Circ Questions and Answers

These have been compiled from the Newsletter and from various emails.

How do I get information on a billed item?

In the display user, click on the "Bills" tab. It will display any unpaid bills. In the "owes" column, click on the dollar amount. A window will pop up with detailed history of the item bill. Click the "Close" button to exit the window.

The bill tab defaults to unpaid bills, but you may wish to look at their complete bill history. In the bills tab, you should see a scroll bar to the right. Use that bar to scroll to the bottom of the bills tab screen. You'll see a box that will allow you to select "All", "Paid", or "Unpaid".

How do I discard a billed item?

If an item is not charged or billed to a patron, you can just use the "Delete title, call number or items" wizard or charge it to *Mr. Discard*. However, if the item is damaged beyond repair and you want to bill the patron, or you simply want to weed out an old item that has an unpaid bill, you will need to charge the item to *Mr. Discard*.

Here's what you would do if the item was damaged and you wanted to bill the patron and remove it from the collection.

1. Discharge damaged item from patron.
2. Click on "Bill a User" wizard on circ toolbar and fill in the workform, selecting DAMAGE as the bill reason. Bill user.
3. Charge your item to "Mr. Discard".
4. Throw item away. Link between item and patron is preserved. Item will be shadowed in iBistro. When the bill is paid, the item will be automatically deleted when a system discard report is run. (Items that have fines or bills remain in the system, even though charged to Mr. Discard—until such time as the bill or fine is paid.)

How do I load a Mr. Discard user?

SETUP:
Use the "New User Registration" wizard. Wand in a patron barcode, as you normally would when adding a new patron, but **select the user profile of DISCARD**. For the patron name, type in, for example, TZT Discard, or TWA discard, etc. Set Expiration date to NEVER. Call or email Jeanne with the barcode you are using for Mr. Discard, so it can be added to the system discard reports.

TO USE:
Just charge the stack of items you want to discard to Mr. Discard! When you charge an item to this "patron", the current location becomes DISCARD, instead of the usual "CHECKEDOUT". After 32 days, the system will automatically remove an item that has a current location of DISCARD, if it has no bill associated with it.

An advantage to charging items to Mr. Discard is that you do not have to notify TdS that it is the last copy. TdS cataloging staff will get a list of unique items that are charged to DISCARD and that must be reported to OCLC. However, if you are using the "Delete Item" wizard, then you must report those last copy titles to TdS!

How do I handle lost/missing items

In last month's newsletter, we discussed what to do with items that you wanted to discard because they were damaged beyond repair but couldn't immediately be deleted because the patron was billed for damage. This month we'll focus on how the system handles lost or missing materials.

There are certain “locations” (item statuses) that were setup for automatic system functions —such as LOST, LOST-CLAIM, LOST-ASSUM, LOST-PAID, and MISSING. When you can’t find an item on the shelf, use the “Mark Item Missing” wizard rather than manually changing the location to LOST. If a patron has lost the item, use the “Mark Item Lost” wizard. If a patron says they returned the item, use “User Claims Returned” wizard. As you use the circulation toolbar wizards to handle these special circumstances, the system will automatically change the location (status) for you--just like it automatically changes the location from ON-SHELF to CHECKEDOUT when you charge a book.

And how were you to know that it’s best not to manually change an item to these special status locations? You wouldn’t! There is nothing in the list of locations that would clue you in. Learn as we go! Maybe we need a warning sign “Student Driver!”

Where did the $$ go on fines/bills?

There is confusion about where to find information about fines and bills on the user record. When you click the *Checkouts* tab of the user record, most of you are not seeing the entire window. Pull down on the blue scroll bar and you’ll see a “display options” section. For “type of checkout”, select ALL. Once a charged item has gone through the billing cycle and is LOST-ASSUM, it becomes an *“inactive”* checkout.

When you see a dotted line under a field, it means that you can get additional information by clicking on the field. In the *Checkouts* tab, the item ID is underlined. If you click the item ID, you’ll get detailed information about the when and where of the checkout, plus fines and billing information.

