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Unit 1: Overview of the Circulation Module

This unit provides a basic overview of the Circulation module and describes the functions of the circulation menus and the various features available to perform different activities. It is important to learn the general layout of the screen as well as where to find specific functions. Learning to navigate among the various tabs and menus will make workflow much easier. Basic navigation tips and in-depth explanations of module functionality are provided in the corresponding units of the manual.

Lesson 1: Navigating the Circulation Screen

This lesson provides tips on navigation and terminology to aid in using the Circulation module interface. Each area of the interface is described on the following pages.

Figure 1: The Circulation Module Interface
Areas of the Circulation module interface are described below:

**Menu Bar**
Contains the commands for features of the module, grouped in drop-down menus.

**Patron Bar**
Contains a search field used to retrieve the name and ID numbers of a current patron. The Patron bar is also used to create a new patron record.

**Item Bar**
Contains a search field used to retrieve an item by barcode, view related information, and create new brief records for uncataloged items.

**Navigation Tree**
Contains nodes that can be selected to access information or perform specific activities within the module. Options vary according to the selected activity tab.

**Upper Pane**
Displays information related to the node selected in the Navigation Tree.

**Lower Pane**
Displays information related to the line selected in the upper pane.

**Activity Tabs**
Correspond to major activities within the module. When an activity tab is clicked, the Navigation Tree and upper and lower panes will display related information and options.

**Application Toolbar**
Allows other modules (Cataloging, Acquisitions/Serials) to be opened.
# Lesson 2: Using The Menu Bar

This lesson includes a brief description of the Menu bar functions used for circulation activities.

<table>
<thead>
<tr>
<th>ALEPH</th>
<th>View</th>
<th>Patrons</th>
<th>Items</th>
<th>Circulation</th>
<th>Requests</th>
<th>Reports</th>
<th>Services</th>
<th>Help</th>
<th>?</th>
</tr>
</thead>
</table>

### The ALEPH Menu

- **Connect to**: Determines the database being accessed. Circulation is always connected to the XXX50 database (where XXX represents the three-letter institution code).

- **Dates**: Changes due dates of current loans by sublibrary, item status, and date. Dates are changed by the Help Desk on request.

- **Show PC/Server Transaction Log**: Displays the daily technical log of transactions with the server.

- **Retrieve Triggers**: Not used.

- **Print History**: Displays a list of all print jobs run from the computer.

- **Options**: Allows users to set Loan and Return options for the computer and customize shortcut keys.

- **Switch Application**: Opens other modules (Cataloging, Acquisitions/Serials).

- **Version Check**: Allows users to download and automatically install updates to the client.

- **Exit**: Close the client.
The View Menu

- **Switch to**: Switches the view to a different circulation activity tab and displays the corresponding options in the Navigation Tree. It also displays the associated function key that can be used as a keyboard shortcut.
- **End Current Session**: Clears the screen of information in the Loan, Return, Patron, and Item activity tabs.
- **Full Screen**: Removes and restores various panes in the Search activity tab to expand the viewing area.

<table>
<thead>
<tr>
<th>Function</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switch to Loan Tab</td>
<td>F5</td>
</tr>
<tr>
<td>Switch to Return Tab</td>
<td>F6</td>
</tr>
<tr>
<td>Switch to Patron Tab</td>
<td>F7</td>
</tr>
<tr>
<td>Switch to Item Tab</td>
<td>F8</td>
</tr>
<tr>
<td>Switch to Admin Tab</td>
<td>F10</td>
</tr>
<tr>
<td>Switch to Search Tab</td>
<td>F9</td>
</tr>
<tr>
<td>End Current Session</td>
<td>F4</td>
</tr>
</tbody>
</table>

The Patrons Menu

- **New Patron**: Opens the new patron registration form.
- **Duplicate Patron**: Duplicates the patron record displayed in the Patron activity tab.
- **Delete Patron**: Deletes the patron record displayed in the Patron activity tab.
- **Patron Profile**: Defines values for a LINCCWeb Catalog (OPAC) user. One default patron profile is defined for LINCC.
- **Remote Registration**: Downloads selected fields of patron records from other institutions.

The Items Menu

- **Catalog Record and Create Item**: Creates brief bibliographic records and item records for uncataloged items.
- **Change Item Information**: Changes selected fields on the item record.
- **Restore Item Information**: Restores selected fields on the item record to a previous version.
- **Change Item Process Status**: Changes the item process status on the item record.
The Circulation Menu

- **Renew Loan by Barcode**: Allows Loans to be renewed by entering barcodes.
- **Reserve Items**: Not used.
- **Offline Circulation**: Allows items to be loaned and returned when the connection to the LINCC server is unavailable.
- **Fast Circulation**: Allows items to be loaned and returned without retrieving full records.
- **In-house Use**: Allows users to enter barcodes to record the number of times items are used on the premises.
- **Manual Transfer**: Allows items to be manually transferred from one campus to another. To perform the transfer, enter the barcode of the item and the location to which the item should be transferred and click OK. Checks for item on loan; no check for item requested.

Fast Circulation does not check for hold requests or place an item in-transit to another campus. It is intended for use by libraries with poor internet connectivity.

The Requests Menu

- **Hold Requests**: Allows users to create and delete hold requests when dealing with multiple items.
- **Photocopy Requests**: Allows users to create and delete photocopy requests within the library's own collection.
- **Booking Requests**: Allows users to create a new Item Booking request.

Filling hold requests through the Hold Requests menu will not place an item in-transit if it has been requested at another campus.
The Reports Menu

- **Payment Report**: Lists cash transactions that have occurred within a given time period. The report can be run for the current workstation or for the currently logged-in staff member.

- **Reading Room Report**: Not used in most LINCC libraries. Related to closed stacks.

- **Reading Room Shelf Report**: Not used in most LINCC libraries. Related to closed stacks.

The Services Menu

- **History**: Retains reports run in the last two days so they may be retrieved, edited if needed, and resubmitted.

- **Notices to Patrons**: Generates Overdue and Lost notices automatically. Notices are retrieved in the Task Manager.

- **Maintenance**: Generates a list of equipment due for maintenance.

- **Renew/Recall Loans**: Renews or recalls loans in batch.

- **Requests**: Generates request slips and reports automatically. Reports are retrieved in the Task Manager.

- **Reports**: Generates reports, such as a patron list, a loan report, and a report of items claimed returned or lost.

- **Patron Records**: Performs batch changes to patron records.

- **Cash Transactions**: Generates a Cash Transactions or Payments Received report.

- **Statistics**: Generates reports of circulation statistics. Reports are retrieved in the Task Manager. Reports are also generated automatically and retrieved on the LINCC Reports Service web page.

- **General**: Provides options for database management and automatic processes.

- **Manage Database Tables**: Not used.

- **Staff**: Includes reports of staff permissions.

- **Items**: Allows users to run the General Retrieval Form to retrieve items by a variety of criteria. Also contains Shelf List reports and Inventory functionality.

- **Course Reading**: Includes Course Lists and reports of courses that are no longer active

- **Custom Services**: Includes reports created by FLVC that can be run as needed by library staff.
Lesson 3: Using the Patron and Item Bars

The Patron and Item bars allow patron and item information to be retrieved. They also display useful information and contain icons for quick access to module functionality.

The Patron Bar

The patron face icon identifies the Patron bar. The Patron bar is used to retrieve the name and ID number of a current patron and to create a new patron record.

To use icons on the Patron bar:

- Click the New Patron icon to retrieve the New Patron Registration.
- The Patron Profile is not used.

To display a patron record from the Patron bar:

- Enter the patron ID or barcode in the search field, and click the blue arrow or press Enter. If the barcode is scanned, the “enter” command may be processed automatically.
  OR
- Click the icon to view the patron list, and then search for a patron by name or ID number.

The Item Bar

The item icon identifies the Item bar. The Item bar is used to retrieve an item by barcode, view related information, and create new brief records for uncataloged items.

To use icons on the Item bar:

- Click the Catalog Record and Create Item icon to create a brief bibliographic record and an item record for a previously uncataloged item.
- Click the Full Screen icon to view the full screen in the Search activity tab.

To display an item record from the Item bar:

- Enter the item barcode in the search field, and then click the blue arrow or press Enter. If the barcode is scanned, the “enter” command may be processed automatically.
  OR
- Click the icon to search for a record by call number.
Lesson 4: Using Activity Tabs

The Circulation module contains six activity tabs located above the Navigation Tree. The options in the Navigation Tree and the information displayed in the upper and lower panes are determined by the selected activity tab. The activity tabs in the Circulation module include the Loan, Return, Patron, Item, Administration, and Search activity tabs. These tabs and the options available in the Navigation Tree are described in this lesson.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
<th>View in Navigation Tree</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Loan Icon]</td>
<td>The Loan activity tab is used to loan an item.</td>
<td>![Loan Icon] [1] Functional [2] Overview</td>
</tr>
<tr>
<td>![Return Icon]</td>
<td>The Return activity tab is used to return an item.</td>
<td>![Return Icon] [1] Functional [2] Overview</td>
</tr>
<tr>
<td>![Patron Icon]</td>
<td>The Patron activity tab is used to access two main nodes.</td>
<td>![Patron Icon] [1] Functional [2] Overview</td>
</tr>
</tbody>
</table>
The Item activity tab is used to search for or view item information.

The Administration activity tab is used to manage Item Booking requests.

The Search activity tab is used to perform Find and Browse searches for items using several possible parameters.
Lesson 5: Using Functional and Overview Screens

Functional and Overview options are located above the Navigation Tree.

The Functional Screen

The Functional screen is active when there is an activity to be viewed or an action to be performed on the patron or item record.

Figure 2: The Functional Screen in the Loan activity tab

The Overview Screen

The Overview screen is active when item information is displayed in the Loan, Return, Item, or Search activity tabs. Selecting Overview will display the item’s related bibliographic, holdings, and additional item information. It will also display options to “push” the item to the Search activity tab or to other modules.

Figure 3: The Overview screen in the Loan activity tab
Unit 2: Managing Patron Records

This unit provides an overview of patron records and describes searching for a patron record, editing patron information, and adding a new patron record.

Lesson 1: Managing the Patron Record

This lesson provides a closer look at the components of the Patron Registration record, accessible by clicking the Patron activity tab.

The Patron activity tab includes two main nodes:

- **Patron Activity node**: Select this node to view or perform actions on a patron’s loans, hold requests, cash activity, and other circulation transactions. These activities are addressed throughout the manual.

- **Patron Registration node**: Select this node to view and edit the patron record. The nodes, tabs, and circulation functions available in the Patron Registration node are described in this lesson.

The Patron Registration node contains four “sub” nodes:

- **Global Patron Information node**: Displays patron information relevant for all campuses.

- **Local Patron Information node**: Displays privileges, delinquencies, and notes that may be relevant only to the selected campus. It is possible to have a different patron status, and therefore different privileges, at multiple campuses of the same institution.

- **Address Information node**: Displays contact information such as address and telephone number.

- **Additional IDs node**: Displays borrower ID number, Student ID, or Social Security number.

**Patron Registration Node: Global Patron Information Node**

Global Patron Information Node: Upper Pane - Tab 1. Global Patron Details

The following fields and options are available on the 1. Global Patron Details tab:

- **Open Date**: The date the record was created.
- **Update Date**: The last date the global record was changed.
- **Patron ID**: A system-generated number.
- **Barcode**: The patron barcode or borrower ID.
- **Barcode PIN**: The PIN used in conjunction with the barcode to access resources requiring verification. The default PIN is the last four numbers of the Social Security number but may vary by institution.
- **Name**: The patron’s name. Use the format: last name, first name.
- **ILL Library**: The patron’s campus for Interlibrary Loan (ILL); usually the same as the Home Library. This will be the default pickup location for ILL requests unless the patron selects another pickup location.
- **ILL Total Limit**: The total number of ILL requests the patron is allowed.
- **ILL Active Limit**: The number of ILL requests that can be open at one time.
- **Home Library**: The patron’s home campus. This will be the default pickup location for hold requests unless the patron selects a different pickup location when placing the request.
- **Update**: Saves changes.
- **Refresh**: Refreshes the screen with new information so changes can be verified.
- **Letter**: Retrieves a list of letters that can be customized and printed. This includes the Patron Circulation Summary Letter which lists the patron’s current transactions.
- **Check**: Generates an online report of delinquencies for the patron, such as "owes money" or "overdue."
- **Update Picture**: Displays options to upload or delete the patron’s photo.
- **Cancel**: Cancels without saving edits.

### Global Information Node: Upper Pane - Tab 2. Global Blocks and Notes

<table>
<thead>
<tr>
<th>Global Block 1:</th>
<th>Global Block 2:</th>
<th>Global Block 3:</th>
<th>Global Note 1:</th>
<th>Global Note 2:</th>
<th>Global Note 3:</th>
<th>Additional Note 1:</th>
<th>Additional Note 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td>04</td>
<td></td>
<td></td>
<td>Left book at the circulation desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following fields are available on the 2. Global Blocks and Notes tab:

- **Global Blocks 1, 2, 3**: Global blocks are manually placed. Click the arrow to view available options, and then select a code to block selected patron privileges at the institutional level. The Global Block field consists of a 2-character code and associated text entered in the adjacent field.

