan periods, these functions are within the Circulation Module. However, this function can be used by staff in Cataloguing to make mass changes to item Institution, Subloca- tion, Collection code, Classification number, Call # prefix, Call # suffix, or Circulation Code. Additional functions allow the permanent codes to be reinstated very easily.

```
DD MMM 19YY          Geac ADVANCE Library System (#.##)          IIIII PP
   14:34                      Your Library Name

                            MASS HOLDINGS UPDATE




                       1. CHU  Holdings Update

                       2. CHR  Holdings Reinstatement


            Enter the number of your selection and press <ENTER>
                     or  ?  followed by <ENTER> for Help.
                Press <ENTER> to return to previous level :
```

Holdings Update

After selecting `Holdings Update` (CHU), you will be asked whether the changes to be made are:

`Permanent [Y] or Temporary [N] changes (Q to quit)?: Q`

NOTE: If you <ENTER> the system accepts the default of Q.

If you select N, for Temporary changes, you will change the **CURRENT** location and circulation code information.

```
02:37P                    MASS HOLDINGS UPDATE              DD MMM YY

Change CURRENT  Institution      N to : AU
                Sublocation      N to : CAM3

                Circulation code N to :

                Collection code  N to :
                Classification   N to :
                Call # prefix    N to :
                Call # suffix    N to :
```

If you select Y, for *Permanent* changes you will change the **OWNING** location and circulation code information.

```
02:41P                    MASS HOLDINGS UPDATE              DD MMM YY

Change OWNING   Institution      N to : AU
                Sublocation      N to : CAM3

                Circulation code N to :

                Collection code  N to :
                Classification   N to :
                Call # prefix    N to :
                Call # suffix    N to :
```

The defaults offered will be those of the port (terminal) where the changes are being made. If no item defaults are defined in Holdings (CEHD) default definitions for this port, then the system will default to the values in the PORT record (See *Utilities Management Guide*).

You must enter Y for each field to be changed. The defaults will be displayed and can be changed. In each case you can access, and select from, the browse lists for the valid codes for each field by keying ??.

If you do not select any fields for updating, i.e. leave all fields N, the system will return to the prompt concerning permanent, or temporary changes. You may return to updating, or quit.

If you have selected *Not* to change the Institution, but selected *Yes* to change to a Sublocation which belongs to a different Institution, the system will ask:

```
Warn on change of INSTITUTION (Y/N)?
```

An Item Barcode: prompt will display to allow you to wand, or key, the barcode numbers of all items to be changed.

Exception messages will display for barcodes whose status or action codes prohibit update, or whose current status will affect the changes being made:

- ```
  No item for this barcode. Press <ENTER>:
  ```

- ```
  Item is checked out. Continue (Y/N)?:
  ```

- ```
  Item is in transit to hold shelf. Press <ENTER>:
  ```

- ```
  Specified institution must have a Sublocation/
  Building code... press <ENTER>
  ```

If the condition does not permit updating by this function, the system will immediately respond with: 39999000101853 not updated. This item should be set aside for individual processing since the summary message which appears at the end of the update will not detail the specific items rejected, or unchanged.

If the item is accepted for update the system acknowledges with: 39999000104135 updated. In all cases the item barcode is displayed as part of the message as a verification.

<ENTER> at the item barcode prompt will complete the entry of barcodes and provide a summary of changes:

```
Items entered   : 15
```

```
Items updated   : 12

Items unchanged : 2        Press <ENTER> :

Items rejected  : 1
```

The DETAILED HOLDINGS display for updated items will now have Owning data in a window, and the Current Location in the numbered fields, as appropriate. (See *Edit Holdings* on page 11-3 [CEH].)

```
Owning Data  : AU,CAM1,GEN2,,HC60

 2) Institution

 3) Bldg/subloc

 4) Collection

 5) Call# Prefix

 6) Call Number

12) Circ Code
```

Holdings Reinstatement

For those items changed **temporarily** in `Holdings Update` (CHU), this function will reinstate the items to their Owning locations, or circulation codes.

After selecting `Holdings Reinstatement` (CHR), the system prompts

```
03:57P                    MASS HOLDINGS REINSTATEMENT                   DD MMM YY



 Item Barcode:
```

The system verifies:

- That the item exists in the pieces file.

- That the barcode is in the correct format.

- That the item has had **temporary** changes applied to it.

- That the item is not checked out.

- The the item is not in RBR processing. It may be located at an RBR location, however, if it is actually linked to an RBR course, then reinstatement must occur through the RBR function.

- That the item is not part of a Revolving collection.

If all of the verifications are acceptable, the system will return the item to its Owning location, or circulation code, and an acknowledgment message will display: `39999000103038 accepted`. Otherwise a message will indicate that the item has not been reinstated. This item should be set aside for individual processing since the summary message which appears at the end of the update will not detail the specific items rejected, or unchanged.

<ENTER> at the item barcode prompt will complete the entry of barcodes and provide a summary of changes:

```
Items entered  : 10

Items updated  : 7
```

```
Items unchanged : 2        Press <ENTER> :
Items rejected  : 1
```

Revolving Collections

The revolving collections function facilitates the scheduled (or unscheduled) movement of collections of material from location to location on a pre-established route. The items in the collection are loaned to patrons from each location that the collection visits. While at host locations, the host library is responsible for administrating the circulation of these items. Ultimately, the items in the collection will return to their original location(s).

ADVANCE allows you to:

- define a collection and location start and end dates
- specify the collection routing details, loan periods, and so forth
- specify the pieces that comprise the collection

Accessing Revolving Collections

Enter CRVC or select Revolving Collection Maintenance from
Holdings Maintenance Functions (CHMF). The REVOLVING
COLLECTIONS screen appears.

```
   DD MMM YYYY            Geac ADVANCE Library System (#.##)         IIIII   PP
      HH:MM                        Your Library Name

                             REVOLVING COLLECTIONS

        Number of records : 5
        Name            Description                            From     To
        --------------- -------------------------------------- ------- -------
     1. ANIMALS         BOOKS ABOUT ANIMALS                    28APR93  30APR95
     2. COOKING         INTERNATIONAL COOKERY                  02FEB93  01JAN94
     3. DUFE            THE DUFUS COLLECTION                   02JUL93  01SEP93
     4. FISHING         FISHING CLASSICS                       01FEB93  01JAN94
     5. BOOKMOBILE 1    BOOKMOBILE COLLECTION                  01JAN93  01JAN94


   ------------------------------------------------------------------------------
    Options:
     Retrieve #   Forward   Backward   Print   Add Collection
     Delete collection #   Exit   ? help
```

From the REVOLVING COLLECTIONS screen you can:

• display the details of one of the collections by using the *Retrieve #*
  option and entering a line number. The REVOLVING COLLECTION -
  CONTROL DETAILS screen appears. The details of the collection,
  such as the start and end dates, are displayed.

• add a new collection, select *Add collection*. A blank REVOLVING
  COLLECTION screen appears.

• delete a collection select *Delete collection #*. (Note: ADVANCE
  prevents deletion of collections that are not yet closed.)

Control Details

Use the *Retrieve #* option on the REVOLVING COLLECTIONS screen to access a collection.

```
  DD MMM YYYY            Geac ADVANCE Library System (#.##)           IIIII  PP
     HH:MM                         Your Library Name

                       REVOLVING COLLECTION - CONTROL DETAILS

  Mode  =  Display/Update Collection control details
  ------------------------------------------------------------------------------
   1. Collection name (15 chars)        : ANIMALS
   2. Collection description            : Scientific works
   3. Assembly location                 : ALII
   4. Release date                      : 28 APR 93
   5. Return date                       : 30 APR 95
   6. Default overall shipping period   : 2
   7. Default overall capture period    : 0
      Collection status                 : 4 = Active at location
   9. Contact name                      : ANN E.
  10. Contact phone #                   : 555-9873
  11. Collection note                   :
      Current location of collection    : 1 = BRA1 in PUB
  ------------------------------------------------------------------------------
   Options:
    # line   Line by line   Route details   Link/unlink Items   Exit   Print
    File   List collection   Status   Close collection   Activate   ? help
```

1. Collection name	Up to 15 characters. Required. Enter the name of the collection.
2. Collection description	Up to 37 characters. Optional. Enter a description of the collection.
3. Assembly location	13 characters. Required. Enter a valid sublocation code. Enter ?? to see a list of valid codes.
4. Release date	9 characters. Optional. Enter the release date of the collection to the first location on the route in the format MM/DD/YY or DD MMM YY.
5. Return date	9 characters. Optional. Enter the date of return of the collection to the assembly location in the format MM/DD/YY or DD MMM YY.
6. Default overall shipping period	3 characters. Optional. Defines the default shipping period between locations on route. Locations may set their own shipping period, or use

the default. The shipping period is used to calculate the difference in days between the date the collection leaves a location (end date) to the date the collection becomes active at the next location. The shipping period should therefore include any allowance needed for processing the collection on arrival, before the items are made available.

7. Default overall capture period	3 characters. Optional. Defines the default capture period for reassembly of the collection prior to routing to the next location. Defaults into the capture period field for each specific location.
Collection status	Displays the status set by the system or manually by the collection administrator. May not be changed at this screen. See *Status Handling* on page 11-41.
9. Contact name	37 characters. Optional. Enter the name of the person who is responsible for organizing the collection.
10. Contact phone #	37 characters. Optional. Enter the telephone number of the person who is responsible for organizing the collection.
11. Collection note.	37 characters. Optional. Enter any applicable comments.
Current location of collection	Provided by ADVANCE. Displays the sublocation where the collection is currently located.

Control Details Options

Route details	Displays the REVOLVING COLLECTION - ROUTING DETAILS screen.
Link/unlink	Displays the REVOLVING COLLECTION - LINK/UNLINK ITEMS screen.
List collection	Displays the REVOLVING COLLECTION - ITEM INFORMATION screen.
Status	Displays the REVOLVING COLLECTION -STATUS FUNCTION screen.
Close Collection	Takes the collection out of circulation and sets the location of the items back to the assembly location, and where appropriate sets the status of items to *ON ROUTE*. This does not delete the collection. It may now be prepared for recirculation.

Activate

Use this option when the list of items that comprise the collection is complete. It will set the current locations of these items to that of the collection assembly location, and where appropriate will set the *ON ROUTE* status in the pieces.

Adding Locations to the Route

To view the route of an existing collection select *Route details* from the
REVOLVING COLLECTION - CONTROL DETAILS screen. The
REVOLVING COLLECTION - ROUTING DETAILS screen displays.

```
                 REVOLVING COLLECTION - ROUTING DETAILS


 Rev Coll : ANIMALS -  Number of locations on route : 3         Collection
      Institution    Sublocation       From        To     Ship    Status
 -----------------------------------------------------------------------------
  *1. PUB           BRA1           29 Apr 93   31 Jul 93   2     active here
   2. PUB           BRA2           02 Aug 93   30 Aug 93   2
   3. PUB           BRA3           01 Sep 93   31 Dec 93   2




 -----------------------------------------------------------------------------


  Options:
   Retrieve #   Forward   Backward   Add new location   Prior screen
   Insert new location   Print   Control details   List collection   ? help
```

Rev Coll	15 characters. Displays the name of the collection.
Number of locations on route	Indicates the number of locations the collection will visit.
Institution	Displays the institution code of the location.
Sublocation	Displays the sublocation code of the location
From/To	Displays the dates when the collection will be at the given location.
Ship	Indicates the shipping period. Number of days after the end date at this location before the collection is due to start at next location.
Collection Status	Status of the collection at this location. An asterisk to the left of a location indicates the current location of the collection.

Routing Details Options

Retrieve #   Displays the REVOLVING COLLECTION - LOCATION DETAILS screen
                        for the sublocation selected.

Control details   Displays the REVOLVING COLLECTION - CONTROL DETAILS screen.

List collections   Displays the REVOLVING COLLECTION - LIST COLLECTION screen.

Add/Insert New   Additional locations can be added to the route by selecting `Add new`
Locations   `location,` which adds a location after the last location displayed. Use
                        `Insert new location` to add a location between existing locations.
                        When this option is used the system prompts you for a location:

                        `Insert new location before which position in list (1-`
                        `3)?:`

                        Either option produces a REVOLVING COLLECTION - LOCATION
                        DETAILS screen.

                        Note that if the start and end dates of the existing locations are in
                        conflict, or there is no available time for the location to be inserted, the
                        system will provide a warning message and will not allow the insertion.

Location Details

```
 DD MMM 19YY            Geac ADVANCE Library System (#.##)          IIIII  PP
    HH:MM                        Your Library Name

                   REVOLVING COLLECTION - LOCATION DETAILS

 Collection - ANIMALS : Mode  =  Insert new Collection location details

 Previous location Start date : 01 SEP 93  : End date : 31 DEC 93 - (Ship = 2 )
 ------------------------------------------------------------------------------
  1. Institution                        :PUB
  2. Sublocation                        :BRA1
  3. Start date at this location        :29 Apr 93
  4. End date at this location          :31 Jul 93
  5. Capture period (days)              :0
  6. Shipping period (days)             :2
  7. Circulation code for this location :AV2
  8. Contact name                       :Ann E.
  9. Contact phone #                    :555-9873
 10. Collection note                    :


 ------------------------------------------------------------------------------

 Latest end date (ignoring any shipping period) is : 31 DEC 93

  Press <ENTER> to continue
```

When a new location is added to the route, ADVANCE checks that:

- the institution is a valid institution

- the location is a valid sublocation or Reserve Book Room location code. It must also be a valid sublocation for the specified institution

- the location does not already exist on the route. If it does, a warning, which can be overridden, is issued

- There is no conflict between start and end dates entered for this location, and for other locations already specified

1. Institution

Up to 13 characters. Required. Enter a valid Institution Code or ?? to view a list. If you enter an invalid code, the system displays the message:

```
Invalid INSTITUTION CODE - Press <ENTER> to continue:
```

2. Sublocation

Up to 13 characters. Required. Enter a valid Sublocation Code or `??` to view a list. If you enter an invalid code, the system displays the message:

```
Invalid SUBLOCATION CODE - Press <ENTER> to continue:
```

3. Start date at this location

9 characters. Optional. ADVANCE displays the earliest possible start date. Enter date the collection is available at this location in the format MM/DD/YY or DD MMM YY.

4. End date at this location

9 characters. Optional. Enter the last day the collection is available at this location in the format MM/DD/YY or DD MMM YY.

5. Capture period (days)

3 numeric characters. Provided for information only.

6. Shipping period (days)

3 numeric characters. Enter the number of days allotted for shipping from this location to the next location. If the shipping period interferes with the start date of the collection at another location, a message is displayed:

```
Shipping period creates conflict with later location.
Press <ENTER> to continue.
```

7. Circulation code for this location

15 characters. Optional. Enter a circulation code for the location being defined. If you do not enter a Circulation Code, the loan period will be determined by the Circulation Code assigned for the previous location. If not specified, for any of the locations, the system will apply the Circulation Code normally used for that item.

8. Contact name

34 characters. Optional. Enter the name of the person to contact at this location for details about the collection.

9. Contact phone #

34 characters. Optional.

10. Collection note

34 characters. Optional. Enter a location specific note.

Location Detail Options

File to save the new location and add it to the route. Note that *File* leaves you at the same screen.

If before you File, you use any of the other options after creating or modifying a record, the system will prompt:

```
Exit without filing changes (Y/N):
```

Answer N <Enter> to remain at the screen where you may *File* the record. Answer Y <Enter> if you do not wish to save the data just entered. The system will execute the chosen option.

Next location and *Preceding location* display the location details for the respective sites.

List Collection displays the items in the collection.

Control details returns you to the REVOLVING COLLECTION - CONTROL DETAILS screen.

Delete location removes the location from the route. NOTE: if the collection is currently at the location you are attempting to delete, a message is provided and the option is not executed.

Adding Items to the Collection

The list of items that comprise the collection may be created before the items are physically present. ADVANCE performs the following checks on the items:

- ensures the items exist

- verifies the barcode format

- determines that if the item is checked out, the due date precedes the activation date of the collection

- ascertains that Institution/Sublocation codes match those of the location at which the collection is being assembled

- ensures that the item will not be required for the Reserve Book Room at any point during the duration of the collection

- determines that the item is not part of another revolving collection

To link items to a collection use *Link/unlink* option at the REVOLVING COLLECTION - CONTROL DETAILS screen. The REVOLVING COLLECTIONS LINK/UNLINK screen is displayed.

1. Select *Link* by entering Y <Enter>.

```
 DD MMM 19YY           Geac ADVANCE Library System (#.##)          IIIII  PP
    11:23                      Your Library Name


               REVOLVING COLLECTION - LINK/UNLINK ITEMS


               Collection : ANIMALS = BOOKS ABOUT ANIMALS
--------------------------------------------------------------------------------


                  Link (Y) or Unlink (N) items ? :
```

2. A new prompt is displayed:

```
Select an item
  or enter a local control number
  or enter an Expert Search command
  press <ENTER> to return to last level
```

3. When a local control number is entered, the Holdings Display screen appears. If an item barcode is entered the linking will be processed immediately. If a search command is entered, the Online Catalogue appears. Retrieve the item record to add it to the collection.

   If the item does not have the same Institution/Sublocation codes as the collection, the option to override is presented:

   ```
   Item does not belong to assembly Institution/Sublocation -
   Continue (Y/N)?:
   ```

   This message means that the items current location data is different from the assembly location and that the item will route to the assembly location when the collection is activated. (See *Status Handling* on page 11-41.)

4. When the item is linked, the system displays:

   ```
   Item linked to collection - <barcode>
   ```

   The cursor returns to the select an item prompt. Enter another barcode or search command, or <Enter> to finish the linking session.

   The system responds:

   ```
   Number of items linked to collection:1
   ```

   Note that the number increments for each additional item linked, but only counts from the current linking session.

After selecting an item to link, ADVANCE **may** prompt you to set or not set the status of routing to item being linked:

```
Route item to current location (Y/N):
```

Y will place the item on route. This prompt will be displayed if an item is linked to a collection which is already active at a location.

Displaying the Items in a Collection

The items in the collection can be viewed by using the *List Collection* option from the REVOLVING COLLECTION - CONTROL DETAILS screen or the REVOLVING COLLECTION - ROUTING DETAILS screen.

```
  DD MMM YYYY           Geac ADVANCE Library System (#.##)         IIIII  PP
    HH:MM                       Your Library Name


                   REVOLVING COLLECTION - ITEM INFORMATION

                   Collection : ANIMALS = BOOKS ABOUT ANIMALS
                           Number of items : 308
     Inst          Branch            Item                User           Status
  -----------------------------------------------------------------------------
  1. PUB           BRA1          39999000106546                       In library
     Creature comforts                                               (okay)
  2. PUB           BRA1          39999000113374                       In library
     Animal rights and human obligations                             (okay)
  3. PUB           BRA1          39999000108062                       In library
     Homes without hands. Being a description of the habitations o+  (okay)
  4. PUB           BRA1          39999000114389                       In library
     Baldy of Nome                                                   (okay)
  5. PUB           BRA1          39999000123264                       In library
     Essentials of canine and feline electrocardiography            (okay)
  -----------------------------------------------------------------------------
   Options:
    Forward   Backward   # line   Recall #   Unlink #   Prior screen   Print
    ? help
```

Collection	Displays the name of the revolving collection.
Number of items	Displays how many items are in the collection.
Inst	Identifies the institution by institution code.
Branch	Identifies the sublocation by sublocation code.
Item	Displays the item bar code number.
User	Displays the Patron ID.

Status   Used for the Item Status (CIS) as well as the Revolving Collection Item
                          Status. The first line is the item status. The status in parenthesis is the
                          Revolving Collection item status.

Item title   The item title is displayed under the institution code.

Item Information Options

Recall #   Generates a recall notice for this item. This option would be used when
                          the collection is being assembled for shipment to the next location.

Unlink #   Use this option to unlink selected items. Items can be unlinked in bulk
                          using the *Link/unlink* option at the Control Details screen.

Deleting Items from a Collection

Items can be deleted from either the CONTROL DETAILS screen or the REVOLVING COLLECTION - ITEM INFORMATION screen.

From Control Details Screen

1. From the CONTROL DETAILS screen select *Link/unlink items*.

2. The REVOLVING COLLECTION - LINK/UNLINK ITEMS screen appears. Enter the item barcode at the prompt.

3. When the item is unlinked, a message appears:

   ```
   Item withdrawn from collection: 39999000112834
   ```

4. The cursor returns to the item prompt. Enter another barcode or <Enter> to end the unlinking session. The system displays the number of items removed from the collection:

   ```
   Number of items unlinked from collection: 2
   ```

5. <ENTER> to continue.