When an item is returned, you would find fines and billing information under the *Bills* tab. Scroll down to the display options section, and select “Bills” ALL. In the *Bills* tab, the “owes” column has a dotted underline. Click the “owes” dollar amount to get detailed information. about bill payment.

Partial payment of bills

It is possible to accept partial payment of a specific billed item. From the circ toolbar, click the Pay Bill Wizard. Identify the user. A list of individual bills and payments appears on the lower portion of the screen. Note that the payment column as a recessed square. Click on the billed item that the patron wishes to pay. The item will be highlighted. Enter the amount to be paid. This amount will appear in the payment column, with black type on a white background. Click button “Pay Bills”. If the patron wishes to do a partial payment on another item, click the “Pay more bills” button. Again, the payment column will have a recessed square. Highlight the item and repeat the process of entering a dollar amount and click the “Pay bills” button.

How do I backdate discharge

Oh no! You forgot to tell Jeanne that you’re closed on Veteran’s Day, and you have tons of items that are due that day, and patrons are going to be really mad if they are fined. Take a deep breath. Then, use backdate discharging. The name for this wizard is actually *Checkin Bookdrop Items*, and it is found under the tornado group in the circ toolbar. The icon is a bookdrop (which actually looks like a mailbox). This wizard allows you to set the date of discharge to an earlier date. Whew! No fines.

But, with the many holidays coming up, please verify your open/close schedule and send it to Jeanne. The way our system is configured, the actual open hours of operation don’t matter, but days open/closed *do*.

What User profiles are “forbidden” (system use only)?

ADMIN
ADMIN-LITE
PUBLIC
ILL (this is for TZT use only)

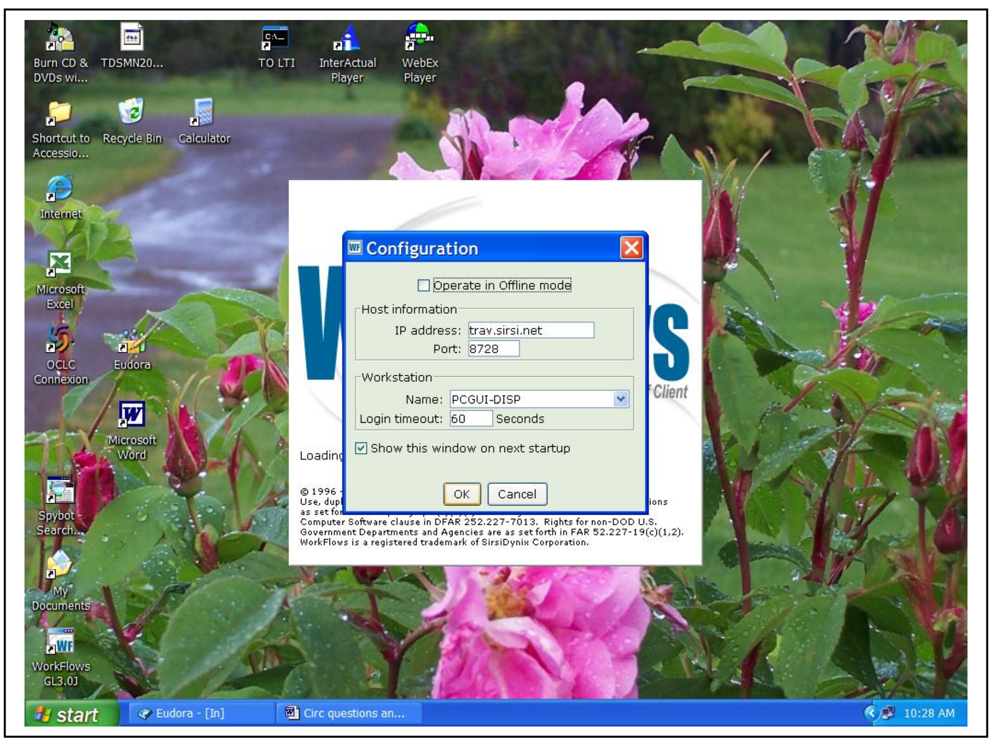
LIB-ILL (TZT only)
INTRANSIT
RESERVES
SCANNER
SIPCHK
SIRSI
SPEC-IDS
SVA
WEBSERVER
TZT-(anything)--these are for TZT's interlibrary loan stats
anything starting with a W.... or a Z..... (these are for specific internal system functions!)

