Bibliovation™

User Manual

Bibliovation Library Services Platform
version 7.2

Latest update: April 12, 2023

LibLime
Empowering Librarians

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Version Changes

Changes between Version 7.0 and Version 7.2

2.4.5 Facets updated v. 7.02.06

2.6.2 Performing a Graphical Search updated v. 7.02.06

removed 4.2.1 Global Cap on Checkouts (deprecated)

removed 4.11.2.7 Paging for Holds Display (deprecated)

4.12 Call Slips, Document Delivery, and other RFI Forms updated v. 7.02.x

4.2.2 Getting a Supervisor Override updated v. 7.02.06

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5.2 Creating a Patron updated v. 7.02.11

5.12.4 Patron Delete Tool updated v. 7.02.17

5.13.8.3 Checking Out Lost Items to Another User new in v. 7.02.10

6.3 Assigning Roles in the Individual Patron Record updated v. 7.02.06

9.3.9.1 Searching, Exporting, Removing Attributes updated v. 7.02.22

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13.1.6 Acquisitions System Preferences updated v. 7.02.06

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17.14 Call Slips and Document Delivery updated v. 7.02.x

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Purpose

The Bibliovation Library Services Platform application is a feature-rich, scalable, web-based application used by organizations to place valued collections under intellectual control, while providing a means for the inventorying, cataloging, describing, indexing, searching, and requesting of any type of materials. The full Bibliovation system includes the digital object component; the ILS-only production version is LibLime Academic Koha.

This User Manual covers each module of the application and offers step by step instructions for how to configure key features and provides instructions for feature use. The User Manual is updated on a regular basis as features or screens change.

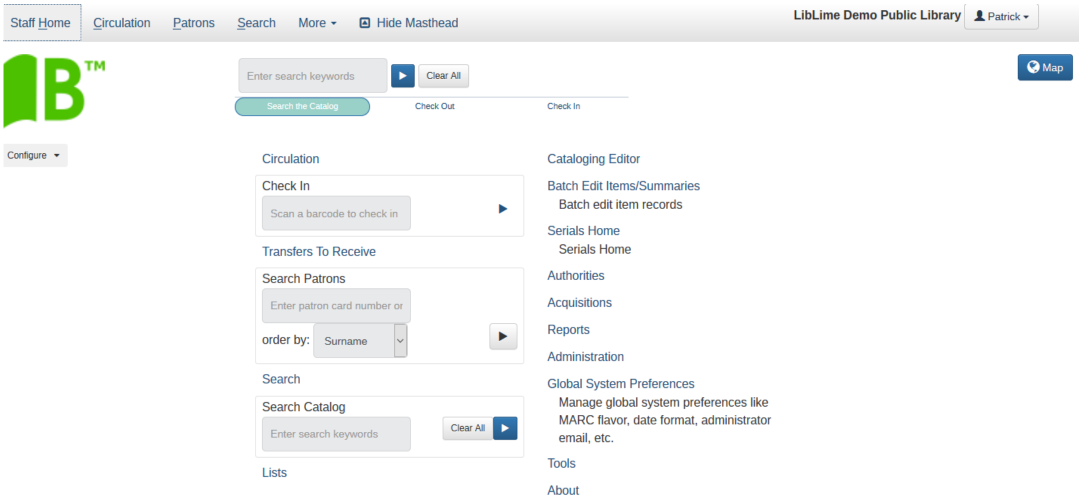
There are two interfaces to the application, the staff client (for staff) and the Discovery Layer (for patrons). The main focus of this User Manual document is the staff client, but Discovery Layer functions are covered as well. Two additional manuals, the Discovery Layer Customization Guide and the Superlibrarian Training Guide are intended for system administrators, not general staff users.

Note that some of the underlying code libraries have been updated in previous versions. This will result in slightly altered screen displays; not all screenshots have been updated. Some local customizations may need to be redone. Also note that as a general rule, any configuration change will require users to refresh the browser. Some may also require a cache clear before the change shows up. If you aren't seeing a change, refresh your browser and/or clear your cache. Some settings are cached on the server end; it may take up to 3-5 minutes before those changes are reflected in a browser refresh.

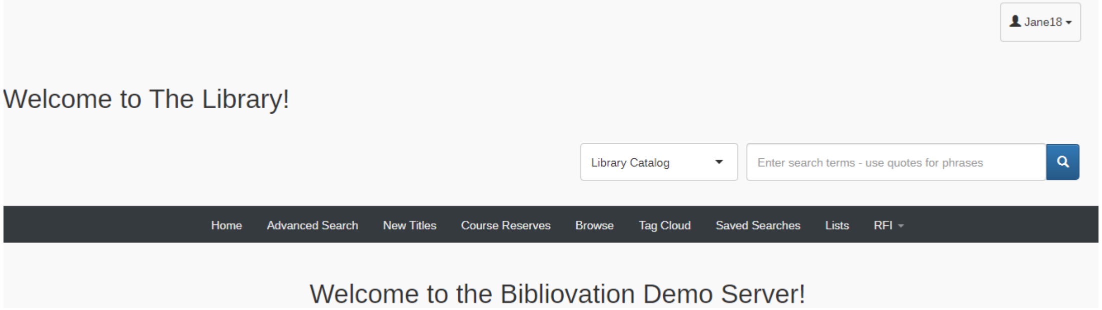
1. Log in to Staff Mode

When staff users first log into the system, the opening screen has information and menu options; these options vary based on the user's permissions. Unlike earlier versions, the same URL is used for both staff and patron logins. The user greeting page clearly shows which user is logged in and provides links only to areas the user is permitted to access. **NOTE: a user can log in either with the defined userid (DL Login field) or the cardnumber – if the value entered does not match the DL Login, it will try to match against a cardnumber.**

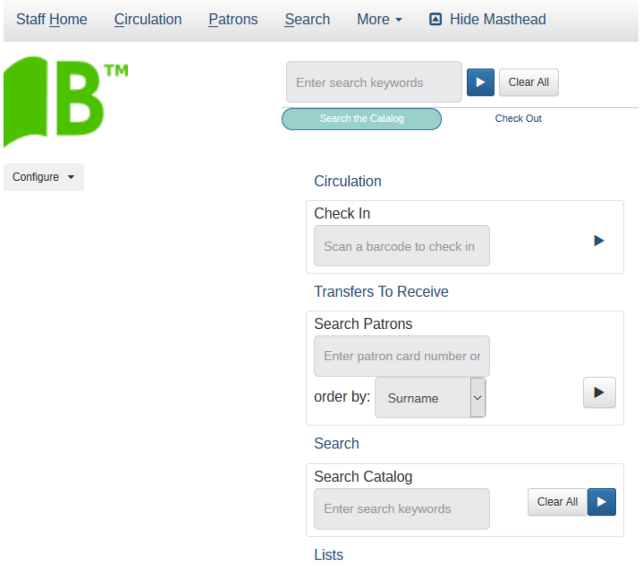
The first user greeting page, shown below, is for a user with full access to the entire system. This person can access any staff module, including the full administrative suite. This user can also initiate a bibliographic search from this page via the Search Catalog option.



The second user greeting page, shown below, is for a public user with limited access to the system. Note that no links to any staff functions are provided. This user can initiate a search against the database from the masthead search box which defaults to Library Catalog (keyword), or by going to the Advanced Search link.



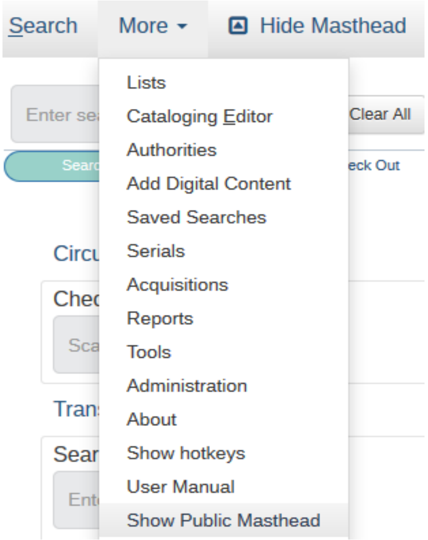
The third user greeting page, shown below, is for a junior circulation librarian. This person has access to circulation, lists, and patron functions, but no other functions.



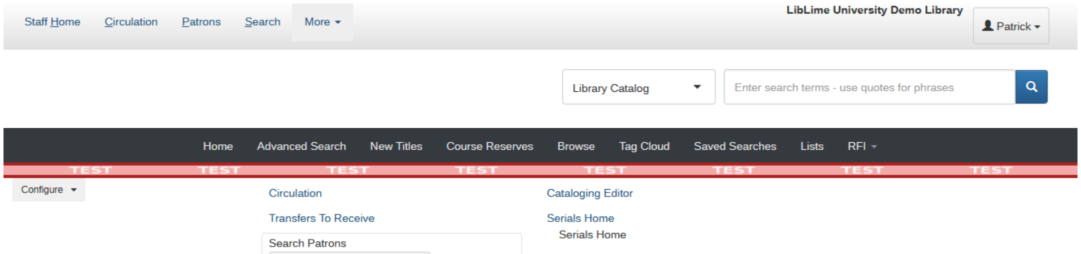
For all staff users, the top menu bar is available throughout the staff client screens – the "More" menu has links to most of the functions listed on the main page. The staff masthead has tabs for searching the catalog and for starting a checkout (options vary depending on what screen you are on).

1.1 Toggle Between Staff or Public Masthead

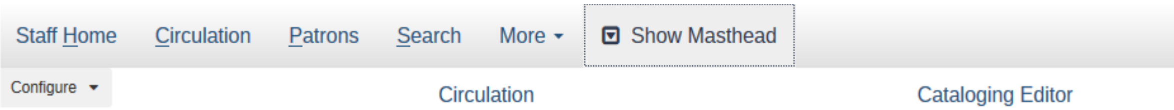
Staff users can toggle between the staff and Discovery Layer masthead for more functionality as needed. Under More, click Show Public Masthead:



The top bar and main menu options remain the same, but the masthead changes to the public view:



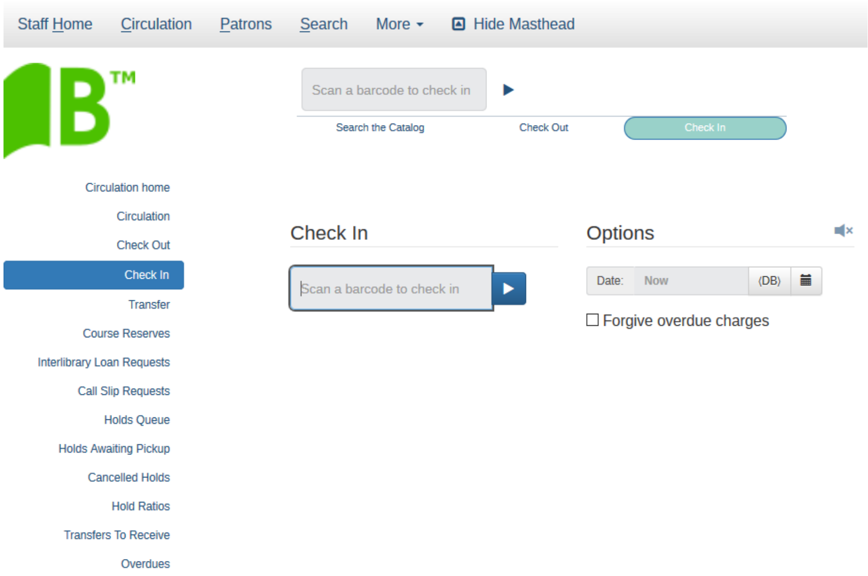
Click More, Show Staff Masthead to toggle back to the staff view. Staff can also minimize the staff masthead with the Hide Masthead toggle (next to the More pulldown). You can bring it back with the Show Masthead toggle:



Note that the masthead can be hidden automatically by certain functions, including the Cataloging Editor. You can always bring it back with the Show Masthead button if needed.