- **Global Notes 1, 2, 3**: Global notes are relevant at the institutional level. These notes can be customized and selected from a drop-down list or entered as text. They are visible in the Loan and Return activity tabs, but do not block any activity.

- **Additional Notes 1, 2**: Additional notes are not visible in the Loan and Return activity tabs and do not block any activity.

- **“Patron Loader” Protected Fields**: Typically not used in LINCC. Selecting the check box next to a field prevents that field from being updated the next time patron records are automatically loaded in the LINCC patron database.
**Patron Registration Node: Local Patron Information Node**

The upper pane of the Local Patron Information node contains the Local Patron Information tab. The lower pane contains three tabs: 1. Local Patron Details, 2. Local Blocks and Notes, and 3. Local Privileges.

**Local Patron Information Node: Upper Pane - Local Patron Information Tab**

![Local Patron Information Table](image)

The Local Patron Information tab displays the sublibrary list and privileges for the institution. A sublibrary usually refers to a campus but may also refer to a separate department that has been set up as a sublibrary, such as Media Services or Technical Services. When a sublibrary is selected in the upper pane, the corresponding sublibrary information is displayed in the lower pane.

Privileges listed at the XXX50 level apply to all campuses of the institution. If privileges are present at the campus level, they apply to that campus only. The system looks locally first and if it does not find privileges for that campus, it will use the XXX50 record.

**Local Patron Information Node: Lower Pane - Tab 1. Local Patron Details**

![Local Patron Details](image)

The following fields and options are available on the 1. Local Patron Details tab:

- **Patron ID**: A unique system-generated number.
- **Barcode**: The borrower ID.
- **Title**: A title, if one is available.
- **Name**: The patron’s name in the format: last name, first name.
- **Sublibrary**: The campus for which the information is valid.
- **Patron Status**: A code that identifies the patron's loan privileges in the sublibrary. Common values are “01” for 2-year student, “20” for faculty, and “40” for community borrowers.
- **Registration Date**: The date the local record was created.
- **Expiration Date**: The date the record will expire.
- **Patron Type**: An optional statistical code (e.g., to indicate dual enrollment or affiliation with a joint use library).
- **Photocopy Charge**: Whether a photocopy fee will be charged.
- **Cash Limit**: The maximum amount of money that the patron may owe before losing circulation privileges.
- **Web OPAC Message**: A message that will be displayed when the patron logs in to My Account in the LINCCWeb Catalog.
- **Update**: Saves changes.
- **Get Defaults**: Restores privileges associated with the selected patron status. The maximum number of loans allowed, loan period, number of renewals, etc., are associated with a patron status. If these parameters have been manually changed, they can be restored by clicking Get Defaults.
- **Cancel**: Cancels without saving edits.

**Local Patron Information Node: Lower Pane - Tab 2. Local Blocks and Notes**

The following fields are available on the 2. Local Blocks and Notes tab:

- **Local Block 1, 2, 3 and Block Note 1, 2, 3**: Local blocks can be manually placed. Click the arrow to view available options, and then select a code to block patron privileges at the local (sublibrary) level. This will not block patron privileges at other campuses of the same institution. The block field consists of a 2-character code and the associated note entered in the adjacent field.
- **Local Block Date**: A date until which the patron is prevented from borrowing items. The local block date is only valid for the specific sublibrary.
- **Local Notes 1, 2, 3**: A note that will be displayed in the Loan and Return activity tabs. Local notes do not block the patron from any activities.
Local Patron Information Node: Lower Pane - Tab 3. Local Privileges

When a patron record is created, default privileges are assigned according to the patron's status and sublibrary. These privileges are set according to the library's policy file.

The settings listed below are available on the 3. Local Privileges tab. To alter a patron's privileges, select the appropriate Yes or No option, and then click Update. To restore the default privileges, click Get Defaults, and then click Update.

- **Loan**: Can the patron borrow items?
- **Renewal**: Can the patron renew items?
- **Hold Requests**: Can the patron place any hold requests?
- **Multiple Hold Requests**: Can the patron place more than one request on the same item?
- **Photocopy Request**: Not used.
- **Check Transactions**: Should the system check the patron record for delinquencies?
- **Override Privileges**: Can staff override delinquencies for the patron?
- **Late Return Ignored**: Should the system disregard late returns and not charge a fine?
- **Allow Hold on Available Item**: Can the patron place a hold on an available item?
- **Reading Room Permission**: Not used.
- **Booking Permission**: Can the patron place a media booking request on an item?
- **Ignore Hours Permission**: Can the patron book an item for use when the library is closed?
Patron Registration Node: Address Information Node

The upper pane of the Address Information node contains a list of addresses for the patron. The lower pane contains details of the address selected in the upper pane. Addresses can be added, edited, and deleted.

Address Information Node: Upper Pane – Address Information Tab

<table>
<thead>
<tr>
<th>Type</th>
<th>Address</th>
<th>Valid from</th>
<th>Valid to</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Apple, Suzyp</td>
<td>01/01/2009</td>
<td>01/01/2009</td>
</tr>
<tr>
<td></td>
<td>123 Fruittree Ave.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bradenton, FL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>36111</td>
<td></td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Apple, Suzyp</td>
<td>01/01/2009</td>
<td>01/01/2009</td>
</tr>
<tr>
<td></td>
<td>120 Honeytree Lane</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Apt. 1000</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bradenton, FL</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>36111</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Address Information Node: Lower Pane - Address Details Tab

- **New**: Creates a new address.
- **Duplicate**: Duplicates the selected address. Duplicated fields can be edited.
- **Delete**: Deletes the selected address.

Address Information Node: Lower Pane - Address Details Tab

The following fields and options are available on the Address Details tab:

- **Name**: The patron’s name as it will be printed on notices in the format: *first name last name*.
- **Address**: The patron’s address: *Address* in the first field; *City, State* in the second field.
- **Zip Code**: The patron’s zip code.
- **Email**: The patron’s email address.
- **SMS Number**: Not used.
- **Telephone**: The patron’s telephone number(s).
- **Valid From/Valid To**: The period of time for which the address is valid. If the Valid To date is 00/00/0000, the address will remain valid indefinitely.

- **Address Type**: The use of the address. For example, type 02 is the Mailing address where library notices will be sent. If there is no type 02 address on the record, letters will be sent to the type 01 Permanent address.

- **Update**: Saves changes made to the address.

- **Cancel**: Cancels without saving edits.

**Patron Registration Node: Additional IDs Node**

The upper pane of the Additional IDs node contains the Additional IDs tab. The lower pane contains the Additional IDs Details tab.

<table>
<thead>
<tr>
<th>Type</th>
<th>Type Name</th>
<th>Key</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>System ID</td>
<td>0000000000</td>
<td></td>
</tr>
<tr>
<td>01</td>
<td>Barcode</td>
<td>21112</td>
<td></td>
</tr>
<tr>
<td>02</td>
<td>Student ID</td>
<td>987654321</td>
<td></td>
</tr>
<tr>
<td>99</td>
<td>SSN or Student ID</td>
<td>999999999</td>
<td></td>
</tr>
</tbody>
</table>

**Additional IDs Node: Upper Pane – Additional IDs Tab**

The Additional IDs tab displays the patron’s identification numbers and associated information. Select the ID in the upper pane to display details in the lower pane. IDs may be added or deleted in the upper pane.

The following fields are displayed on the Additional IDs tab:

- **Type**: Several ID Types are possible. The most commonly used types are listed below.
  - **Type 00**: The Patron ID automatically assigned to the record when it is created. This number cannot be edited or deleted.
  - **Type 01**: The barcode or borrower ID. The Verification field associated with the barcode is the PIN used in conjunction with the barcode to access electronic resources. The PIN is typically the last four digits of the patron’s Social Security number, but may vary by institution. This number cannot be deleted.
- **Type 03**: The Student ID assigned by the institution’s business office.
- **Type 99**: The student’s Social Security number or other unique statewide number. Used for matching and updating the record each semester when patron files are sent from the institution’s business office.

- **Type Name**: The text associated with the Type number.
- **Key**: The identification number.
- **Status**: The status, either Active (AC) or Non Active (NA). A Non Active ID cannot be used to access electronic resources.
- **Add ID**: Adds a new identification number.
- **Delete ID**: Deletes an identification number that is no longer valid. Some ID Types cannot be deleted.

**Additional IDs Node: Lower Pane - Additional IDs Details Tab**

Details of the ID selected in the upper pane will be displayed in the lower pane. The ID Type determines whether it can be edited or deleted.

- **Update**: Saves edits made to an ID.
- **Cancel**: Cancels without saving edits.

**Lesson 2: Creating a New Patron Record**

The Computer Services or IT department at each institution extracts student and personnel records each semester from the business office database. The records are sent to FLVC and loaded in the LINCC patron database. This process ensures that the majority of patrons have a record in the patron database when the term begins.

However, there are some circumstances in which a patron record must be manually created. For example, a student may have registered after files were sent to FLVC, a new staff or faculty member may be hired in the middle of the semester, or a community patron who does not have a record in the business office may wish to borrow items.

Before creating a new patron record, be sure there is no existing record for the patron. If the patron does not have a barcode or borrower number, the patron record may be retrieved by name or keywords.
To search for a patron with no barcode:

1. On the **Patron bar**, click the icon to retrieve the patron list.

2. The Patron List window will appear. In the **Sort by** box, select **Patron Name**. In the Enter Starting Point field, enter the patron's last name.

3. Press **Enter** – *do not click Select*. The first entry that begins with the text entered in the search field will appear at the top of the list.

4. If the patron record is located, double-click the record or click **Select**. If the patron record is not located, it may be possible to find the record using a keyword search: Click **Keywords**. In the **Enter Keyword(s)** field, enter a keyword from the name or address and then click **Search**. The record(s) will appear in the list. Select the appropriate record, and then click **Select**. (Note that keyword searches must be very specific. The database is large and the search may time out for generic searches.)
To create a new patron record:

1. On the Patrons menu, click New Patron (or click the New Patron icon on the Patron bar).

2. The Patron Registration Form will appear. Required fields are marked with an asterisk (*) on the form. Use the Tab key to move quickly from one field to the next.

3. Complete the following fields:
   - **Barcode**: Enter the patron’s new barcode number or borrower ID.
   - **Barcode PIN**: Enter the last four digits of the patron’s Social Security number or any other four numbers. The PIN will be used with the barcode to access restricted resources and can be changed in the LINCCWeb Catalog.
   - **SSN or Student ID**: Enter the Social Security number or other unique statewide ID number. This number will be used to find and update the record during the patron load each semester.
   - **Patron ID**: Leave blank. System-generated.
   - **Name (Last, First)**: Enter the patron’s name in this format – last name, comma, space, first name.
- **Address**: Enter the address. Use the correct format: *Address* in the first field, and *City, State* in the second field.
- **E-mail**: Enter the email address.
- **Zip Code**: Enter the zip code.
- **Date of Birth**: Enter the birth date, if known.
- **Gender**: (Optional) Select Male or Female.
- **Place of Birth**: (Optional). Enter the birthplace.
- **Telephone 1**: Enter the telephone number.
- **Telephone 2**: Enter a second telephone number, if known.
- **Receive SMS**: Not used.
- **SMS Number**: Not used.
- **Patron Sublibrary**: Select the XXX50 institutional level line (where XXX is the three-letter institution code).
- **Patron Status**: Click the arrow to view available options, and then select the patron status.
- **Patron Type**: Click the arrow to view available options, and then select the patron type. This information is used for statistical purposes.
- **Language**: English is the default language.
- **Profile**: Not used.
- **Home Library**: Click the arrow to view available options, and then select the home campus. This is the campus where the patron will primarily be registered and will be the default pickup location for hold requests.
- **ILL Library**: Click the arrow to view available options, and then select an ILL Library. This is the same as the Home Library.

4. Click **Update** when finished. If there is an error, or if a required field is omitted, a message will appear in red at the bottom of the form.

5. Click **Save Defaults** to retain the Sublibrary, Home Library, and ILL Library fields. Defaults are saved on a specific workstation; the fields will automatically be completed each time a new patron registration form is retrieved on the workstation.

6. (Optional) If the name prints out as First Name then Last Name on notices, edit the address Name field. To do this, click the Address Information node. In the Name field, edit the name so the first name appears first and the last name appears last.
Lesson 3: Editing a Patron Record

Information in a patron’s record may need to be changed. Changes frequently occur to the patron’s address, telephone number, email address, and status.

To add an address using New:
1. Select the Address Information node. Click New.
2. Enter the address and other contact information.
3. Select the address type.
4. Click Update.

To add an address using Duplicate:
1. Select the Address Information node. Click Duplicate.
2. Edit the address and other contact information.
3. Select the address type.
4. Click Update.