From Item Information Screen

1. From the REVOLVING COLLECTION - ITEM INFORMATION screen select *unlink #*. Enter the line number of the item you want to delete.

2. A prompt, such as

   ```
   Collection route completed. Continue(Y/N)?:
   ```

   may appear depending on the status of the collection.

3. When the item is unlinked, another message appears:

   ```
   Item withdrawn from collection: 39999000112834

   Press <ENTER> to continue:
   ```

4. The ITEM INFORMATION screen appears.

Status Handling

Statuses allow you to document what is currently happening to the collection. There is a logical sequence to the statuses but they can be overridden. ADVANCE applies any appropriate changes to the item data and issues a warning if an inappropriate action is taken. Status are changed when certain options on the Control Details screen are executed, or they may be explicitly changed at the STATUS FUNCTION screen.

Collection Status Settings

0	Dormant	This status is applied to the collection when it is first being specified, for example on Control Details and Route Details screens, and to the items which comprise the collection. It may also be reapplied at the end of the route, to be re-assembled, updated or recirculated as appropriate. The *Update status* option when used with 0 as the current status, prompts you to update the status to 1.
1	Collection being prepared	This is an intermediate status between physically gathering the items at the assembly location, and setting the next status. The *Update status* option when used with 1 as the current status prompts you to update the status to 2.
2	Collection ready to be circulated	Essentially a documentary status, this implies that the items which comprise the collection have been linked to it, and that the next action is to move the collection to the next location. When the *Update status* option is used with 2 as the current status, you will be prompted to update the status to 3.
3	Collection in transit to next location	This status is automatically set by the *Move Collection* option. This updates the locations of the items to the next location on the route, and changes the status of the items to *ON ROUTE*. The Update status option when used with 3 as the current status prompts you to update the status to 4.
4	Collection active	Implies that the collection has now arrived at the next location and is available for circulation or display. The *Update status* option when used with 4 as the current status prompts you to update the status to 5.

Collection Status Settings

5	Ready to move to next location	The collection has finished at it's current location, and is ready to be moved to the next location on the route. When the *Update status* option is used with 5 as the current status, the system provides these choices: a) if the collection is not at the last location on the route, it will prompt 3, that is, *In transit to next location;* or b) it will prompt 6, *Return to assembly location.*
6	Being returned to assembly location	The collection has completed the defined route and is returning to the assembly point. The *Update status* option when used with 6 as the current status prompts the user to update the status to 7.
7	Back at assembly location	The collection has physically returned to the assembly location. The *Update status* option when used with 7 as the current status prompts the user to update the status to 8.
8	Return processing complete	The collection has been fully checked after it's return to the assembly location.
9	Dissolved - items going home	The collection has been dissolved. The items that constitute the collection are now on route to their owning locations. The *Update status* option when used with 9 as the current status prompts the user to update the status to 0.
99	Collection suspended	Allows the library to suspend the circulation of a collection.

The STATUS FUNCTION screen can be obtained by selecting the *Status* option from the CONTROL DETAILS screen.

```
  DD MMM YYYY            Geac ADVANCE Library System (#.##)          IIIII  PP
     HH:MM                       Your Library Name

                      REVOLVING COLLECTION - STATUS FUNCTION

  ----------------------------------------------------------------------------
  Collection          : ANIMALS                   (from 28 Apr 93 to 30 Apr 95)
  Number of locations : 3
  Number of items     : 308
  Assembly location   : ALII in AU
  Current location    : 1 = BRA1 in PUB
  Next location       : 2 = BRA2 in PUB           (from 02 Aug 93 to 30 Aug 93)
  Status on file      : 4 = Active at location on route
  Actual status       : Collection active
  Status based on date : As above


  ----------------------------------------------------------------------------
   Options:
    Location exceptions   Item exceptions   Activate   Move to new location
    Return collection home   Update status   Close collection
    Delete collection   ? help   Exit
```

Collection	The collection name.
Number of locations	Indicates the number of locations the collection will travel to.
Number of items	Displays the number of items in the collection.
Assembly location	Indicates where the collection was physically assembled.
Current location	Displays where the collection is currently located.
Next location	Displays the next scheduled location for the collection.
Status on file	The status of the collection as it has been set.
Actual status	The status of the collection, if it differs from that on file.
Status based on date	The status of the collection as determined by the routing schedule. Also identifies conflicts.

Status Options

Location exceptions
Checks whether the collection is at the location implied by the route dates.

Item exceptions
Checks that all items are at the expected location. This will be the assembly location or one of the locations on the route.

Activate
Use this option when the list of items that comprise the collection is complete. It will set the locations of these items to that of the collection assembly location, and where appropriate will set the *ON ROUTE* status.

Move to new location
Sets the Institution, Sublocation, and where specified for the new location on the route, the Circulation Code, to that of the next location on the route; if the current location is the final location on the route, the user is informed that this action will **return** the items in the collection to the assembly location.

Return collection home
This option sets the collection status to *9 - Dissolved - items going home*. When a collection is dissolved, this option reinstates the owning Institution and Sublocation for the items in the collection. It sets the status to *ON ROUTE* for all appropriate items.

Update status
This option allows you to explicitly change the status of the collection. It should be used by someone well-versed in assembling and circulating revolving collection. As far as possible, it follows a logical chain of action, in that each current status setting implies the subsequent status setting. This is qualified to an extent when the collection is either at the assembly location, or the last location on the route.

Date settings for the Collection as a whole, and for each location, are not binding. In both cases, they may be unspecified, or totally specified, as required. When specified, the function warns you when a status update is inappropriate. In all cases, these can be overridden.

Close collection
Takes the collection out of circulation and sets the location of the items back to the assembly location, and where appropriate sets the status to *ON ROUTE*. This does not delete the collection. It may now be prepared for recirculation.

Delete collection   Physically deletes the Revolving Collection record. ADVANCE initially
                           checks the status of the collection to determine if it can be deleted. If it
                           can not be deleted, a warning is displayed, which may be overridden.
                           The system automatically takes you through the Control Details, Route
                           Details, and Item List screen. On each screen you will be prompted as to
                           whether you wish to continue with the deletion. The details for specific
                           locations and the items in the collection may be displayed.

Administering the Collection

While you are adding items to a collection and defining the routing details, the status of the collection is dormant (Status = 0).

- Use the *Activate* option (CONTROL DETAILS screen or STATUS FUNCTION screen) to change the status of the collection to *1 Collection being prepared*

- Use the *Update status* option (STATUS FUNCTION screen) to change the status of the collection to *2 Collection ready to be circulated*

- Use the *Move collection to new location* option (STATUS FUNCTION screen) to put the items in transit and assign *on route status* to pieces. This changes the status of the collection to *3- Collection in transit to next location* and updates the current institution and location codes

- When the items arrive at the new location and they are checked in, use the *Update status* option (STATUS FUNCTION screen) to change the status to *4 - Collection active*

- When the collection is finished at a location, use the *Update status* option (STATUS FUNCTION screen) to change the status to *5 - Ready to move to next location* and then use the *Move to new location* option

Dissolving the Collection

- When the collection has completed it's route and is ready to return to its assembly point, use the *Update status* option (STATUS FUNCTION screen) to change the status to *6 - Returning to assembly location.*

- After the collection has physically returned to the assembly location, use the *Update status* option (STATUS FUNCTION screen) to change the status to *8 - Return processing complete*.

- Select the *Close collection* option from the CONTROL DETAILS screen to set the institution and location codes back to the assembly location. This option does not delete the collection, you must select the *Delete collection* option from the STATUS FUNCTION screen to physically remove the revolving collection record.

If you do not wish to recirculate the collection immediately, but instead, return the items to their owning locations, use the *Return collection home* option. This sets the status to *9 Dissolved - items going home* and updates the current locations of the items, as appropriate.

Changing Action and Status Codes

Two options on the `Item Control Menu` provide you with batch methods for changing action and status codes for any number of items, i.e., for items requiring the same change to a new action or status code. For example, if there are 10 items that need to be routed to another building, you can use the *Change Actions* option to assign the `Route to:` code to each item. This can be done as fast as the barcodes can be wanded into the system. The system will change the holdings records without requiring you to directly access each record.

Change Action Codes

Display the ITEM ACTION UPDATE screen by entering Change Actions (CCA) at the prompt on the Item Control Menu.

```
                    ITEM ACTION UPDATE

     Delete/Report date:                  Delete/Report time:

Enter Item ACTION code : _

Item status to add :
Item actions to delete :

   Barcode Title
```

Enter the action code **that you want to change** at the Enter Item ACTION code: prompt. The code you specify here is the **NEW** action code you want entered in all items which will be wanded/keyed. If you need a listing of the available action codes, enter two question marks (??) at the same prompt.

```
                        ITEM ACTION UPDATE
                         ACTION CONTROL

        Number of records : 12
        Code   Description of code
        -----  -----------------------------------------------------------
   1.  0       Delete Action code (Do not delete)
   2.  1        MISSING                                  Missing
   3.  4        Incomplete, Return to cataloguing        Return to Cataloguin
   4.  8        On Hold                                  On Hold/PATRON
   5.  16       Route to:                                Route to:
   6.  17       Return to:                               Return to:
   7.  18       Transfer to:                             Transfer to:
   8.  220      On Hold for Cataloguing                  Send/Cataloguing
   9.  230      On Hold for Book Repair                  Send/P&R
  10.  240      On Hold for Bindery                      Send/Bindery
  11.  250      On Hold for RBR                          Hold/RBR


 Options:
  ? help   # line   Print   Forward   Backward   Search jump   Exit
```

When you select a line number from the screen above, or enter an action code at the original Change Actions screen prompt, the ITEM STATUS UPDATE screen appears. The system automatically completes some of the fields from the codes table when you choose an action code.

```
                        ITEM STATUS UPDATE

      Delete/Report date: 19 APR 19YY          Delete/Report time: 07:09PM

Enter Item status code : 135 In Transit

Item status to add :
Item actions to delete : 16,17,18

   Barcode Title

  1)
```

The cursor moves to the Barcode entry line. The data in the fields Item status to add and Item actions to delete are completed based on the Status/Action setup tables only. See the CIRCULATION CODES MENU: Item Control Codes Menu (CICM), Item Status Control

Codes (CIS), Item Status Calendar Codes (CISC), Item
Action Control Codes (CIA), and Item Action Calendar
Codes (CIAC) in the *Circulation Management Guide.*

Wand or type in the barcodes of the items requiring an action code
change. The following screen displays four items and their barcodes
have been entered.

```
                        ITEM ACTION UPDATE

     Delete/Report date:                     Delete/Report time:

Enter Item action code : 1 Missing

Item status to add :
Item actions to delete :

    Barcode Title

  1)   39999000107610    The Architecture of digital computers
  2)   39999000107609    Alaska regional studies plan
  3)   39999000107608    Supertube : the rise of television sports
  4)   39999000107607    On justice = Peri dikaiou
  5)   <enter>
```

After you have wanded/keyed all of the items, <ENTER> to complete the
process. The system returns to the Enter Item action code:
prompt, should you have further items to be changed, you may select it
at this time. No summary screen is provided for items which have been
changed.

Change Status Codes

Display the ITEM STATUS UPDATE screen by selecting CCS at the prompt on the ITEM CONTROL MENU.

```
                  ITEM STATUS UPDATE

    Delete/Report date:                 Delete/Report time:

Enter Item STATUS code : _

Item status to add :
Item actions to delete :

   Barcode Title
```

Enter the status code that **you want to change** at the Enter Item STATUS code: prompt. The code you specify here is the **NEW** status code you want entered in all items which will be wanded/keyed. If you need a listing of the available status codes, enter two question marks (??) at the same prompt. The system will display a list of status control codes.

```
                        ITEM STATUS UPDATE
                         STATUS CONTROL

        Number of records : 27
        Code   Description of code
        -----  --------------------------------------------------------
   1.  0       Remove current Item's status        In Library
   2.  016     ON ROUTE                            En Route
   3.  050     Billed as Lost                      Billed as Lost
   4.  055     Lost and Paid                       Lost and Paid
   5.  100     Temporarily out of collection       Out of collection
   6.  110     Sent for repair                     Being Repaired
   7.  112     At Reprography                      At Reprography
   8.  114     At Bindery                          At Bindery
   9.  124     New Books Display                   New Books Display
  10.  130     Out on Loan                         Checked Out
  11.  135     In Transit                          In Transit
  12.  136     Sorting shelves                     Sorting Shelves
  13.  140     Recalled                            Recalled

 Options: _
  ? help   # line   Print   Forward   Backward   Search jump   Exit
```

When you select a line number, or enter an action code, the ITEM STATUS UPDATE screen appears. The system automatically completes most of the fields from the codes table when you choose an action code.

```
                        ITEM STATUS UPDATE

      Delete/Report date: 20 APR 19YY          Delete/Report time: 04:05PM

 Enter Item status code : 124 New Books Display

 Item status to add :
 Item actions to delete :

    Barcode Title

   1)
```

Wand or type in the barcodes of the items requiring an status code change.

```
                        ITEM STATUS UPDATE

      Delete/Report date: 20 APR 19YY          Delete/Report time: 04:05PM

 Enter Item status code : 124 New Books Display

  Item status to add :
  Item actions to delete :

     Barcode Title

    1)    39999000107610     The Architecture of digital computers
    2)    39999000107609     Alaska regional studies plan
    3)    39999000107608     Supertube : the rise of television sports
    4)    39999000107607     On justice = Peri dikaiou
    5)    <enter>
```

After you have wanded/keyed all of the items, <ENTER> to complete the process. The system returns to the Enter Item status code: prompt, should you have further items to be changed, you may enter it at this point. No summary screen is provided for items which have been changed.

Physical Inventory Control

The PHYI *Physical Inventory Control* menu, and its two associated functions PHYT *Physical Inventory* (Terminal Mode), and PHYD *Physical Inventory* (Portable Unit Mode) enable the library to conduct an inventory of library materials and obtain reports on:

• items in the library which do not have the status *In Library*.

• items which are not in the library but have the status *In Library*.

• items shelved at the wrong location.

• items in the library which do not have pieces records.

Physical Inventory is an optional, separately purchased module.

Patron History

The LAST PATRON DISPLAY function allows you to find out which patron had most recently borrowed an item. The system keeps track of the last borrower to have Checked in an item only if the library chooses this option. You respond Y to *Keep Patron History?* in the general `Circulation Control Table (CCT)`, and in the ADDITIONAL PARAMETERS screen of the `Circulation Code (CCC)`.

An associated function will allow staff to delete information about the item's previous borrower and, if appropriate, to add a blocks record for that patron.

These functions are accessed from the `Last Access Patron History Display CLPD)` and `Last Access Patron History Clear (CLPC)`, found under the `Item Control Menu (ICM)`.

Last Access Patron History Display

Select option `Last Access Patron History Display (CLPD)` from the `Item Control Menu.`

```
05:22PM                    LAST PATRON DISPLAY                 DD MMM YY



Command or Item Barcode: _

```

To identify an item you can enter

• a barcode number or

• S to search the online catalogue. (Note: Expert Search, i.e. T= ____ to search a specific title is not available from this prompt.) Once the title is identified from the browse list, it can be selected by *Retrieve #* for display in this function.

If you enter an item which has a patron history, the system the LAST PATRON DISPLAY screen appears:

```
05:31PM                     LAST PATRON DISPLAY                    DD MMM YY




Command or Item Barcode: 39999000101853




Last access by : 29999000001456

          Name : McPherson, Margaret E.

   Return date : 16 APR 1993




Display patron details (Y/N) ? N
```

Answer N to return to the function's initial screen.

Answer Y to access the borrower's registration screen.

```
                       PATRON REGISTRATION

   Patron Barcode..: 29999000001456                    Last Update: 04/14/93
                                                        Last Trans.: 04/15/93
 1. Name (Last, F M): McPherson, Margaret E.            Registered : 04/06/93
 2. Address........: 8956 Abbey Lane

 3. Zip/Postal Code.: SAN CLEMENTE, CA  93657
 4. Phone Number(s).: 606-826-9822
 5. Address 2.......:

 6. Zip/Postal Code.:                 14. Password...: #####
 7. Personal ID.....: 222560011       15. Home Inst..: AU-University of Qualit
 8. ID Type.........: SSN             16. Home Subl..: CAM1-Main University Li
 9. Patron Code.....: F-Faculty       17. Housebound (Y/N) ? : N
10. Expiration Date.: 13 APR 1999
11. Comments........:

12. Rte. Recipient..: N
13. Rte. Location...:

Press <enter> to continue : _
```

The borrower's registration record cannot be updated at this point, but all information can be displayed.

Last Access Patron History Clear

Select option `Last Access Patron History Clear` (CLPC) from the `Item Control Menu`.

```
11:13AM                    LAST PATRON CLEAR                    DD MMM YY




Command or Item Barcode:

*** Enter 'B' to place a BLOCK on patron record ***
```

This screen has two modes

- Clearing mode - for deleting the patron history.

- Blocking mode - for adding a patron block and **not** deleting the patron history.

Type B to change from one mode to the other. The function stays in the same mode until you use the B command to switch back to the other mode. Once you have entered B, the message changes from

```
*** Enter 'B' to place a BLOCK on patron record ***,
```

to

```
*** Patron Transaction Update ***
```

which permits access to the patron record for adding the block. Enter B again to return to clearing mode.

Clearing Mode

Enter an item barcode, or S to search the *Online Catalogue* and retrieve and item. If you identify an item which has a patron history, the system displays the LAST PATRON CLEAR screen.

```
11:19AM                    LAST PATRON CLEAR                    DD MMM YY



Command or Item Barcode:

*** Enter 'B' to place a BLOCK on patron record ***



Item barcode : 39999000103038

Last access by : 20000002003070

        Name : SNELLING, JOHN CRAIG

   Return date : 20 APR 19YY
```

The cursor returns to the Command or Item Barcode: prompt. <ENTER> to return to the previous menu. The system clears the information on who last borrowed the item. Or you may enter another item barcode for the next patron history record to be cleared. The system will clear the history for the previous item.

Blocking Mode

If you enter B to place a BLOCK on a patron's record, the initial screen display will change to

```
11:24AM                    LAST PATRON CLEAR                    DD MMM YY



Command or Item Barcode:

*** Patron Transaction Update ***
```

Enter an item barcode, or S to search the *Online Catalogue* and retrieve an item. With the *Patron Transaction Update* option turned on, and if you identify an item which has a patron history, the system displays LAST PATRON CLEAR screen.

```
11:24AM                    LAST PATRON CLEAR                    DD MMM YY

Command or Item Barcode: 39999000103038

*** Patron Transaction Update ***


Item barcode : 39999000103038

Last access by : 20000002003070

         Name : SNELLING, JOHN CRAIG

   Return date : 20 APR 19YY


Display patron details (Y/N) ?
```

Answer N to access the patron's Blocks screen directly.

Answer Y to access the PATRON REGISTRATION screen before going on the PATRON BLOCKS screen.

In either case, the system **does not clear** the information on who last borrowed the item.

Once the PATRON BLOCKS screen is displayed it will list any blocks and charges against the patron, and allow you to add new blocks. See *Transaction Update* on page 3-31.

Flagged Hold Cancellation

Select Flagged Hold Cancellation (CFHC) from the Item Control Menu (ICM). This screen provides a list of holds which have been identified as *unable to be filled*. You use this screen to determine whether any or all of those holds should be cancelled. This list is produced by the system's background processor - HOLDS function in Calendar Processor (See the *Circulation Management Guide* for further information on the Calendar Processor (OCP) and its HOLDS report). The library must determine whether or not the OCP program should produce this report, by selecting the appropriate option in Holds Control (CHOLD), Holds Reports (CHLDP) control codes (See the *Circulation Management Guide*, *Configuration Codes* for more information). If the report is selected in CHLDP, **and** if the individual holds record has an *Autocancel* flag set to YES, then the calendar processor will report on holds for which there are no copies that can fill them, e.g. the last copy was deleted, or the Scope of the hold prohibits filling from certain locations.

(See *Holds, Recalls or Traces* on page 6-1 for more information on setting the *Autocancel* option).