How do I generate a pickup notice for an ILL item?

When an ILL item arrives from TZT, place a HOLD on the item. (Make sure that the pickup location is defaulting to your library and not TZT). Then immediately TRAP the hold. This will then generate a notice for the ILL item the next time the pickup notices are run. (Note: For ILL items, you do **not** need to do a receive item in-transit.) This procedure will change when we implement NCIP for ILL transactions.

Why am I getting strange due dates?

Occasionally the system acts like you are logged in as TZT instead of your own library. If this is happens, close WorkFlows, and re-open, logging in with your CIRC login. (You might have been logged in under the REPT login instead of your CIRC login.) Also check to make sure that the configuration screen has not been altered. It should ALWAYS be "PCGUI-DISP", or your “Named” station, if configured for such. If it is anything other than that, the system may act like it is TZT, and all the charge stats will belong to TZT. The configuration screen should **NEVER** be altered.



How do I load a temp card for a patron?

When you load a patron with a user profile of TDSTEMP1, TDSTEMP2, or TDSTEMP3: Enter the alt user ID, as you normally would. You no longer need to use a prefix of TEMP in front of the alt ID. When the permanent card is issued by the home library, use the LOSTCARD wizard to move it from the temporary barcode to the permanent barcode. This will move the checkouts, bills, etc. which may have accumulated on the temporary card to the permanent card. Remember to change the library from the temporary library to the permanent library.

When should I use "Suspension"?

NEVER. Do not use the "Suspend User" wizard (under the User Information and Maintenance group). We just discovered that there is no way to undo a suspension, other than to let time run its course. I suppose there are times when it could be very useful--but it would be an exceptional circumstance rather than normal library routine. Just wanted to alert you to this. This function has now been blocked.

How do I stop holds on new items going to branches?

There is a special "library card number" for each library for inprocess materials. When you charge an item to, for example TLSINP, the item will not be available for holds until you discharge it and put it on your shelf. In OPAC, the item will say "InProcess" rather than "Checked out". So, charge materials to xxxINP (xxx=your 3 letter library code). (The "library card number" IS actually, for example, TZTINP or TMAINP.)

WorkFlows Tips

Make sure you are doing a general *keyword* search. If you are searching for author and title, put *and* between the title word and author word. Here's an example of a general keyword search for author/title: *Winspear and birds.* It immediately pulled up the record for *Birds of a feather* by Jacqueline Winspear!

There is no browse search of the general keyword index. In PALS the keyword index was browsable. In Sirsi, it is not. It will flip you over to a subject browse search instead. Do you know about the binoculars? When you do an item search, the first icon in the window allows you to limit your search. Once you get a results list, those little icons in the upper left of the window change. It's fun to click on them to see how it changes the display, both from a list of records and from a single record display.

Did you know? F2 = Check Item Status; F4= Item Search; F5=Checkout; F7=Renew User Chgs; F9=Place Hold; F11=Register User. SH/F5= Discharge wizard.

See those "radio buttons" at the far right? And how they don't change back when you move from Item (Exact) to Author (Keyword)? Well, if you have your search up and then touch the ALT key, a line appears under the radio buttons and then you can ALT + K for keyword or whatever.

You can look up a patron by phone number if you leave out all the dashes. Did you know you can use the $ sign as a truncation symbol to search for a partial name or partial user ID? For example JOHNS$ or 2060$.

Your WorkFlows desktop preferences needs to be set correctly in order to see all serial holdings in an edit pane. On the top bar of WorkFlows, click on Preference. Point to desktop, and then desktop setup. Click on Desktop Setup. Change the max response size to a million: 2000000. Click OK. Close and restart WorkFlows to put the change into effect. This will now be your default setting, and it shouldn't be necessary to up that max size again any time soon.