1.2 Navigation

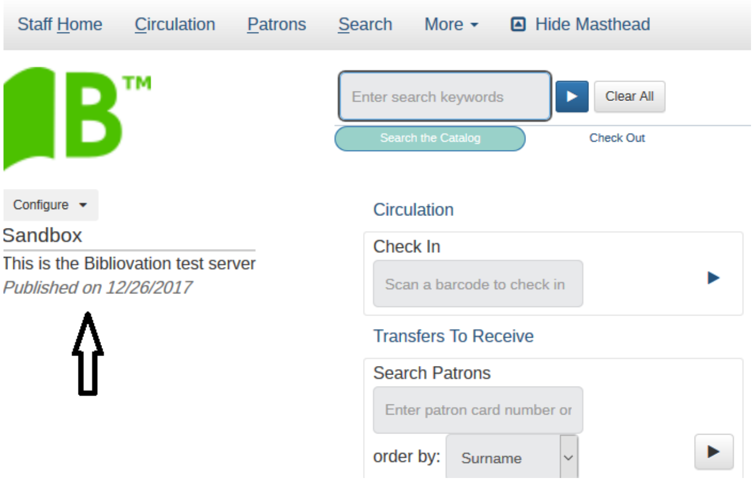
As you navigate through menus and submenus, you will see a sidebar menu relevant to the module you're in. Click any of those links to move to a different area of the module.



You can always click the Staff Home link in the masthead to return to the main page, or click More to move to a different module.

1.3 News Items

If you have permissions, (see the Creating a Staff Patron and Setting Granular Permissions section) you can create News items to display messages and notes for staff.

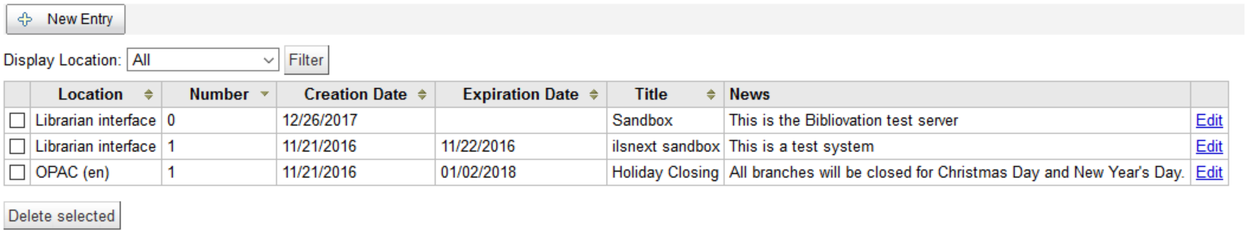


Sandbox

This is the Bibliovation test server

Published on 12/26/2017

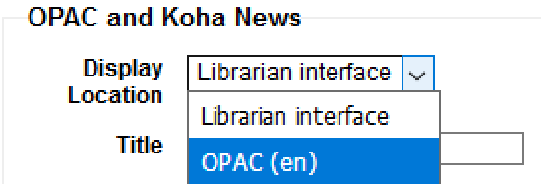
To access News items display messages and notes for staff, go to Tools, News. You can edit existing news items, delete items, or create a new one. To edit, click the 'Edit' link in the last column of the display. To delete, check the selection box and then click the 'Delete selected' button.



Display Location: All

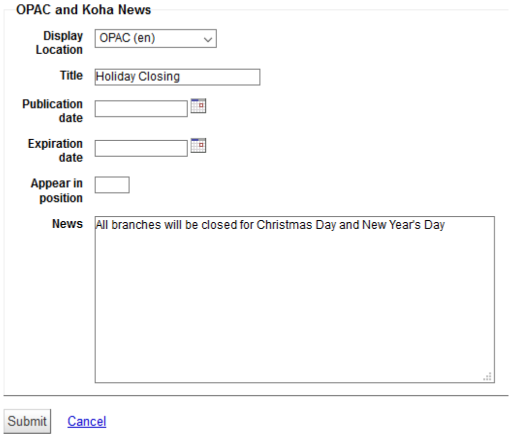
	Location	Number	Creation Date	Expiration Date	Title	News	
☐	Librarian interface	0	12/26/2017		Sandbox	This is the Bibliovation test server	Edit
☐	Librarian interface	1	11/21/2016	11/22/2016	ilsnext sandbox	This is a test system	Edit
☐	OPAC (en)	1	11/21/2016	01/02/2018	Holiday Closing	All branches will be closed for Christmas Day and New Year's Day.	Edit

To create a new news item, click the New Entry button. First choose whether the item Display Location should display in Librarian interface (staff mode) or OPAC (Discovery Layer).



Then fill in the rest of the fields. Publication date will default to the date of creation. You can specify an expiration date, after which the item will no longer display. If it's an item that should display indefinitely, you can leave the expiration field blank. (This is a change from earlier versions.)

Position is meant to determine the order in which items display; you can leave it blank if you only have one item. The News field is the text for your message.

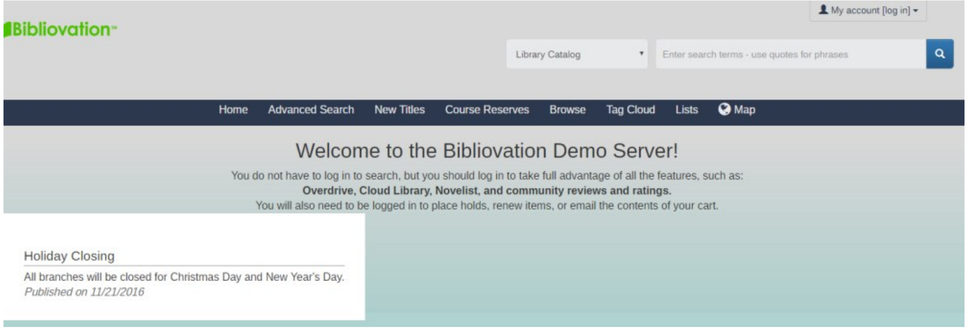


Display Location: OPAC (en)

Title: Holiday Closing

News: All branches will be closed for Christmas Day and New Year's Day

Click the Submit button to save your message, or Cancel to cancel it. To check staff messages, go to the staff client home page (first screenshot in this section). **NOTE: You will need to refresh your browser to see changes.** For DL messages, go to your Discovery Layer interface:



Welcome to the Bibliovation Demo Server!

You do not have to log in to search, but you should log in to take full advantage of all the features, such as:
Overdrive, Cloud Library, Novelist, and community reviews and ratings.
You will also need to be logged in to place holds, renew items, or email the contents of your cart.

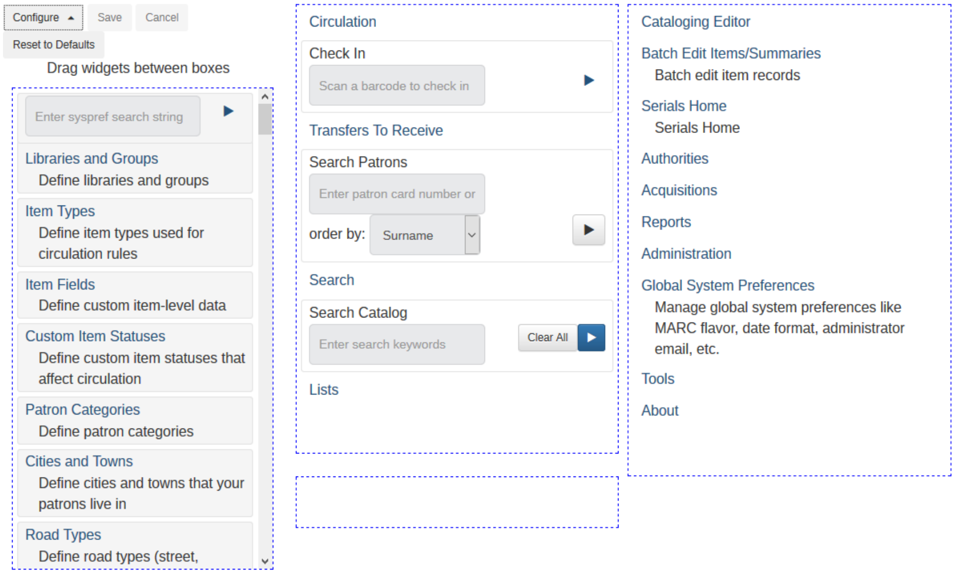
Holiday Closing

All branches will be closed for Christmas Day and New Year's Day.
Published on 11/21/2016

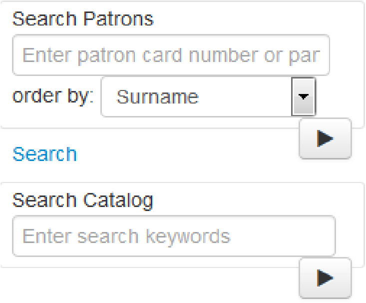
If you have any main page text configured for your Discovery Layer (such as the "Welcome" message above), it will display before the news items. See the Discovery Layer Configuration Guide for how to change that if desired.

1.4 Custom Menu Configuration

If your system administrator allows it (in Discovery Layer configuration editor, under Performance/Authentication, Configurable staff home), staff users may configure their own menu layouts. You will see a Configure button in the upper left corner of the main staff menu. Click it, and you will get three columns of options:



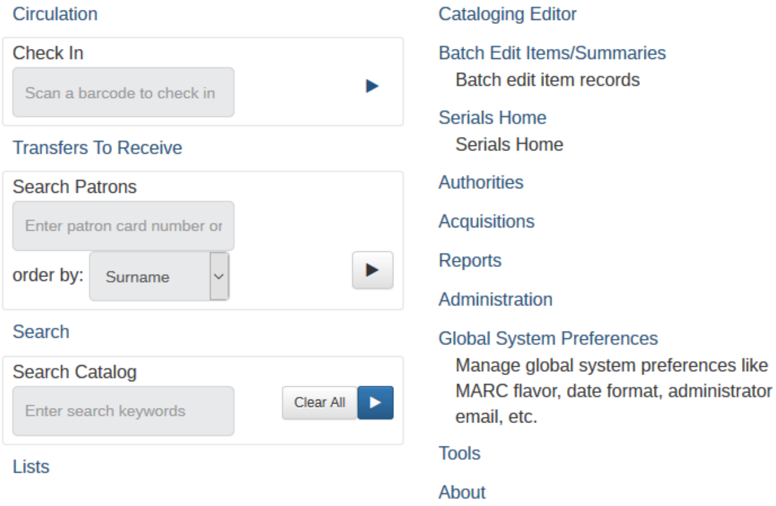
The available options are at left, based on the user's permissions. Users can drag widgets in and out of the three right-hand columns to design a menu that suits their needs. Some widgets are search boxes such as patrons or bib searches:



Others are links to specific menus or actions, such as Lists, Reports, etc.