To edit an address:
1. Select the Address Information node.
2. Select the address to be edited.
3. Edit the information.
4. Click Update.

Patrons can access and update address fields, including street address, email address, and phone number, through My Account in the LINCCWeb catalog (OPAC).

To update a patron status:
1. Select the Local Patron Information node, and then select the Local Patron Details node.
2. Select the new patron status.
3. Click Get Defaults.
4. Click Update.

To add a global block:
1. Select the Global Patron Information node, and then select the Global Blocks and Notes tab.
2. Select a block. The block will be displayed in the Loan and Return activity tabs and will prevent the patron from borrowing items.
3. Click Update.
To assign a new patron borrower ID/barcode:
1. Select the Global Patron Information node, and then select the Global Patron Details tab.
2. Delete the number in the Barcode field.
3. Enter the new number.
4. Click Update.

To add an additional ID:
1. Select the Additional IDs node, and then click Add ID.
2. In the Key Type field, select the ID type. Add the number to the Key Data field.
3. Do not make any changes to the Verification fields.
4. In the Status field, select Active. Click Update.

Lesson 4: Creating a Patron Record for a Reciprocal Borrower

All Florida state colleges and all publicly funded Florida universities signed a Reciprocal Borrowing Agreement in 1999. Students or staff members at these institutions may borrow materials from any of these institutions.

The Family Educational Rights and Privacy Act (FERPA) affords students certain rights with respect to education records. The sharing of personally identifiable information is limited, therefore only certain fields of a patron’s record can be copied from one institution to another during the reciprocal borrowing process.

The Remote Registration functionality allows library staff limited access to the patron database of another college. The patron record is checked for delinquencies and select fields of the record are transferred.

To create a patron record for a reciprocal borrower:

Step 1: Copy Global Patron Information from the patron’s original college

1. On the Patrons menu, point to Remote Registration, and then click the patron’s home institution.
2. When prompted, enter the Remote Registration user name and password. Click OK.

3. The Remote Patron List window will appear. Select a Sort by option. In the Enter Starting Point field, enter the reciprocal borrower’s last name or barcode. Press Enter.
4. A list of patrons will be displayed. Select the correct patron, and then click Select.

5. A Global Check will be performed.
   - If there is a global block, or if the patron has exceeded the maximum amount of allowable cash owed to the remote library, a message will appear. Click Yes to proceed despite the block, or No to stop the registration process.
   - If no warning message appears, or if Yes is clicked on the error message, the record will be copied from the remote library to the local patron database.

Step 2: Add Local Patron Information

1. Select the Local Patron Information node. In the upper pane, select the XXX50 line.
2. In the lower pane, click the Local Patron Details tab. Complete the Patron Status and Patron Type fields.
3. Click Get Defaults, and then click Update.
4. Select the Address Information node and verify the contact information.
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Unit 3: Circulating Library Materials

The process of circulating library materials is an essential service to patrons. Loaning, renewing, and returning items are all fairly simple processes. It is the exceptions that can make circulation challenging at times. Exceptions include delinquent patrons or items returned to a campus other than the one owning the item. This unit describes the normal process of circulating materials as well as the exceptions.

Lesson 1: Calculating Due Dates

The library calendar is used in determining due dates and times. Regular loan items become due at the closing time on the due date. If the library is closed on the due date, the item will be due at closing time of the next open day.

Hourly loan items will be due at their default time or at closing of the same day if that closing is sooner than the default loan period. This default for hourly loans can be adjusted by item status so that the items will become due at opening the next day instead of closing the same day. The policy file can be changed by the Help Desk, upon request.

Items can be loaned on days the library is closed according to the calendar. Items will not become due on a closed day. If an hourly item is loaned on a closed day, it will become due immediately.

The calendar should be reviewed and updated each semester, or more frequently if needed. All library staff should have the privileges to view the calendar. Selected library staff are given privileges to update the calendar. Contact the Help Desk if the staff member assigned responsibility for the calendar cannot update it.

To view active due dates:

1. Click the Loan activity tab, and then select the Active Due Dates node.
2. In the Sublibrary field, select the appropriate campus.
3. In the upper pane, select the line that contains the appropriate item status and patron status.
4. Review the Due Date and Due Hour. Details of the selections are visible in the lower pane.

It is sometimes useful to see what the current due date should be for items that are checked out today. In this example, an item status 01 (regular loan) should be due on 7/13/2007 at 4:30 PM. If this is not correct or there is a different due date when the item is loaned, the calendar or the patron record may need to be corrected.
To access the calendar:

1. In the Circulation module, click the Loan tab and select the Open Hours node.

2. If more than one sublibrary will be affected by editing the calendar, a message will appear with a list of the affected sublibraries. If this message appears, click OK.

3. To view a different calendar, select another sublibrary from the Sub Library drop-down menu. Note that each sublibrary (campus) may have its own calendar, or one campus may have a calendar that applies to several other campuses. The system will display a message listing the sublibraries that will be affected when the calendar is changed.

To view the calendar:

1. If the logged-in user account does not include edit privileges, an error message will appear when the Open Hours node is selected.
2. Click **OK** and continue to view the library Open Hours. *Changes will not be saved.*

![Calendar screenshot](image)

To edit the calendar:

1. In the **Sublibrary** drop-down list, select the appropriate campus.

2. Read the message that lists the campuses for which calendars will be changed. These campuses have been placed in a group and designated as using the same calendar. Note that the campuses in the group can be changed. Contact the Help Desk if one calendar is no longer relevant to all campuses in the group.

3. Click the **Weekly Schedule** tab. These are the library’s normal operating hours.

4. Select **Open** or **Closed** beside each day of the week.

5. Enter the library’s Opening and Closing hours. Enter times using the 24-hour format (e.g., 10:00 PM is 22:00).

![Calendar screenshot](image)

6. Click **Apply** to save changes, **Cancel** to abandon changes, or **Clear All** to clear everything and start over.

Note that if you select Clear All, you must also click Apply to save the change, or Cancel to abandon the change. When Apply is clicked, the system will display a message asking you to confirm that you want to make the change. If more than one sublibrary was affected by the change, the message will list all affected sublibraries.
7. Click the **Exceptions** tab. List all days that are an exception to the library’s normal operating hours, as listed in the Weekly Schedule tab. This includes days when the library is closed or has shortened hours due to holidays or semester breaks.

8. Edit the dates and times directly in the table by double-clicking in each box and entering new dates and times.

- To access a pop-up calendar and comment box, select the line to edit and then click **Edit Line**.

- View comments by hovering the mouse over the line.

- If the library is always closed for July 4th, leave the year blank. The Closed date will apply for every year.

- To add a single date, enter the date in the From columns but not in the To columns.
Lesson 2: Loaning Items

Loaning an item is a simple process that involves entering patron and item barcode numbers in the barcode fields of the Loan activity tab. The loan period is determined by a combination of the patron’s status (e.g., faculty, student) and the item’s status (e.g., Regular Loan, 7-Day Loan).

Circulation parameters are determined by a combination of the patron and item status. For example, a faculty member may have a longer loan period than a student for the same item. Circulation parameters and limits are determined by the library and entered in the library’s policy file.

Loaning an item becomes more complicated when there are exceptions. Procedures for loaning items and handling exceptions are described in this lesson.

To loan an item:

1. Click the Loan activity tab.
2. Enter the patron barcode in the Patron bar. The patron's active address, cash owed, and notes will be displayed in the upper pane.
3. Enter the item barcode in the Item bar. If the item barcode is typed, press Enter or click the blue arrow. If the item barcode is scanned, the “enter” command may be processed automatically.
4. Item information is displayed in the lower pane. Continue entering item barcodes until all transactions are complete.
To print a loan receipt:

- After the item has been loaned, click **Print Session** in the lower pane. A loan receipt will be displayed and may be printed.

To change a due date of a single item or multiple items:

1. After the items have been loaned, select the items to be changed. (Select **multiple** items by pressing the CTRL key and clicking the items to be renewed. Select **all** items by pressing the SHIFT key and clicking the first item and then clicking the last item on the list.

2. Click **Change Date**

3. In the **Change Due Date** window, enter a new **Due Date** and **Due Hour**.

4. Click **OK**.

When entering a new Due Date, remember to enter a new Due Hour as well. If a Due Hour is not entered, the item will be due after midnight on the due day – not at the end of the day.

To add a loan note:

1. After the item has been loaned, click **Loan Notes** in the lower pane.

2. In the window that appears, enter up to two notes regarding this loan. The information entered in the **Note 1** field will appear on loan receipts. Both notes will be displayed in the Loan node of the Patron activity tab. The loan note will be deleted automatically when the item is returned.
**Loaning an Item when the Patron is Delinquent**

If the patron is unable to borrow an item, the item barcode field will become unavailable and item barcodes cannot be entered. A patron may be considered to be delinquent for a variety of reasons. The library’s policy file specifies loan parameters including how much money a patron can owe and how many items can be on loan.

The loan process will be stopped for the following reasons:

- The patron owes too much money in overdue fines or lost item replacement fees.
- One or more items are overdue.
- Too many items are already on loan.
- The patron does not have permission to borrow a specific item, such as a reference book.
- The patron’s library card has expired.

The reason for the delinquency will be listed in the 2. Blocks tab in the lower pane.

To loan an item when the patron is delinquent:

1. Click the **Patron** activity tab. Retrieve the patron record and determine the cause of the delinquency message.
2. Inform the patron of the delinquency. Decide whether to Override the delinquency message and loan the item or inform the patron that the delinquency must be cleared before the item can be loaned. To override the delinquency, click the **Loan** activity tab, and then click **Override**.
Click the Patron’s Cash option to quickly move from the Loan activity tab to the patron record.

**Loaning an Item when the Patron is Blocked**

When a block prevents an item from being loaned, the reason for the block will be listed in the Blocks tab of the lower pane. Blocks are manually placed on a patron's record by a staff member for various reasons, including lost items or a block issued by the business office.

A manually placed block will include a number at the beginning of the message (e.g., 04). All manually placed blocks must be manually removed when the reason for the block no longer exists.

To loan an item when the patron is blocked:

1. Click the **Patron** activity tab. Retrieve the patron record and determine the reason a staff member manually placed a block on the record.
2. If the block is still needed, inform the patron of the reason for the block. If the block is no longer needed, remove it and loan the item.
To remove a block:

1. Select the Global Patron Information node. Click the 2. Global Blocks and Notes tab.
2. Edit the Global Block field that contains the block message, and then select 00 Borrower has no GLOBAL delinq.
3. Click Update.

4. When the transaction is complete, press F4 or click End Current Session.

Not all library staff have the account privileges necessary to use the Override function. Another staff member with higher-level privileges may need to perform the override.

**Loaning an Item with No Local User Information**

When attempting to loan an item, the message “Unable to find local user information” may appear. This occurs when a patron record has been manually added but no Local Record has been created.
To loan an item with no local user information:

1. Click the **Patron** activity tab.
2. Select the **Local Patron Information** node. Note that no patron status is assigned.
3. Select a patron status.

4. In the lower pane, click **Get Defaults**, and then click **Update**.
5. Click the **Loan** activity tab and continue loaning items.

**Loaning an Item that has a Hold Request**

If a patron attempts to borrow an item that has a hold request placed by another patron, a hold request message will appear.

**To loan an item that has a hold request:**

- Retain the item and place it on hold for the requesting patron, or Override the block and loan the item.
**Loaning an Item that is Already on Loan**

If the item being loaned is still registered in the system as loaned, a message will appear. The situation should be investigated further before the item is returned.

![Item Loan Message]

**To loan an item that is already on loan:**

1. Click the **Item** activity tab, and then enter the item barcode to determine which patron currently has the item on loan.
2. Click the **Patron** activity tab, retrieve the patron record and review the loans list.
3. Identify the reason the item is already on loan. Is it overdue? Has it been declared Lost? Determine whether to charge the overdue fine.
4. Return the item and retain or waive the fine.
5. Loan the item.

**Loaning an Item when the Borrower has an Item on Hold**

If the patron has an item on hold and the item is available on the Hold Shelf, a message will appear.

![Check Patron Message]

**To loan an item when the borrower has an item on hold:**

- Retrieve the requested item from the Hold Shelf and process the loan.

---

Always clear the Loan screen when transactions are complete by pressing F4 or clicking End Current Session. Never leave patron information available on the screen when you are not using the record. See Appendix C for more information on patron confidentiality.
Lesson 3: Renewing Items

A patron may wish to renew an item for an additional loan period rather than return it when it is due. Library policy will determine if the item is eligible for renewal. Renewals can be made in the Loans node of the Patron activity tab or in the Item activity tab.

To renew a single item or multiple items from the Loans node:

1. Click the Patron activity tab. Retrieve the patron record by entering the patron barcode or searching for the patron in the patron list.
2. Select the Loans node.
3. In the upper pane, select the item to be renewed and click Renew Marked. Multiple items can be selected by pressing the CTRL key and clicking the items to be renewed.

   - If there are any delinquencies or blocks that might prevent renewal, the Check Report will appear. Inform the patron of the message or click Override and continue.