Once the calendar processor has compiled this report, at a library specified frequency, you may view, and if necessary cancel, the holds from the CANCELLATION OF FLAGGED HOLDS screen.

```
  DD MMM YYYY              Geac ADVANCE Library System (#.##)        IIIII PP
     HH:MM                        Your Library Name

                         CANCELLATION OF FLAGGED HOLDS

     Number of records : 4
                 Patron                        Title            Report date  Stat
   -----------------------------------------------------------------------------
   1. 29999000000100 Smith, Fred     Focus on Africa        22 Apr 93        C
   2. 29999000537399 Jones, Albert   Msthematics for the+   22 Apr 93
   3. 29999000112221 Brown, Susan    Lost Cities            21 Apr 93
   4. 29999000048132 Harris, Anne    Japanese Art           20 Apr 93




   Options:
     # line   Forward   Backward   Cancel hold #   Cancel all   Exit   ? help
```

The patron barcode and name, title, date the hold was reported by the calendar processor, and the status are shown. The status refers to your **action** on this hold, not the status of the hold itself. No status is shown when the screen is first displayed; only after the *Cancel hold #* option is selected will a *C* display in the *Status* column. Note that if a hold is cancelled from this screen, and you leave and re-enter the screen, the *C* status indicating that the hold has been cancelled is no longer displayed.

 # line selects one of the holds for examination. You are taken to the HOLDS DISPLAY screen (and if desired, to the second screen of HOLDS FULL DISPLAY). This allows a full examination of the hold to determine if the hold can be filled by other means (e.g. a different scope), or if it should be cancelled. **No action** can be taken on the hold from those screens. You must return to Holds,Recalls,Traces (HRT) to edit the hold.

Cancel hold # allows you to cancel a specific hold from this screen.

Cancel all allows you to cancel all of the reported holds. This will apply to all holds, even if they appear on subsequent screens.

A

Using ADVANCE

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen

- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen

- the terminal's **Port Code** (PPPPPP)and default **Institution Code** (IIIIII), in the top right corner of the screen

- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen

- an **information display** or **work area**, in the middle of the screen

- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY          Geac ADVANCE Library System (RRRR)        PPPPPP  IIIIII
   HH:MM                      Your Library Name

                              MASTER MENU



        1. CAT   Cataloguing              4. ACQ   Acquisitions

        2. CIRC  Circulation              5. SER   Serials Control

        3. OPAC  Online Catalogue         6. UTIL  Utilities

                        7. ON    Change User

                        8. OFF   Log Off




        Enter the number of your selection and press <ENTER>
               or  ?  followed by <ENTER> for Help :
```

Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (ᴜᴜᴜᴜᴜᴜ) is shown in the top right corner of many screens.

```
           ORD - ORDERING DATA                         UUUUUU

 PO#/LINE#: 9200000314/0001    VENDOR   : PENGUIN    ORDER DATE: 02/08/93
 REQUEST #: 920123             ORDER TYPE: REGULAR   REQST DATE: 02/08/93
 LIBRARY  : UL                 CONDITION : OPEN       EST DELVRY: 02/22/93
 ISBN/ISSN: 0898598125         LC CARD # :   85029331   RECEIVED  :
 AUTHOR   : Buss, Arnold H.,  1924-
 TITLE    : SOCIAL BEHAVIOR AND PERSONALITY.


 STATUS   : Rush Order

  1. VENDOR   : PENGUIN    6. SELECTOR : ACQ       10. UNIT COST:       46.50
  2. PAY TYPE : PAY        7. TOTAL CPY:   6       11. DISCOUNT%: 15.000
  3. TRANSFER : Y          8. PRIORITY : RUSH      12. TAX %    :  8.000
  4. CLM CODE : DFLT       9. CURRENCY : CDN       13. ADDED CHG:        0.00
  5. REQUESTOR: C. Smith                           14. CONDITION: OPEN
 15. VENDOR   : Please supply ASAP
     NOTE     :


 Options:    Description of selected option
   File   # line   Line by line   Bibliographic   Allocation   Notes   Status
   Conditions   Serial Publication   Vendor inquiry   Prior screen   ? Help
   Exit
```

Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the "option bar" feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal's port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

Option Bar

If the "option bar" feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options:     Get more information
 Check in   Holdings   Claims   Order detail   Forward   Backward
 Prior screen   ? help   Exit
```

To select an option:

1. move the highlighted bar in any of three ways:

    • press an arrow key

    • press the space bar

    • type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.

2. and then <ENTER> to execute it.

Option Code

If the "option bar" feature is turned **off**, the option line will look something like the following, with a code (or "command") shown to the left of each option.

```
Options:                         <ENTER> = scroll options
 C = Check in   H = Holdings   CL= Claims        O = Order detail
 F = Forward    B = Backward   P = Prior screen  ? = ? help
```

To select and execute an option, enter the option's code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

Scrolling   If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options:                          <ENTER> = scroll options
 F = Forward   B = Backward  P = Prior screen   ? = ? help
 E = Exit
```

and then to:

```
Options:                          <ENTER> = scroll options
 E = Exit
 C = Check in   H = Holdings  CL= Claims        O = Order detail
```

and then finally back to the original display.

Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSOR file.

Enter	Description
\<ENTER>	To leave the current field as is and **proceed**, just \<ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
(blank)	To leave the current field as is and send the cursor **down to the option line**, even in line-by-line mode, enter a blank at the beginning of the field and \<ENTER>.
.	To leave the current field as is and **go back** one field, type a period at the beginning of the field and \<ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.
#	To **clear** the current field and proceed, type a number sign at the beginning of the field and \<ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.
?	For library-defined **help** on the field, type a single question mark at the beginning of the field and \<ENTER>.
??	At fields which take a setup code as the value, you can have the system display the **list of valid codes**. Type two question marks at the beginning of the field and \<ENTER>. For example, typing ?? in the *CHRONOLOGY CODE* field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.
\<ESC>A	ErAse character under the cursor (the cursor moves to the left).
\<ESC>B	Tab Backwards within the field.
\<ESC>D	Delete character under the cursor (the cursor does not move).
\<ESC>H	Go to the beginning of the field (Home).
\<ESC>I	Insert (paste) text from your preceding deletion/capture in the field.
\<ESC>L	Go to the end of the field.
\<ESC>O	Toggle between insert and Overtype modes.

Enter	Description
<ESC>P	For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an **edit window**.
	See the next section for a list of window editing commands.
<ESC>Q	Delete (and capture) text to the beginning of the field.
<ESC>R	Restore the field (undo changes).
<ESC>Z	Delete (and capture) text to the end of the field.

<ESC> Commands

1. Press the keys one after another rather than together. To use "<ESC>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or "pages" of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

Enter	Description
<ESC>A	erAse character under the cursor (the cursor moves to the left)
<ESC>B	tab Backwards
<ESC>D	Delete character under the cursor (the cursor does not move)
<ESC>E	Exit from the window (and save changes)
<ESC>F	reFormat the contents of the window
<ESC>H	go to the beginning of the line (Home)
<ESC>I	Insert (paste) text from your preceding deletion/capture
<ESC>L	go to the end of the Line
<ESC>M	go to the bottoM of the window
<ESC>O	toggle between insert and Overtype modes
<ESC>P	go to the next Page; oPen a window
<ESC>Q	delete (and capture) text to the beginning of the line
<ESC>R	Restore the line (undo changes)
<ESC>S	Split the line into two lines
<ESC>T	go to the Top of the window
<ESC>U	go Up to the previous page
<ESC>Z	delete (and capture) text to the end of the line

<ESC> Commands

1. Press the keys one after another rather than together. To use "<ESC>E", for example, press the Escape key, release it, and then press the "E" key.

2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.

B

Edit Functions

Edit Function Keys

Key	Function
Arrows	Move the cursor around a space at a time on tag or subfield.
Tab	Moves right, field, indicators and subfield on tag or subfield.
<ENTER>	Moves down a field at a time or places cursor at the subfield designation when pressed at the end of a line of text. If used on the middle of text line, deletes the remainder of the line.
Space bar <ENTER>	Returns the option line.
#	Deletes a tag or subfield as well as its contents.
ESC 1	Authority Hot Key (within authority-controlled tag).
ESC 2	Move Tag/Subfield to another part of the record. Cursor must be on a tag or subfield.
ESC 3	Copy Tag/Subfield to another part of the record. Cursor must be on a tag or subfield.
ESC 4	Information toggle. Cursor must be on a tag or subfield.
ESC 5	Insert Tag/Subfield After. Cursor must be on a tag or subfield.
ESC 6	Insert Tag/Subfield Before. Cursor must be on a tag or subfield.

Edit Function Keys (Continued)

Key	Function
ESC A	Backspace (delete under cursor). Applies to text line or window.
ESC B	Backward tab. Applies to text line or window.
ESC D	Delete character. Applies to text line or window.
ESC E	Exit window. Applies to window.
ESC F	Reformat window contents. Applies to window.
ESC H	Move to beginning of line. Applies to text line or window.
ESC I	Insert deletion buffer. Applies to text line or window.
ESC L	Move to end of line.
ESC M	Move to bottom of window. Applies to window.
ESC O	Insert/overlay toggle. Applies to text line or window.
ESC P	Opens a text editing window (Only works when cursor is within a subfield.).
ESC Q	Delete to beginning of line. Applies to text line or window.
ESC S	Cut line or split a line within a window. Applies to window.
ESC R	Restore a line.
ESC T	Move to top of window. Applies to window.
ESC U	Move to previous page. Applies to window.
ESC Z	Delete to end of line. Applies to text line or window.

Note: Escape commands are not case sensitive.

Edit Functions

Function	Key(s)	Description
Activate Command Mode	Space Bar	Use the space bar to exit edit mode and display the option lines on the screen.
Backspace	Backspace or ESC A	Deletes the character under the cursor, then moves the cursor one character to the left.
Backward Tab	ESC B	Moves the cursor one tab position to the left. Used when in window mode.
Bottom of Window	ESC M	Moves the cursor to bottom of the window. Used when in window mode.
Copy	ESC 3	Allows the cataloguer to copy the current tag/subfield to a new location in the record (display). The system will prompt for the insertion point, i.e., the tag following which the cut tag/subfield will be inserted. If there is more than one occurrence of the insertion point, the system will prompt for the number of the occurrence following which the tag/subfield will be inserted. The system prompts: How many copies of this tag?.
Cursor Home	ESC H	Moves the cursor to the beginning of the line.
Cursor Movement	Arrow Keys	Use the arrow keys to move the cursor around the screen.
Delete to Beginning of Line	ESC Q	Deletes all characters from the cursor left to the beginning of the line.
Delete Character	ESC D	Deletes the character at the current cursor position.
Delete to End of Line	ESC Z	Deletes all characters from the cursor right to the end of the line.
Delete Tag/ Subfield	#	Deletes the tag or subfield at the current cursor position.
Enter Window Mode	ESC P	The window provides a separate area where the data for a field can be entered or modified, before being inserted into a field. The cursor must be a subfield to invoke window mode.

Edit Functions (Continued)

Function	Key(s)	Description
Hot Key	ESC 1	Allows the cataloguer to search the authority records for a correct entry for an authority-controlled field.
Information Toggle	ESC 4	Turns the display of the tag/subfield information lines on or off. The information lines display tag/subfield name, authority information, valid subfields or entries.
Insert After	ESC 5	Allows the cataloguer to insert a tag or subfield after another tag or subfield in a record. The new tag or subfield is inserted immediately below the current cursor position. An inserted tag is numbered 000. An inserted subfield creates a blank line.
Insert Deletion Buffer	ESC I	Inserts the contents of the deletion buffer at the current cursor position. The deletion buffer contains the most recent data deleted using delete to end of line function. Used only in window mode.
Insert Before	ESC 6	Allows the cataloguer to insert a tag or subfield before another tag or subfield in a record. The new tag or subfield is inserted immediately above the current cursor position. An inserted tag is numbered 000. An inserted subfield creates a blank line.
Insert/Overlay Toggle	ESC O	Changes the edit mode from insert to overstrike and back to insert. Allows characters to be inserted (insert mode) or overwritten (overstrike mode) in a subfield or in the window.
Move	ESC 2	Allows the cataloguer to move the current tag/subfield to a new location in the record. The system will prompt for the insertion point, i.e, the tag following which the cut tag/subfield will be inserted. If there is more than one occurrence of the insertion point, the system will prompt for the number of the occurrence following which tag/subfield will be inserted.
Move Cursor to End of Line	ESCL	Moves the cursor right to the end of the line.
Page Up	ESC U	Moves the cursor to the previous page in the window. Used in Window mode.
Reformat Window	ESC F	Reformats and redisplays the contents of the window. Used in window mode.
Restore Line	ESC R	Restores line to its original contents.
Split Line	ESC S	Splits a line in two by placing the right truncated portion on the next line. Used when in the window mode.
Tab to Field	Tab	Moves the cursor one field at a time; form tag to indicator to subfield.

Edit Functions (Continued)

Function	Key(s)	Description
Top of Window	ESC T	Moves the cursor to the top of the window. Used when in window mode.
Window Exit	ESC E	Exits the window mode and writes the data in the window to the current subfield.

C

Materials Booking

Materials Booking allows library staff to schedule reservations for items such as audiovisual equipment, videos, rooms, or any materials the library designates as bookable. Unlike holds, materials booking allows staff to schedule loans for specific times. Materials booking is an add-on software package to the ADVANCE circulation module.

This appendix covers:

- materials booking set-up
- materials booking function
- displaying bookings from OPAC
- displaying bookings from checkout
- materials booking picking list

Materials Booking Set Up

To set up materials booking, you must:

- define booking patterns

- link specific booking pattern to single or multiple circulation codes

You may define booking patterns for either **fixed** or **sliding** time frames. Fixed booking periods specify that the bookings are valid only within specified time slots, for example, 2 hour booking periods are available only for 8 a.m. - 10 a.m., 10 a.m. - 12 noon, 12 p.m. - 2 p.m., and so forth. For a sliding 2 hour pattern, bookings may be made for any 2 hour period.

Booking patterns may be Hourly or Daily.

It is also possible to specify multiple booking patterns for a single circulation code, where there is a date range dependence of the pattern used. For example, you may have a 1 day booking period for items. This may be extended to 1 week during the summer.

By linking a circulation code and a booking pattern, the library specifies which items are bookable.

Creating Booking Patterns

Booking pattern parameters may be entered from the *Circulation Loan Periods* menu by selecting *Materials Booking Patterns* (MBP).

The Booking Pattern screen displays. At the prompt, Enter Booking Pattern code:

- enter an existing pattern

- enter ?? to search

- or enter a new code (maximum 10 characters)

```
                    MATERIALS BOOKING PATTERNS              DD MMM YY


     Enter Bookings Pattern Code : H2C

 1) Description          : TWO-HOUR BOOKING PATTERN
 2) Booking type         : H - Hourly 3) Booking form     : F - Fixed
 4) Application date start : 04 FEB 93  5) End date    : Indefinite

    Capture periods (Days - Hours:Minutes)
 6) Normal      :     0    -    00:30
 7) Transit     :     0    -    00:45

 8) Grace period (overdue)     :           -

 9) Display field width :

10) Number of booking periods : 38


 Options:
  ? help   # line   Line by line   Second screen   Backward   Forward
  Delete   Exit   Copy
```

If you enter a code that does not exist, the system prompts:

Pattern not found. Do you wish to create a new entry? (Y/N):

Answering, Y <Enter> places the cursor on the *Description* field.

1) Description   40 characters. Optional. Free text description of the booking pattern code.

2) Booking type	Required. Valid choices are H or D. **H**, for Hourly, indicates that the typical booking period is for a number of hours. **D** (Daily) indicates that items are booked for a number of days.
3) Booking form	Required. Valid choices are F or S. **F**, fixed, means that booking periods are predefined for fixed periods, such as from 9:00 to 11:00 a.m. **S**, sliding, indicates that the booking periods do not form predefined slots but are based on *a number of time periods* from the start of the booking. Defaults to **F.** (Note that this parameter does not affect the creation of the booking pattern or subsequent processing but is used for information only.)
4) Application date start	Required. Defines the date when the booking period starts. Date format is MM/DD/YY (use / or - as a separator) or DDMMMYY. Defaults to today's date.
5) End date	Required. Defines the date when the booking period ends. Date format is MM/DD/YY, or DDMMMYY. If left blank on creation of new booking pattern, defaults to indefinite.
Capture periods (Days - Hours:Minutes)	Optional. All capture periods are defined in units of days, hours, and minutes and are entered in the form nnn nn:nn. There are two capture periods which are used based on whether the item is to be collected at the current location, or another location, or is to be delivered. (Fields 6 and 7) Based on the period entered, the booked item will be captured for the patron prior to the time the booking period actually begins.
6) Normal	For normal bookings, no shipping is required. Defaults to 0.
7) Transit	If an item must be shipped to a pickup location, it should be captured at the specified period prior to the start of the booking. Defaults to 0.
8) Grace period (overdue)	Optional. Enter the number of days overdue before an item will be designated **very overdue** and not selected for booking. Defaults to 0.
9) Display field width	Valid choices are 7-20. Defaults to 7. According to the booking slot time periods, the system displays a series of boxes corresponding to the slots. The display width field determines a minimum number of character positions for the boxes. This determines how the boxes are laid out on

the screen and the number of characters available to display bookings within the booking calendar in Materials Booking.

The booked items display in the following manner within the boxes:

"#" to indicate fully booked

"*" to indicate overbooked

"-"to indicate items still available for booking.

Each #, * or - character represents a fraction of the booking period. Thus, if each booking slot was 1 hour long, and the display width was 10 then each # would correspond to a 6 minute interval. This field may be changed at any time and the effect on the display checked. For most booking patterns, a value from 7-10 is appropriate.

The following booking pattern has a display width of 7. There are two copies available for booking.

```
 3 JUL 92 -          1           2           3           4           5        >
 1 JAN 94        08:00 -     10:00 -     12:00 -     14:00 -     16:00 -       >

 Tuesday                     ####---     #######     * * * * * *              >
 08 JUN 93            0         2-1          2           3           0        >

                     1           2           3           4           5        >
                 08:00 -     10:00 -     12:00 -     14:00 -     16:00 -18     >

 Wednesday                                                                    >
 09 JUN 93           0           0           0           0           0        >
```

Slot 1 on June 8 represents the cursor location; slot 2 is fully booked for one hour but one item is still available for one hour; slot 3 is fully booked for both available items and slot 4 is overbooked (three bookings for the full 2 hour period).

10) Number of booking periods

This is provided by the system based on the number of lines entered on the second screen.

Options

Second screen

Displays the MATERIALS BOOKING PATTERNS second screen. See *Materials Booking Patterns Second Screen* on page C-8.

Copy

This option allows you to append a modified pattern to an existing code or create new codes.

You can create a new booking code by entering a new code name and copying an existing pattern.

Using Copy to
Create a New
Booking Pattern

1. Enter MBP (Materials Booking Patterns).

2. Select the existing booking pattern that you want to duplicate

3. The MATERIALS BOOKING PATTERNS screen appears.

4. Select *copy*.

```
                      MATERIALS BOOKING PATTERNS               DD MMM YY


  Enter new code :    H2C
  Enter new start date :        28 JUL 93




   Valid Entries : New start date for pattern
```

5. Prompt to enter new code appears with the name of the existing pattern you are copying.

6. Enter a new code name <Enter>.

7. ADVANCE provides a new start date that is derived from the end date of the pattern you are copying. You can modify this date by entering new information over the old date <Enter>.

8. The first screen of the MATERIALS BOOKING PATTERNS appears. Edit the fields as desired.

9. Define the booking periods by selecting the *Second screen* option. See *Materials Booking Patterns Second Screen* on page C-8.

Using Copy to
Append to an
Existing Pattern

The *Copy* option may be selected to append the new pattern to the current pattern. This provides for date dependent loan/booking periods. For example, short term loan items may be booked for 2 hour time slots,

whereas during vacation periods these booking patterns may be changed to 1 day booking periods. Thus several booking patterns may be linked to a single circulation code.

1. Enter MBP (Materials Booking Patterns).

2. Select the existing booking pattern to which you want to append a new pattern.

3. The MATERIALS BOOKING PATTERNS screen appears.

4. Select *Copy.*

5. A prompt to enter a new code appears.