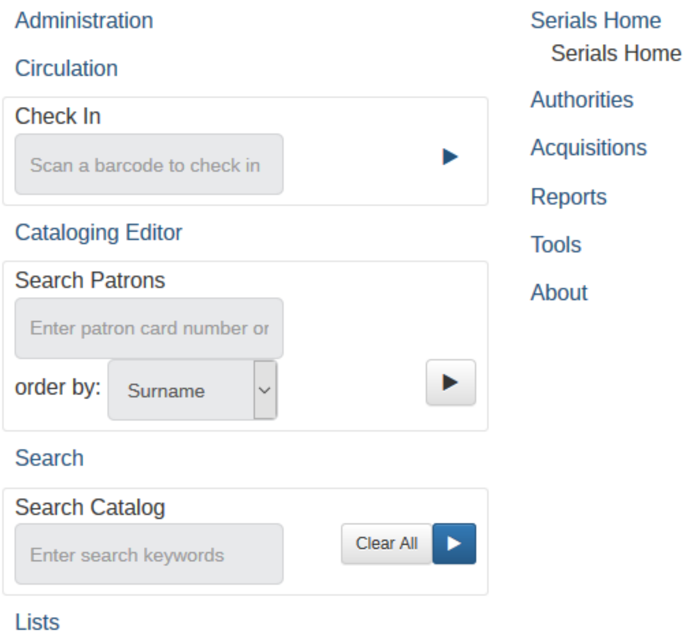
You can save your settings by clicking the Save button at upper left, or cancel. If you haven't made any changes, clicking the Configure button will turn off the configuration display. You can also reset the interface to the default if you change your mind later.

Here's an example of a change, to remove certain links and move others around. The default staff interface for someone with full rights looks like this:



Manage global system preferences like MARC flavor, date format, administrator email, etc.

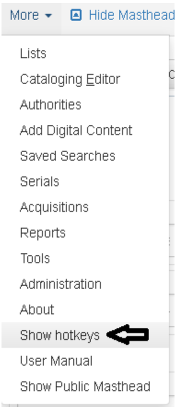
This user has chosen to remove some links and move others around on the screen:



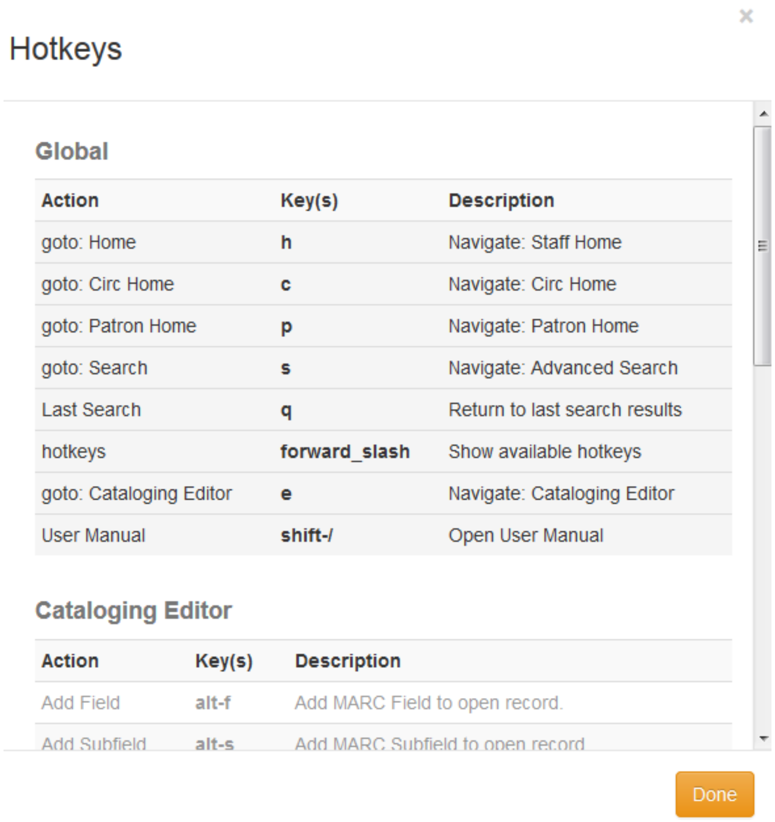
Only users with individual logins should configure a custom menu. If a login is shared (for example, a generic circdesk login), anyone changing the menu will affect everyone who uses that login. In those situations, all users should agree on a change first.

1.5 Hotkeys

Previously, hotkeys were available only in the Cataloging Editor. Now, certain key strokes or hotkeys are configured to for system-wide actions. You can see available hotkeys from anywhere in the application. Go to More, Show Hotkeys, or use the hotkey forward slash (/). (Press the Escape key or click somewhere outside the data entry fields so that no field has focus. Then type a forward slash.)



A popup window will show available shortcuts:



Global

Action	Key(s)	Description
goto: Home	h	Navigate: Staff Home
goto: Circ Home	c	Navigate: Circ Home
goto: Patron Home	p	Navigate: Patron Home
goto: Search	s	Navigate: Advanced Search
Last Search	q	Return to last search results
hotkeys	forward_slash	Show available hotkeys
goto: Cataloging Editor	e	Navigate: Cataloging Editor
User Manual	shift-/	Open User Manual

Cataloging Editor

Action	Key(s)	Description
Add Field	alt-f	Add MARC Field to open record.
Add Subfield	alt-s	Add MARC Subfield to open record

The top section shows hotkeys that work throughout the application. The next section shows hotkeys that are specific to the Cataloging Editor. If a hotkey is not functional in your current location, it will be grayed out.

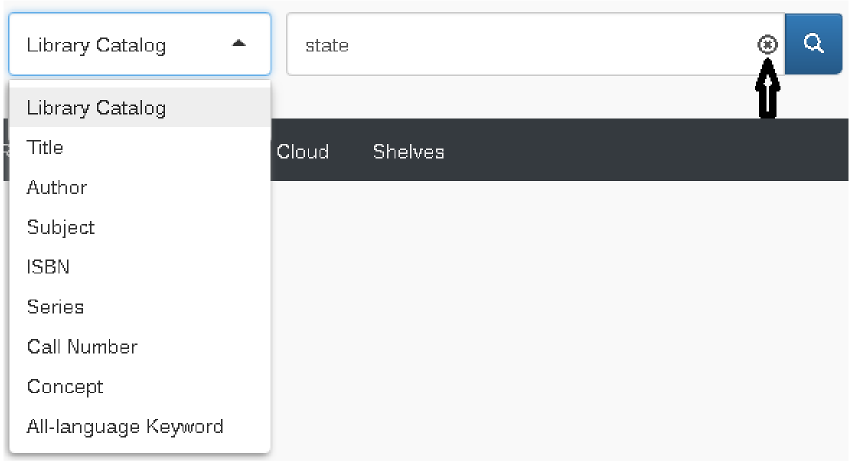
2. Searching

You can search for bibliographic records in a number of ways. The search areas offered will vary slightly in appearance and display, based on user permissions, but all searches are conducted in a similar manner. **If a user is logged in when a search is performed, the search query and results are cleared when the user logs out.**

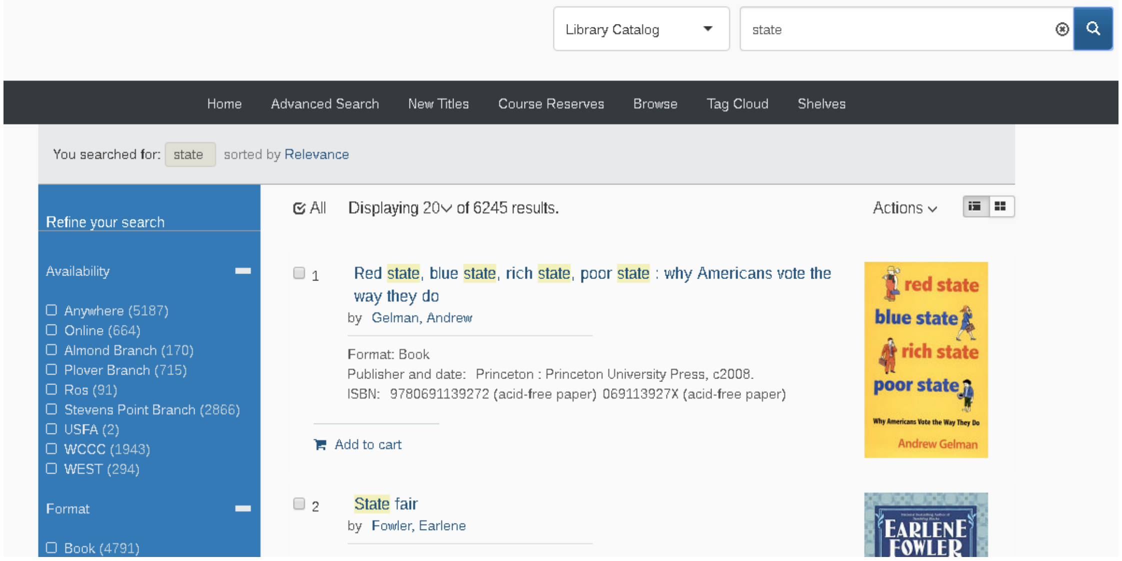
2.1 Basic Search

Users with public access can perform basic searches via the Discovery Layer masthead. Search terms can be entered into the box provided. Searches can be narrowed using the dropdown choices provided by choosing one of the choices within the pulldown list. The default is a keyword search of the entire Library

Catalog. Sites can configure which indexes are available for search in the Discovery Layer Configuration Editor (see the Discovery Layer Configuration Guide for more information).



Search terms and facet selections are persistent but may be cleared from the box by using the circled X in the upper right of the search box (previous versions had a separate Clear button). The search results will remain on the screen. For example, a results set might look like this:



You searched for: state sorted by Relevance

Displaying 20 of 6245 results.

Availability

☐ Anywhere (5187)
☐ Online (664)
☐ Almond Branch (170)
☐ Plover Branch (715)
☐ Ros (91)
☐ Stevens Point Branch (2866)
☐ USFA (2)
☐ WCCC (1943)
☐ WEST (294)

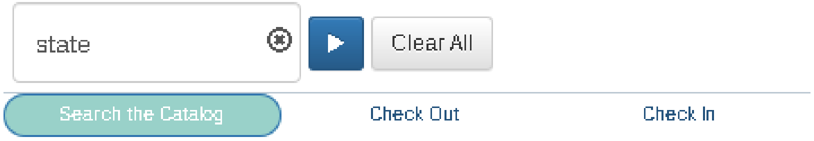
Format

☐ Book (4791)

☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do
by Gelman, Andrew
Format: Book
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)

☐ 2 State fair
by Fowler, Earlene

Staff users will see a persistent search bar atop each screen. This search bar includes a search box for search terms and three tabs, labeled Checkout, Check In, and Search the Catalog, respectively. The tabs active or available may change depending on what module is currently on screen. As with the public search box, search terms are persistent but may be cleared by clicking the Clear All button



The staff search box is a keyword search of the entire catalog; more targeted searches are available on the Advanced Search page.