   - If there are no blocks preventing renewal, or if Override is clicked on the Check Report, the Renew Loan window will appear.

4. Enter a new Due Date and Due Hour, or accept the system default, and then click OK.

5. View the Renew All Log in the lower pane. A message is shown for each item with a renewal attempt.
To renew all items from the patron’s loans list:

1. In the loans list, click **Renew All**. A check will be performed.
2. If any errors that might prevent renewal are encountered, a Check Report will be displayed. Inform the patron of the message or click **Override** and continue. If no errors are discovered, the Renew Loan window will appear. The Due Date and Due Hour will be set to zero.
3. Click **OK** to accept the system defaults. Items will be renewed one by one, with the new due date, as appropriate for that item. Or, to make all items due at the same date and time, type over the zeros or select a date from the calendar.

When entering a new Due Date, remember to enter a new Due Hour as well. If a Due Hour is not entered, the item will be due after midnight on the due day – not at the end of the day.

To renew items from the Item activity tab:

1. Click the **Item** activity tab. Enter the barcode of the item to be renewed.
2. Select the **Loan** node. Detailed loan information will be displayed in the upper pane.
3. In the upper pane, click **Renew**. The system will check for errors that might prevent a renewal.
   - If any errors are identified, the Check Report will be displayed. Inform the patron of the message or click **Override** and continue.
   - If no errors are identified, a renewal form will be displayed. Enter a new **Due Date** and **Due Hour**, or accept the system default, and then click **OK**.
To print a renewal letter:

1. Click the Patron activity tab, and then select the Global Patron Information node.
2. Click Letter.
3. In the box that appears, select Patron Renewal Summary.
4. Click Print. The renewal letter will appear.
Lesson 4: Returning Items

Returning an item is generally a simple process of entering the item barcode in the Return activity tab. However, a variety of exceptions may occur. For example, the item may be overdue, lost, or have a hold request placed on it. Procedures for retuning items and handling exceptions are described in this lesson.

To return an item with the current date:

1. Click the Return activity tab.
2. Enter the item barcode number in the item barcode field. The item will be returned with the default due date.
3. To clear the screen when finished, press F4 or click Clear.

Returning an Item Using Override Date

Returning items by changing the return date to a previous date is most commonly used when returning items from a book drop that has not been checked for more than a day.

To return an item using Override Date:

1. Click the Return activity tab. To change the return date, click Override Date in the lower pane, and then enter a new Return Date/Hour. Click OK.
2. Click Clear Override to reset the current date as the default return date.
To return an overdue item:

1. When an item is returned late, a message will appear. Click OK.

![Item Return Image]

2. The fine is recorded and displayed in the upper pane. Click **Pay Cash** to pay the fine immediately or click **Patron’s Cash** to go to the Cash node on the patron’s record to view additional details. If the fine is not paid immediately, it will automatically be saved to the patron’s record for later payment.

![Patron Information Image]

To return a lost item:

1. When an item with a status of Lost is returned, a message will appear. Click **Yes** to continue or **No** if there is a need to investigate further before returning the item.

   When the item is returned, the Lost Item Replacement charge will be waived and the patron will no longer owe the replacement cost. If the patron also owes overdue fines, the overdue fines will be charged.

![Item Return Image]

2. A message will appear offering the option of printing the patron’s cash summary. If Yes is clicked, a letter will be generated listing the patron’s remaining obligations. This may be given to the patron as proof the fines are cleared or to list remaining obligations.
To return an item with an MI (Missing) process status:

- Return the item. If the item has an item processing status of MI (Missing), it will automatically be removed and an on-screen message will appear.

  The library may ask the Help Desk to add any additional item processing statuses that they wish to have automatically removed.

To return an item with a hold request:

1. Return the item. The Hold Request window will appear and the item will be placed on Hold for the first patron in the list.
2. A Hold Request Letter will be generated. Use the contact information in the letter to notify the patron that the item is available.

3. A Hold Request Slip will be generated. Print the slip and place it with the item on the Hold Shelf.

To return an item with a hold request from another campus:

1. Return the item. If it has been requested by a patron at another campus, a message will appear. Click OK.

2. The status of the item will be changed to In Transit and an in-transit letter will be generated. Print the letter, place it with the item to be transferred, and send the item to the requesting campus.

Be sure to review the “to” campus listed on the letter. The item may have been requested at a third campus and may be transferred to another requesting campus rather than its owning campus.
Returning an Item Owned by Another Campus

If an item is returned to a campus that does not own the item, the item’s status will change to In Transit for the return to the owning campus.

To return an item owned by another campus:

1. When the item is returned, an alert message will appear. Click OK.

2. A transfer slip will be generated. The item is now on loan to a sublibrary patron record with the name of the campus and is given a status of In Transit. Place the transfer slip with the item and send it to the owning campus. The item must be returned when it is received at the owning campus.

Collecting In-house Use Statistics

The barcodes of items that have not been loaned can be entered to record the number of times an item is used on the premises.

To collect in-house use statistics:

1. On the Circulation menu, click In-house Use.
2. In the window that appears, enter the barcode. The window will remain open to allow multiple barcodes to be entered.
3. Click Close when all barcodes have been entered.
4. To view the In-house Use count, click the Item activity tab, and then select the Circulation Summary node.
Lesson 5: Recalling an Item

Recalls are used occasionally by library staff to change the due date of a loan to an earlier date and to inform the patron of the new due date. The default new due date is seven days from the date of the recall. This can be changed manually at the time of the recall. The default can also be customized upon request to the Help Desk. The Hold Request function is used to generate recalls.

To create a recall:

1. Click the Items activity tab and retrieve the item to be recalled.
2. Click Hold Request.
3. Enter the patron's ID or search by name.
4. In the Recall Type field, select 01 for Regular Recall or 02 for Rush Recall. Either choice will make the new due date seven days from the current date.
5. If a due date other than the seven day default is needed, select a new due date in the Recall Due Date field.
6. Click **OK**. A **Loan Recall** letter will appear and can be used to contact the patron regarding the new due date.

<table>
<thead>
<tr>
<th>Loan Recall</th>
<th>MCC Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cindy Pear</td>
<td>Venice Campus</td>
</tr>
<tr>
<td>100 Mountain View Way</td>
<td>8000 S. Tamiami Trail</td>
</tr>
<tr>
<td>Bradenton, FL 34293</td>
<td>Venice, FL 34293</td>
</tr>
<tr>
<td>954-789-1111</td>
<td>813-493-3604 ext. 2312</td>
</tr>
<tr>
<td><strong>Patron ID:</strong></td>
<td><strong>MJCP38296</strong></td>
</tr>
</tbody>
</table>

Dear Sir/Madam,

Please return the following items by their due date.

This item has been recalled. Please return the item by 06/27/2007 0900 PM.

Please be aware that an additional fine will be in effect after 06/27/2007 0900 PM.

**Gendlin, Eugene T.**, 1926-.

**Focusing**/Eugene T. Gendlin.

2nd ed., new, rev. instructions


0553231251 (ptbk.):

**Barcode:** 345010314314315

**Sublibrary:** Manatee/Venice

**Collection:** Special Collections

**Call No:** SP COLL BF698.2.G46 1982

The due date of the loan is changed to the new recall due date.

When the item is returned, a **Hold Request Filled** letter will appear. The letter can be used to contact the patron for whom the recall was placed.
Lesson 6: Using Offline Circulation

Offline circulation is used when the connection to the LINCC server is unavailable. Occasions for using offline circulation include periods when libraries experience network problems, during FLVC-scheduled maintenance periods, and in the event that LINCC experiences unexpected downtime.

The server connection indicator in the lower left portion of the screen is generally represented as a green diamond, indicating that the client is connected to the LINCC server. If the connection to the server becomes unavailable, the indicator changes to a blue and yellow disconnect symbol.

Offline circulation will:

- Loan and return items.
- Charge an overdue fine.
- Charge a lost fee.
- Shorten the loan period according to the expiry date and library policy.
- Generate an Offline Circulation Check Report that will include any errors that may have caused a loan or return to fail (such as an incorrect barcode).

Offline circulation will not:

- Check for Hold Requests when loaning an item.
- Change an item’s status to In Transit when it is returned to a sublibrary other than its owning sublibrary.
- Check for patron blocks or delinquencies when loaning an item.

When the connection is restored, the offline transaction file should be sent to the server – the transactions will be entered automatically. Each offline transaction file is saved to an individual workstation; therefore, each workstation’s file should be sent to the server.
To access offline circulation:

1. Open the Circulation module. When prompted to log in – do not enter a user name or password. Instead, click Cancel.

2. When prompted to start Aleph without logging in, click Yes.

3. An error message indicating that the client has failed to make the connection to the host (the LINCC server) may appear. Click OK. Other error messages, such as “Failed to Read Reply” or “You are not currently logged on to ALEPH” may appear. Click OK.

To loan items using offline circulation:

1. Open the Offline Circulation window. In the Choose Transaction box, select Loan.
2. Enter the patron barcode in the Patron ID/Barcode field.
3. Enter the item barcode in the Item Barcode field. If the barcode scanner does not automatically process the “enter” command, press Enter on the keyboard or click Loan.
4. When the transactions for the patron are complete, delete the patron barcode to prepare for the next patron.
5. To loan items to the next patron, enter the patron and item barcodes in the same manner and loan the items.

To return items using offline circulation:

1. Open the Offline Circulation window. In the Choose Transaction box, select Return.
2. Enter the item barcode in the Item Barcode field. If the barcode scanner does not automatically process the “enter” command, press Enter on the keyboard, or click Return.

If possible, do not return items to the library shelf until the offline transaction file has been sent to the server and the Offline Circulation Check Report has been obtained and resolved.
To send an offline circulation file to the server:

1. Contact the Help Desk before sending the file to ensure that the connection is reestablished and the server is available to receive the file.
2. Log in to the Circulation module. On the Circulation menu, click Offline Circulation.
3. An offline transactions file message will appear. Click OK.

4. If the server connection is reestablished, click Send File. If the connection is still unavailable, continue to process transactions in offline circulation. The transactions will be added to the current file.
5. After sending the file to the server, click the 2. Offline Circulation - Check Report tab to view a list of errors and other conditions related to the transactions.

6. Click Print to print the Check Report and follow up on error messages. Because error messages indicate an unsuccessful transaction, library staff should carefully review each failed transaction to determine whether further action is necessary. Possible error messages include:
   - Item not found.
   - Item not on loan.
   - User not found.
   - Return – Late Return.
   - Loan period was shortened according to expiry date.
   - Item has active holds.
   - Lost or Claimed Return item has been returned.

7. Review and resolve the errors listed in the Check Report. When finished, click Clear File to delete the Check Report. If Clear File is not clicked, the Check Report will remain and will be appended to the new report the next time offline circulation is used.
Lesson 7: Using the Circulation Log

The circulation log is a useful tool for tracking the history of a loan. It records all events that have happened during the time the item is on loan to the patron. Events such as claim return, claim lost, and cash transactions are recorded. The date of the event and the user account are also included in the log. Loans that have been returned and have no outstanding transactions are deleted from the circulation log each day.

To view the circulation log from the Patron activity tab:

- Click the Patron activity tab, and then select the Circulation Log node. The upper pane will display options for filtering the circulation log. The lower pane will display details of the transactions. The lower pane also includes a User Note field that can be used to add a note to a specific transaction in the Circulation Log.

To view the circulation log from the loans list:

- In the loans list, select a loan. Click Circ Log. The circulation log will appear; the list will be sorted and all transactions relevant to the selected loan will be displayed.
To view the circulation log from the items tab:

1. In the Item activity tab, select a loan.
2. Click Circ Log. The circulation log will appear. The list will be sorted and all transactions relevant to the selected loan will be displayed.

![Circulation Log Example]

Lesson 8: Setting Loan, Return, Print and User Account Options

Options for loaning, returning, and printing can be customized for each workstation. The options apply only to the workstation on which they are set and will remain until manually changed or until a new client is installed. When a new client is installed, default settings will be applied, and customized settings must be reset.

Setting Loan Options

Options for displaying messages and printing receipts during a loan can be customized in the Set Up Loan Options form.

To set loan options:

1. On the ALEPH menu, point to Options, and then click Set Up Loan Options. The Set Up Loan Options form will appear.
2. Complete the following fields:
   - **Display Circulation Note**: If selected, the circulation note entered in the item record will be displayed when an item is loaned.
   - **Display “Item(s) on hold for this patron” Message**: If selected, and if the patron has items on the hold shelf, an item on hold message will be displayed.
Display “Item is requested” Message: If selected, a message indicating an item has holds will be displayed.

Patron Verification Required: If selected, a patron's PIN must be entered when items are loaned.

Display Item Process Status: If selected, the item process status will be displayed before the transaction is finished.

Override Button as Default: If selected, and if the patron does not have permission to borrow the item, Override will be the default option. If not selected, Cancel Loan will be the default option.