```
                    MATERIALS BOOKING PATTERNS               DD MMM YY

Enter new code :     H2C
Enter new start date :        28 JUL 93




 Valid Entries : New start date for pattern
```

6. <Enter>
   Do not enter a new code name.

7. ADVANCE provides a new start date that is derived from the end date of the pattern you are copying. You can modify this date by entering new information over the old date <Enter>. If the start/end dates of the old/new pattern conflict, a warning message is displayed. You must modify the end of the original pattern before filing the new pattern.

8. The first screen of the MATERIALS BOOKING PATTERNS appears. You can edit the fields as desired.

9. Define the new booking periods by selecting the *Second screen* option. See *Materials Booking Patterns Second Screen* on page C-8

10. When you re-display the codes list, codes that are append to other codes display without labels beneath the original code.

Materials Booking Patterns Second Screen

Use the *second screen* option to display or create a booking period.

1. If you are entering a new code, ADVANCE displays the message:

    ```
    No bookings periods defined
    ```

```
                   MATERIALS BOOKING PATTERNS              DD MMM YY


     Enter Bookings Pattern Code : TESTMM

  Day of week  Start Period   End day  (Plus)  Time  Issue end date  time
  -----------  ------------   ---------------  ----- -----------  -------
        No bookings periods defined








Options:    Enter specified line number
  ? help    # line   Add item   Backward   Forward   Delete #   Exit
  Prior screen
```

2. Select *Add item*. The cursor appears at the first line, adjacent to the word `New)`. The following screen appears whenever you add a new item, even through other booking periods are already defined.

```
                    MATERIALS BOOKING PATTERNS                DD MMM YY


      Enter Bookings Pattern Code : TESTMM

   Day of week  Start Period   End day  (Plus)  Time  Issue end date  time
   -----------  ------------   ----------------  ----- -----------  -------
 New)














 Valid Entries : Day of week for start of booking period
```

3. Enter the day of the week that the booking period starts.

4. Enter the time that the booking period starts, for example 08:00. (Use 24 hour/military time.)

5. In the *Plus* field, enter a number to indicate how the end day of the period differs from the start day. Enter 0 or leave this field blank if the start and end days are the same. For example, if the booking period starts on Monday but ends on Wednesday, enter 2. (When you are finished and redisplay the option line, ADVANCE will display the end day, based on the number entered.)

   Enter a plus sign (+) after the number (if any) to indicate that the system must check for the end day being a closed day. Note that when calculating due dates, the system uses the *Ignore Closed days and Holidays for loans using MBP* parameter in the Circulation Control Table (CCT) rather than the information in the *Plus* field.

6. Enter the time that the booking period ends, for example 9:00.

7. If you wish, in the *Issue end date* field, enter the day of the week that the checkout period ends.

By specifying checkout end days and times, you could define a pattern such as this: items checked out on Friday up to 15:00 are due at 17:00 that day, but items checked out on Friday after 15:00 are due on Monday at 09:00.

8. If you entered an checkout period end day, enter the time that the checkout period ends.

    The cursor moves to the next line.

9. When you are finished, <Space> <Enter> to return to the option line. The display will be similar to the following sample screens. Use the *Prior screen* option to return to the main screen.

10. *File* to save the changes. The pattern is used to create a calendar of bookings screen for display in the Materials Booking Function (MB).

Sample Daily Pattern

```
                     MATERIALS BOOKING PATTERNS                  DD MMM YY

     Enter Bookings Pattern Code : 1DAY

   Day of week  Start Period   End day  (Plus)  Time  Issue end date  time
   -----------  ------------   ---------------- -----  -----------  -------
   1) MONDAY       09:00       TUESDAY    1+     09:00
   2) TUESDAY      09:00       WEDNESDAY  1+     09:00
   3) WEDNESDAY    09:00       THURSDAY   1+     09:00
   4) THURSDAY     09:00       FRIDAY     1+     09:00
   5) FRIDAY       09:00       MONDAY     3+     09:00
   6) SATURDAY     09:00       MONDAY     2+     13:00
   7) SUNDAY       12:00       MONDAY     1+     09:00



 Options:
  ? help   # line   Add item   Backward   Forward   Delete #   Exit
  Prior screen
```

Sample Hourly Pattern

```
                      MATERIALS BOOKING PATTERNS              DD MMM YY

       Enter Bookings Pattern Code : H1

    Day of week  Start Period   End day  (Plus)  Time  Issue end date  time
    -----------  ------------   ----------------  ----- -----------  -------
   1) MONDAY      08:00         MONDAY            09:00
   2) MONDAY      09:00         MONDAY            10:00
   3) MONDAY      11:00         MONDAY            12:00
   4) MONDAY      12:00         MONDAY            13:00
   5) MONDAY      13:00         MONDAY            14:00
   6) MONDAY      14:00         MONDAY            15:00
   7) MONDAY      15:00         MONDAY            16:00
   8) MONDAY      16:00         MONDAY            17:00
   9) MONDAY      17:00         MONDAY            18:00
  10) MONDAY      18:00         MONDAY            19:00




 Options:
  ? help   # line   Add item   Backward   Forward   Delete #   Exit
  Prior screen
```

Linking Booking Pattern to Circulation Code

ADVANCE determines the appropriate booking pattern from the Circulation Code, *Additional parameters* option.

1. Link the booking pattern to the circulation code. Enter CCC (circulation code.

2. Select the *Additional parameters* option.

3. Enter the booking pattern at line 1) Booking Type.

4. Select *Exit* from the CIRCULATION CODE, Additional parameters screen.

5. File to save the changes.

```
                        CIRCULATION CODE                    DD MMM DD

        Circulation code :  AV1

     Description         : AUDIO VISUAL 1

1) Booking Type       : 1DAY
2) Lending/Ref (L,R,N) :
3) Fast Track (Y/N)    : N
4) Dynamic stock (Y/N) : N
5) Keep Patron History (Y/N): Y




Options:
 ? help   Exit   # line   Line by line   Prior screen
```

Field 1, *Booking Type*, links the Circulation Code to the Materials Booking module. Enter the booking pattern code in this field.

Purging Materials Booking Patterns

When *Delete* is selected from the Materials Booking Patterns screen, the pattern is only marked for deletion. You must remove the pattern from the Materials Booking Pattern Deletion screen.

1. From the Circulation Master Menu, select Circulation Purge Files Menu (`CPFM`).

2. The Circulation File Purge Menu appears.

3. Select Materials Booking pattern deletion (`CPMBP`).

```
DD MMM YYYY           Geac ADVANCE Library System (#.##)          XXXXX  YY
   HH:MM                       Your Library Name

                        CIRCULATION FILE PURGE MENU



                    1. CPPR   Patron file purge report

                    2. CPPD   Patron file purge

                    3. CPMBP  Materials Booking pattern deletion






         Enter the number of your selection and press <ENTER>
                 or  ?  followed by <ENTER> for Help.
               Press <ENTER> to return to previous level :
```

4. The REMOVE DELETED BOOKING PATTERNS screen appears.

5. The system prompts:

   ```
   This option will remove any Materials Booking Pattern
   codes which have been deleted and for which no outstanding
   bookings exist. This program also cross checks the book-
   ings patterns. Do you wish to continue. (Y/N)?
   ```

   N allows you to terminate the process and codes marked for deletion remain on file. Y deletes all codes with no bookings that are marked for deletion. When the process is completed, the system will display the number of patterns deleted, along with a list of the deleted codes.

```
 DD MMM YYYY            Geac ADVANCE Library System (#.##)          XXXXX  YY
    HH:MM                        Your Library Name

                         REMOVE DELETED BOOKING PATTERNS




       This option will remove any Materials Booking Pattern codes
      which have been DELETED and for which no outstanding bookings exist.
     This program also cross checks the bookings patterns.
     Do you wish to continue (Y/N) ?
```
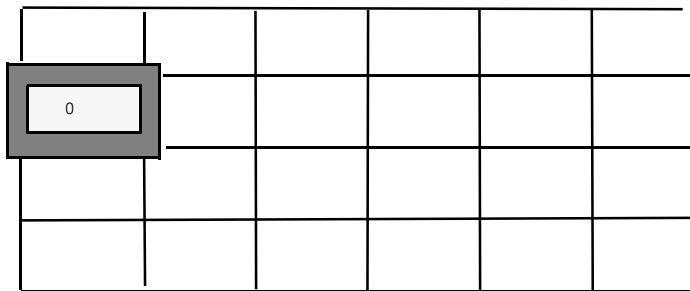
<Enter> displays the CIRCULATION FILE PURGE MENU.

Materials Booking Function

Materials Booking allows library staff to schedule reservations for items such as audiovisual equipment, videos, rooms, or any materials the library designates as bookable. Unlike holds, materials booking allows staff to schedule loans for specific times.

In order for an item to be bookable:

• a bibliographic record must be defined for that item.

• a booking pattern code must be linked to the items circulation code.

Booking Process

The normal booking process is:

• search for title to book

• use the *retrieve* option for an item to make a title level booking or *retrieve #* to make a copy specific booking

• identify the patron

• if desired, modify the booking details to add a note, change pick-up location or booking period.

Accessing the Materials Booking Calendar

Enter MB or select Materials Booking from the `Standard Circula-`
`tion Menu (SCM)`. The MATERIALS BOOKING search screen appears.

1. At the prompt, enter any OPAC expert search command.

```
   DD MMM YYYY            Geac ADVANCE Library System (#.##)        XXXXX  YY
     HH:MM                          Your Library Name


                                  MATERIALS BOOKING



   Enter search command : t=1812 overture
```

2. Retrieve the Booking Calendar for the title using the *Retrieve* option
   at the Brief Display.

   If there are multiple booking patterns available for the title (that is
   the pieces each have different circulation codes linked to different
   booking patterns) an interim screen is displayed allowing you to
   select the appropriate pattern.

   Or, use the *Retrieve #* option to book a specific copy.

   NOTE: ADVANCE verifies that the item or title is bookable (that is the
   circulation codes are linked to a booking pattern). ADVANCE also
   verifies that the item is not very overdue. If the item **is** very overdue,
   ADVANCE prompts:

   `Item is very overdue Continue Y/N?`

3. The Calendar of Bookings screen appears, with the cursor positioned
   in the left-most box in the week or day which includes today's date/
   time. If one of the copies is very overdue, a message displays on the
   Calendar of Bookings.

```
  Calendar of Bookings                       DD MMM YY

  Title : 1812 overture, op. 49


  Booking pattern : 1DAY            Sliding/Daily          Bookable copies : 1


            ._____._____._____._____._____._____
  21 JAN 93     |    1    |    2    |    3    |    4    |    5    |    6   >
  01 JAN 95     |   Mon   |   Tue   |   Wed   |   Thu   |   Fri   |   Sat  >
            ############---------+---------+---------+---------+---------+--------
  19 JUL 93   . #         # ####---
  25 JUL 93     #   0     #  2-1  |    0    |    0    |    0    |    0
            ############---------+---------+---------+---------+---------+--------
  26 JUL 93     |         | ####### |         |         |         |
  01 AUG 93     |    0    |    2    |    0    |    0    |    0    |    0   >
            .----------+---------+---------+---------+---------+--------
  02 AUG 93     |         |         |         | ******* |         |
  08 AUG 93     |    0    |    0    | C 0     |    3    |    0    |    0   >
            .----------.---------.---------.---------.---------.--------

  Use the cursor keys to move around the windows, or press -
  'M' to make a booking for a slot, 'D' to display bookings for a slot
  'F' to Find next Free slot, <RETURN> to get to the option line
```

At this point you can:

- use the cursor to move around in the display,

- type D to see a list of bookings

- type M to make a booking

- <Enter> to go to the option line

Screen Labels

Booking Pattern   For information only as defined in Materials Booking screens. Fixed periods are predefined for specific time slots. Sliding patterns do not form predefined time periods but are based on a number of time periods.

Bookable copies   For information only, provided by the system. Indicates the total number of items that are available.

The first row of boxes displays the column headings and the booking periods. The subsequent boxes show the specific slots for a given day. If the box is blank, there are no bookings for that period. The symbols in the boxes indicate:

–   There are bookings, and there are items available for the time slot.

The time slot is fully booked.

*   The time slot is overbooked.

blank   No bookings for the period.

The numbers in the booking slots indicate the number of bookings for the slot.

C   Closed day

L   Item on loan

Options

Use the cursor keys to move the highlighted box to the time slot you want. Press M to make a booking; press D to display bookings or F to find the next available time slot. While the cursor is positioned within the calendar, you have several "hidden" options. <Enter> to display options.

Select date   Allows you to enter a specific date. The cursor positions you at the left of the row which includes the date specified.

> screen right   Allows you to scroll to the right to display slots at the end of each row.

< screen left   Allows you to scroll to the left to see the beginning of each row.

Line by line   Positions the cursor on the Booking Calendar.

Placing a Booking

After you have highlighted the booking slot desired, enter M. The Booking Calendar is cleared, and ADVANCE prompts you for a patron name or barcode.

```
                    Calendar of Bookings                    DD MMM YYY

Title : 1812 overture, op. 49


Enter Patron Name or Barcode: _
```

When a valid name or barcode is entered, the MATERIALS BOOKING DETAIL screen appears. The booking is completed. (You can also enter LST if the booking is being made for the last patron you accessed in Circulation.)

NOTE: If the patron has blocks, these will be displayed first. You may exit the blocks screen, and the Materials Booking screen appears. However, if the patron has an administrative block, you will be prompted to override the block (Y/N). If Y, you may continue with the booking.

NOTE: Once the patron barcode has been entered and the MATERIALS BOOKING DETAIL screen appears, the booking has been made. There is no need to file the booking detail screen unless you wish to make changes. If all is satisfactory, you may simply exit this screen.

Modifying the Booking Details

```
                    MATERIALS BOOKING DETAIL                    XXXXX

    Booking for borrower : MAASDAM, HEIDI RUTH

    Title :  1812 overture, op. 49

 Booking pattern : 1DAY (21 JAN 93)

  1. Start date         : 21 JUL 93     Creation date : 20 JUL 93 15:45
  2. Start time         : 09:00        Capture date  :
  3. End date           : 22 JUL 93    Held date     :
  4. End time           : 09:00        Item          : 39999000121444
  5. Pickup location    : PUB/BRA3
                                       Sequence      : 1

  6. Booking note       :

 Booking status : Pending

 Options:
  # line   Line by line   Prior screen   Notes   Delete   ? help   Exit
```

Start date	Enter the start date of the booking in the format DDMMMYY or MM-DD-YY.
Start time	Enter the start time in the format HH:MM.
End date	Enter the start in the format DDMMMYY or MM/DD/YY (Use / or - as a separator).
End time	Enter the end date in the format DDMMMYY or MM-DD-YY.
Pickup location	Enter the sublocation code where the item will be picked up. Use ?? to obtain a browse list of valid locations.
Booking note	Automatically opens a text editing window. Use the standard ADVANCE window editing commands to enter text. To exit the window <Esc> e.
Creation date	Provided by the system. Displays the date the booking was created.

Capture date   Provided by the system. Displays the date the item was routed to the pickup location. If not routed, will be the same as the held date.

Held date   Provided by the system. Displays the date when the booking was captured and placed on the hold shelf.

Item   Provided by the system. Displays the item barcode number for captured and filled bookings, and outstanding copy-specific bookings.

Sequence   Provided by the system. (Used by ADVANCE support.)

Displaying Bookings Summaries

The MATERIALS BOOKING SUMMARY screen allows you to view the current booking and/or confirm that a booking has been made. Provides a listing of all bookings on the item/title.

```
02:24PM                   MATERIALS BOOKING SUMMARY            DD MMM YY


 Title   :  1812 overture, op. 49

      Start Date        End Date        Borrower                     Status
      --------------    --------------  ------------------------------  ------

  3. 22 JUL 93 09:00  23 JUL 93 09:00  MCKINNON, JANE J                 O/S
  4. 22 JUL 93 09:00  23 JUL 93 09:00  MAASDAM, HEIDI RUTH              O/S




  Options:

  # line   Forward   Backward   ? help   Prior screen
```

Selecting D from the Calendar of Booking screen produces a list of bookings (if any bookings have been placed). Statuses may be:

- Exp — expired without being held.

- O/S — outstanding.

- Trn — item in transit to pickup location.

- Held — item is held for the patron.

- Lapsed — item was held, never picked up.

Filling a Booking

Bookings are filled through COUT (Checkout) from the Standard Circulation Menu. ADVANCE determines whether there are any bookings that the item might satisfy and establishes any routing information for the item. If an item is booked for a different patron, the system will not allow the item to be checked out. If the item is booked for another patron for a time in the future which begins prior to the DUE DATE for a regular loan, the system will reduce the loan period to ensure its availability for the start of the future booking.

```
 03:54PM                    CIRCULATION CHECKOUT                   DD MMM YY

 Enter Patron Name or Barcode : 20000002032121  Carter, E.

 Blocks : 3    Fines : 1.50     Items out : 2    Holds : 2

     ITEM                 DUE




 This item is held for another patron

 Press any key to continue
```

If the patron is checking out an item that he/she has booked, ADVANCE displays a message on checkout.

```
02:33PM                    CIRCULATION CHECKOUT                 DD MMM YY

 Enter Patron Name or Barcode : 20000002002032  MABEE, CAROL MARIE
 Blocks : 1    Fines : 0.00     Items out : 1    Holds : 1


      ITEM               DUE

  1.  39999000121444     08-18-93  09:00AM  Patron collecting booking
  2.
```

If a patron has made multiple bookings for an item, COUT will prompt to cancel bookings. Answer Y to cancel, N to keep. Cancelled items are shown as deleted on the MATERIALS BOOKING SUMMARY screen.

```
11:40AM                 MATERIALS BOOKING SUMMARY              DD MMM YY


 Title   :  The adventures of Robin Hood
       Start Date        End Date         Borrower                        Status
      ---------------   ---------------   ------------------------------  ------
  1. 17 AUG 93 09:00   18 AUG 93 09:00   Carter, E.                      Filled
  2. 17 AUG 93 16:45   18 AUG 93 09:00   Carter, E.                      Filled
  3. 18 AUG 93 09:00   19 AUG 93 09:00   Carter, E.                      O/S
  4. 19 AUG 93 09:00   20 AUG 93 09:00   Carter, E.                      Deleted
  5. 20 AUG 93 09:00   23 AUG 93 09:00   Carter, E.                      Deleted
  6. 23 AUG 93 09:00   25 AUG 93 09:00   Carter, E.                      Deleted




 Options:  Please enter number(s) for this option
  # line   Forward   Backward   ? help   Prior screen
```

Capture Periods

The period during which items are held is known as the *capture period–* a period associated with the booking. For example, if a booking has been made for an item for Wednesday between 11:00 to 13:00 hours, and the item is returned at 10:50 a.m. Wednesday, then clearly it should be held for the booking. However, if it was returned on Monday, then it is unlikely that the item would be held for that booking.

Transit Periods

If the item needs to be shipped to some other location, then the window for the booking may need to be extended. Thus the additional parameters for transit and delivery must be considered.

When a booking has been made for 11:00 a.m. at the current location and for 10:00 am at another branch, ADVANCE subtracts the appropriate capture period from the two bookings to decide which will take priority.

Capture and transit times must be specified in the booking pattern in order that bookings may be filled properly.

When an item is required for a booking but the next booking is not within the capture period, ADVANCE displays, at Circulation Checkout, messages such as:

```
Next booking at 1:00 am 28 Jul 93 - Pickup from BRANCH
```

If an item is required for a booking within the established capture period at this location, ADVANCE displays the message:

```
Hold for: J.Smith - Booking 11:00-12:00 28 Jul 93
```

If an item is required for transit, a message appears:

```
Ship to BRANCH for : J. Smith - Booking 11:00-12:00 28 Jul
93
```

These are warnings only. The system does not prevent you from checking out the item.

Checkin

When a booking item is checked in it will be captured (held) for outstanding bookings based on the capture period and the start period of the bookings. ADVANCE provides a message which describes the action required.

```
 3:34PM                    CIRCULATION CHECKIN                    DD MMM YY


                                                      Charging Fines: Yes
 Command or Item Barcode:
                                                      Amount: $






 Pending Actions --> On Hold/PATRON MABEE, CAROL MARIE  Phone 752-5758
                     Address 1335 KINGS BLVD A5
 Item booked from 17 AUG 93 09:00 to 18 AUG 93 09:00
 Please enter "Y" to continue.
```

Displaying Bookings from OPAC

Bookings may be displayed from the Brief or Full Display screen of the Online Catalogue, if the Library allows OPAC public users to see the Holds Queue.

```
                  Online Catalogue - BRIEF DISPLAY        (1 of 1 titles)
Local Control # :10002213                          Number of holdings :2
AUTHOR         :Tchaikovsky, Peter Ilich, 1840-1893
TITLE          :1812 overture, op. 49
SUBJECT        :Overtures

    Library   Locn         Call Number         Ltype    Status / Due date
    -------   -------   ------------------------ -----   -----------------
 1. CAM1      stacks    M1004.C36 E54            AV2     Lost;AUDIO
 2. CAM1      A/V       M1004.C36 E54 c.1        AV1     En Route




 Last Page
Options:
 # item   Prior screen   Extend search   Full display   Search copy   Output
 MARC   Holds   Order display   Review search   OPAC parms   New search
 Reset   ? help
```

1. Select *Holds*.

2. The HOLDS QUEUE DISPLAY screen appears.