As mentioned above, staff users can toggle between the staff search bar (masthead) and the public version. Each has different options. Certain screens and functions may hide the masthead; it can be restored by clicking the Show Masthead link in the top menu bar.

2.2 Advanced Search

The Advanced Search screen allows for more search options and increased precision within the search results set. Users can select multiple search options, such as Title and Author, and limiters as desired. Depending on system configuration, users may limit a search by:

- Library: (common in a multi-branch system)
- Item Type: (book, manuscript, DVD, Video)
- Collection Type: (Fiction, Non Fiction, History, Reference)
- Shelving Location: (Upstairs, Downstairs, Basement, Storage)

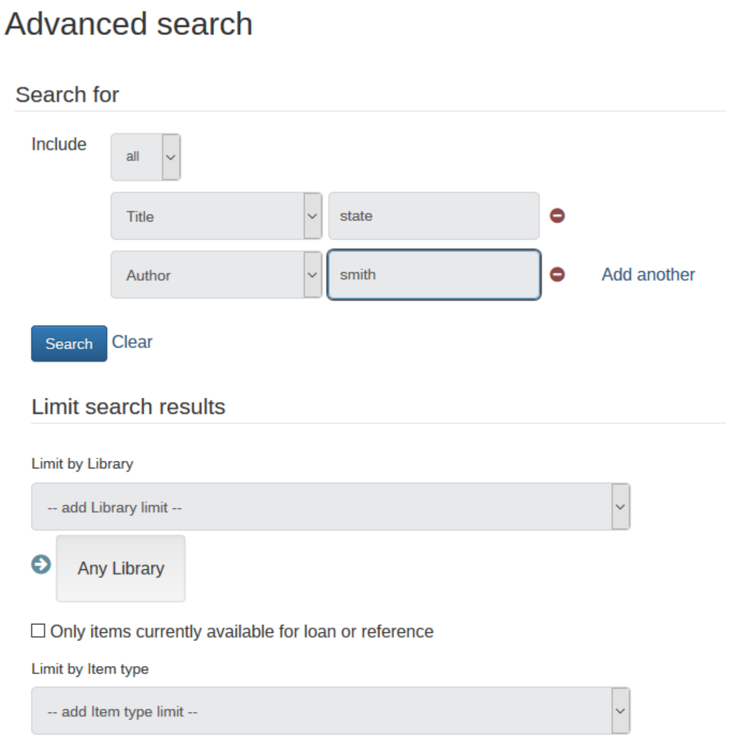
Other limiters are possible, and additional indexes can be added to the search box pulldowns if desired. See the Discovery Layer Customization Guide for setup information.

Be aware that both staff and patrons use the same Advanced Search page, so any customizations will affect both sets of users.

Users can do combined searches (e.g., title and author) by adding search fields at the top. Users can also limit searches to particular branches, item types, or other selectors as desired.

Two options (Limit by Loaded Date and Limit by Creation Date) allow searching against digital object file dates on full Bibliovation systems. These also search bibliographic data (Creation Date comes from the 260$c and Loaded Date from the 260$g) so they can be used for systems without the digital object module as well.

Search entries are persistent – they will remain if the user comes back to the Advanced Search screen later. Click the Clear link to clear previous settings.



Advanced search

Search for

Include: all

Title: state

Author: smith

Limit search results

Limit by Library: -- add Library limit --

Any Library

☐ Only items currently available for loan or reference

Limit by Item type: -- add Item type limit --

2.3 Truncation, Wildcard, and Direct Index Searching

See Appendix 2 of this manual or http://lucene.apache.org/core/2_9_4/queryparsersyntax.html for more details on searching; here are some tips.

For all searching (basic and advanced), stemming happens automatically (and is mutually exclusive with wildcard searching). The exception to stemming is call number searching. An earlier problem with using the call number index has been fixed, and full call numbers can be searched as entered. However, to search a partial call number against that index, use an asterisk. For example:

JK3516 S73 2006 or JK3516 S73* but not JK3516 S73 without the asterisk.

Note that stemming will also include related words in the search – “launderer” will also find “laundering” unless you use an asterisk as below.

For example:

- All searches will stem, but records that match the search term exactly will be ranked with higher relevance and be higher in search results. Further, stemming is based on terms, so the words offered in a search result match are going to be related to the search terms; for example:
  - "test" will not match "tester", but it will match "tests" and "testing"
- Using an asterisk (*) will expand stemming and will remove the dictionary logic from the search

  - "test*" will match "test", "tests", "testing", "tester", "testitudinal".

- Adding a question mark (?) to the search term will return results with the search term plus one character, but no more than one character.

  - “test?" will match "tests" but not "test" or "tester"

- To use a wildcard to substitute for one character, put a question mark in the string:

  - “wom?n” will find woman or women

- Putting parentheses around terms will search the words in any order. To search an exact phrase, enclose it in double quotation marks:

  - “united states”

- You can also use an asterisk as an open-ended truncation symbol at the beginning, end, or both of a search term:

  - title:unite*

2.3.1 Other search tips

- What’s the syntax for single character right-hand truncation – nap or naps?
  - nap?
- What’s the syntax for multiple character right-hand truncation – nap or naps or napping?
  - nap*
- What’s the syntax for single character internal truncation – woman or women?
  - wom?n – single character truncation
- What’s the syntax for multiple character internal truncation – woman or woken?
  - wo*n – multiple character truncation
- Is there syntax for left-hand, single or multiple truncation? – stub or tub – ecology or biology?
  - No left-hand truncation.
- What’s the syntax for phrase searching?
  - Place the phrase in quotes, i.e.: "roman empire"

2.3.2 Index Searches

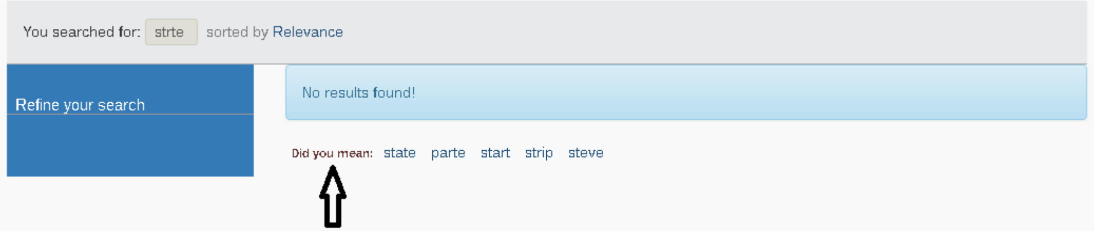
You can search against an index not configured in the pull-down, if you know the index name. For example, to do a manual title search (rather than using the pull-down), you could type title:(united AND states) in a search box. The "title:" portion is the index name. The search term follows; you can use Boolean operators such as AND, OR, NOT (in all caps). You can also combine indexes in a manual search: title:united AND author:smith. See Appendix 1 with a list of Solr index names to identify a particular index.

2.3.3 Digital Object Searching

If your site is configured as a full Bibliovation system with associated digital objects, any search will automatically include searching against digital object metadata or full text of documents. Therefore, if you search for a string that might be in an attached .pdf file, the title record for the .pdf file will show in your search results. This may be confusing to users, since there is no immediately obvious reason for that title to be in the results list. Always check the title for associated digital objects and their content.

2.3.4 Did You Mean

The system will check your search term against an internal dictionary and offer suggestions for alternate terms. The number of suggested terms is controlled by the system preference OPACSearchSuggestionsCount. For example, a search term with a typo ("strte") offers alternate suggestions:



Clicking one of the suggested terms will redo the search.

2.3.5 ISBN-10 and ISBN-13 Searching

A conversion routine now allows searching against both ISBN-10 and ISBN-13 field entries, even if one or the other is not present in the record. For example, searching the ISBN-13 entry 9781558219342 will find a record with only the ISBN-10 entry 155821934X.

2.3.6 Partial Item Barcode Searching

If your site has configured item barcode prefixes for each branch (in the branchcode policy), you can now search for items with just a partial barcode. For example, if your item prefix is 39178, and the item's full barcode is 39178022248523, you can enter a search string of just 022248523. The system will apply the prefix for the branch to which you belong, so this will only work for your own items. You will need to enter the full barcode to find items from other branches.

The barcode has been added to the keyword index to make this work. If entering a partial string produces too many hits, you can isolate to just the barcode by searching barcode:022248523 (limiting the search to that index).

2.3.7 Barcode Search Goes to Item Status Tab

If a staff person searches on a barcode, the system will take the user directly to the Item Status tab for that item, with other items hidden. This will only work for search strings exactly matching the system-defined item barcode length. **NOTE**: The Discovery Layer setting Single Result Shortcut must be enabled or this feature will not work. See the Discovery Layer Configuration Guide.

2.3.8 Searching in Date Field Indexes

These Solr fields can now be searched with partial date strings: action-datetime, modified-datetime, load-date, create-date, timestamp, catdate, acqdate. Previous to this users would have to search on these fields with a full Solr index value like catdate:[2019-08-26T00:00:00Z TO 2019-08-26T23:59:59Z] to find records cataloged at any time on 2019/08/26. Now you just have to search on catdate:2019-08-26, or catdate:2019-08 for the entire month of August, or catdate:2019 for the whole year. If desired, sites can add catdate as a searchable index in the DL masthead or advanced search dropdowns.

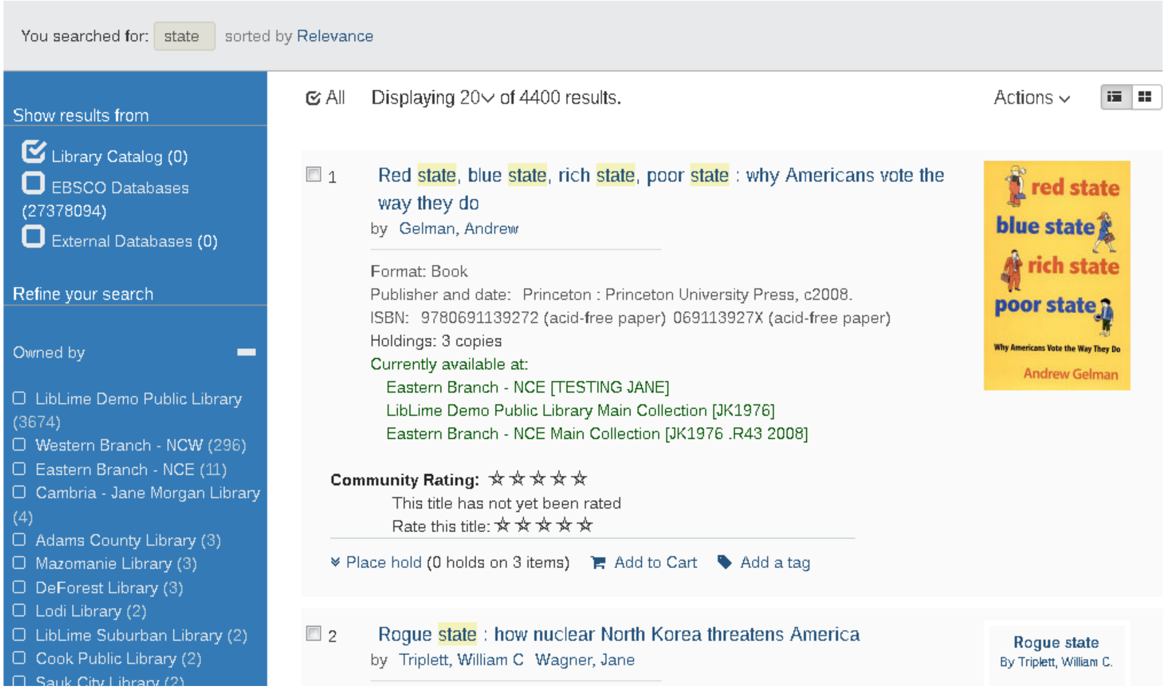
The load and create date indexes are primarily used for digital objects. For the others, acquisition date is the most recent date from the combination of the 856$x, the 952$d, 260$c and biblio.datecreated. The catdate index is just biblio.datecreated (the date the record was created in the system). See the list of indexes in the Appendix.