Create Return Receipt on Automatic Return: If selected, will print a receipt for the previous borrower of the item, if the system is configured to register an automatic return when an item is already on loan to another patron.

Loan Receipt Printing: Select an option to specify when loan receipts should be printed.

3. Click OK.

Setting Return Options

Options for displaying messages and printing receipts during return can be customized in the Set Up Return Options form.

To set return options:

1. On the ALEPH menu, point to Options, and then click Set Up Return Options. The Set Up Return Options form will appear.

![Set Up Return Options form]

2. Complete the following fields:
   - **Print Return Receipt:** If selected, a receipt will be printed for each return transaction.
   - **Print Return Receipt - Transfer:** If selected, a transfer slip will be printed when the returned item should be transferred to another sublibrary.
- **Display List of Hold Requests**: If selected, a list of holds for the returned item will be displayed.
- **Print Photocopy Request Slips**: If selected, photocopy request slips will be printed for the returned item.
- **Display “Item is not on loan” Message**: If selected, notification that the system has no record of having loaned the item will be displayed.
- **Display Circulation Note**: If selected, the circulation note entered in the Item Record will be displayed when the item is returned.
- **Display Item Process Status**: If selected, the process status attached to the item will be displayed before the transaction is finished.
- **Late Return Message**: Select an option to specify when a message indicating a late item should be displayed.

3. Click **OK**.

**Setting Print Options: Using the Printer Icon**

The printer icon, located at the lower right portion of the screen, provides access to printing options. Right-click the printer icon to select one of the options listed below.

- **Normal Printing**: Sends the letter directly to the default printer.
- **Preview**: Opens the letter in a preview window. The letter can be printed. A printer other than the default can be selected.
- **View Raw XML and Browse XML**: Displays the code used to create the letter.
Setting User Account Options: Using the Key Icon

Accounts and privileges are associated with a user name and password. Several functions related to log in and password can be accessed from the key icon 🤖 at the lower right portion of the screen. Right-click the key icon to select one of the following options:

- **Profile: default-user**: View the current user name.
- **Login as Another User**: Login as another user.
- **Change Current Password**: Change the password for the user name currently logged in.
- **Temporary Password Override**: A user with higher level of access rights may temporarily log in to use a selected function, and then return control to the account originally logged in. As long as the log-in window remains on the screen, the override account will have access.
- **Staff Privileges**: Permissions to perform various functions within the system are assigned in Staff Privileges. All changes to privileges are made through the Help Desk.
- **Set Workstation Identifier**: The Workstation ID is the five-letter sublibrary code assigned to each sublibrary. The Workstation ID must be entered the first time the client is installed on a workstation. The ID will be saved until a new client is installed, at which time the ID must be reset.

The workstation ID is mandatory for any workstation that will be used to loan and return library materials. It is used by the system to distinguish items that belong to the sublibrary from items that must be transferred to another sublibrary.
Unit 4: Working with Items

This unit provides an overview of the Item activity tab and the item record. It describes how to change selected fields in an item record, such as the collection, item status, and item process status. This unit also describes the process of adding a new brief bibliographic and item record for an uncataloged item.

**Lesson 1: Using the Item Activity Tab**

The Item activity tab allows users to search for an item by barcode and to view item and circulation activity details. This lesson describes the nodes and upper and lower panes that appear in the Item activity tab.

**List of Items Node**

The List of Items node provides information on all items attached to the bibliographic record for all sublibraries.
The following options are available on the Items List tab (upper pane):

- **Booking Request**: Places a booking request on the item.
- **Photocopy Request**: Not used.
- **Hold Request**: Places a hold request on the item.
- **Claim Return**: Claims the item Returned when the patron states it has been returned.
- **Lost**: Claims the item Lost when a patron states it has been lost.
- **Print Slip**: Prints an Item Slip with the title, barcode, and other item information.
- **Push to Items**: Displays the selected item in the Cataloging module.
- **Refresh**: Refreshes the screen to display changes.

**Item Node**

The Item node displays item details for the selected item. Options for the item are displayed when other nodes, such as Hold Request or Loan, are selected. The numbers next to the Hold Requests node represent the number of requests the selected item can fulfill and the total number of requests.
Bibliographic Info Node

The Bibliographic Info node displays information from the MARC record to which an item is attached.

Trigger List Node

The Trigger List node is not used in LINCC.

Maintenance Profile Node

The Maintenance Profile node is related to Media Management and Item Booking functionality.

Lesson 2: Cataloging an Uncataloged Item

The fast cataloging function within the Circulation module may be used for several reasons. For example, an item may arrive at the circulation desk with no barcode or a patron may find an item without a barcode on the shelf. Whenever possible, an item with no barcode should be sent for full cataloging. If the item is needed for immediate circulation, creating a brief bibliographic record and an item record will allow the item to be loaned.

Items intended for course reserves which are not permanent additions to the library – such as photocopies or instructor’s personal copies – should be cataloged in the Course Reserves node of the Administration activity tab.
To catalog an uncataloged item:

1. On the **Items** menu, click **Catalog Record and Create Item**.
2. In the window that appears, select **FCC01 LINCC BIB** and click **OK**.

Always select FCC01 when cataloging in the Circulation module. XXX30 is used only in the Course Reserves module.

3. Click the **1. Document Information** tab. In the **Title** field, enter a title. Title is the only mandatory field. If additional information is available, enter it in the appropriate fields. This will make it easier to find the record in the LINCCWeb Catalog and it may be helpful if the item is sent for more complete processing.
4. Click the **2. Item Information** tab.

5. Complete the following fields:
   - **Item Barcode**: (Mandatory) Enter a new item barcode or leave the field blank for the system to automatically assign a number.
   - **Material Type**: (Mandatory) Click the arrow to view available options, and then select the material type.
   - **Sublibrary**: (Mandatory) Click the arrow to view available options, and then select the sublibrary.
   - **Collection**: Click the arrow to view available options, and then select the collection. Only collections that are valid for the selected sublibrary will be listed. If the list is empty, return to the Sublibrary field and select a sublibrary.
   - **Item Status**: (Mandatory) Click the arrow to view available options, and then select an item status. The item status defines the loan period and other circulation parameters.
   - **Item Process Status**: (Optional) Leave this field blank or click the arrow to view available options, and then select an item process status. If the item should be sent to Cataloging for further processing, select SC (Send to Cataloging). This will be displayed when the item is loaned or returned.
   - **Call Number Type**: (Optional). Enter the call number type.
   - **Call Number**: (Optional) Enter the call number.
   - **OPAC Note**: (Optional) Enter a note that will appear in the LINCCWeb Catalog.
   - **Internal Note**: (Optional) Enter a note that will appear only on the item form.
   - **Circulation Note**: (Optional) Enter a note that will appear in circulation transactions.

6. Click **OK**.
7. The brief bibliographic record will appear. Click OK to continue. The brief bibliographic record and item record have now been created and the item can be loaned.

When entering several items with the same information, click Save Def (save defaults) to save fields to be completed automatically. To clear the fields and save the blank form, press the Delete key and then click Save Def.

Lesson 3: Changing Item Information

It is sometimes necessary to change an item’s status or process status, or to move items from one collection to another. This can be done quickly for one or more items through the Items menu.

To change a sublibrary, item status, item process status, or collection:

1. On the Items menu, click Change Item Information.
2. In the window that appears, edit only the information to be changed for a specific item. If data in a field should be deleted, enter a minus sign (-) in the field.
3. Do not select the Permanent Change check box. If selected, the original information cannot be restored. Select the Check Requests check box to be alerted if a hold has been placed on the item.
4. Click OK. In the window that appears, enter the barcodes of all items that should reflect the change.

<table>
<thead>
<tr>
<th>Field</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sublibrary</td>
<td>MJCBR</td>
</tr>
<tr>
<td>Item status</td>
<td>03</td>
</tr>
<tr>
<td>Item process</td>
<td>status</td>
</tr>
<tr>
<td>Remote Storage</td>
<td>ID</td>
</tr>
<tr>
<td>Collection</td>
<td>REF</td>
</tr>
<tr>
<td>Call number</td>
<td></td>
</tr>
<tr>
<td>Call number 2</td>
<td></td>
</tr>
</tbody>
</table>

Enter Item Barcode: 3401010122593

5. When finished, click Close.

If an item is on loan or has a hold request, an informational message will appear. Click OK and the change will be made.

**Restoring Item Information**

A group of items may be moved temporarily from one item status, collection, or sublibrary to another. It is possible to quickly and easily restore original item information in LINCC.

**To restore item information:**

1. On the Items menu, click Restore Item Information.
2. In the Enter Item Barcode field, enter the barcode of the item to be restored.
3. Click **OK**. The original item information will be restored and the changes will be displayed on the screen.

![Restore Item Information](image)

4. Continue entering item barcodes. When finished, click **Close**.

**Changing an Item Process Status**

The item process status may be changed more frequently than other fields in the item record. The item may be marked Damaged, Missing, Withdrawn, or a variety of other statuses. When only the item process status is being changed, the Change Item Process Status form can be used.

To change an item process status:

1. On the **Items** menu, click **Change Item Process Status**.
2. In the **Item Process Status** field, click the arrow to view available options, and then select the desired item process status.

![Change Item Process Status](image)
3. In the **Barcode** field, enter the barcode of the item to be changed, and then click **OK**.

   ![Image of Change Item Process Status window]

4. The window will remain open and additional barcodes can be entered. When finished, click **Cancel**.

   ![Image of Item Loan window]

   **An item process status message will appear when the item is loaned or returned. Click OK to continue.**

**To manually remove an item process status:**

1. On the **Items** menu, click **Change Item Process Status**.
2. Leave the **Item Process Status** field blank.
3. Scan the item barcode.
4. Click **OK**.
5. The form remains open to allow additional items to be scanned. If there are no more items, click **Cancel** to close the form.

   ![Image of Change Item Process Status window]

   **Note that the item process status can also be removed in the Items menu under Change Item Information, and in the Item record in the Cataloging/Items module. Leave the Item Process Status field blank and click OK or Update.**
To automatically remove an item process status:

Item processing statuses to be automatically removed can be specified at the institutional level. Missing (MI) will be set as a default to be removed for all libraries. To remove additional item processing statuses for the college, send a policy file change request to the Help Desk.

The following actions will cause the automatic removal:

- Item is loaned or returned.
- Item information is changed in the Items menu of the Circulation module.
- Item is requested by using its barcode.
- Item is renewed by its barcode.

A message will appear to indicate the processing status has been removed.

Lesson 4: Replacing a Barcode or Adding a Circulation Note

Almost all items management necessary for circulation can be done in the Circulation module. However, some fields can be changed by only accessing the full item record within the Items activity tab of the Cataloging module.

To replace a barcode:

1. Click the Items activity tab. Enter the barcode to retrieve the item.
2. In the upper pane, click **Push to Items**. The selected item will be displayed in the Item activity tab of the Cataloging module. Details of the selected item record will be displayed in the lower pane.

3. In the lower pane, click the **2. General Information (1)** tab. Select the barcode and click **Delete**.

4. Enter the replacement barcode.

5. Click **Update** to save the change.
To add a circulation note:

1. Enter the barcode to retrieve the item.
2. Click **Push to Items** to display the item in the Items activity tab of the Cataloging module.
3. In the lower pane, click the **3. General Information (2)** tab.
4. In the **Circ. Note** field, enter or edit the circulation note that will be displayed each time the item is loaned or returned.
5. Click **Update** to save the change.

---

**Lesson 5: Searching for Items**

Search capability is fully integrated in the Circulation, Cataloging, and Acquisitions/Serials modules. The Search feature can be accessed in each of these modules by clicking the Search activity tab. The most commonly used search methods for circulation activities are described in this lesson.

The Search activity tab’s Navigation Tree contains three nodes:

- **Find**: Select the Find node to perform keyword searches using a variety of parameters.
- **Browse**: Select the Browse node to browse a list of titles.
- **Show**: Select the Show node to view and edit search results.
The upper pane of the Find node provides access to three types of Find keyword search.

- **Advanced Search**: Use Advanced Search to perform Boolean searching on several fields.
- **Multi-field Search**: Use Multi-field Search to search several fields in one record.
- **Multi-base CCL Search**: Use Multi-base CCL Search to perform Common Command Language searching.

**To perform an advanced search:**

1. Click the Search activity tab, and then select the Find node.
2. In the upper pane, click the **1. Advanced Search** tab.
3. In the Base field, select the database to be searched. Options include LINCC BIB (contains bibliographic records of all 28 colleges in LINCC), the institution's bibliographic database, and campus level searching.

```
Base:                       Manatee BIB  LINCC BIB
   LINCC AUT
   Manatee BIB
   MJC Bradenton BIB
   MJC Venice BIB
   Manatee CRS
   Library of Congress
   LC Authority

Words Adjacent: On

Titles: On
```

4. Click the arrow to the right of the first search field to view available options, and then select the field to be searched. Options are listed in three categories: basic word fields, numeric fields, and limiting fields.

5. In the adjacent search field, enter search terms. If needed, use the remaining search fields to narrow or broaden the search by defining additional search criteria.