```
 15:03                    HOLD QUEUE DISPLAY                    DD MMM 19YY

 LCN.....: 10002213              No. of holds : 3          No. of pieces : 2
 TITLE...: 1812 overture, op. 49
 AUTHOR..: Tchaikovsky, Peter Ilich, 1840-1893

     TYPE PR    HOLD ITEM/TYPE  HOLD STATUS    HOLD DATE & TIME EXP.DATE & TIME
     ---- --    -------------- --------------  ---------------- ---------------
  1. B          Booking                        08-16-93  09:00  08-17-93   09:00
  2. B          Booking                        08-16-93  09:00  08-17-93   09:00
  3. B          Booking                        08-17-93  09:00  08-18-93   09:00
     *** End of list




 Options:
  Backward   Forward   Prior screen   Hold   New search   ? help
```

Screen Labels

LCN	Local Control Number.
TITLE	Title of the item.
AUTHOR	Author of the item.
No. of holds	Number of holds and bookings placed on the item.
No. of Pieces	Number of items available.
TYPE	Type of hold; B denotes booking.
PR	Priority (Blank since there is no priority for bookings.)
HOLD ITEM/TYPE	Booking, item hold, or title hold.
HOLD STATUS	• Blank - Outstanding

- Filled

- Cancelled

- Held

HOLD DATE & TIME   Date the item was placed on hold for booking.

EXP. DATE & TIME   Date the hold will expire.

Using the *HOLDS* Option from Materials Booking

You can display bookings from the Calendar of Bookings screen by using the *holds* options at the detail screen after a search from Materials Booking. This option also allows you to place, cancel or modify existing bookings.

1. From the circulation module, enter MB (Materials Booking).

2. The MATERIALS BOOKING screen appears.

3. Enter a search command.

4. The OPAC Brief or Full Display screen appears.

5. Select *Holds.*

6. The MATERIALS BOOKINGS screen appears.

```
 14:06                    MATERIALS BOOKING                      DD MMM 19YY

 LCN.....: 10002213             No. of holds : 7        No. of pieces : 2
 TITLE...: 1812 overture, op. 49
 AUTHOR..: Tchaikovsky, Peter Ilich, 1840-1893

     TYPE PR    HOLD ITEM/TYPE  PATRON ID / NAME          GROUP HOLD DATE EXP.DATE
     ---- --    --------------  ----------------------------  --------- --------
  1. B          Booking         20000002004007            P7    07-27-93  07-28-93
                                CAPUTO, DANA ANN                 09:00     09:00
  2. B          Booking         29999000005454            P7    07-28-93  07-29-93
                                MAASDAM, HEIDI RUTH              09:00     09:00

     *** End of list




 Options:
  Backward    Forward    Prior screen    New search   ? help   # line
  Display calendar
```

7. To place a booking from this screen use the *Display Calendar* option and refer to *Placing a Booking*.

   To modify or cancel a booking use the *# line* option and edit the booking details (*Placing a Booking*).

Displaying Bookings from Checkout

Bookings by the patron may be displayed.

1. Enter Checkout (COUT) and find a patron.

2. The Circulation Checkout screen appears.

3. At the barcode prompt, enter H for holds.

4. The HOLDS PROCESSING screen appears.

5. Enter SH (Show Holds).

6. The HOLDS BY PATRON screen appears. Under the heading TYPE the code B indicates a booking.

```
10:00AM                    HOLDS BY PATRON                         DD MMM YY

 PATRON BARCODE: 29999000005454
 PATRON NAME: MAASDAM, HEIDI RUTH                  TOTAL NUMBER OF HOLDS: 2

    TYPE CALLNO/BARCODE TITLE/AUTHOR                  STATUS        ACTION
    ---- -------------- ---------------------------- -------------- --------
  1. B                  1812 overture, op. 49
                          Tchaikovsky, Peter Ilich, +

  2. B                  1812 overture, op. 49
                          Tchaikovsky, Peter Ilich, +




 Options:
  Queue display #   # line   Cancel hold #   Cancel all   Exit   ? help
```

Materials Booking Picking List

The materials booking picking list is a report that produces a list of those items that are required to fill outstanding bookings.

The report will typically be run overnight or at specified times during the day.

The report will show the item description, the barcode and any charging information. It will also show the pick-up location or delivery point, if appropriate.

To obtain the Materials Booking Picking List, select Circulation Reports from the Circulation Reports Menu. Select report # 198 Listing of Active Bookings.

```
                                            RF198        13:52:10  07-2
6-93
Start Date......  26 JUL 1993
Start Time...... 11:58
Author.......... Aarhus Universitet. Matematisk institut
Title.......... Various publications series
Pickup Location. AU - CAM1
Items.......... 39999000120495
Call No......... AU ALII  FOLIO QA1 .A15
Due date........
Due time........
Hold type....... Booking

Start Date......  23 JUL 1993
Start Time...... 10:53
Author.......... Lyons, Eugene, 1898-
Title.......... Our secret allies, the peoples of Russia
Pickup Location. AU - CAM1
Items.......... 39999000107974
Call No......... AU ALII SPEC  DK273 .L9
Due date........
Due time........
Hold type....... Booking
```

D

Glossary

This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

A

AACR2	Anglo-American Cataloguing Rules, version 2. These are the rules that form the "bible" of cataloguing procedure as they relate to the construction of catalogues and other lists.
access level	A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.
access point	An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.
accession number	A number assigned by the library to an individual *bibliographic item* when it is added to the library's collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.
account	Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.
accounts receivable	The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.
Acquisitions module	The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

added entry	An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.
ALA character set	An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.
application	A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.
archive tape	Tape from a *bibliographic utility* (*OCLC*, *WLN*, *RLIN*, or *UTLAS*) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.
ASCII	An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.
attach	To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.
authoritative form	The form of a heading that has been chosen as the standard form to be used in all bibliographic records.
authority control	A way of handling and standardizing bibliographic information using "see" and "see also" references.
	The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".
	"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".
	Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.
authority file	Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.
authority hot key	The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.

B

backup
: An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.

barcode
: A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.

barcode reader
: A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.

batch
: A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.

baud rate
: Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.

bibliographic item
: A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.

bibliographic record
: In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.

bibliographic utility
: An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.

binding entry
: An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

bit	A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
blind heading	This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
blind reference	This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
Boolean searching	A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
boot	Short for "boot strap". The operation of loading the initial elements of the 'operating system' into computer memory.
borrower	Known as *patron*.
BOT	Reflective marker to identify the beginning of a tape.
bug	An error in a program or hardware function that causes the function to work incorrectly.
byte	A character of data, normally represented by 8 bits.

C

call number	Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
CAN/MARC	Canadian version of the MARC format.

carriage return	Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to "<CR>".
Cataloguing module	The ADVANCE module that automates bibliographic and authority control.
cataloguing source number	Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.
charge	Known as *checkout*. A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.
checkdigit	A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in *barcodes*, *ISBN*s, and so on.
checkin	1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as *discharge*.

2) In the Acquisition and Serials modules, *checkin* is the process of receiving an item shipped to the library, and recording the receipt on the system. |
checkout	A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to *charge* it out to the patron.
chronology	Date that identifies an issue of a serial — e.g. "June 1991".
Circulation module	The ADVANCE module that automates circulation functions and transactions.
citation	A display of bibliographic information describing a given work.
CODABAR	A 14-digit *barcode* format that ADVANCE uses.
COM	Acronym for "Computer Output on Microform". Information is recorded on microfilm or microfiche instead of paper.
command	An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.

compile	To translate a program from a high-level source language to a machine-executable form.
content designator	The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.
control characters	Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.
control console	A terminal, usually in the computer room, from which the system may be controlled.
conversion	The process of turning machine-readable records in one format into machine-readable records of a different format.
copy	A single piece of a document; a duplicate; an instance of a serial issue. See also *bibliographic item, physical volume*, *piece*, and *copy set*.
copy number	A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title.
copy set	A duplicate run of issues of a serial; simplistically a "subscription".
copy-specific hold	A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.
core	Computer memory, usually measured in megabytes: "MB".
CRT	Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).
CSN	Cataloguing Source Number.
cursor	A small square or line on the terminal screen which tells you where the next character you type will appear.
cutter number	Part of the *call number* used to identify the author for filing purposes.

D

database	A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.
data communication	The transmission of data across geographically separated locations.
data element	The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions.
date of last use	The date of the last transaction associated with a particular record.
Dewey	Dewey Decimal Classification system, developed by Melvil Dewey.
diacritics	Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.
discharge	Known as *checkin*. A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.
disk	Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.
disk drive	A data storage device that holds, reads from, and writes to *disks*.
diskette	Also "floppy disk". Similar to *disk*, typically used with microcomputers.
DOS	Disk Operating System, for a microcomputer.
download	The data flow from the host computer system **down** to the microcomputer.

E

edit record
: The "edit" records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.

edition
: A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition.

editor
: A program that enables the user to create, purge, retrieve and update variable-length record source files.

editor file
: A file created using the editor.

enumeration
: Numbering that identifies an issue of a serial — e.g. "Vol.3 Pt.A".

EOF
: The magnetically recorded mark at the end of a file.

EOT
: The reflective marker at the end of a tape attached to the tape surface.

established form
: This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as *authoritative form*.

F

F.E.
: Stands for "Field Engineer". Also written "FE".

F.E.D.
: Also written "FED". Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.

field
: 1) A MARC "field" is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - *variable length* and *fixed length*. Some people use the word "tag" to refer to a MARC field.

  2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has "AUT:" or "AUTHOR" beside it.

field separator	A control character used at the end of each *variable field* to separate it from the next.
file	A collection of related records treated as a unit.
	A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.
file structure	The rules of organization that relate records within a file.
fixed-length field	Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called *offset*s).
fixed-length field element	Part of a MARC *fixed-length field* whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.
fixed-length subfield	A *subfield* whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).
frame	Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.
function	In ADVANCE, "function" refers to each of the possible actions available in the main menus.
	For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.
fund	The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.

G

GFE   Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

H

hang   Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.

hold   Sometimes called "reservation". A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.

holdings   **Piece holdings**: the physical volumes that the library owns of a given work.

Copy holdings: the issues that the library owns of a serial.

Summary holdings statement: a description of the range of copy holdings.

host   The controlling or main computer in a data network.

hot key   See *authority hot key*.

I

imprint   Publisher name, including date and place of publication.

index   A list of data arranged in some order (usually alphabetical) using a special "key" (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.

index entry   A word, phrase, or number used to locate an item within a specific index.

index key   The term or phrase from a source record which allows you to search for that record - for example, "Twilight Zone", or "Bowie, David".

indicator   A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

intensity	The brightness of the characters on the screen.
interface	To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary.
interlibrary loan	The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.
invoice	An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.
I/O	Abbreviation of "input/output".
ISBD	"International Standard Bibliographic Description" — a format for describing bibliographic information.
ISBN	"International Standard Book Number" — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.
ISO	Short form for "International Standards Organization".
ISSN	International Standard Serial Number. Similar to ISBN, except for serials.
issue	A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).
item	Used variously, in different contexts, to mean *bibliographic item*, *physical volume*, *copy*, or barcoded *piece*.

J

job	Often used as a synonym for "program". A unit of work to be done using the computer. Often accomplished through the use of a batch or program.

journal entry   In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

K

KB   Short for "kilobyte" — 1024 *bytes* of memory.

keyword   A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

L

laser scanner   Device for reading barcodes or OCR labels. See also *barcode reader*.

LC   Short for "Library of Congress". It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.

LCSH   "Library of Congress Subject Headings". A subject classification system for cataloguing.

LC Card Number   Sometimes abbreviated to "LCCN". "Library of Congress Control Number" — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.

LC MARC Records   Records in *US/MARC* format produced by the Library of Congress.

leader   The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.

library system   Also called "library", or more often, "site". A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more "agencies" which share the same CPU.

lightpen   The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons

	to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.
line	The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
line printer	The printers used to print reports are often called "line printers", so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, "600 lpm".
linking	The process of adding holdings information and (in particular) a barcode number for an item to the item's bibliographic record.
	Also used in the Reserve Book Room to bring together specific courses with items.
load	To mount a tape on the tape drive and set it to the load point.
load point	The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
local call number	Known as *shelf location*.
local copy number	Known as *copy number*.
log	To record events and their time of occurrence.
log on	See *sign on*.
log off	See *sign off*.

M

magnetic tape	Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
main entry	In a manual cataloguing system, the primary access point for a biblio-graphic item. Normally the author but sometimes the title.

MARC field	A *fixed-length* or *variable-length field* in a MARC format record.
MARC format	"MAchine Readable Cataloguing" — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC.
material type	A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.
master record	Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.
MD or M/DICT	"Master Dictionary" — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user's Master Dictionary: verbs, procs, connectives, file-names, etc.
menu	A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).
module	An "application" package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.
monograph	Book; contrast with *serial*.

N

non-filing	Words or characters that do not affect sorting. For example, **The Joy of Cooking** is filed under "J" for "Joy", not "T" for "The". "The" is a non-filing word.
non-filing count	A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, **The Joy of Cooking**,

filed under "J" for "Joy", would have a non-filing count of "4" (the three characters in "The" plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization To improve the matching and filing of index entries, several "normalization rules" are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note A type of field or screen display where library staff can enter free text about a patron or item.

notice In ADVANCE, "notice" generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

O

OCLC A bibliographic utility, formerly "Ohio College Library Center", now "Online Computer Library Center". Among other services, it provides a machine-readable database for cataloguing.

OCR Optical Character Recognition or Reader.

offline Opposite of *online*.

offset Another term for fixed-field data elements.

online "Online" has two meanings:

1. Connected directly to and interacting with a computer.

2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC Short for "Online Public Access Catalogue". The ADVANCE OPAC is known as the "Online Catalogue".

operating system	Often referred to as "OS". The set of programs that control the computer and its processing.
operator	The person using a terminal.
order	See *purchase order*.
OS	Short form for *operating system*.
OSI	Stands for "Open System Interconnect." An international standard developed by *ISO* and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect.

P

parity	A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).
parity error	Parity errors occur when the bit patterns caused by the system's 'parity' setting are incorrect: for example, when the system detects a "0" but expected a "1". Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system.
password	A code which is typed by an operator to sign on to the system or to a module. The password determines the operator's *access level*.
password security	The type of security in which staff passwords are used. The password indicates the operator's access level which, in turn, determines the commands he or she is permitted to use.
patron	Refers to the individuals who use the goods and services offered by a library. Also called "borrower" and "user".
patron agency	The location/library where a patron is registered.
patron class	Known as "patron privilege class".
patron record	The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.

peripheral	Also "peripheral device". In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).
physical volume	All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also *piece*.
PICK	The operating system and database management system used by ADVANCE.
piece	A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module's holdings function.
pointer	A data element which specifies the record-number of a record in a file, or in a related file.
policies	Each library has certain characteristic ways of handling the way it conducts business. These are referred to as "policies". Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.
policy parameters	Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.
policy tables	The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables.
port	An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.
powerfail recovery	The computer's ability to recover from power failures without losing data.
printer	A peripheral device used to provide hard copies of data.

priority level	Refers to a "security level" required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with *access level*.
PROC	PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.
program	A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.
project manager	The Geac Project Manager is responsible for liaison between Geac and the individual customer.
prompt	A message from the *operating system* or an *application* program. Prompts appear on the CRT screen, and require a response from the computer operator.
publication pattern	A serial's *enumeration* pattern, *chronology* pattern, and publication frequency pattern, used by the Serials module to predict issues.
purchase alert	A warning that additional copies of a title may be needed. Usually because all copies are missing or because the "hold ratio" for this item (that is, the number of holds compared to the number of active copies) is very high.
purchase order	A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated "PO").

R

reboot	To perform a second or subsequent *boot*.
recall	To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.
recompile	To perform a second or subsequent *compile* of a program.
recon	Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a

library automation system but still has some bibliographic records that were never put into machine-readable format.

record
To make computer processing easier, data items are brought together to form a unit called a "record". A group of records makes up a "file".

recovery
The process of returning a system to operable condition following a failure.

reel
A magnetic tape volume or the tape and the spool on which it is wound.

registration
The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, "patron registration" applies to the initial entry of this information onto the system.

release
Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.

remote
A term applied to a device or operation that is geographically-separated from a computer but communicates with it.

renewal
The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.

report
A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a "report".

reserve
A "reserve collection" is also known as "short loan collection". In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items.

The term "reserve" is sometimes used by public libraries to mean *hold*.

reserve book room
"RBR" is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.

reserve recall
An item is recalled for the Reserve Book Room.

response time	Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.
restore	To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

S

scanning	Also "wanding". The act of drawing the lightpen across a barcode to read the barcode into the system.
security level	The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator's active access level may be used.
"see also" reference	A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.
see reference	A reference to the established form of a name from a form which should not be used as a heading. Also known as a "'see' cross reference", "rejected form heading", or "variant form heading".
serial	A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.
Serials module	The ADVANCE module that automates serials control — primarily checkin and issue prediction.
shelf list	A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.
shelf location	Also "local call number". The *call number* assigned to a specific copy of an item.

sign off	Also "log off" and "logging off". To enter the necessary information to end a session on a terminal. The console command is "OFF". Compare to *sign on*.
sign on	Also "log on", "log in", and "logging on". To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name.
site	Customer library, usually where the computer is located.
sort	To arrange entities according to some pre-defined criteria, usually alphabetic.
spine label	Label for the spine of a book, typically with the call number.
string	Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or "string".
subfield	In MARC format, the name for a defined part of the field in a MARC *variable-length field*, such as subfield b.
subfield code	The one-character code which identifies a MARC subfield: for example, the "a" in "‡a".
subject headings	Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.
surcharge	The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.
syndetic structure	The logical organization of the catalogue, using *"see"* and *"see also" references* to interrelate the concepts represented in the catalogue.
SYSPROG	System Programmer. The highest-level account within PICK.
system backup	To copy (back up) all the files making up the system.
system manager	The library staff member responsible for the systems staff and the computer.

T

tag	The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, "210" is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. "Tag" is sometimes used to mean MARC field.
tag number	A term sometimes used to mean *tag*.
tape	A magnetic tape reel or cassette, or the tape on the reel or cassette.
tape backup	The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.
tape drive	The equipment that holds, reads from, and writes to magnetic tapes.
TCL	"Terminal Control Language" processor. TCL is the primary interface between end-users and the computer. The state in which the computer *prompt* is displayed and is waiting for user input is commonly called being "at TCL".
telecommunications	The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.
terminal	A device used by a person to communicate with the computer.
Terminal Number	Each terminal in a library system is assigned a unique number.
title	The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.
tracing	Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.
track	A unit of data storage space on disk.

transfer	To read data in one location and write it in another location.
transaction	Any checkin, checkout, renewal, or hold.

U

UK/MARC	The United Kingdom version of the MARC format.
UNIX	A computer *operating system* developed by Bell Laboratories.
upload	The data flow from the microcomputer **up** to the host computer system.
UPS	"Uninterruptable Power Supply" — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
user	Same as *patron*.
US/MARC	The version of the MARC format used in the USA.

V

variable-length field	Also "variable field". A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
vendor	A dealer, wholesaler, or other organization supplying books or other materials to the library.
volume	Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
voucher	A request for the complete or partial payment of one or more invoices, usually sent to the library's financial services department.

W

wand	Device for reading barcodes. Known as *lightpen*.
wanding	Known as *scanning*.

WLN   "Western (formerly "Washington") Library Network" — a bibliographic utility.

word   A unit of data storage: 8, 16, or 32 bits depending on the computer.

work file   A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.

E

Inter-Library Loan

The Inter-Library Loan (ILL) optional add-on product provides functions for creating ILL requests, updating the status of requests, generating notices for ILL pickup and overdues, and archiving completed or cancelled requests.

This appendix describes:

- Setup
- Requests from OPAC
- Maintenance
- Checkout
- Checkin
- Archiving

Setup

The setup required depends on how you are using ADVANCE for ILL.

- If you use the online catalogue for entering ILL requests and use AVISO or another system for circulation, perform the setup for steps 3 to 7 only.

- If you use the ADVANCE online catalogue and circulation for ILL, perform all setup steps.

Implementing ILL requires the following steps.

1. Define ILL Institution, Sublocation, and Collection Codes.

2. Create a single bibliographic record in cataloguing to define the generic title (245 MARC field) for ILL items. Attach as many place-holder barcodes to this record as will be required for ILL. Enter the ILL Bibliographic LCN in the ILL OPAC/CAT Setup (CICS) table.

3. Edit your Patron Type Codes to allow ILL privileges.

4. Enable the appropriate security features in OPAC PORT CONTROL and select a setting for the *Allow patrons to review ILL requests* field.

5. Add Request Material Type templates using the Request Template Editor. (Defaults are provided.)

6. Add Request Types. (Defaults are provided).

7. Edit the ILL OPAC/CAT Setup table to include any request types and material types for patrons.

8. Set up Library Codes in the ILL module to identify lending institutions.

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Holding Codes

From Circulation, enter CHSM or select the Holding Setup Menu from the Loan Periods Menu (CLPM) to access the Institution, Sublocation, and Collection tables. See Chapter 4, *Holding Codes Setup,* in the *Circulation Management Guide*.

Set up a dummy ILL code at the institution, sublocation and/or collection level. Suppress the display of ILL pieces for searches from the OPAC.

Institution Code

1. Enter CHIC or select Institution Codes from the Holding Setup Menu to display the INSTITUTION CODES TABLE.

2. Select *Add item*. The INSTITUTION CODES screen appears.