2.3.9 Slashes and Hyphens

For many sites with technical report bibs, report or other identifying numbers may have been entered inconsistently in the 035, with either hyphens or slashes, such as AB-2020-123-01 or AB/2020/123/01. Searching has been configured to substitute hyphens or slashes, so that searching either variant will find the correct record.

2.4 Search Results

After searching, the user is given a search results set. Both staff and public users see the same results screen.



You searched for: state sorted by Relevance

☑ All Displaying 20⌄ of 4400 results. Actions ⌄

Show results from

☑ Library Catalog (0)
☐ EBSCO Databases (27378094)
☐ External Databases (0)

Refine your search

Owned by

☐ LibLime Demo Public Library (3674)
☐ Western Branch - NCW (296)
☐ Eastern Branch - NCE (11)
☐ Cambria - Jane Morgan Library (4)
☐ Adams County Library (3)
☐ Mazomanie Library (3)
☐ DeForest Library (3)
☐ Lodi Library (2)
☐ LibLime Suburban Library (2)
☐ Cook Public Library (2)
☐ Sauk City Library (2)

☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do
by Gelman, Andrew

Format: Book
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)
Holdings: 3 copies
Currently available at:
Eastern Branch - NCE [TESTING JANE]
LibLime Demo Public Library Main Collection [JK1976]
Eastern Branch - NCE Main Collection [JK1976 .R43 2008]

Community Rating: ☆☆☆☆☆
This title has not yet been rated
Rate this title: ☆☆☆☆☆

Place hold (0 holds on 3 items) Add to Cart Add a tag

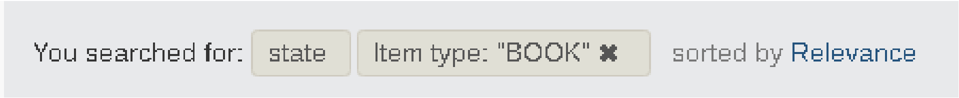
☐ 2 Rogue state : how nuclear North Korea threatens America
by Triplett, William C Wagner, Jane

If the system is configured to use dust jackets from an external source (Google is the most common), images will show where available. If no image is available, a box with title/author will display.

If the system is configured for it (see Discovery Layer Configuration Guide), and there is only one result, the display may go directly into the title display.

2.4.1 Statement of Search Terms

At the top of the results list, you'll see your search terms restated with any facet limiters applied:

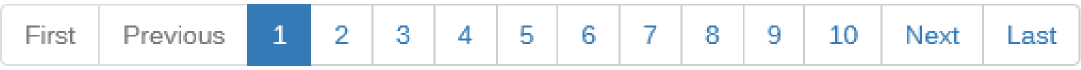


You searched for: state Item type: "BOOK" ✖ sorted by Relevance

If a searcher wants to expand the search beyond the results found in this example, remove the limit on item type of "Book" by clicking the X next to it; the search will be rerun and the result set would, logically, be larger.

2.4.2 Search Results Paging

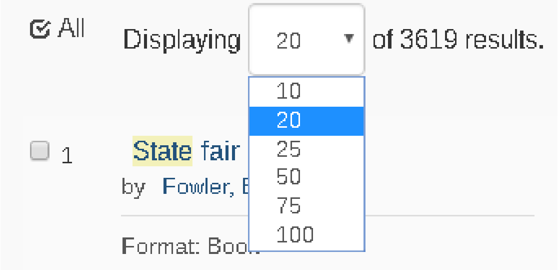
Beneath the statement of the search terms are the search results; at the bottom, a pagination bar allows you to move to the next page of results. In earlier versions, this only showed four page options at a time. Now an option in the Discovery Layer Configuration Editor allows sites to specify the number of pages to show in the pager bar.



By default, 20 search results will display per page; this can be adjusted in the administrative settings (the OPACnumSearchResults syspref) if desired. Users can adjust the number of results per page by clicking the down arrow next to the count:

Displaying 20 of 3619 results.

This opens a dropdown; the user can choose another count:



This is persistent for the current session or until the browser is refreshed. If a user refreshes, log outs, or closes and reopens the interface, it will reset to the system default.

2.4.3 Search Results Screen

The standard results display shows key bibliographic and descriptive information as well as the current availability and location (call number) of items on the list. **NOTE**: For titles with a lot of items attached, the results list will now display only the first three items/call numbers, with a note of how many others there are (e.g., "and 7 other locations"). The first three are displayed on separate lines for better readability.

☐ 3 Rogue state : how nuclear North Korea threatens America
by Triplett, William C. Wagner, Jane Test 700e.
Score: 18.079

Format: Book
Publisher and date: Washington, D.C. : Regnery Publishing, c2004.
ISBN: 0895260689.
Holdings: 11 copies [1 suppressed]
Currently available at:
LibLime Demo Public Library [TEST DEFAULT]
Eastern Branch []
LibLime Demo Public Library Main Video Collection []
and 3 other locations.
Tags from library users: Korea (2)
Community Rating: ☆☆☆☆☆

The titles and item information show in the main part of the screen. The title and author are presented as hyperlinks.

- Clicking on the **title** will display the single title, with further descriptive details
- Clicking on the **author** will result in a new search being run, for all records with that author

The results list also shows number of copies and availability status. If there are no physical copies attached to the title, the results list will omit that section rather than saying zero copies. The previous display was confusing for electronic resources.

NOTE: Availability in this section means that the item is available for checkout or hold. If items are marked as not for loan or otherwise not eligible for checkout, they won't be included in the "available" count.

From this page, a hold can be placed on a title by clicking on the **Place hold** link.

From this page, a title can be copied to a searcher's Cart by clicking on **Add to cart**.

2.4.3.1 View Digital Objects

If the system is a full DLS, the results list will show thumbnails of attached digital objects. Clicking on the thumbnail will open the object in the viewer, as a popup window on top of the results list. See section 3.2 Viewing Digital Objects for more information about the viewer.

☐ 3 COLORADO 1:24000 [V877C LAFAYETTE]

by Geological Survey (U.S.)

Format: Cartographic | Map

Holdings: 1 copy

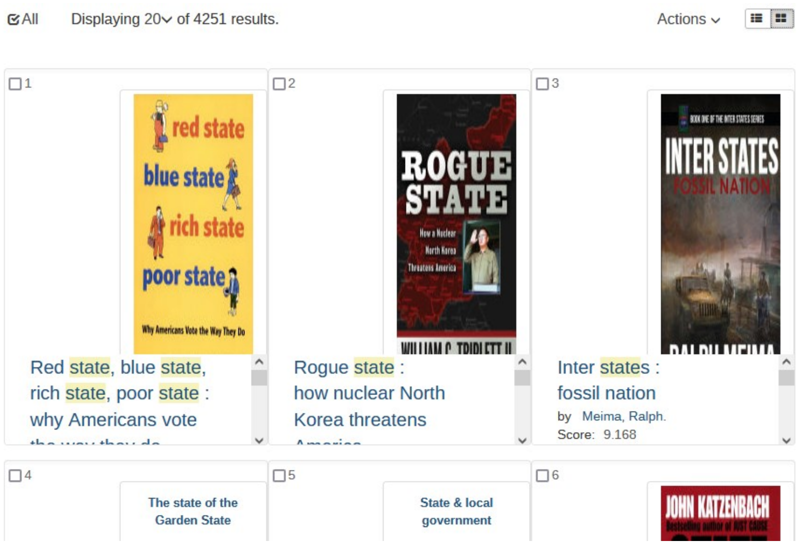
Currently available at:

LibLime Demo Public Library Online []

2.4.4 Display Results as List or Images

At the top of the results list buttons and links offer several options; most are discussed below. Users can switch views of the search results. The standard view is List.

If you switch to Images, this will display the search results with available images (either dust jackets or thumbnails from digital objects):



☐ 1 Red state, blue state, rich state, poor state : why Americans vote

☐ 2 Rogue state : how nuclear North Korea threatens

☐ 3 Inter states : fossil nation

by Meima, Ralph.

Score: 9.168

☐ 4 The state of the Garden State

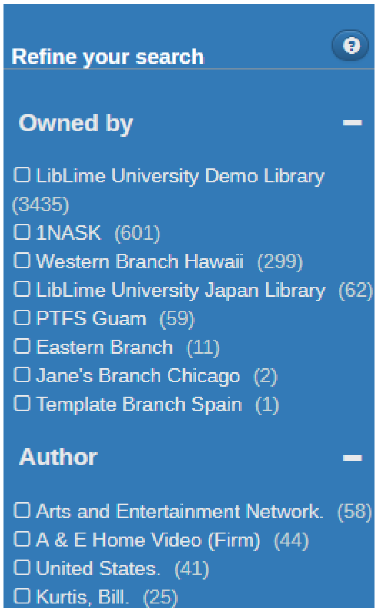
☐ 5 State & local government

☐ 6

A user’s choice is persistent – if you have images selected and log out, then log back in and do another search, images will still be the default view. If a user is not logged in, the choice does not carry over to the next anonymous session.

2.4.5 Facets

To the left of the search results are search facets. These are drawn from various fields in the title and item record, and apply to the entire search results set. Sites can control what facets are used and the display order through the syspref SearchFacets.