6. When finished, click **OK**.
7. Search results will appear in the lower pane.
   - If five or fewer records are found, the records are automatically displayed in the Show view.
   - If more than five records are found, a summary of the search criteria, the database used, and number of records located will be displayed. To view the records, click **Show**.

![Search results and Show view interface]

All searches are saved until the module is closed. Individual searches can be deleted while the module is open by selecting the search in the list and clicking Remove.

**Viewing Records in the Show View**

The Show view lists the results of a particular search. The upper pane lists the records in a brief, columnar display. The lower pane provides a full display of the record selected in the upper pane.

The upper pane of the Show view offers three options for viewing records: Brief List, My Records, and Brief Records. The most useful of these options is the Brief List.
Show Node: Upper Pane – Tab 1. Brief List

A search field at the top of the upper pane displays the terms used to formulate the search. A list of records appears in the main part of the pane, displaying the title, author, publication year, and location of each record.

The following options are available on the 1. Brief List tab:

- **Sort**: Sorts the records in the desired order.
- **Save As**: Saves a set of records.
- **Print/Send**: Prints the record. Formats include MARC, citation, and catalog card.
- **My Records**: Saves records in the 2. My Records tab.

Show Node: Lower Pane

Four tabs in the lower pane allow the record to be viewed in different ways.

- **Full+Link**: Provides a complete display of the bibliographic record with field headings. This view also contains location information. This is the default view; all of the features in the full display work only in this view.
- **MARC Tags**: Provides a display of the entire MARC record.
- **Public View**: Provides a display similar to the MARC Tags view with descriptions of each field rather than the tag number.
- **Citation**: Provides a bibliographic citation of the record.
To push a record from the Show view to the Item activity tab:
- In the lower pane, click Circulation.

To perform a Browse search:

Browse searching is useful when searching for a specific title, author, or subject heading. Browse searching provides a list of headings that closely match the search term.

1. Click the **Search** activity tab, and then select the **Browse** node.
2. In the upper pane, complete the following fields:
   - **Base**: Click the arrow to view available options, and then select the database to be searched. External databases, such as the Library of Congress, do not support browse searching.
   - **Headings List**: Click the arrow to view available options, and then select the appropriate heading.
   - **Enter Starting Text**: Enter search terms.

3. Click **Go**.

4. To view one or more records listed in the Browse view, select the heading(s), and then click Show. The record(s) will appear in the Show view.
Unit 5: Managing Cash Transactions

When an item is returned after the expected due date, the library's policy file determines whether an overdue fine will be charged. If the patron's status calls for a fine, the status of the item determines the amount of the fine.

For example, a library may elect to charge students, but not faculty, for overdue materials, or allow overdue books to carry smaller fines than overdue audio-visual materials.

Fines and fees are referred to as cash transactions in LINCC. They may be generated by the system or manually placed on the patron record. Cash transactions are recorded at the time the item is returned or renewed, when an item is recorded as lost, or when a fee is manually placed.

Lesson 1: Managing Cash Transactions

Cash Transactions can be viewed in the Cash node of the Patron activity tab. Selecting a transaction in the upper pane will display detailed information about that transaction in the lower pane. The tabs in the upper pane are described below.

Cash Node: Upper Pane - Tab 1. Active Cash

The 1. Active Cash tab displays a list of cash transactions that have a status of Credited or Not Paid.
Cash Node: Upper Pane - Tab 2. Cash History

The 2. Cash History tab displays transactions that have been paid.

Cash Node: Upper Pane - Tab 3. Cancelled Transactions

The 3. Cancelled Transactions tab displays waived transactions.

Cash Node: Upper Pane - Tab 4. All Transactions

The 4. All Transactions tab displays all transaction statuses.
The following options are available in the upper pane when any of the tabs are selected:

- **Pay Sum**: Pays the total amount due.
- **Pay Selected**: Pays the amount due (or a partial amount) for a selected item.
- **New**: Creates a new fine or fee.
- **Waive**: Allows a fine to be waived. A note can be added to indicate the reason for the waived fine.
- **Partial Waive**: Allows part of a fine to be waived. A note can be added to indicate the reason for the partially waived fine.
- **Print**: Prints a Cash Summary letter with brief information about each cash transaction.
- **By Sublibrary**: Displays the list of cash transactions by sublibrary.
- **Circ Log**: Displays the selected cash transaction in the Circulation Log node.

A cash transaction that displays with No Bib information usually indicates that the item was deleted or moved to another bib record.

**Lesson 2: Manually Creating a New Fine**

Most charges, such as overdue, fines, and lost item replacement charges, are system-generated. However, there may be circumstances in which a manually created fine is needed. For example, a library may charge for printing, for diskettes, or for damaged items.

**To create a new fine:**

1. Click the **Patron** activity tab, and then select the **Cash** node. In the upper pane, click **New**.
2. The New Cash Transaction window will appear. In the **Description** field, enter a description of the charge. In the **Sum** field, enter the amount to be charged.
3. Click **OK**. The new cash transaction will be listed in the 1. Active Cash tab.

![Cash Transaction Table]

To create a new fine and associate it with an item:

1. Click the **Patron** activity tab, and then select the **Cash** node.
2. In the upper pane, click **New**.
3. The New Cash Transaction window will appear. In the **Enter Item Barcode** field, enter the item barcode associated with the fine. In the **Description** field, enter a description of the charge. In the **Sum** field, enter the amount to be charged.

![New Cash Transaction Window]

4. Click **OK**. The fine will be listed in the 1. Active Cash tab.
Lesson 3: Paying or Waiving Overdue Fines and Lost Item Charges

An item becomes overdue when the due date has passed and the item has not been returned. The fine will accumulate up to the maximum set by library policy. The accumulating fine can be viewed on the loans list. When the item is returned, the overdue fine stops accumulating and appears in the 1. Active Cash tab of the Cash node.

An item becomes lost when a Lost notice is generated at an interval set by library policy, usually 30 days past the due date. When the item status becomes Lost, the Lost Item Replacement cost is generated and appears in the 1. Active Cash tab of the Cash node. At this time, a lost item processing fee may also be added. Library policy will determine whether the processing fee is added and whether it is refundable if the item is returned.

Actions in the 1. Active Cash tab of the Cash node include:

- Paying the total sum owed.
- Paying or partially paying a selected fine.
- Waiving or partially waiving a selected fine.

To pay the entire sum owed:

1. Click the Patron activity tab, and then select the Cash node.
2. In the upper pane, click Pay Sum.
3. A confirmation screen will appear. If the amount listed is correct, click OK to continue. The Payment Mode field is used to indicate the payment method – cash or credit card. 00 Cash is the default. (Other payment methods can be selected from the drop-down list.)
4. The fines will disappear from the 1. Active Cash tab and appear in the 2. Cash History tab as Paid.

5. A cash receipt will be generated for the patron.
To pay or partially pay a selected fine:

1. In the upper pane, click the 1. **Active Cash** tab, and then select the fine to be paid.

2. Click **Pay Selected**.

3. When prompted, click **OK** to pay the entire fine or enter a partial amount, and then click **OK**.

4. The partially paid fine remains on the 1. **Active Cash** tab with a note indicating how much of the fine has been paid. The partially paid fine will also appear in the 2. **Cash History** tab. A cash receipt will be generated for the patron.
**Waiving a Fine**

The total Sum to Pay cannot be waived. Each fine must be selected individually and waived or partially waived.

**To waive a fine:**

1. Click the **1. Active Cash** tab, and then select the fine to be waived.
2. Click **Waive** to waive the entire amount. Enter a reason in the Waive Description window and click **OK**.
3. A receipt will be generated for the patron. The fine will disappear from the **1. Active Cash** tab and appear on the **3. Cancelled Transactions** tab.
To partially waive a fine:

1. Click the 1. Active Cash tab, and then select the fine to be partially waived.
2. Click Partial Waive. In the Partial Waive window, enter the reason and the amount to be waived. Click OK.

3. A receipt will be generated for the patron. The fine will remain on the 1. Active Cash tab with the new amount owed. The fine will also appear in the 3. Cancelled Transactions tab.
Lesson 4: Managing Lost and Claim Returned Loans

An item’s status will become Lost when it is past due by the number of days specified in the library’s policy file. An item’s status may be manually claimed Lost when the item is reported lost before sufficient time has passed for the status to be changed by the system.

To claim an item as lost:

1. Click the Patron activity tab, and then select the Loans node.
2. In the upper pane, select the item reported as lost.
3. Click Lost. The Confirm Lost window will appear. Click Yes to continue.
4. The Replacement Cost window will appear. Enter an amount or accept the default replacement cost. Click OK.
5. A Lost Material Bill will be generated for the patron.

Lost Material Bill

04/01/2006
lost-material-bill-m-00

MDC Library
P.O. Box 1849
Bradenton, FL 34206
813-755-1511, ext 4305

Joey Lime
100 Citrus Ave.
Bradenton, FL 32006
joey@email.com

Dear Sleekadam,

This item has been declared lost.
The status of the item will change to Lost and the replacement cost will become a cash transaction, visible in the 1. Active Cash tab. Overdue fines will not be charged but will continue to accumulate until the maximum allowed fine is reached.

If the lost item is returned, the lost item replacement charge will be credited and overdue fines will be charged.

**Managing a Lost Item when the Charge has been Paid**

When an item has a status of Lost, it remains on the loans list until it is manually deleted. If the item has been paid for, two options are available:

- Leave the Lost item on the loans list. This should be done when there is any possibility that the item might be found and returned. The item must remain on the loans list for the system to give credit for the lost item replacement fee that has already been paid.
- Mark the item Withdrawn and delete the Lost item from the loans list. This should be done when there is no possibility that the item will be returned.

**To mark the item Withdrawn and delete it from the loans list:**

1. On the Items menu, click **Change Item Process Status**.
2. Enter the barcode of the lost item and select **Withdrawn**.
3. Click the Patron activity tab, and then select the Loan node.
4. In the upper pane, select the lost item and click **Delete**.

Do not Return the item to remove it from the loans list – the system will credit the lost item replacement cost to the patron. Instead, use the Delete option on the Loans list to remove the item.
Managing a Lost Item when the Charge has been Paid and the Item Returned

When an item has been lost and paid for, then is returned, the system will credit the amount paid. The credit will appear in the 1. Active Cash tab.

To refund the paid charges:

- Click the 1. Active Cash tab, and then select the cash transaction. Click Pay Selected.

Managing a Lost Item when the Charge has not been Paid and the Item is Returned

When an item is lost, the Lost item Replacement charge appears in the 1. Active Cash tab with a status of Not Paid. When the item is returned, the active charge remains in the 1. Active Cash tab with a status of Not Paid; the Lost item Replacement Charge is credited and appears in the 1. Active Cash tab with a status of Credited.
Marking an Item Claim Returned

A patron may claim that an item has been returned, yet the system shows the material is still on loan. The item should be marked Claim Returned. Fines will continue to accrue until the maximum fine is reached; the fine will not be converted to a cash transaction. The patron will not be blocked from borrowing items.

To mark an item Claim Returned:

1. Click the Patron activity tab. In the upper pane, select the loan that the patron is claiming returned.

2. Click Claim Returned. The Confirm Claim Return window will appear. Click Yes to continue. The status becomes Claimed Returned.

3. The status will be displayed in the LINCCWeb Catalog. Follow up by searching for this item in the book stacks. If the item is found, Return it and waive any overdue fees that have accumulated. If the item is not found, follow local policies.

<table>
<thead>
<tr>
<th>Item of Loan</th>
<th>Due Date</th>
<th>Hour</th>
<th>Barcode</th>
<th>Item Status</th>
<th>Sublibrary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital video camera</td>
<td>03/25/2005</td>
<td>11:27 AM</td>
<td>34501010117338</td>
<td>2-Day</td>
<td>Manatee/Venice</td>
</tr>
<tr>
<td>The symposium</td>
<td>Claimed</td>
<td>Returned</td>
<td>34501010351746</td>
<td>20-Day Loan</td>
<td>Manatee/Venice</td>
</tr>
</tbody>
</table>
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Unit 6: Managing Hold Requests

This unit describes the hold request process. Creating hold requests, filling hold requests, and transferring items to another campus are all important parts of the process. Maintenance is another important component since requests expire or cannot be filled and must be deleted.

Lesson 1: Creating Hold Requests

Hold Requests can be created in the LINCCWeb Catalog by patrons or in the Circulation module by library staff. Requests can be placed from the Requests menu in the Circulation module; however, this method requires the barcode to be known in advance and is rarely used. More commonly, a hold request is placed from the Item activity tab.

To place a hold request from the Item activity tab:

1. Click the Item activity tab. Retrieve the item record.

2. Click Hold Request. In the window that appears, enter the patron barcode or borrower ID. If the barcode is not known, select the list icon to search by patron name.
3. Click OK. The Create Hold Request window will appear.