```
                    INSTITUTION CODES

     INSTITUTION CODE : ILL
     ------------------------------------------------------------------
 1. Institution Name                 : ILL department
 2. Name Displayed In OPAC(max. 6 ch.): ILL
 3. 049 Institution Prefix           :
 4. Loan Code Override Level (1-99)  : 9
 5. Circulation Code (Default #5)    :
 6. Material Group Code (Default #5) :
 7. Only Holding level (1 = Yes)     : 1
       Loan periods
 8. Disable Rebuild of (1 = Yes)     :
    Loan Tables During Checkout
 9. Notice Header for Institution.   :
10. Suppress display from OPAC (1=Yes): 1
11. NUC Symbol for this institution  :

    Valid Sublocations/Buildings     : ILL1

Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

3. Enter the appropriate information and *File*.

Sublocation Code

1. Enter CHSC or select Sublocation Codes from the Holding Setup Menu to display the SUBLOCATION CODES TABLE.

2. Select *Add item*. The SUBLOCATION CODES screen appears.

```
                       SUBLOCATION CODES

      SUBLOCATION CODE : ILL1
      ------------------------------------------------------------------
 1. Sublocation Description                     : ILL department
 2. Name Displayed In OPAC                      : ILL1
 3. Institution/Agency                          : ILL = ILL department
 4. Loan Code Override Level (1-99)             : 9
 5. Circulation Code (Default #4)               :
 6. Material Group Code (Default #4)            :
 7. Return to Original (1=subl. ; 2=port)       :
 8. Route to Original Sublocation (1=yes)       :
 9. Type of hold function allowed               : 2
     (0=none,1=title hold,2=holds screen)
10. Display names on holds (0=No, 1=yes)        : 0
11. Allow patrons to CANCEL holds (0=No,1=Yes)  : 0
12. Block codes that prevent holds (e.g. 2,6)   :
13. Notice header code for this location        : AU = Header for agency+
14. Suppress display from OPAC (1=Yes)          : 1

Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

3. Enter the appropriate information and *File*.

Collection Code

1. Enter CHCC or select Collection Codes from the Holding Setup Menu to display the COLLECTION CODES TABLE.

2. Select *Add item*. The COLLECTION CODES screen appears.

```
                      COLLECTION CODES

     COLLECTION CODE : ILL
     -------------------------------------------------------------------
 1. Collection Description                : Inter-library loan
 2. Name Displayed In OPAC                : ILL
 3. Valid Sublocations/Buildings          : ILL1 = ILL department
 4. Loan Code Override Level (1-99)        : 9
 5. Circulation Code (Default #3)          :
 6. Material Group Code (Default #3)       :
 7. Institution/Campus (No sublocations)   :
 8. Return to Original                     :
        (1=collection; 2=port)
 9. Route to Original Collection (1=yes)   :
10. Suppress display from OPAC (1=Yes)     : 1




Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

3. Enter the appropriate information and *File*.

ILL Bibliographic Record and Placeholder Pieces

From Cataloguing, create a single bibliographic record to identify ILL items. This record provides a generic title for ILL items and allows you to add as many placeholder barcodes (pieces) as needed for ILL checkout. See Chapter 3, *Creating a New Record,* in the *Cataloguing User's Guide*.

1. Enter BMC or select MARC Cataloguing from the Bibliographic Cataloguing Menu to display the BIBLIOGRAPHIC MARC CATALOGUING screen.

2. Enter N to create a new bibliographic record.

3. Edit the record. The information entered in the 245 field will be the generic title used to identify all ILL items throughout the system. This title will appear in Holds Available blocks, items checked out lists, and notices, with the Placeholder temporary title (that is, the title of the ILL item).

4. On the BIBLIOGRAPHIC MARC CATALOGUING screen, file the record into the Main Database.

```
                    BIBLIOGRAPHIC MARC CATALOGUING

Local Control # : 10025539    Transaction type : Original Entry
Last updated     : 04 JUN 1995 Leader          : aam1p 2
Cataloguer       : Cataloguing Staff

008      950603s1993    onc           000 1 eng d
040 BB c here
245 10 a ILL items




Options:                                       <ENTER> = scroll options
 ? = ? help    # = # tag    LE = Leader    CC = Copy cataloguing
 OW = Overlay workform    I = Item update    LNK = Link    UNL = Unlink
```

5. Enter the LCN of the ILL Bibliographic record in field 4 of the ILL OPAC/CAT Setup (`CICS`) table.

6. Retrieve the ILL bibliographic record again and select *Item Update* to display the PIECES SUMMARY screen. Or, add the pieces from Edit Holdings (`CEH`) in Circulation.

7. Select *Add item* to display the HOLDINGS DISPLAY screen.

8. Add as many placeholder barcodes to this record as will be required for ILL loans. Assign renewable Circulation Codes that are renewable as well as some that are not. These pieces should have the Holding Codes you have defined for ILL.

9. File after each placeholder barcode has been created.

Patron Records

ILL access can be limited by Patron Type Codes and can be further restricted by options provided in Patron Registration.

Patron Type Codes

1. Enter CPC or select Patron Type Codes from the Loans Period Menu (CLPM) on the Circulation Codes Menu (CCM). The PATRON TYPE screen appears.

2. Select a code. Add ILL access by entering 1 at the *Allow ILL* field.

```
                            PATRON TYPE

      PATRON TYPE CODE : STF
      ---------------------------------------------------------------------
  1. Description                            : Staff
  2. Patron Group Code                      : STF = STF
  3. Additional Borrower (1 = Yes)          : 1
  4. Default Expiration Date (e.g. 01 Jun)  :
  5. Maximum Number of Holds                : 75
  6. Number of years before expiration 1-99:
     (takes precedence over 4 above)
  7. Default priority for Holds (1-99))     :
  8. Allow ILL (1 = Yes)                    : 1




  Options:
   ? help   # line   Line by line   Copy   Print   Delete   Exit
```

3. File the code.

Patron Registration

Patron access to ILL is controlled from the Patron Type Codes, but individual patrons within a patron type may be allowed or denied access to ILL. If your Patron Type allows access to ILL, the Patron Registration screen defaults to the *Allow ILL* value set in your Patron Type Code. You can override the value here in Patron Registration.

```
                    PATRON REGISTRATION - SECOND SCREEN


     Patron ID :  20000002003232 Carter, Bruce

      1. email address.................:
      2. fax number....................:
      3. Allow ILL (Y/N/D)?............: Y
      4. LViS lang. code...............:
      5. LViS Contact Time.............:
      6. Department   .................:
      7. Billing Code   ..............:
      8. Country of origin.............:
      9. Numeric field.................:
     10. Description of patron.........:
     11. Favourite format..............:
     12. Birthday date.................:
     13. Not defined...................:
     14. Not defined...................:
     15. Not defined...................:


  Options:
   # line   Line by line   Accept   Exit   ? help
```

Allow ILL   Determines access to ILL.

   D ILL access defaults to the setting in the Patron Type Code table.

   Y Always allows ILL access even if ILL permission has not been granted in
     Patron Type Codes.

   N Always denies ILL access even if ILL permission has been granted in
     Patron Type Codes.

Online Catalogue Setup

Use the OPAC Port Control table to define the security restrictions for patron inquiry and to specify whether patrons may review their ILL requests.

NOTE: Security restrictions apply to the port being defined. Therefore, if ILL requests are issued from a specific terminal or ILL department that uses the same port definitions, these restrictions are ILL specific.

1. Enter OPC or select Port Control from the Online Search Setup (OSUP) screen.

2. Page to the PATRON INQUIRY CONTROL screen.

```
                    OPAC PORT CONTROL

    OPAC PORT CONTROL CODE : DEFAULT
    ------------------------------------------------------( Page 5 of 5 )
    < PATRON INQUIRY CONTROL >

 1. Security measures on patron inquiry function          : 4
     Patron must know their barcode plus :
     (1=password,2=Personal ID,3=Phone #,4=first 3 letters of surname)
     (e.g. 1234 means patron must know all 4)
 2. Allow patrons to see hold queues (0=No,1=Yes)         : 1
 3. Allow patrons to see blocks, fines (0=No,1=Yes)       : 1
 4. Allow patrons to see items checked out (0=No,1=Yes)   : 1
 5. Allow patrons to review ILL requests (0=No,1=Yes)     : 1
 6. Patrons can add ILL requests from bib display (0=No,1=Yes): 1
 7. Allow patrons to renew checked out items (0=No,1=Yes)   : 1




 Options:
  Backward   ? help   # line   Line by line   Copy   Print   Exit
```

1. Security measures on patron inquiry function

Patron must know their barcode plus: (1=password, 2=Personal ID, 3=Phone #, 4=first three letters of surname). (For example, 1234 means patron must know all four.) It is up to the library to define the number of security measures applied to the user.

This option sets the level of security that must be met before a patron can use the Patron Display (PAT) function which can allow the patron to review their ILL requests. The patron data used in security measures is defined in the patron record. Passwords, 1 to 23 characters long, are

encrypted and do not display in the online catalogue. A home institution or sublocation can be specified in the patron record.

5. Allow patrons to review ILL requests

If yes (1), the *Review ILL* option appears on the PATRON RECORD INQUIRY screen. That option will display the BROWSE ILL REQUESTS BY PATRON screen which shows the reference number, title, supplying library, status, and date (of last status update) of the request.

6. Allow patrons to add ILL requests from bib display

If yes (1), the *ILL request* option appears on the bibliographic display in OPAC. That option will display the ILL Request Entry screen which allows users to make an ILL request for the bibliographic item on display.

ILL Maintenance Setup

The ILL Maintenance Menu (CILL) provides access to:

- Request Entry/Update (CIRE) for daily ILL functions such as creating, updating, and monitoring requests. See *Request Entry/Update (CIRE)* on page E-36.

- First time setup tables, described in the following sections.

```
 DD MMM YYYY          Geac ADVANCE Library System (#.#)          DEFAULT  AU
   HH:MM                    Your Library Name

                           ILL MAINTENANCE


                  1. CIRE   Request Entry/Update


                  2. CICS   ILL OPAC/CAT setup

                  3. CIRTE  Request template editor

                  4. CIRT   Request types

                  5. CILC   Supplying Library Codes


                  6. CAPD   AVISO patron download

          Enter the number of your selection and press <ENTER>
                 or  ?  followed by <ENTER> for Help.
               Press <ENTER> to return to previous level :
```

Request Template Editor (`CIRTE`)

Defines the material type choices users have when they make an ILL request, and the entry fields that display for each material type. The ILL REQUEST UPDATE screen lists the types of material which may be requested and displays the information from the Description of code field.

Some default templates are provided: BK (Books), SE (Serials), ABI-Citations, and IAC-Citations. (The ABI and IAC templates provide examples of the types of templates that might be used with citation databases.) Do not change these templates.

Each request entry/update screen is a combination of two templates, GEN and a material specific template.

• The GEN template defines the first six numbered fields that are common to all request entry screens, such as Reference #s, Library, Date Required, and so forth.

• The second part of the template contains fields that are specific to the material type, for example, serials and books.

You can change the field labels in the GEN template but you cannot add, delete, or re-arrange the fields.

If you change the display labels in GEN and File the changes, the common fields in all your templates will change (including previously filed requests).

When you create a new template, it is not necessary for you to copy GEN because these fields will automatically display when the material type is used.

To modify or create a new template based on these defaults, create a new template and copy one of the defaults into it. You can add, delete, or re-arrange fields on the new template. You can also create a new template without copying the default templates.

```
                        Request template editor

        Number of records: 20
        Code          Description of code
        ------------- -------------
    1.  ABI           ABI Citations
    2.  ARTICLE       Periodical/magazine article
    3.  BK            Books
    4.  CO            Computer files
    5.  FILM          Film and visual media
    6.  GEN           Control Data
    7.  IAC           IAC Citations
    8.  TECH.REPORT   Technical Report
    9.  SE            Serials

Options:
  # line   Forward   Search jump   Add item   Exit   Print   ? help
```

Select a line number to see the template.

```
                         ILL Template [ARTICLE]

        Number of fields: 11       Heading: Periodical/magazine article
        Field         Help message
        ------------- -------------
    1.  Journal Title Enter the Journal Title
    2.  Issue Details Enter the Issue Details
    3.  Article Autho Enter Author(s) of the Article
    4.  Article Title Enter the title of the Article
    5.  Pages         Enter the Start and End pages
    6.  Pub Place     Enter the Place of Publication
    7.  Pub Name      Enter the name of the Publisher
    8.  Pub Date      Enter the date of Publication
    9.  ISSN          Enter the ISSN
   10.  Notes         Enter anything that would help identify this work
   11.  Max Amt.      Enter the max amount you are willing to pay


Options:
  # line   Add #   Delete #   Exit   Print   Heading   Copy   ? help
```

The first screen of the template displays two columns. The first column
lists the field names as they appear on the ILL Request/Entry Update
screen. The second column displays the help message that appears near
the bottom of the screen when the user enters the field.

Add #	For new templates, use *Add #* to add a field. The system prompts you for a line number. Enter 1. (When your template is attached to the GEN template this field will appear on the ILL Request/Entry screen starting at line 7.) If the line number duplicates an existing number, the system adds a new line after the existing number and re-numbers the remaining lines.
Delete #	For new templates, use *Delete #* to remove a field. The system prompts you for the line number. The system deletes the line and re-numbers the remaining lines.
Heading	Use the *Heading* option to edit the description that appears in the OPAC for this material type code. The heading text also displays at the top of this screen.
Copy	Use *Copy* to duplicate a template. The system prompts you for the request material type (Request template code) to copy from. Enter the code for the old template.

Adding a Field

You reached this screen by entering a line number from the second screen, or by using the *Add #* option.

```
                    ILL Template - [ARTICLE}

     Field :  1
     ----------------------------------------------------------------
  1. Field name              :  Journal Title
  2. Help message            :  Enter the Journal Title
  3. Export field name       :  bib_tit1
  4. Mandatory?              :  Y
  5. Validation (C,D,V)      :
  6. Valid entries (if type V) :
  7. CODES prefix (if type C) :
  8. MARC tag                :  245
  9. MARC indicator          :  10
 10. MARC subfield           :  a
 11. Is this the title field?   :  N
 12. Is this the author field?  :  N




 Options:
  # line   Line by line   Exit   Print   ? help
```

1. Field name	The display label for the field.
2. Help message	Displays at the bottom of the screen when the request is entered.
3. Export field name	Used for export to an external ILL package such as AVISO. Type ?? for a list of valid fields.
4. Mandatory?	Specifies whether a response must be entered in this field. Typically used for Title.
5. Validation (C,D,V)	Specifies the type of validation checking, such as a codes (C) file, date (D), or pattern (V).
6. Valid entries (if type V)	Enter the valid match patterns.

7. CODES prefix (if type C)	Enter the CODES prefix to be validated. For example, if the field is for the institution code, enter INSTITUTION. NOTE: This is primarily for the definition of the GEN template.
8. MARC tag	The tag of the MARC field which supplies the information if the request information is made from the OPAC item display screen.
9. MARC indicator	The indicator of the MARC field which supplies the information if the request information is made from the OPAC item display screen.
10. MARC subfield	The subfield of the MARC field which supplies the information if the request information is made from the OPAC item display screen.
11. Is this the title field?	ILL requests are indexed on Title and Author. Only one Title and one Author field can be indexed. Answering Y indicates that this is the title-indexed field. Each template must have one field flagged for indexing by Title.
12. Is this the author field?	ILL requests are indexed on Title and Author. Only one Title and one Author field can be indexed. Answering Y indicates that this is the Author-indexed field. Each template must have one field flagged for indexing by Author.

Request Types (`CIRT`)

Request Types define the single letter codes that are used to specify the way that the ILL request (ILL REQUEST/ENTRY UPDATE screen) will be satisfied.

```
                        Request types


     Number of records : 18
     Code       Description of code
     --------   -------------------------------------------------------
 1. B          Copy with binding margins
 2. C          Copy of microform
 3. D          Document delivery
 4. F          Fax
 5. I          Film
 6. L          Loan
 7. M          Loan of microform
 8. O          Other
 9. R          Computer files
10. U          Audio
11. V          Video
12. X          Photocopy


Options:
 ? help   Add item  # line   Print   Forward   Backward   Search jump
 Exit
```

When a code is selected, the following screen is displayed. Non-circulating items are not normally assigned barcodes.

```
                         Request types

     Request type : B
     ------------------------------------------------------------------
  1. Description                     : Copy with Binding margins
  2. Circulate (1 = YES)            :




 Options:
  ? help   # line   Line by line   Copy   Print   Delete   Exit
```

NOTE: Field 2 is for information only.

ILL OPAC/CAT Setup (`CICS`)

Defines:

- the number of days after which the item is no longer required

- the request types (delivery formats) available for patron-entered ILL requests

- the material types available for patron-entered ILL requests

- the LCN of the bibliographic record used for ILL

- the messages displayed to OPAC patrons

```
                      ILL OPAC/CAT setup


      CONTROL ITEM : CIRC.ILL.CONTROL
      -------------------------------------------------------------------
   1. Request duration in days      : 14
   2. Request types for patrons     : L,X,F,O,C,M,R,DOG,F
   3. Request templates for patrons : BK,SE,ARTICLE,THESIS,VID
   4. ILL Bibliographic LCN         : 10025539
   5. Message for patrons           : To create an ILL Request, please en+
   6. MAIN Db template - BK material : BK = Books
   7. MAIN Db template - AM material : AM.2 = Manuscripts
   8. MAIN Db template - CF material : CF = Computer Files
   9. MAIN Db template - MP material :
  10. MAIN Db template - MU material :
  11. MAIN Db template - VM material :
  12. MAIN Db template - SE material : SE = Serials



  Options:
   ? help   # line   Line by line   Print   Exit
```

1. Request duration in days

Enter the number of days allotted to fill the ILL request. After this time, the request will be cancelled. Provides a default for all requests.

2. Request types for patron

Enter a code. Separate each code in the list by commas.

Request types displayed to the patron when they make a request in OPAC. For example, the patron may ask that the item is delivered as a photocopy, a microform, or fax. Request types are maintained in Request Types (`CIRT`).

<table>
<tr><td>3. Request templates for patrons</td><td>Templates corresponding to the types of loan materials displayed to the patron when they make a request in OPAC. For example, the item may be a book, journal article, or a computer file. Material types are maintained in Request Template Editor (CIRTE).</td></tr>
<tr><td>4. ILL Bibliographic LCN</td><td>LCN of the bibliographic item created to handle ILL requests.</td></tr>
<tr><td>5. Message for patrons</td><td>Instructions displayed to the patron when they use the ILL request option in OPAC.</td></tr>
<tr><td>6. - 12. MAIN Db templates</td><td>These fields allow the library to specify the code for the template that displays when the patron uses the ILL Request option on the OPAC Brief or Full Display. ADVANCE reads the material type in the MARC record and automatically displays the template defined for that material type. If nothing is entered in the field for a given material type, the system prompts the patron to select a material type code.</td></tr>
</table>

Supplying Library Codes (`CILC`)

Library Codes identify the lending institutions that may supply the items requested on inter-library loan. The information entered in this table is used for your reference and is not used by the system.