Refine your search

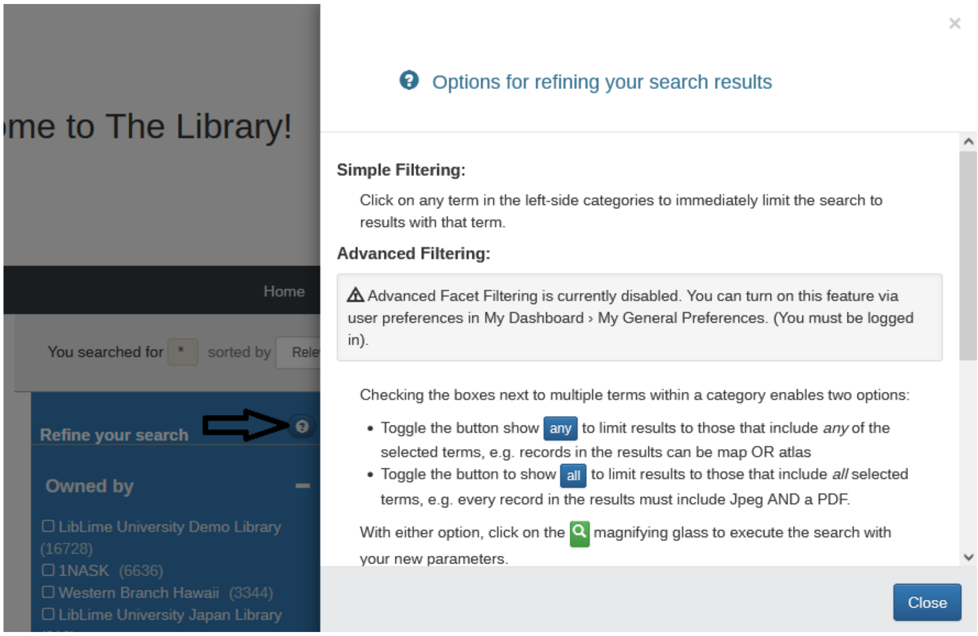
Owned by

☐ LibLime University Demo Library (3435)
☐ 1NASK (601)
☐ Western Branch Hawaii (299)
☐ LibLime University Japan Library (62)
☐ PTFS Guam (59)
☐ Eastern Branch (11)
☐ Jane's Branch Chicago (2)
☐ Template Branch Spain (1)

Author

☐ Arts and Entertainment Network. (58)
☐ A & E Home Video (Firm) (44)
☐ United States. (41)
☐ Kurtis, Bill. (25)

A help button (question mark icon) will produce a popup with some basic tips for faceting:



Options for refining your search results

Simple Filtering:

Click on any term in the left-side categories to immediately limit the search to results with that term.

Advanced Filtering:

⚠ Advanced Facet Filtering is currently disabled. You can turn on this feature via user preferences in My Dashboard › My General Preferences. (You must be logged in).

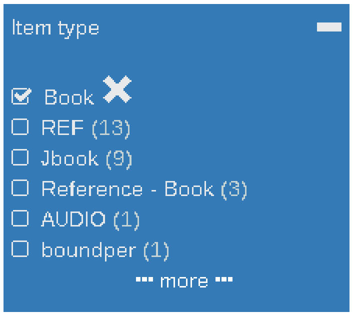
Checking the boxes next to multiple terms within a category enables two options:

- Toggle the button show any to limit results to those that include *any* of the selected terms, e.g. records in the results can be map OR atlas
- Toggle the button to show all to limit results to those that include *all* selected terms, e.g. every record in the results must include Jpeg AND a PDF.

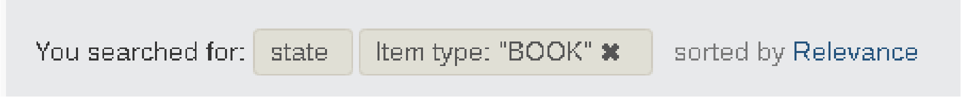
With either option, click on the magnifying glass to execute the search with your new parameters.

Note that there are two indexes you can use for the Availability display. The original one ("on-shelf-at") includes materials that are at the library but marked as not for loan. A new one ("for-loan-at") excludes not-for-loan items, checked-out items, items in transit, and items with waiting holds. Check your library's setup to see which is being used.

You can use facets to filter down results to a smaller group. For example, clicking the Item Type link for Book will limit the search to titles with that item type:



Facets are used to narrow further a search result set. Each facet offered is displayed as a hyperlink followed by a number, which indicates how many records in the current search results set are linked to that facet. Clicking on a facet will re-run the search and return only items with that facet.



You searched for: state Item type: "BOOK" ✖ sorted by Relevance

Clicking the X, either at the top or next to the facet in the sidebar, will remove the facet and redo the search. For large sets of facets, clicking the More link will show more options:

Search Query: *

Sort by: Count

In the popup window, a "Sort by" pulldown allow you to sort the list by number of times the term is used (the default) or alphabetically.

Note that if your results list returns only one or no matches for a facet, that facet will not display. For example, if only one of your records had a subject field, no subject/topic facet would show at left.

NOTE: There is an upper limit of 200 for the number of entries displayed for any facet group. If you do a search with a large results set, facets with few entries may not be displayed. For example, if an author or subject is only used once in the results set, it may not show if the number of more frequently-used terms is large.

2.4.5.1 Publication Date Facet

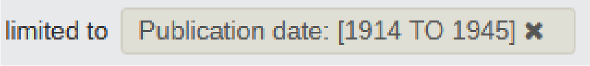
The publication date facet has a decade date range (e.g., 1990-2000) list instead of individual years. (This also eliminates a problem with faceting on incomplete dates (19uu) in fixed field data.) The available ranges are based on the publication dates in the search results.

☐ 2018 (3)
☐ 2016 - 2018 (38)
☐ 2013 - 2016 (163)
☐ 2010 - 2013 (187)
☐ 2000 - 2010 (1418)
☐ 1990 - 2000 (1062)
☐ 1980 - 1990 (943)
☐ 1970 - 1980 (235)
☐ 1960 - 1970 (200)
☐ 1950 - 1960 (50)
☐ 1940 - 1950 (16)
☐ 1930 - 1940 (6)

Users can either select the target decade by clicking the checkbox, or they can enter a custom date range. For a custom range, enter a starting and/or ending year in the YY fields, then click the Refine button. The search results will update based on the year(s) entered. For example, entering a starting year of 1945 and no ending year will result in results limited to publication year of 1945 on:

You searched for: state Publication date: [1945 TO *] ✖ sorted by Relevance

There are some subtle differences in the range, reflected in the appearance of a bracket or curly brace in the above line. A square bracket means an inclusive end, and a curly brace means an exclusive end. With the square brackets, the above example will search everything from 1945 to the present. This example



limited to Publication date: [1914 TO 1945] ✖

will include all years starting at 1914, up to and including 1945. If you select a year range from the facet, the line would show like:

limited to Publication date: [2000 TO 2010} ✖

Note the curly brace ending mark. In this case, the search will include all years starting at 2000, up to but **excluding** 2010. This is basically equivalent to [2010 TO 2019].

2.4.5.2 Authority Term Facets

Facet indexes have been created which use the authority RCN value (not the policy code). The new RCN-aware topic index also includes all 650 subfields (the existing topic index only includes the 650$a). These new facets are redundant with the existing facets of similar name, like topic_facet and genre_facet. The RCN-based facets are more detailed and more precise, but there are possibly circumstances where library patrons would prefer the looser matching of the existing string-based facets. The new faceting indexes are

- author_rcn_facet
- series-title_rcn_facet
- uniform-title_rcn_facet
- topic_rcn_facet
- geo_rcn_facet
- era_rcn_facet
- genre_rcn_facet

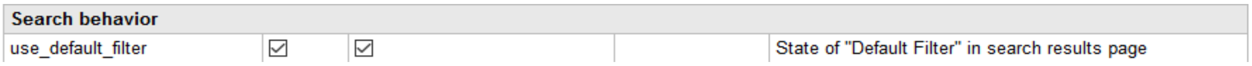
Syntax in the SearchFacets syspref should be like this:

topic_rcn_facet:Topic:rcn-heading

2.4.6 Enhanced Facets for Boolean Operators

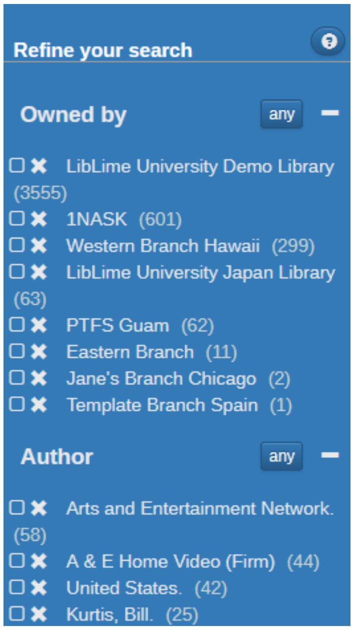
If desired, an individual or Role patron can be configured to use enhanced facet operations. These will allow using facets as Boolean filters (AND, OR, NOT) within a particular facet group. **NOTE**: This feature only allows Boolean operations within a facet group. Multiple facet categories will always be ANDed together, regardless of whether selections within that category are ANDed or ORed. In other words, you could do multiple selections within one facet group, but you can't search for THIS facet group setting not THAT facet group setting (you can't do location X or Y but not item type X).

In the patron or Role record, under user preferences, both checkboxes must be checked for the preference advanced_facets:

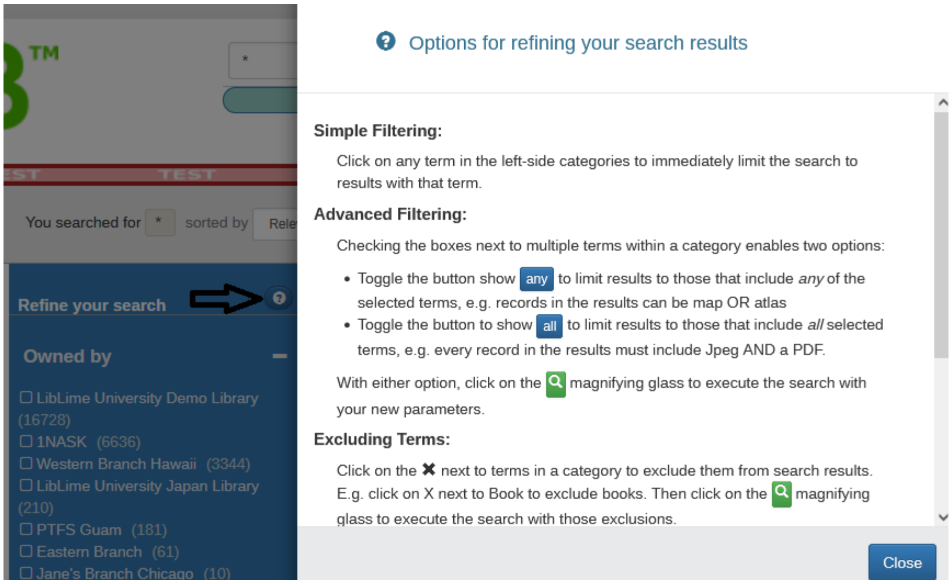


Search behavior				
use_default_filter	☑	☑		State of "Default Filter" in search results page

Then, the facet display on search results screens will have additional options:



As with basic faceting, the help icon at the top will show a popup, this one with tips for advanced faceting:



Options for refining your search results

Simple Filtering:

Click on any term in the left-side categories to immediately limit the search to results with that term.

Advanced Filtering:

Checking the boxes next to multiple terms within a category enables two options:

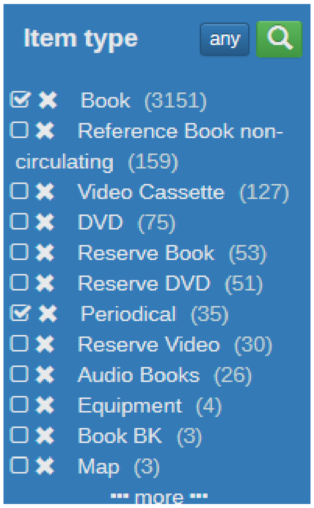
- Toggle the button show any to limit results to those that include *any* of the selected terms, e.g. records in the results can be map OR atlas
- Toggle the button to show all to limit results to those that include *all* selected terms, e.g. every record in the results must include Jpeg AND a PDF.