4. Complete the following fields as needed:
   - **Author of Part**: (Optional) Enter the author of the part if different from the item as a whole. A patron may want a photocopy of a specific chapter or essay.
   - **Title of Part**: (Optional) Enter the title of the part if different from the item as a whole. A patron may want a photocopy of a specific chapter or essay.
   - **Pages to Copy**: (Optional) Enter the requested pages.
   - **Note 1, Note 2**: (Optional) Enter notes for library staff.
   - **From Date/To Date**: Accept the default dates or enter the period of time during which the patron is interested in receiving the material.
   - **Pickup Location**: Accept the default location or select the location where the patron will receive the material.
   - **Recall Type**: Leave the default value selected (03, No Recall).
   - **Priority**: Accept the system default (30) or enter a lower number (e.g., 10) if the request should be first in the queue. The system default carries the same priority as requests created by patrons in the LINCCWeb Catalog. Requests with the same priority level are placed in the queue in order of date requested. Requests placed first are filled first.
- **No. of Requests**: Not used.
- **Rush Handling**: Select this check box if the request requires rush handling. This will add a rush handling message to the hold request slip. It does not move the request to the top of the queue.
- **Title Request**: Not used.
- **Only Selected Item**: Select this check box if only this item should be used to fill the hold request. Leave the box unchecked to allow the hold request to be filled using any like item attached to the bibliographic record. The following fields can be changed manually when placing the request:
  - **Sublibrary**: The # symbol indicates that an item attached to this bibliographic record but belonging to any bibliographic record can be used to fill the request.
  - **Item Status**: Only an item with a matching item status can be used to fill the request.
  - **Item Process Status**: Only an item with no item process status can be used to fill the request.
  - **Collection**: Only an item with a matching collection can be used to fill the request.
  - **Copy, Year, Volume, Part, and Issue Number**: Notes to assist in requesting series or photocopies.

**Lesson 2: Viewing and Editing Hold Requests**

Hold Requests can be viewed and edited from the Patron and Item activity tabs.

**To view and edit a hold request from the Patron activity tab:**

1. Click the **Patron** activity tab, and then select the **Hold Requests** node.
2. In the upper pane, select the request. Details will be displayed in the lower pane.
3. Edit fields as necessary.

To view and edit a hold request from the Item activity tab:

1. Click the Item activity tab, and then select the Hold Requests node.
2. In the upper pane, select the request. Details will be displayed in the lower pane.
3. Edit fields as necessary.
Lesson 3: Filling Hold Requests

Hold requests are placed throughout the day by patrons and library staff. Two methods are used to fill hold requests:

- The item has been on loan and is returned. At the time of return, the Hold Request window will appear and the item will automatically be placed on hold for the first patron in the list. A Hold Request letter will be generated.

- The item is on the shelf. Hold request slips are generated each day and can be retrieved in the Task Manager. All daily system-generated reports (such as overdue and lost notices) can be retrieved in the Task Manager. This is also where any reports generated by library staff are retrieved. Hold request slips are retrieved each day and are used to pull items from the shelf and fill the requests.

To fill a hold request when the item is returned:

1. Return the item. The Hold Request window will appear and the item will automatically be placed on hold for the first patron on the list.

2. A Hold Request Letter containing contact information will be generated. Print the letter and notify the patron that the item is available.
3. A Hold Request Slip will be generated. Print the Hold Request Slip and place it with the item on the Hold Shelf.

![Hold Request Slip]

**Material Requested:**

Turner, Jonathan H.


69047591.95 (pseudonym paper)

To fill a hold request when the item is available on the shelf:

1. In the **Administration** activity tab, select **File List**. Reports are listed in the lower pane and can be sorted by using the **Sort by** field. The default sort order is Date/Time Descending – the most recent reports appear at the top of the list. Refer to Unit 6, Lesson 6 for more information on using the Task Manager.
2. Two files are generated for Hold Request slips:
   - **D007** is a file of Hold Request Slips for items that should be available on the shelf. Print this file.
   - **D008** is a file of requests in Waiting status; these items are still on loan. When an item is returned, it will automatically be placed on hold for the requesting patron. Do not print this file.

3. To save the file to the local computer, double-click the file beginning with **D007** in the lower pane (or select the file and click the up arrow).

4. Use the Hold Request Slip to retrieve items from the shelf. Enter each item barcode in the Return activity tab.

5. The message “Item is Not on Loan” will appear. Click OK. The list of patrons requesting the item will appear.

6. A Hold Request Letter will be generated. Print the letter and notify the patron that the item is available.

7. A Hold Request Slip will be generated. Print this slip to place with the item.

8. Place the item on the Hold Shelf with the Hold Request Letter and/or the Hold Request Slip.

---

**LINCC Note**

D012 can also be used to retrieve available items from the shelf. It includes the same information as D007 in tabular report format. It can be used when a full piece of paper for each request is not needed.

---

**Filling a Hold Request for Pickup at Another Location**

An item may be requested for pickup at another campus. The pickup location is listed on the Hold Request Slip. Whether the item is being returned from loan or was available on the shelf, the item should be returned in the system. On return, the system will indicate that the item should be transferred to another campus.

**To fill a hold request for pickup at another location:**

1. Return the item. A transfer alert will appear; click OK.
2. A Transfer Slip will be generated. Place the transfer slip with the item and send it to the pickup location. The item will now be listed as on loan to a sublibrary patron record with the name of the campus and is given an In Transit status. The receiving campus must return the item. When it is returned, it will be placed On Hold for the requesting patron.

Transfer Slip

MCC Library
Venice Campus
8000 S. Tamiami Trail
Venice, FL 34293
813-490-3504 ext. 2312

MCC Library
Eradon Campus
P.O. Box 1849
Eradon, FL 34200
813-756-1511, ext. 4305

We are transferring the following item, which was returned at MCC Library to MCC Library.

Turner, Jonathan H.
0004732193 (cloth : alk paper).

Always Return an item you are unsure about or have received from another campus. This will help determine what to do with the item – whether it has been requested by a patron, is the library’s item, or has been sent to the library by mistake.

To manage a hold request when the item is missing from the shelf:

1. Check the shelf to see if another copy is available. A copy in the same collection attached to the same bibliographic record can be used to fill the hold request.

2. If another copy is not available, search for the title to determine if a copy is on loan. If so, the hold request will be filled when the item is returned.

3. If no other copy is available, delete the hold request and notify the patron that the request cannot be filled. Use the barcode on the Hold Request Slip to change the item process status to Missing.
Lesson 4: Deleting Hold Requests

Automatic deletion of hold requests occurs when an outstanding request has expired or when a request has been on the hold shelf longer than the number of days allowed. It may also be necessary to delete hold requests that have not yet expired when an item is missing from the shelf or is no longer needed.

To delete a hold request from the items list:

1. Click the Item activity tab. Retrieve the item by barcode.
2. Select the item, and then select the Hold Requests node.
3. The list of hold requests for the item will appear; select the hold request and click Delete.
4. The Confirm Delete window will appear. Click Yes.

5. A window will appear. In the Patron Note field, enter the reason for the deletion.

6. A Hold Delete Letter will be generated. Notify the patron that the hold request has been deleted.
To delete a hold request from the patron record:

1. Click the Patron activity tab. Retrieve the patron record.
2. Select the Hold Requests node.
3. Select the request and click Delete.
4. A window will appear. In the Patron Note field, enter the reason for the deletion.
5. A Hold Delete Letter will be generated. Notify the patron that the hold request has been deleted.

Lesson 5: Managing Hold Requests

Several reports are used for managing hold requests and the hold shelf. These reports have been set up to run automatically on a daily or weekly basis. A description of the reports and information on how they can be used is provided below. Reports are available in the Task Manager and on the LINCC Reports Service web page.

Request Reports

D004 — Request Expired on [date]
This report, run daily for each sublibrary, allows staff to identify expired holds that have been deleted automatically (i.e., hold requests that have passed the "last interest date"). This report provides item and patron information and is sorted by item barcode.

Use this report to notify the patron that an outstanding request has expired and to determine whether the patron is still interested in the item. Use this report to evaluate the number of requests that become expired before being filled. A high number of expired requests may need investigation.

D007 — Hold Request Slip
This report, run daily for each sublibrary, produces a file of hold request slips that detail available items for which there are outstanding requests. This report provides item information and patron information and is sorted by call number.

Use this file of hold request slips each day to retrieve available items from the shelf to fill hold requests.

D008 — Hold Request Not Available
This report, run daily for each sublibrary, produces a file of letters to inform patrons that requested items are not currently available. These hold requests are in Waiting status since the items are still on loan. When an item is returned, it will automatically be placed on hold for the requester.

Use this report for troubleshooting when needed. It does not need to be accessed every day.
D009 — Hold Shelf Report
This report, generated weekly by sublibrary, is a list of expired On Hold requests. These are items that have been on the hold shelf longer than the system allows. For most libraries, this is seven days. The number of days can be customized.

Expired requests have been automatically deleted and the item has been automatically placed on hold for the next requester, if there is one. If a Next Requester is listed in the report, the patron should be notified that the item is now available. Automatic deletion and hold placement for the next requester is the default setting; this can be customized.

Use this report to identify items that can be returned to the circulating shelves. If an item does not have a next requester, but belongs to another campus, return it so it can be placed in-transit to the owning campus. If the item does have a next requester in D009, the item has automatically been placed On Hold for that patron. Do not enter the barcode in the Return activity tab. A Hold Request letter has been generated automatically by the system. If a Next Requester is listed in D009, refer to D010 for the Hold Request Letter that can be used to notify the patron.

D010 — Next Requester Letters
This report, generated weekly by sublibrary, is a file of letters notifying the next requester that the requested item is now available for pickup. It is generated for patrons listed in Next Requester column of D009.

Use the letters in this report to obtain contact information to notify a patron that an item is available.

D011 — Hold Delete Letters
This report, generated weekly by sublibrary, is a file of letters informing a patron that a hold request that was on the shelf has been deleted. This is for hold requests with On Hold status. It is generated for patrons listed in D009.

Use this report to inform a patron that the item is being returned to circulation.

D012 — Hold Request – On Shelf
This report, run daily for each sublibrary, produces a list of hold requests that details available items for which there are outstanding requests. This report provides item information that includes the material requested, item barcode, call number, and collection. This report also provides patron ID and patron name. It is sorted by call number.

Use this report in place of D007 Hold Request slips to retrieve requested items from the shelf.
Lesson 6: Using the Task Manager

The Task Manager enables staff to view or print reports and letters and to monitor the progress of various jobs that have been run or are running. The Task Manager is located in the Administration activity tab in each module. Depending on the module, the Task Manager will be present with other functions (e.g., Course Reserves, Partners, and Budgets), or it will be the only entry (as in the Cataloging module).

The Task Manager has four nodes: File List, Batch Log, Batch Queue, and Print Daemon. Print Daemon is not used.

Using the File List

The File List is used to view or print reports and letters that have been run from the Services menu in any module or that have been placed there by FLVC. It is the most commonly used function of the Task Manager. The files on the server are displayed in the lower pane; files that have been copied to the local computer are displayed in the upper pane.

Key sections are described below:

- **Library**: Indicates the library to which the user is connected, such as the XXX50, XXX30, or FCC01, etc.
- **Clear Filter**: Used to remove a filter which was created by using the View Printouts button in the Batch Log node so that all files on the remote server are shown in the lower pane.
- **Delete**: Used to delete reports or letters that have been copied to the upper pane. Functional only for local files.
- **Rename**: Used to rename reports or letters that have been copied to the upper pane. Functional only for local files.
- **Print**: Prints the selected file. Can be used with Local or remote files.
- **Refresh**: Refreshes the list of files shown in the lower pane. Functional only for remote files.
• **Print Configuration**: Used to determine how the report or letters will be printed. The default view is Print Preview. Other options are Normal Printing (used with email), View Raw XML, and Browse XML.

• **Setup Type**: Active when Normal Printing is selected. Used to determine how the report or letter will be printed. Options are Print, E-mail, or Both.

• **Print Setup**: Active when Normal Printing is selected. Options are Y or N.

• **Sort By**: Sorts the files in the upper and lower panes. The default is Date/Time Descending.

---

To print a report or letter in the File List:

1. Click the **Administration** activity tab in any module.
2. Click the **File List** node.
3. Locate the desired report or letter in the lower pane.
4. Click **Print** to display a print preview (or double-click the file to transfer it to the upper pane and then click **Print**).
If a report that has been submitted does not appear in the File List, contact the Help Desk. The submittal form’s parameters may be causing it to retrieve too large a set of records to enable it to finish in a reasonable amount of time.

For example, the date range may be too large or a sublibrary may not have been selected, causing the report to run for the entire college. FLVC can end any job that is taking too long to run. The submittal form can be reviewed, changes made to narrow the report, and the report can be resubmitted.

Navigating the Batch Log

This lesson provides a closer look at the functions of various elements of the batch log. The Batch Log can be used to monitor the running of each job and to troubleshoot jobs in which a problem occurred. It lists the batch processes that have run or are currently running.