1. Select Library Codes (`CILC`).

```
                        LIBRARY CODES

     Number of records : 7
     Code      Description of code
     --------  --------------------------------------------------------
 1. CaNLC      National Library of Canada
 2. CaOnT      University of Toronto Library
 3. CaOnW      University of Waterloo Library
 4. CaOnWe     University of Western Ontario
 5. CaUBC      University of British Columbia Library
 6. UuYtrd     University of University
 7. UyTfDw     University of Tennesse



Options:
 ? help   Add item   # line   Print   Forward   Backward   Search jump
 Exit
```

2. Select *Add item* to add a new library code.

```
                          LIBRARY CODES

     LIBRARY CODE : CaOnT
     -------------------------------------------------------------------
 1. Library Name      : University of Toronto Library
 2. NUC Symbol        : CaOnT
 3. ILANET Mail Box ID: ila@Tor.edu
 4. Address Line 1    : Sigmund Samuel Library
 5. Address Line 2    : ILL Department
 6. Address Line 3    : Toronto, Ontario
 7. Post Code         : N3L 5G6
 8. Telephone         : 517-588-3456
 9. Fax Number        : 588-3455
10. Email Address     : ila@Tor.edu
11. Contact Name      : Tory Hide


Options:
 ? help   # line   Line by line   Copy   Print   Delete   Exit
```

All fields accept one line of text information. This data is for your infor-
mation only and is not used by the system.

Requests from OPAC

You can make an ILL request from:

- the Search Selection screen, using the *Make ILL request* option

- the PATRON RECORD INQUIRY screen, using the *Review ILL* option

- Brief or Full Display, using the *ILL Request* option.

Requests from the
Search Selection
Screen

Select *Make ILL request* from the Search Selection screen. The ILL
Request Entry screen appears.

```
        W e l c o m e   t o   t h e   O n l i n e   C a t a l o g u e

LOOK FOR THE FIRST WORD IN THE:           LOOK FOR ANY WORD IN THE:
   Subject                                   Subject
   Title                                     Title
   Author                                    Author
      Personal Name
      Corporate Name                         Notes
      Conference Name                        Series
   Series                                    All of the above
   All of the Above                          Expert search
   Call Number                               Search IAC Database
                                             Search ABI Database
DIRECT KEY SEARCHES:                      RESERVE DOCUMENTS:
   ISBN/ISSN                                 Title
   CODEN                                     Author
   LCCN                                      Patron Inquiry
   Control Number                            Course Details
   LCN                                       Make ILL request
   Music Publisher Number

Select your choice using the <SPACEBAR> or Arrow Keys, then press <ENTER>.
For HELP, type "?" then press <ENTER>.  To EXIT, type "E" then press <ENTER>.
```

```
                         ILL Request Entry                    MASTER


  To create an ILL Request, please enter your Library Card Number

  at the prompt and press <ENTER>.



  To EXIT without creating a request, leave the field empty and

  press <ENTER>.

 Please enter your library card barcode or <ENTER> :
```

3. Enter a barcode.

4. If patron security is set up for further identification, additional prompts will appear. (Use the OPAC PORT CONTROL (OPC) to specify security measures in OPAC.)

5. The system prompts: Select ILL Request Material Type. For example, select Serials from this screen.

```
                         ILL Request Entry                    MASTER


                    << Select Request Material Type >>


                    1) Books
                    2) Serials
                    3) Theses
                    4) Technical Report




 Please select the type of material and press <ENTER>
```

6. Select a material type. The Select ILL Request Type screen appears. For example, select Photocopy from this screen.

```
                        ILL Request Entry                    MASTER


                   << Select ILL Request Type >>


                   1) Loan
                   2) Photocopy
                   3) Fax
                   4) Other
                   5) Copy of microform
                   6) Loan of microform
                   7) Computer files
                   8) Map
                   9) Fax


Please select the type of ILL request and press <ENTER>
```

7. The ILL REQUEST ENTRY/UPDATE screen appears.

```
                      ILL REQUEST ENTRY/UPDATE

 ILL Request No    : 1000481         Current Status    : 000 IDLE
 Created Date      : 04 MAR 1996     Last Updated Date : 04 MAR 1996
 Created By User ID: MASTER          Last Update UserID: STAFF
 Patron Barcode    : 20000002002222  Patron Name       : JONES

  1. Date Required : 18 MAR 1996
  2. Request Type  : X - Photocopy
  3. Mark RUSH     : 0
  4. Journal Title : BYTE
  5. Issue Details : Vol. 19, No 3
  6. Article Author: Reinhardt, Andy
  7. Article Title : Building the Data Highway
  8. Pages         : 46-74
  9. Pub Place     : Peterborough, NH
 10. Pub Name      : McGraw-Hill, Inc.
 11. Pub Date      : March 1994
 12. ISSN          : 0360-5280
 13. Notes         :

 Options:
  ? help   # line   Line by line   File   Exit
```

Some updateable fields are dependent on format, either book or serials.

Display Fields

ILL Request No   System generated number.

Current Status   The status of the request.

Created Date   Date the request was entered on the system.

Last Updated Date   Date when the status was changed either by the system or by someone
                        using the *Update status* option to manually change the status.

Created By User ID   The ADVANCE signon identification of the person who created the
                        request.

Last Update UserID   The ADVANCE signon identification of the person who last updated the
                        request.

Patron Barcode   The barcode of the patron who made the request.

Patron Name   The name of the patron who made the request.

Updateable Fields

1. Date Required   Generated from the number of days entered in field 1 on the ILL OPAC/
                        CAT SETUP (CICS) screen. You may edit this field to insert your required
                        date. Enter a date in the format MM/DD/YY.

2. Request Type   Defaults to the Request Type entered. Enter ?? to browse a list of
                        Request Types.

3. Mark RUSH   Enter 1 to mark this request rush. Currently used for export only.

Example: Serials Request

Updateable Fields - Serials Format

4. Journal Title	Required. Enter the journal title.
5. Issue Details	Required. Enter the volume and issue number.
6. Article Author	Enter the name of the author: last name, first name.
7. Article Title	Required. Enter the title of the article.
8. Pages	Enter the page range of the article requested.
9. Pub Place	Enter the name of the city where the article was published.
10. Pub Name	Enter the name of the publishing house.
11. Pub Date	Enter the date the article was published (month, year, and, if applicable the week/day).
12. ISSN	Enter the ISSN information.
13. Notes	Add any additional notes that might help locate the article.

*Example: Book
Request*

```
                     ILL REQUEST ENTRY/UPDATE

ILL Request No    : 1000483          Current Status   : 000 IDLE
Created Date      : 04 MAR 1996      Last Updated Date : 04 MAR 1996
Created By User ID: MASTER           Last Update UserID: STAFF
Patron Barcode    : 20000002002222   Patron Name      : JONES

 1. Date Required : 18 MAR 1996
 2. Request Type  : L - Loan
 3. Mark RUSH     : 0
 4. Author        : SEIDEL
 5. Title         : REGENERATION IN MIXED CONIFER CLEARCUTS IN THE CASCASE RAN
 6. Edition       : 1
 7. Pub Place     : PORTLAND, OR
 8. Pub Name      : DEPT. OF AGRICULTURE
 9. Pub Date      : 1979
10. LCCN          :
11. ISBN          :
12. Notes         :


Options:
 ? help  # line  Line by line  File  Exit
```

Updateable Fields - Book Format

3. Author   Enter the author's name.

4. Title   Required. Enter the title of the book.

5. Edition   Enter the edition of the book.

6. Pub Place   Enter the name of the place where the item was published.

7. Pub Name   Enter the name of the publisher.

8. Pub Date   Enter the date the item was published.

9. LCCN   Enter the LCCN of the book.

10. ISBN   Enter the ISBN of the book.

11. Notes   Add any additional notes that might help locate the article.

Request from Patron Inquiry

Patrons can display their ILL requests if the *Allow patrons to review ILL requests* is set to yes in OPAC Port Control (OPC).

1. Select Patron Display from the ONLINE CATALOGUE MASTER MENU. The PATRON RECORD INQUIRY screen appears.

```
   DD MMM 19YY          Geac ADVANCE Library System (#.##)        STAFF   ILL
    11:48                     Your Library Name

                        P A T R O N    I N Q U I R Y




Please enter your library card barcode or <ENTER> :
```

2. Enter a barcode number.

```
                    PATRON RECORD INQUIRY

    Patron Barcode..: 20000002001173              Last Update: 07/06/95
                                                  Last Trans.: 07/17/95
 1. Name (Last, F M): MEHL, TRENT ERIC            Registered : 07/06/95
 2. Address........: HAWLEY HALL 423

 3. Zip/Postal Code.: PIONEER TRAIL, OR 97331
 4. Phone Number(s).:
 5. Address 2.......: 1299 MARCY LOOP

 6. Zip/Postal Code.: 97527           14. Password...: ####
 7. Personal ID....: 541969757        15. Home Inst..:
 8. ID Type.........: SSN             16. Home Subl..:
 9. Patron Code....: S-Student        17. Housebound (Y/N) ? : N
10. Expiration Date.: 31 DEC 1995
11. Comments.......:

12. Rte. Recipient..: N
13. Rte. Location...:
 Options:
  List holds   Item list   Review ILL   Exit   ? help
```

3. Select the *Review ILL* option. The BROWSE ILL REQUESTS BY
    PATRON screen appears. Requests display in chronological order
    from the oldest to most recent.

```
                      BROWSE ILL REQUESTS BY PATRON

   Patron Barcode:  20000002001173   Patron Name: MEHL, TRENT ERIC

   #  Request     Title Requested              Supp Lib  Status    Date
   --------------------------------------------------------------------------
   1. 1000060     AN EVALUATION OF THE SLASH (I)+ CEN       COMPLETED 07/06/95
   2. 1000064     THE GRIZZLY IN THE SOUTHWEST:D+ CHINCH    IDLE      07/06/95
   3. 1000070     ANCIENT ENVIRONMENTS AND THE I+ CEN       IDLE      07/07/95

   Options:
    # item   Add item   Exit   ? help
```

Display Fields

Patron Barcode	The barcode number as entered.
Patron Name	System supplied name from the Patron Registration screen.
#	Line number of the item.
Request	System generated request number assigned to the ILL request when the request was created.
Title Requested	The title of the item requested.
Supp Lib	The Library Code of the supplying institution.
Status	The status of the ILL request as of the date indicated in the *Date* field.
Date	The date when the status was last changed.

Options

Add item
Displays the BROWSE ILL REQUESTS BY PATRON screen. The system prompts: `Please select the type of material and press <ENTER>`. After you select a request type, the ILL REQUEST ENTRY/UPDATE screen appears. Complete your request and *File*.

Requests from Brief/Full Display

If the OPAC PORT CONTROL (OPC) table is set up to allow patrons to copy database bibliographic information into an ILL Request, the *ILL request* option becomes available at the OPAC Brief and Full Displays. If used, ADVANCE copies the information from the current display into the ILL request template.

Select *ILL request* to obtain the ILL Request Entry screen.

```
                Main Online Catalogue - BRIEF DISPLAY     (1 of 1 titles)
                                              Number of holdings :1
 AUTHOR           :Robbins, William G
 TITLE            :The Oregon environment: development vs. preservation,1905-1950
                   / by William G. Robbins.
 SUBJECT          :Conservation of natural resources -- Oregon -- History
 SERIES           :Man's activities as related to environmental quality in
                   Oregon;
 LANGUAGE         :ENGLISH

    CAMPUS  LIBRARY    COLLECTION/CALL NUMBER                STATUS/DUE DATE
    ------- ---------- ----------------------------------    -----------------
 1. ACAD    CAM1       HC107.O73 E58                         In Library




 Last Page
 Options:
 # item   Full display   Prior screen   Extend search   Limit list   Output
 MARC   Holds   ILL request   Order display   Review search   OPAC parms
 New search   Reset   ? help
```

If there is a request template specified in ILL OPAC/CAT Setup (CICS) for this item's material type, the system skips the prompt for Request Material Type, and displays the Request type prompt. If not, the system prompts first for Request Material type, then Request Type, as described in *Requests from the Search Selection Screen* on page E-24.

Once the Request Type is selected, the ILL REQUEST/ENTRY UPDATE screen is displayed with data from the bibliographic record filled in. Use the *File* option to file the request. The patron is returned to the OPAC Brief or Full Display.

Request Entry/Update (`CIRE`)

Use Request Entry/Update (CIRE) for:

- searching current requests

- changing new ILL requests

- creating new ILL requests

- monitoring the status of ILL requests.

Access

1. Select ILL Maintenance (CILL) from the General Circulation Menu. The ILL Maintenance screen appears.

2. Select *Request Entry/Update* (CIRE). The ILL REQUEST UPDATE screen appears. (For information on setting up Library Codes, see *ILL Maintenance Setup* on page E-12.)

```
                        ILL REQUEST UPDATE                    MASTER

        Enter the type of request retrieval:

        CUR  Search existing requests        ARC  Search archived requests

                        NEW  Create new request

        Enter option :











         Enter the code and optional search string (eg. CUR A=TWAIN)
```

Searching Current Requests

1. Select *Search existing requests* (`CUR`) from the ILL REQUEST
   UPDATE screen. The ILL Current Request Search Entry screen
   appears.

```
               ILL Current Request Search Entry              MASTER
        ENTER type of search:

        RQ   Browse requests by request #
        RF   Browse requests by reference #
        ST   Browse requests by status
        P    Browse requests by patrons
        T    Browse requests by title
        A    Browse requests by author
        I    Browse requests by institution


        Enter option=








 Enter the search code and string (eg A=TWAIN), or <ENTER> to exit
```

2. Select a search method. The search entry screen is common to both
   current and archive searches.

Browse requests by
request #

Enter `RQ = [nnnnnn]`.

Displays a chronological list of all requests at the request number
nearest to the one entered. Request numbers are assigned by the system
when a request is made.

Browse requests by
reference #

Enter `RF = [nnnnnn]`.

Displays a browse list of all reference numbers associated with ILL
requests. The reference number is assigned by the lending institution and
must be entered into the system from the ILL REQUEST ENTRY/UPDATE
screen before it can be searched.

Browse requests by status	Enter `ST = [nnn]` where *nnn* is the status code.
	Enter ?? to see a list of statuses and status codes. Use this search method to see new requests (ST = 000), or to review requests that have a particular status. Status codes are provided by the system and cannot be changed. No status code table maintenance is provided.
Browse requests by patrons	Enter `P = [xxxxxx]`.
	You can enter a patron barcode or browse by name. This search displays a list of all the requests made by the patron. If the patron name does not match exactly an existing name, a browse list of names that are alphabetical close to the name entered appears.
Browse requests by title	Enter `T=[xxxx xxxxxx x xxx]`.
	If a title matches the search request exactly, the ILL REQUEST ENTRY/ UPDATE screen appears. If the search request does not produce an exact match, a browse list of ILL titles that are alphabetically close to the title entered appears.
Browse requests by author	Enter `A = [xxxxxx]`.
	If an author matches the search request exactly, the ILL REQUEST ENTRY/UPDATE screen appears. If the search request does not produce an exact match, a browse list of ILL authors that are alphabetically close to the author entered appears.
Browse requests by institution	Enter `I= [xxx]` where *xxx* is a defined institution code (not a lending institution). The institution code is defined by CHIC codes.
	This search displays a list of the requests made by the institution.
	If an invalid institution code is entered, a browse list shows the INSTITUTION CODES screen. If you do not enter an institution code, the system displays the ILL BROWSE LIST - BY REQUEST NUMBER. This is a list of all the requests made by all institutions.

```
  DD MMM YY              ILL BROWSE LIST                      MASTER

  Institution: All Institutions
        Code: 000                   Description:  No Description Found

      Request  Status   Library   Act Date  Title          Author
 ------------------------------------------------------------------------------
  1.  1000042  IDLE               28 JUN 95 The future of wo+Fields, Rona M.
  2.  1000041  IDLE               28 JUN 95 The complete boo+Kuntzleman, Char+
  3.  1000054  IDLE               30 JUN 95 The grizzly in t+Brown, David E. +




  ** Last Screen **
 Options:
  # line    Search jump   Exit   New search   ? help
```

Changing the Request Status

The status of a request is maintained by library staff. When a request has been sent to a potential lending institution, you should change the status of the request from idle to sent.

NOTE: ILL adds some statuses automatically, such as checked-out, renewed, overdue, and completed (returned). Other statuses must be added manually.

1. From the BROWSE LIST screen, select a line number. The ILL REQUEST ENTRY/UPDATE screen appears.

```
                      ILL REQUEST ENTRY/UPDATE

ILL Request No     : 1000041          Current Status    : 000 IDLE
Created Date       : 28 JUN 1995      Last Updated Date : 10 JUL 1995
Created By User ID: RKF               Last Update UserID: MASTER
Patron Barcode     : 29999900007763   Patron Name       : Zackary, William

 1. Reference #s  :                   2. Date Required : 08/07/95
 3. Library       :                   4. Request Type  : L - Loan
 5. Mark RUSH     : 0                 6. Institution   : PUB - PUBLIC LIBRA
 7. Piece Number  :
 8. Author        : Kuntzleman, Charles T.
 9. Title         : The complete book of walking /
10. Edition       :
11. Pub Place     : New York :
12. Pub Name      : Simon and Schuster,
13. Pub Date      : [c1978]
14. LCCN          :    78078065
15. ISBN          : 0671247727 :
16. Notes         :

Options:
 ? help   # line   Line by line   Status   File   Receive   Delete   Exit
```

2. Select *Status*. The ILL REQUEST ENTRY/UPDATE screen appears.

```
                    ILL REQUEST ENTRY/UPDATE

ILL Request No   : 1000041           Current Status   : 000 IDLE
Created Date      : 28 JUN 1995       Last Updated Date : 10 JUL 1995
Created By User ID: STAFF             Last Update UserID: STAFF
Patron Barcode   : 29999900007763    Patron Name      : Zackary, William
                  << ILL TRANSACTION STATUS HISTORY >>

    STATUS          DATE        USER ID Comment/Note

 1. 000 IDLE       28 JUN 1995 STAFF   Patron entered request




Options:
 ? help   # line   Update status   Delete #   Accept   Exit
```

3. Select *Update status*. The ILL REQUEST ENTRY/UPDATE screen re-appears with the cursor positioned above line 1.

4. Enter a status code and <ENTER>. You may add other information in the comment field. <ENTER>.

```
                    ILL REQUEST ENTRY/UPDATE

ILL Request No   : 1000079           Current Status   : 000 IDLE
Created Date      : 11 JUL 1995       Last Updated Date : 11 JUL 1995
Created By User ID: STAFF             Last Update UserID: STAFF
Patron Barcode   : 20000002001111    Patron Name      : Zachary, William
                  << ILL TRANSACTION STATUS HISTORY >>

    STATUS          DATE        USER ID Comment/Note
    010 SENT       11 JUL 1995 STAFF
 1. 000 IDLE       11 JUL 1995 STAFF Patron entered request
```

5. Select *Accept*.

```
                      ILL REQUEST ENTRY/UPDATE

ILL Request No   : 1000079          Current Status  : 000 IDLE
Created Date     : 11 JUL 1995      Last Updated Date : 11 JUL 1995
Created By User ID: STAFF           Last Update UserID: STAFF
Patron Barcode   : 20000002001111   Patron Name      : Zachary, William
                 << ILL TRANSACTION STATUS HISTORY >>


    STATUS          DATE        USER ID Comment/Note

 1. 010 SENT       11 JUL 1995 STAFF
 2. 000 IDLE       11 JUL 1995 STAFF Patron entered request








Options:
 ? help   # line   Update status   Delete #   Accept   Exit
```

Creating New Requests

1. Select *Request Update* (CIRE) from ILL Maintenance (CILL) screen.

2. At the prompt, enter NEW. The Enter Patron Name or Barcode prompt appears.

```
                    ILL REQUEST UPDATE                      STAFF

     Enter the type of request retrieval:

     CUR  Search existing requests        ARC  Search archived requests

                     NEW   Create new request

     Enter option : NEW




 Enter the code and optional search string (eg. CUR A=TWAIN)
```

```
                       REQUEST UPDATE                       STAFF

 Enter Patron Name or Barcode: 20000002002222




                   << Select ILL Material Type >>

                   1) Books
                   2) Serials
                   3) Theses
                   4) Video/visual media




 Please select the type of material and press <ENTER>  1
```

3. Enter a patron name or barcode.

4. The system prompts: `Select ILL Material Type`.

5. Select a material type. The ILL REQUEST ENTRY/UPDATE screen appears.

```
                    ILL REQUEST ENTRY/UPDATE

ILL Request No   : 1000097           Current Status    : 000 IDLE
Created Date     : 17 JUL 1995       Last Updated Date : 17 JUL 1995
Created By User ID: STAFF            Last Update UserID: STAFF
Patron Barcode   : 20000002002222    Patron Name       : Zachary, William

 1. Reference #s  : X9006               2. Date Required : 08/26/95
 3. Library       : CEN                 4. Request Type  : L - Loan
 5. Mark RUSH     : 0                   6. Institution   : ILL - ILL departme
 7. Piece Number  : 39999000000101
 8. Author        : HALFORD
 9. Title         : THE DRY-FLY MAN'S HANDBOOK: A COMPLETE MANUAL, INCLUDING T+
10. Edition       :
11. Pub Place     : LONDON
12. Pub Name      : G. ROUTLEDGE & SONS, LIMITED
13. Pub Date      : 1913
14. LCCN          :
15. ISBN          :
16. Notes         :

Options:
 ? help   # line   Line by line   Status   File   Receive   Delete   Exit
```

6. Enter the information requested and *File*.

Display Fields

ILL Request No
System generated.