With either option, click on the 🔍 magnifying glass to execute the search with your new parameters.

Excluding Terms:

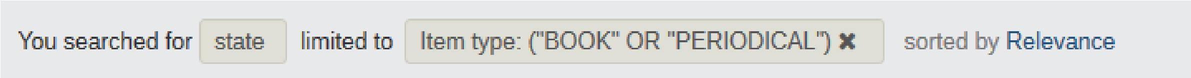
Click on the ✖ next to terms in a category to exclude them from search results. E.g. click on X next to Book to exclude books. Then click on the 🔍 magnifying glass to execute the search with those exclusions.

For most facet groups, you can use the check box next to an entry to select that facet. You can check multiple boxes:

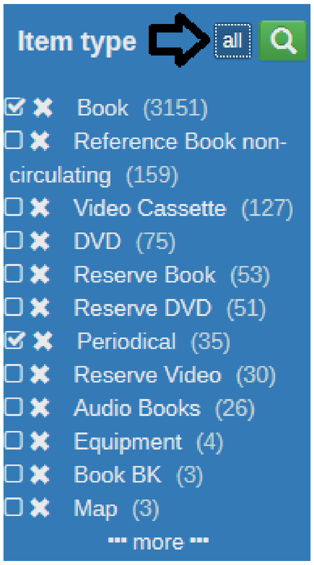


☑ ✖ Book (3151)
☐ ✖ Reference Book non-circulating (159)
☐ ✖ Video Cassette (127)
☐ ✖ DVD (75)
☐ ✖ Reserve Book (53)
☐ ✖ Reserve DVD (51)
☑ ✖ Periodical (35)
☐ ✖ Reserve Video (30)
☐ ✖ Audio Books (26)
☐ ✖ Equipment (4)
☐ ✖ Book BK (3)
☐ ✖ Map (3)

As soon as you check one or more, a green search icon appears at the top of the group. Click that to apply your selections to the present search results:

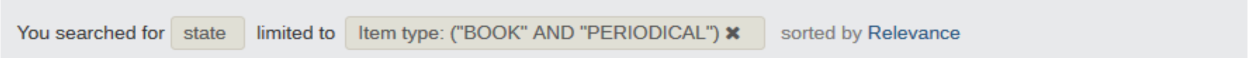

You searched for state limited to Item type: ("BOOK" OR "PERIODICAL") ✖ sorted by Relevance

The default operation is the Boolean OR. To do an AND query, clear the existing group facet selection (the X in the above screenshot). You can leave other selections if you have made any, such as owning library. Then, at the top of the facet group, click the blue Any button. That is a toggle; clicking it changes it to All:



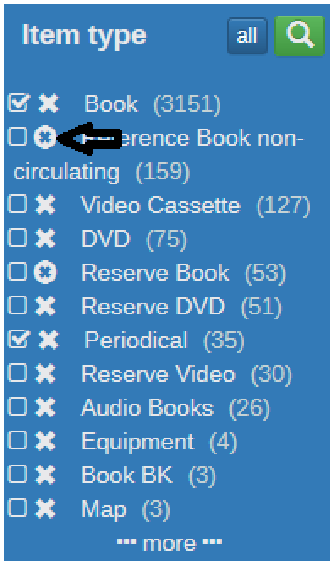
☑ ✖ Book (3151)
☐ ✖ Reference Book non-circulating (159)
☐ ✖ Video Cassette (127)
☐ ✖ DVD (75)
☐ ✖ Reserve Book (53)
☐ ✖ Reserve DVD (51)
☑ ✖ Periodical (35)
☐ ✖ Reserve Video (30)
☐ ✖ Audio Books (26)
☐ ✖ Equipment (4)
☐ ✖ Book BK (3)
☐ ✖ Map (3)

Click the green search button, and your search results will update:

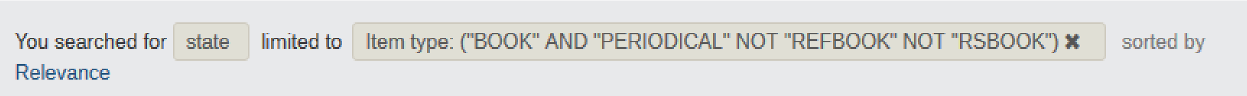

You searched for state limited to Item type: ("BOOK" AND "PERIODICAL") ✖ sorted by Relevance

If you already have a limit applied, clicking any/all won't change the existing limit. It applies to future searches that go on top of the previous ones. You need to remove the old limit and start over if you want to change the logic of a previously applied search.

To do a NOT search, again clear any current group facets from your results list. Then, in the facet group, click the checkboxes for the entries you want, and the X next to the checkbox for the entries you don't want. The X icon changes to a smaller, circled X:



Select the All or Any button as desired and click the green search button to apply:



You searched for state limited to Item type: ("BOOK" AND "PERIODICAL" NOT "REFBOOK" NOT "RSBOOK") ✖ sorted by Relevance

The system will apply any AND or OR terms before the NOT terms. For example, the screen shows a string of

("BOOK" AND "PERIODICAL" NOT "REFBOOK" NOT "RSBOOK")

The system will process that as

("BOOK" AND "PERIODICAL") (NOT "REFBOOK" NOT "RSBOOK")

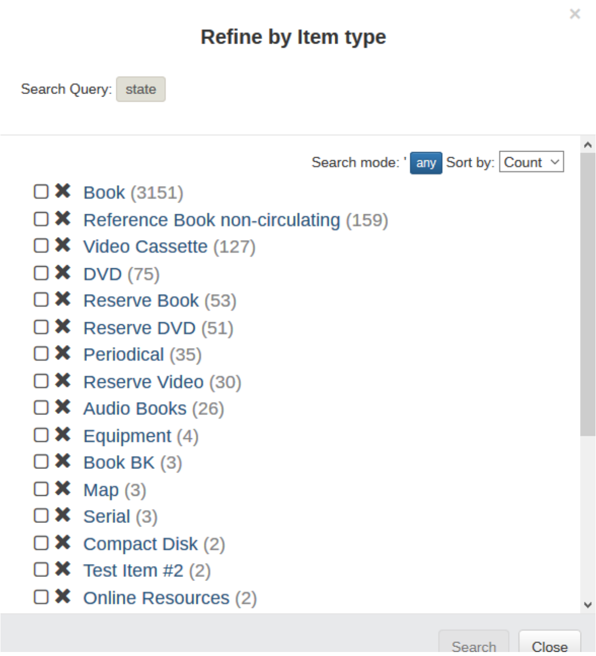
Another example with an OR statement:

("BOOK" OR "PERIODICAL" NOT "REFBOOK")

Is processed as

("BOOK" OR "PERIODICAL") NOT "REFBOOK"

The same faceting options are available in the More popup:



Refine by Item type

Search Query: state

Search mode: ' any Sort by: Count

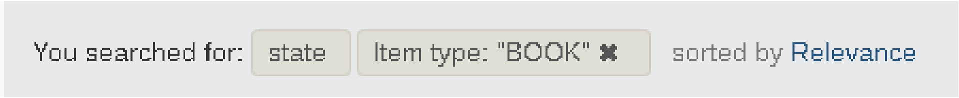
- ☐ ✖ Book (3151)
- ☐ ✖ Reference Book non-circulating (159)
- ☐ ✖ Video Cassette (127)
- ☐ ✖ DVD (75)
- ☐ ✖ Reserve Book (53)
- ☐ ✖ Reserve DVD (51)
- ☐ ✖ Periodical (35)
- ☐ ✖ Reserve Video (30)
- ☐ ✖ Audio Books (26)
- ☐ ✖ Equipment (4)
- ☐ ✖ Book BK (3)
- ☐ ✖ Map (3)
- ☐ ✖ Serial (3)
- ☐ ✖ Compact Disk (2)
- ☐ ✖ Test Item #2 (2)
- ☐ ✖ Online Resources (2)

NOTE: There is optional CSS to change the buttons from ALL/ANY to AND/NOT. See the Discovery Layer Customization Manual.

2.4.7 Sort Order and Relevance Ranking

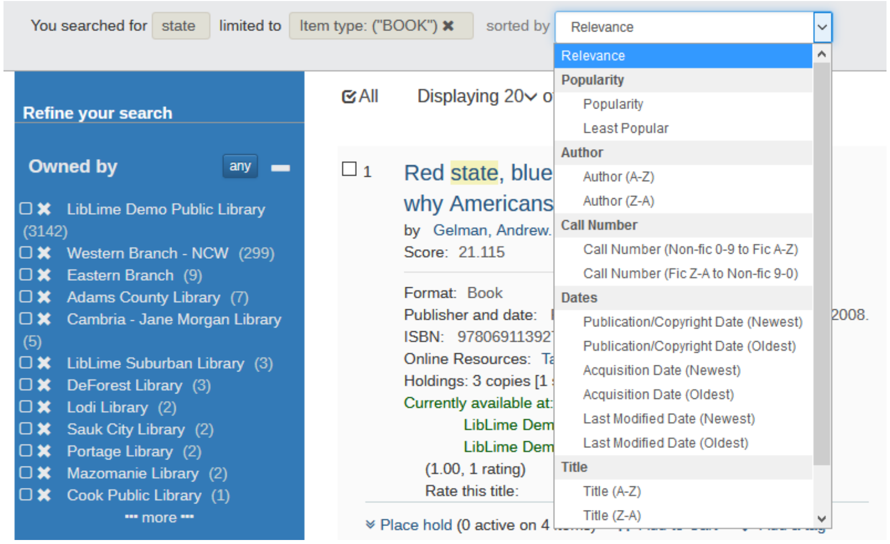
The default sort order is relevance ranking, and that's the best option to use. The Solr search engine is configured to give more weight to records with the search term in specified fields (such as title, author, and subject). Entries with the search terms adjacent to each other will be ranked higher as well. The weighting for keyword goes title - subject - author - isbn - fulltext.

In previous versions, results list sort options have been hard-coded -- sites could not hide unwanted options or add new ones. Now a section in the Discovery Layer Configuration Editor allows sites to specify the sort options they want. Users can sort on the configured options by clicking on the word Relevance in the top line.