Batch Log Node: Upper Pane – Batch Log tab

When the Administration activity tab is clicked and the Batch Log node is selected, the Batch Log appears in the upper pane. The Batch Log tab displays each job with basic information about it.

The following fields and options are available on the Batch Log tab:

- **Library**: Indicates the library to which the user is connected, such as the XXX50, XXX30, FCC01, etc.
- **Print ID**: Not used.
- **Type**: Filters the list of jobs based on the selection made. Choices are tied to USERID and module and include: All, Only Mine, Run from server, Acquisition, Cataloging, Circulation, ILL, Indexing, Items, Serial, Staff, and System.
- **Status**: Filters the list of jobs based on the status of the job. Choices are: All, Success, Done with errors, Abort, Running, and Failed.
- **Date From/Date To**: Filters the list of jobs according the date the job was run.
- **Service Form**: Retrieves the submittal form corresponding to the selected job. Changes can be made to the form as needed and resubmitted if the report does not contain desired results.
- **View Printouts**: Filters the File List so that only print outs associated with the job selected in the Batch Log are shown in the lower pane of the File List. To remove the filter so that all files appear in the lower pane of the File List, click Clear Filter.
- **Refresh**: Refreshes the list of files shown in the upper pane.

**To use the Service Form:**

1. Select a job in the upper pane.
2. Click the **Service Form** button.
3. Review the form and make any necessary changes.
4. Click **Submit**.
5. Click the **File List** node, and then click **Refresh** in the upper pane. The new report will be listed in the lower pane.

If the report does not appear immediately, it may still be running. Click Refresh again until the file appears in the lower pane of the File List.

**To use the View Printouts feature:**

1. Select the job in the upper pane.
2. Click **View Printouts**. The focus will shift to the File List. The only file displayed in the lower pane will be that corresponding to the result of the selected job.
3. Click **Print** to display a print preview (or double-click the file to transfer it to the upper pane and then click Print).
4. In the File List upper pane, click **Clear Filter** to remove the filter. All files will be displayed in the lower pane.
Batch Log Node: Lower Pane – Tab 1. Batch Job Details

The Batch Job Details pane displays more complete details about the job selected in the upper pane.

<table>
<thead>
<tr>
<th>Job ID:</th>
<th>13252</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job name:</td>
<td>Restart Server</td>
</tr>
<tr>
<td>Start time:</td>
<td>01/14/2009 03:36 PM</td>
</tr>
<tr>
<td>End time:</td>
<td>01/14/2009 03:36 PM</td>
</tr>
<tr>
<td>Status:</td>
<td>Success</td>
</tr>
<tr>
<td>Summary:</td>
<td>SYSTEM</td>
</tr>
<tr>
<td>User:</td>
<td>CCLA</td>
</tr>
<tr>
<td>Errors:</td>
<td>No Errors</td>
</tr>
<tr>
<td>Parameters:</td>
<td>BECS0,PC</td>
</tr>
<tr>
<td>Log file:</td>
<td>/exlibris/aleph/prod/aleph/scratch/bec50_p_sys_01.00211</td>
</tr>
<tr>
<td>Printouts:</td>
<td>No Printouts</td>
</tr>
</tbody>
</table>

Batch Log Node: Lower Pane – Tab 2. Log File

The Log File tab displays complete data from the log file about the job selected in the upper pane.

```
Load: /exlibris/aleph/prod/aleph/tab/tab100
Load: /exlibris/aleph/prod/bec/bec50/tab/tab100
0(200)/MD/01m
ALEPH/SUN_08_2, Copyright Ex Libris,
version 15 revision 01 copy 1, 23-Dec-2007
start BECS0,report,report2,00,006,023,
procedure=p_aq_03
fixed param: BECS0,report,report2,00,006,023,
setenv p_file_name_in "report"
setenv p_file_name_out "report2"
setenv p_report_form no "00"
```
Using the Batch Queue

The Batch Queue displays the jobs waiting to be run. Jobs will run as soon as previously submitted jobs finish. The Batch Queue can be used in conjunction with the Batch Log to troubleshoot problems with reports and letters.

Fields in the Batch Queue are described below:

- **Library**: Indicates the library to which the user is connected, such as the XXX50, XXX30, FCC01, etc.
- **Status**: Indicates whether the Batch Queue is running or not running. Reports and other services will only be run if the Batch Queue is running. If it is not running, FLVC must be contacted to restart it.
- **Delete**: Deletes the highlighted job to prevent it from running.
- **Change Runtime**: Enables staff to change the date and/or time a job will run. Clicking this option will cause the Change Entry’s Runtime dialog window to appear so that the date and time during which the job will run can be changed.
- **Refresh**: Refreshes the list of files shown in the batch queue.
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Appendix A: Glossary

**Activity Tabs** — Tabs that appear above the Navigation Tree and correspond to major activities within a specific module. When an activity tab is clicked, the Navigation Tree and upper and lower panes will display related information and options.

**ADM** — The three-letter code for the Administrative Library, or database, which is associated with each community college. This is also represented by XXX50, where XXX is the three-letter institution code that has been assigned to a specific college. For example, IRC50 is the Administrative Library for Indian River Community College and MDC50 is the Administrative Library for Miami Dade College. The ADM contains data about acquisitions, serials, circulation, and users (library staff and borrowers).

**ADM Doc Number** — The numeric code assigned to each administrative record. Generally, administrative records are linked to bibliographic records. The ADM doc number corresponding to the bibliographic record is different for each college. As a result, bibliographic records can be searched for and retrieved by the college’s ADM doc number.

**Application Toolbar** — The toolbar at the bottom of the screen that indicates the connection status of the program, the application icons that can be clicked to open or switch modules, and setup icons that enable customization of the interface.

**AUT** — The three-letter code for the Authority Library, or database, located on the server at FLVC and shared by all state colleges. The AUT, also represented as FCC10, contains the authority records of preferred forms of headings and relationships between them.

**Base** — The base, seen in the Search feature in every module, indicates which database is to be searched. Examples of bases are LINCC BIB, LINCC AUT, Okaloosa-Walton BIB, and Library of Congress.

**BIB** — The three-letter code for the bibliographic library, or database, located on the server at FLVC and shared by all state colleges. The BIB, also represented as FCC01, contains the bibliographic records for all state colleges.

**Cataloging Bar** — The toolbar in the Cataloging module used to search for bibliographic records by system number. Once a record is selected, the Cataloging bar will contain brief information about the record, including system number, title, author, and year of publication.

**Client** — The LINCC library management system (LMS) functions as a client-server relationship. The term “client” is used to describe the Aleph software installed on the local computer. The client interacts with the server located at FLVC.

**Functional Mode** — The default working mode in each module, visible above the Navigation Tree. When a record is displayed in any module, the Functional mode enables specific actions to be taken, such as creating an order and loaning an item. The alternate mode is Overview mode.
HOL — The three-letter code for the Holdings Library, or database, located on the server at FLVC. The HOL, also represented as FCC60, contains the summary holdings records for all colleges.

Invoice Bar — The toolbar in the Acquisitions/Serials module used to search for invoices by vendor or to create a new invoice. Once an invoice has been selected, the Invoice bar will contain brief information about the invoice, such as vendor and invoice number.

Item Bar — The toolbar in the Circulation and Cataloging modules used to search for items by selected parameters. Once a record has been selected, the Item bar will contain brief information about the record such as BIB number, ADM number, title, author, and year of publication.

Library — A database in LINCC. There are currently five databases: the bibliographic library (BIB), the authority library (AUT), the holdings library (HOL), the administrative library (ADM), and the course reading/reserve library.

Local Drive — The hard drive of the local personal computer on which the LINCC client is installed. The command “Save on Local Drive” will save a bibliographic record to the local drive and will not update the shared bibliographic database on the server at FLVC.

Lower Pane — The lower right portion of the module interface where information and available options are displayed. The lower pane is governed by the node selected in the Navigation Tree. The display can consist of a form, a list, or a record and usually contains detailed information relating to the line selected in the upper pane.

Menu Bar — The toolbar at the top of the screen that contains drop-down menus with access to functions that can be accomplished in the module.

Navigation Pane — The area of the screen that contains the activity tabs and the Navigation Tree.

Navigation Tree — The Navigation Tree appears on the left side of the screen, in the Navigation Pane, and contains nodes that can be selected to access information or perform specific activities. Available options vary according to the activity tab that is selected. The Navigation Tree is similar in concept to a table of contents which leads to major functions within the selected activity tab.

Node — Options available in the Navigation Tree that represent various activities and sub-activities used to navigate within a module. Nodes are dependent on the module and the selected activity tab. The nodes of the Navigation Tree activate different areas of the screen when selected.

Order Bar — The toolbar in the Acquisitions/Serials module used to search for orders by selected parameters. Once a record has been selected, the Order bar will contain brief information about the record such as BIB number, ADM number, title, author and year of publication.
Overview Mode — One of two working modes available in each module, visible above the Navigation tree. When a record is displayed in any module, selecting Overview will allow the record to be transferred to another module or function by selecting the relevant record in the tree and clicking a function button (Cataloging, Items, Circulation, Orders, Serials, or Search). The alternate mode is Functional Mode.

Patron Bar — The toolbar in the Circulation module used to search for patron records. Once a record has been selected, the Patron bar will contain brief information, such as patron name and ID.

Server — The hardware located at FLVC that contains the libraries (databases) shared by all state colleges: the Bibliographic Library (BIB), the Authority Library (AUT), and the Holdings Library (HOL). The command “Save on Server and Local Drive” will update the bibliographic database on the server at FLVC as well as the local computer.

Split Bar — The horizontal or vertical double line that separates a window into two panes. In many screens, clicking on and dragging a split bar enables the panes to be resized.

Sublibrary — Each state college campus, represented by a five-letter designation, such as BECCO and PJCPE.

System Number — The numeric code assigned by LINCC to each bibliographic record. This is the database control number for the record.

Serial Bar — The toolbar in the Acquisitions/Serials module used to search for serials by selected parameters. Once a record has been selected, the Serial bar will contain brief information about the record such as BIB number, ADM number, title, and year of publication.

Toolbars — Various rows below the Menu bar that contain fields and icons for commonly performed tasks within a module. Examples of toolbars include: Order bar, Serial bar, Item bar, and Patron bar.

Upper Pane — The upper right portion of the module interface where information is displayed. The upper pane is governed by the node selected in the Navigation Tree. The display can consist of a form, a list, or a record. The contents of the upper pane change according to context.
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Appendix B: LINCC Documentation and Help

Documentation for LINCC is extensive and almost exclusively online. The following resources are available to assist you with questions related to specific module functionality or procedures.

**Manuals:** LINCC manuals cover the basic functionality of LINCC modules and provide screen shots and simple, step-by-step instructions. Module-specific LINCC manuals are distributed during each on-site training session. Updated versions are available online from the LINCCLearn web page (now called FLVC Learn).

**Online Help:** FLVC has developed extensive online help to assist library staff in performing activities that are unique to LINCC. This is available from the Library Staff Resources web page at staff.lincc.net.

**Aleph Module Help:** Almost every screen or window in the modules contains a Help menu and a Help option that lead to a description of each field. In addition, a Help icon on the Menu bar allows users to search module-specific help.

**Aleph Documentation:** Aleph’s vendor, ExLibris, provides additional print documentation that includes general information about Aleph implementation. For more information on Aleph documentation, contact the Help Desk.

**Additional Resources:** Additional resources, in a variety of formats, are available on FLVC’s State College Library Services web site. These resources include discussion lists, which provide additional information from FLVC and other LINCC users; *Linking to LINCCWeb*, which explains the process of developing URLs for LINCC-based products for local college web sites; equipment recommendations; the LINCC Reports Service (LRS); online help for SFX and MetaLib; and much more.

**Help Desk:** The Help Desk is available to assist college library staff with FLVC products and services. Contact the Help Desk by email at help@flvc.org or by phone at 1-877-506-2210 during regular business hours (8:00 a.m. to 5:00 p.m. ET, Monday – Friday).
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Appendix C: Patron Confidentiality

All library patrons have the right to privacy regarding the use of library materials and resources. As a member of your library’s staff, you have a responsibility to help protect that privacy.

Confidentiality extends to information sought or received, and materials consulted, borrowed, or acquired, and includes patron records, database search records, interlibrary loan records, and other personally identifiable uses of library materials, facilities, or services.

Adapted from: The Code of Ethics of the American Library Association

Six Rules to Protect Confidentiality

It is essential that you familiarize yourself with your library’s policy on patron confidentiality. Such policies are based Florida statutes. While local policies may vary somewhat, six simple rules summarize practices that help protect the privacy of your patrons.

1. Never give out a patron’s personal information, such as address or telephone number.
2. Never disclose the identity of a patron who has an item on loan.
3. Never disclose the items loaned to a patron.
4. Always ask a patron to provide a borrower ID or Social Security number before providing a list of items the patron currently has on loan.
5. Never leave patron information displayed on the screen when you are not actively using the record. Press F4 to clear the screen.
6. If you are unsure of appropriate conduct in any situation, request the assistance of your supervisor.