Current Status
The status of the request. Use the *Update status* option to update the status manually.

Created Date
Date the request was entered on the system.

Last Updated Date
Date when the status was updated either by the system or when the *Update status* option was used to manually update the status.

Created By User ID	The ADVANCE signon identification of the person who created the request.
Last Update UserID	The ADVANCE signon identification of the person who last updated the request.
Patron Barcode	The barcode of the patron who has made the request.
Patron Name	The name of the patron who made the request.

Updateable Fields - Independent of Format

1. Reference #s	Enter any external reference numbers that were supplied by lending libraries. Separate multiple entries with commas.
2. Date Required	Date the item is required. Calculated from the number of days specified in Field 1 on the ILL OPAC/CAT Setup (`CICS`) screen. Edit this field by entering a date in the system format (for example, MM/DD/YY).
3. Library	Enter the Library Code (as defined in ILL) for the supplying library.
4. Request Type	Enter the single letter request type code or enter ?? to browse a list.
5. Mark RUSH	Enter 1 or 0. 1 indicates a rush request.
6. Institution	Defaults to the patron's Home Institution Code as defined on the Patron Registration screen. If an institution code is not available from the patron record, then the institution code defaults to that of the port.
7. Piece Number	Optional. Enter the placeholder barcode that will be assigned when the item is received. If a barcode is not entered, the system prompts for one when the *Receive* option is used. The system supplies N/A for photocopy requests.

Updateable Fields - Book Format

The fields that display are those defined for the bibliographic format of the item being requested.

8. Author	Enter the author's name.
9. Title	Required. Enter the title of the book.
10. Edition	Enter the edition of the book.
11. Pub Place	Enter the name of the place where the item was published.
12. Pub Name	Enter the name of the publisher of the item.
13. Pub Date	Enter the date the item was published.
14. LCCN	Enter the LCCN of the book.
15. ISBN	Enter the ISBN of the book.
16. Notes	Information provided by the patron that will assist in identifying the work required.

Updateable Fields - Serials Format Fields

8. Journal Title	Required. Enter the journal title.
9. Issue Details	Required. Enter the volume and issue number.
10. Article Author	Enter the name of the author: last name, first name.
11. Article Title	Required. Enter the title of the article.
12. Pages	Enter the page range of the article requested.
13. Pub Place	Enter the name of the city where the article was published.
14. Pub name	Enter the name of the publishing house.
15. Pub Date	Enter the date (month, year, and, if applicable the week/day) the article was published.

16. ISSN   Enter the ISSN information.

17. Notes   Information provided by the patron that will assist in identifying the
                          work required.

Receiving

When an ILL item arrives from the supplying library:

- it must be received by the ILL module

- a barcode must be assigned (if this has not been previously assigned) if the item is to be circulated. NOTE: If a barcode is not assigned, the system will not generate a notice.

- the patron who has requested the item must be contacted.

```
                    ILL REQUEST ENTRY/UPDATE

ILL Request No    : 1000097         Current Status   : 000 IDLE
Created Date      : 17 JUL 1995     Last Updated Date : 17 JUL 1995
Created By User ID: STAFF           Last Update UserID: STAFF
Patron Barcode    : 20000002002222  Patron Name      : Zachary, William

 1. Reference #s  : X9006             2. Date Required : 08/26/95
 3. Library       : CEN               4. Request Type  : L - Loan
 5. Mark RUSH     : 0                 6. Institution   : ILL - ILL departme
 7. Piece Number  :
 8. Author        : HALFORD
 9. Title         : THE DRY-FLY MAN'S HANDBOOK: A COMPLETE MANUAL, INCLUDING T+
10. Edition       :
11. Pub Place     : LONDON
12. Pub Name      : G.ROUTLEDGE & SONS, LIMITED
13. Pub Date      : 1913
14. LCCN          :
15. ISBN          :
16. Notes         :

Options:
 ? help   # line   Line by line   Status   File   Receive   Delete   Exit
```

1. Select *Receive*.

```
                    ILL REQUEST ENTRY/UPDATE

 ILL Request No   : 1000097           Current Status   : 000 IDLE
 Created Date     : 17 JUL 1995       Last Updated Date : 17 JUL 1995
 Created By User ID: STAFF            Last Update UserID: STAFF
 Patron Barcode   : 20000002002222    Patron Name      : Zachary, William

  1. Reference #s  : X9006             2. Date Required : 08/26/95
  3. Library       : CEN               4. Request Type  : L - Loan
  5. Mark RUSH      : 0                 6. Institution   : ILL - ILL departme
  7. Piece Number  :
  8. Author        : HALFORD
  9. Title         : THE DRY-FLY MAN'S HANDBOOK: A COMPLETE MANUAL, INCLUDING T+
 10. Edition       :
 11. Pub Place     : LONDON
 12. Pub Name      : G.ROUTLEDGE & SONS, LIMITED
 13. Pub Date      : 1913
 14. LCCN          :
 15. ISBN          :
 16. Notes         :

Enter Library: CEN
```

2. The system prompts: Enter Library.

    If a lending library has been previously identified, the prompt
    contains the code for that library.

3. Enter a library code; or if a code has already been entered <ENTER>.

```
                      ILL REQUEST ENTRY/UPDATE

 ILL Request No    : 1000097           Current Status    : 000 IDLE
 Created Date      : 17 JUL 1995       Last Updated Date : 17 JUL 1995
 Created By User ID: STAFF             Last Update UserID: STAFF
 Patron Barcode    : 20000002002222    Patron Name       : Zachary, William

  1. Reference #s  : X9006                2. Date Required : 08/26/95
  3. Library       : CEN                  4. Request Type  : L - Loan
  5. Mark RUSH      : 0                    6. Institution   : ILL - ILL departme
  7. Piece Number  :
  8. Author        : HALFORD
  9. Title         : THE DRY-FLY MAN'S HANDBOOK: A COMPLETE MANUAL, INCLUDING T+
 10. Edition       :
 11. Pub Place     : LONDON
 12. Pub Name      : G.ROUTLEDGE & SONS, LIMITED
 13. Pub Date      : 1913
 14. LCCN          :
 15. ISBN          :
 16. Notes         :

 Enter placeholder barcode (if item is circulated): 39999000000101
```

4. If a barcode has not been entered the system prompts:

   ```
   Enter placeholder barcode (if item is circulated):
   ```

   If a barcode was entered previously in the Piece Number field, this prompt (screen) is skipped.

   NOTE: You may want to reserve both renewable and non-renewable barcodes for ILL purposes. Whether an item is renewable is determined by the Circulation Code entered in the Placeholder piece linked to the ILL Bibliographic Record.

5. The ILL REQUEST ENTRY/UPDATE screen appears and the current status displays as ITEM RECEIVED.

```
                    ILL REQUEST ENTRY/UPDATE

ILL Request No   : 1000097            Current Status   : 080 ITEM RECIEVED
Created Date      : 17 JUL 1995        Last Updated Date : 17 JUL 1995
Created By User ID: STAFF              Last Update UserID: STAFF
Patron Barcode   : 20000002002222      Patron Name       : Zachary, William

 1. Reference #s  : X9006              2. Date Required : 08/26/95
 3. Library       : CEN                4. Request Type  : L - Loan
 5. Mark RUSH      : 0                  6. Institution   : ILL - ILL departme
 7. Piece Number  :
 8. Author        : HALFORD
 9. Title         : THE DRY-FLY MAN'S HANDBOOK: A COMPLETE MANUAL, INCLUDING T+
10. Edition       :
11. Pub Place     : LONDON
12. Pub Name      : G.ROUTLEDGE & SONS, LIMITED
13. Pub Date      : 1913
14. LCCN          :
15. ISBN          :
16. Notes         :

Options:
 ? help   # line   Line by line   Status   File   Delete   Exit
```

6. Select *File*.

Notices

Contact notices are generated using whatever procedures are specified in your Circulation system. (Hold Pickup notices for ILL items are generated for ILL items which have been assigned barcodes during ILL receiving, based on library setup for Hold Pickup notices.) When patrons check out ILL items, the normal notice cycle goes into effect. You may want to define specific Hold Codes and notice formats for ILL items.

Checkout

You may specify that ILL items can only be checked out and checked in from specific ports that have been defined as ILL ports. See Chapter 3, *Port Control,* of the *Circulation Management Guide*.

When a patron has ILL items waiting, the items are included in the block and hold counts displayed on the CIRCULATION CHECKOUT screen.

```
01:30PM                  CIRCULATION CHECKOUT                DD MMM YY

Enter Patron Name or Barcode : 20000002002222  Zachary, William
Blocks : 1    Fines : 0.00    Items out : 0    Holds : 1

      ITEM                TITLE                                    DUE


  1.
```

Enter ILL <ENTER> to display the BROWSE ILL REQUESTS BY PATRON screen.

```
                    BROWSE ILL REQUESTS BY PATRON

 Patron Barcode:  20000002002222  Patron Name: Zachary, William

 #  Request      Title Requested           Supp Lib  Status     Date
 ---------------------------------------------------------------------------
 1. 1000075      THE DRY-FLY MAN'S HANDBOOK    CEN      COMPLETED  07/17/95
 2. 1000076      DATABASE MANAGEMENT IN SCIENCE+ CEN    RENEWED -+ 07/11/95




Options:
  ? help   Add item   Delete #   Backward   Forward   # line   Exit
```

```
 11:53AM                     CIRCULATION CHECKOUT                    DD MMM YY

Enter Patron Name or Barcode : 20000002002222 Zachary, William
Blocks : 1    Fines : 0.00    Items out : 2    Holds : 0

     ITEM                TITLE                                    DUE


 1.  39999000000106     ILL items                                07-19-95
                                                                 09:00PM
 2.
```

You may use the *DUE:* option to specify the exact due date and time rather than allowing the system to calculate the due date based on the Patron Group and Circulation Codes. Enter the placeholder barcode to check out the ILL item.

Holds

ILL requests can be viewed from *Holds Processing* (HRT).

1. Select HRT. The HOLDS PROCESSING screen appears.

```
  DD MMM YYYY           Geac ADVANCE Library System (#.##)        STAFF   ILL
    HH:MM                      Your Library Name

                            HOLDS PROCESSING

Enter Patron Name or Barcode: 20000002002222
```

2. Enter a patron name or barcode.

```
  DD MMM YYYY              Geac ADVANCE Library System (#.##)         STAFF   ILL
    HH:MM                        Your Library Name

                             HOLDS PROCESSING

 Enter Patron Name or Barcode : 20000002002222 Zachary, William


 Blocks : 0    Fines : 0.00    Items out : 0    Holds : 2


 Enter command : ILL


 - Type in a statement to search the database
 - Type 'S' to get to the OPAC search screen
 - Type 'B' to check the patrons blocks
 - Type 'IT' or 'LIST' to view checked out items
 - Type 'P' to update the patron record
 - Type 'SH' to show the holds for this patron
 - Type 'ILL' to review ILL requests for this patron
 - Type '?' for a more detailed help screen
```

3. Enter ILL.

4. The BROWSE ILL REQUESTS BY PATRON screen appears. ILL items are listed in chronological order, the oldest appearing first.

```
                     BROWSE ILL REQUESTS BY PATRON

 Patron Barcode: 20000002002222  Patron Name: Zachary, William

 #  Request      Title Requested              Supp Lib  Status      Date
 ------------------------------------------------------------------------------
 1. 1000075      THE DRY-FLY MAN'S HANDBOOK      CEN       COMPLETED  07/17/95
 2. 1000076      DATABASE MANAGEMENT IN SCIENCE+ CEN       RENEWED -+ 07/11/95




 Options:
  ? help   Add item   Delete #   Backward   Forward   # line   Exit
```

5. Use the *Add item* option to request additional ILL items.

Blocks

Received ILL items display as blocks and holds. The PATRON BLOCKS screen also appears if you use TRANSACTION UPDATE (CTU) from the PATRON CONTROL MENU. The Holds Available block indicates that ILL items are waiting.

1. Select COUT. The CIRCULATION CHECKOUT screen appears.

2. Enter B at the item prompt (line number).

3. The PATRON BLOCKS screen appears.

```
01:52PM                     PATRON BLOCKS                    DD MMM YY


 Enter Patron name or barcode : 20000002002222  Zachary, William

  #.#               PATRON TRANSACTIONS          AMT.   CNT    DATE
  1      *** Item Waiting from Hold ***
    1     ILL items                                            07-11-95
    2     ILL items                                            07-12-95
  ---    ---------------------------------------  -------  ---  --------








   ** LAST SCREEN **
 Options:
  Accept payment   Add item   On/off display   Page #   Del # range (#.#)
  File    Forward   Backward   Exit   ? help
```

The ILL items that have been assigned placeholder barcodes display as ILL items.

NOTE: The title identifier (ILL items) that displays comes from the ILL Bibliographic record, 245 tag.

Checkin

When the item barcode is entered at checkin, the system recognizes the ILL item and automatically changes the status to completed in the ILL module.

```
05:03PM                    CIRCULATION CHECKIN                    DD MMM YY


                                               Charging Fines: Yes
Command or Item Barcode:
                                               Amount:
(Detailed Display Mode)

ITEM               TITLE
39999000000106     ILL items





39999000000106 accepted.
```

```
                   BROWSE ILL REQUESTS BY PATRON

 Patron Barcode:  20000002002222   Patron Name:  Zachary, William

  #  Request      Title Requested              Supp Lib  Status     Date
 ---------------------------------------------------------------------------
  1. 1000075     THE DRY-FLY MAN'S HANDBOOK      CEN       COMPLETED  07/17/95
  2. 1000076     DATABASE MANAGEMENT IN SCIENCE+ CEN       COMPLETED  07/11/95






 Options:
  ? help    Add item   Delete #   Backward   Forward   # line   Exit
```

Completed requests are archived automatically and can be searched using the ARC (Search Archived Requests) option from ILL Request Update.

Renewals

Whether a item can be renewed is determined by the Circulation Code that was attached to the item. (To designate an ILL item as non-renewable, you must assign it a barcode with a Circulation Code that is non-renewable. Changing the ILL status to non-renewable has no effect on checkout.)

To renew the ILL item, either:

a. Wand the barcode at the item prompt in Checkout (COUT), or

b. Use the *Renew line(s) #* option in Checkout (COUT).

For more information see, *Renewals* on page 8-1.

Archiving

The system automatically archives completed ILL requests, that is requests that have been checked out and checked in. Archived requests can be searched in the same way as current requests. See *Searching Current Requests* on page E-37.

You can view archived information and add notes to status fields but statuses cannot change.

```
  DD MMM YYLL BROWSE LIST - BY TRANSACTION NO - ARCHIVE          JOHN

  Institution: Univ

      Trans No   Status     Library   Act Date  Title          Author
--------------------------------------------------------------------------------
  1.  1000023    COMPLETED  CaNLC     27 JUN 95 A centennial h+ Kirincich, M. +




 ** Last Screen **
 Options: # line   Forward   Backward   Search jump   Exit   New search   ? help
```

```
                    ILL ARCHIVE TRANSACTION DISPLAY

 ILL Request No   : 1000023         Current Status    : 400 COMPLETED
 Created Date     : 26 JUN 1995     Last Updated Date : 29 JUN 1995
 Created By User ID: JOHN           Last Update UserID: JOHN
 Patron Barcode   : 20000002003263  Patron Name       : GABER, JUNE EDNA

  1. Reference #s :                    2. Date Required : 06/27/95
  3. Library      : CaNLC             4. Request Type  : L - Loan
  5. Mark RUSH     : 0                 6. Institution   : AU - University of
  7. Piece Number : ILL-0001
  8. Author       : Kirincich, M. Stephen
  9. Title        : A centennial history of Stellarton
 10. Edition      :
 11. Pub Place    : Antagonish, N.S.
 12. Pub Name     : Scotia Design Publication,
 13. Pub Date     : c1990
 14. LCCN         :
 15. ISBN         : 0-920147-03-8
 16. Notes        : bip september 1991

Options:
  ? help    Status   File   Delete   Exit
```

Options

Status   Displays the status history window.

File   Saves changes made in the *Comment/Note* field that is attached to the
                        STATUS field.

Delete   Removes the record from the archive.

```
                    ILL ARCHIVE TRANSACTION DISPLAY

 ILL Request No    : 1000023           Current Status    : 400 COMPLETED
 Created Date      : 26 JUN 1995       Last Updated Date : 29 JUN 1995
 Created By User ID: JOHN              Last Update UserID: JOHN
 Patron Barcode    : 20000002003263    Patron Name       : GABER, JUNE EDNA
                  << ILL TRANSACTION STATUS HISTORY >>


     STATUS           DATE        USER ID Comment/Note

 1. 400 COMPLETED   27 JUN 1995 MEM
 2. 230 CHECKED OUT 27 JUN 1995 MEM
 3. 080 ITEM RECIEV 27 JUN 1995 MEM
 4. 010 REQUEST SEN 26 JUN 1995 JOHN
 5. 000 IDLE        26 JUN 1995 JOHN    Staff entered request




 Options:
  ? help   # line   Accept   Exit
```

Options

# line	Positions the cursor at the Comment/Note field. You can add a note but cannot make other changes.
Accept	Temporarily saves changes made in the *Comment/Note* field that is attached to the *STATUS* field.

ADVANCE — AVISO Interface (CAPD)

AVISO is an Inter-Library Loan software product. AVISO interacts with ADVANCE in the following ways:

• ILL requests created in ADVANCE from OPAC or the ILL request/entry update screen can be transferred to AVISO.

• The current status of requests can be transferred to ADVANCE.

• Patron information can be transferred to AVISO to assist you if your library enters requests directly in AVISO.

Transferring ILL Requests to AVISO

1. From AVISO, select *search OPAC*.

2. Login to ADVANCE.

   This process may take some time depending on the size of the ADVANCE ILL database, and whether the patron information is included.

3. When the completion message appears, the requests may be loaded into AVISO in the same manner as other AVISO requests.

Transferring ILL Status Reports to ADVANCE

1. From AVISO, select *output OPAC status*.

2. Login to ADVANCE.

3. When the process is complete, the status of ILL requests will be available to ADVANCE users. (This process is quicker than transferring ILL requests.)

Transferring Patron Information to AVISO

This information is automatically transferred with ILL requests. To determine which patrons to transfer, run the AVISO Patron Download (CAPD) from the ILL MAINTENANCE screen in ADVANCE before requesting a transfer.

```
                           AVISO Patron Download


         1. Send all patrons

         2. Send all ILL capable patrons

         3. Send specific patron group

         4. Send specific patron










     Options:
      # line   File   Exit   ? help
```

From this screen you can select which patrons should be included in the AVISO patron database. As a patron or group of patrons is selected, their download code appears on the right side of the screen. Up to 20 separate codes can be entered. To enter more, run the program again.

If AVISO is installed in ADVANCE, each time patron information is changed in Patron Registration (CPR), the patron record is marked for download to AVISO the next time ILL requests are downloaded.

NOTE: This screen merely selects patrons for download; the actual download is initiated by AVISO.

1. Send all patrons

Transfer all patrons in ADVANCE to AVISO.

2. Send all ILL capable patrons

Transfer all patrons in ADVANCE to AVISO who belong to patron groups with ILL access, or have ILL access because of an override in the Patron Registration Second Screen (CPR).

3. Send specific patron group

Transfer all patrons in a specific patron group in ADVANCE to AVISO. Type ?? for a list of valid groups.

4. Send specific patron   Enter the name or barcode of each patron to transfer to AVISO. This option will result in the quickest processing because the entire Patron file will not be scanned.

Screen Index

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