You searched for: state Item type: "BOOK" ✖ sorted by Relevance

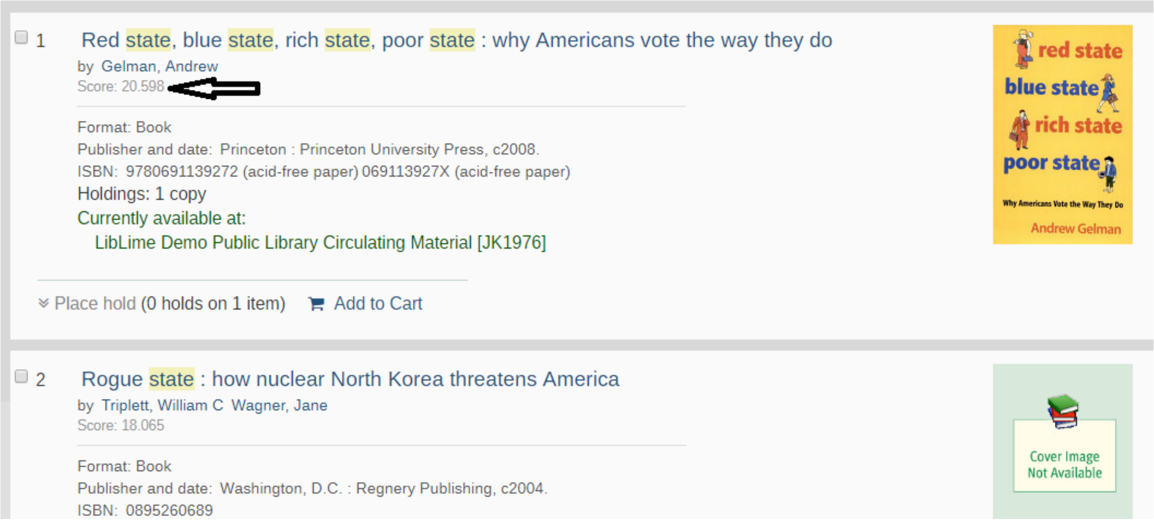
That opens a pulldown with the configured options:



2.4.8 Solr Rank Display

The Solr ranking (the number used by Solr to determine display order in search results pages) is visible by default on the search results page. Sites which do not want to display that can hide it by placing the code below in the CSS Inline Styles section of the Discovery Layer editor (see the Discovery Layer customization guide for more information). **NOTE: This is a change from earlier versions, where the score was hidden by default.**

.score-data { display: none; }

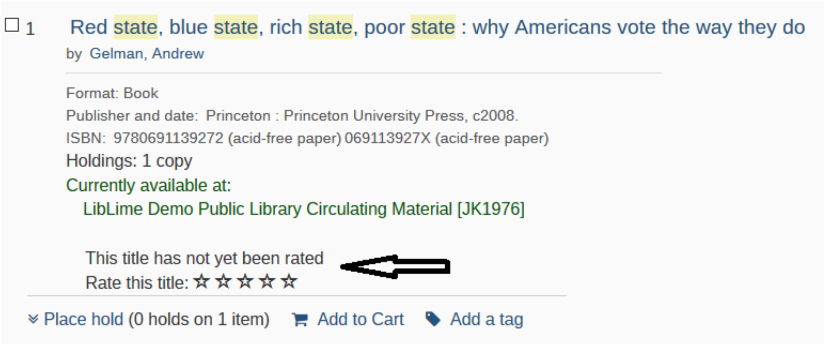


☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do
by Gelman, Andrew
Score: 20.598
Format: Book
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)
Holdings: 1 copy
Currently available at:
LibLime Demo Public Library Circulating Material [JK1976]
Place hold (0 holds on 1 item) Add to Cart

☐ 2 Rogue state : how nuclear North Korea threatens America
by Triplett, William C Wagner, Jane
Score: 18.065
Format: Book
Publisher and date: Washington, D.C. : Regnery Publishing, c2004.
ISBN: 0895260689

2.4.9 User Rankings

Users with the granular permission *catalogue: bib_ratings* will have the ability to rank a bibliographic record (on a scale of 1-5) by marking stars on the display. Users with the permission *catalogue: bib_ratings-view* will be able to view bib ratings but not create or modify them. *Users lacking these permissions will not see bib rankings at all.* These permissions can be assigned to patrons through Role records (see that section for details).



☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do

by Gelman, Andrew

Format: Book

Publisher and date: Princeton : Princeton University Press, c2008.

ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)

Holdings: 1 copy

Currently available at:

LibLime Demo Public Library Circulating Material [JK1976]

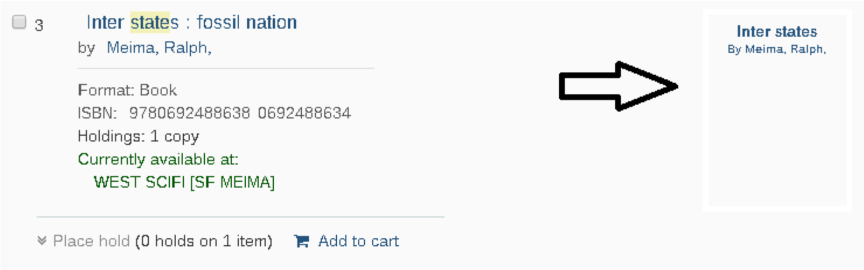
This title has not yet been rated

Rate this title: ☆ ☆ ☆ ☆ ☆

See the Discovery Layer section for details on how records are ranked and displayed. Note that staff users logged in as superlibrarians will always see the bib rankings unless they are hidden by a CSS command.

2.4.10 Default Cover Images

If there is no available image from your content service provider (Google, Syndetics, etc.), the user will see a text block with title/author:



☐ 3 Inter states : fossil nation

by Meima, Ralph,

Format: Book

ISBN: 9780692488638 0692488634

Holdings: 1 copy

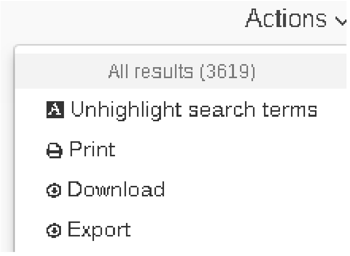
Currently available at:

WEST SCIFI [SF MEIMA]

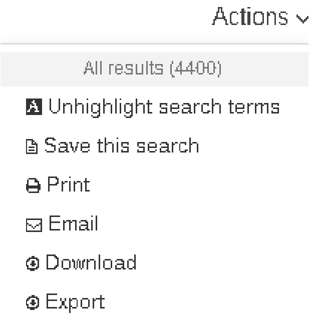
Sites can set a default image if desired (see the Discovery Layer Configuration Guide). This image will show on the individual title display along with the title/author text.

2.5 Manage Search Results

All search results are available for emailing or saving, as the user desires. This is controlled via the Actions dropdown at the top of the search results. If the user is not logged in, possible actions are limited.

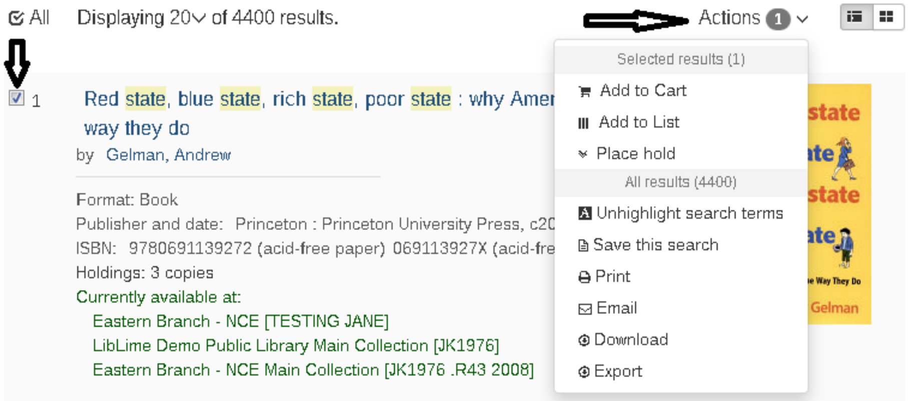


You must be logged in to email results or save a search:



Each item on the search results list has checkbox next to its main entry. These boxes can be checked individually. If all or a large part of search results set is to be emailed or saved, users can click the All link at the top the search results list. **NOTE: This will only select records from the current results display screen, not every record in the entire results set. You will need to page through the results set, adding each page's entries.**

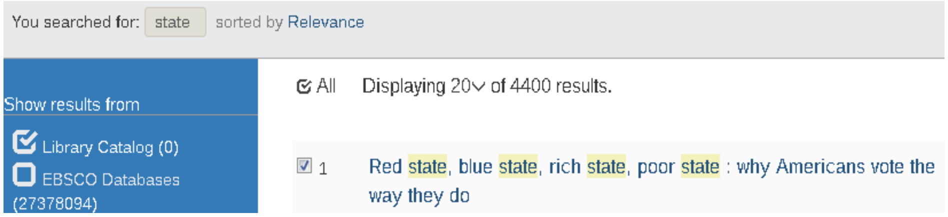
Once items are selected (and there is a check mark in the box next to the main entry) they can be added to a list or cart under the Actions dropdown. Again, users must be logged in to see certain options, such as adding to a list/shelf or emailing:



☑ 1 Red state, blue state, rich state, poor state : why Amer
way they do
by Gelman, Andrew

Format: Book
Publisher and date: Princeton : Princeton University Press, c20
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-fre
Holdings: 3 copies
Currently available at:
Eastern Branch - NCE [TESTING JANE]
LibLime Demo Public Library Main Collection [JK1976]
Eastern Branch - NCE Main Collection [JK1976 .R43 2008]

Search terms within the search result set can also be highlighted for quick visibility. For example, if the Highlight option is selected, the search term is shown in a different-colored font in the search results set.



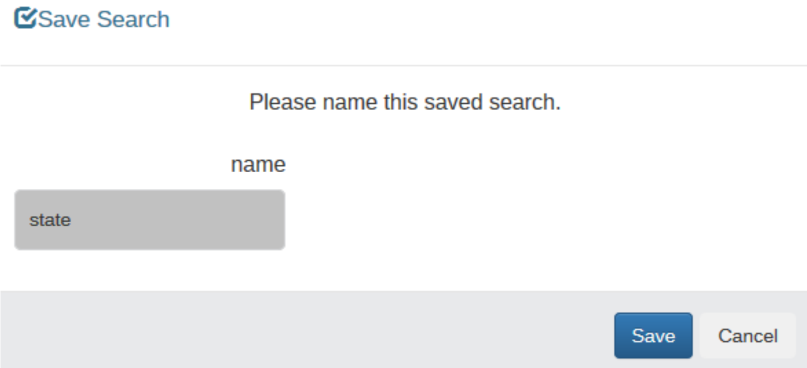
You searched for: state sorted by Relevance

Displaying 20 of 4400 results.

☑ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do

2.5.1 Saved Searches

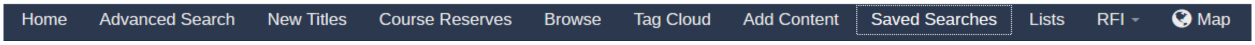
If you are logged in, search results can be saved for future use. Click on “Save this Search” under the Actions pulldown. A popup window will prompt you to name the saved search:



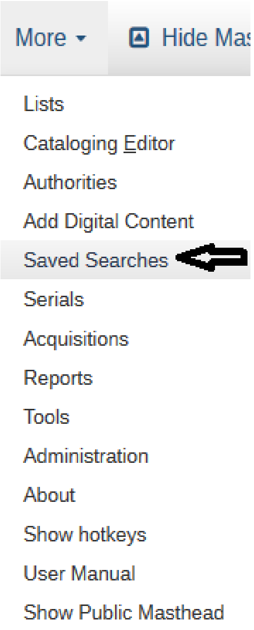
Please name this saved search.

name: state

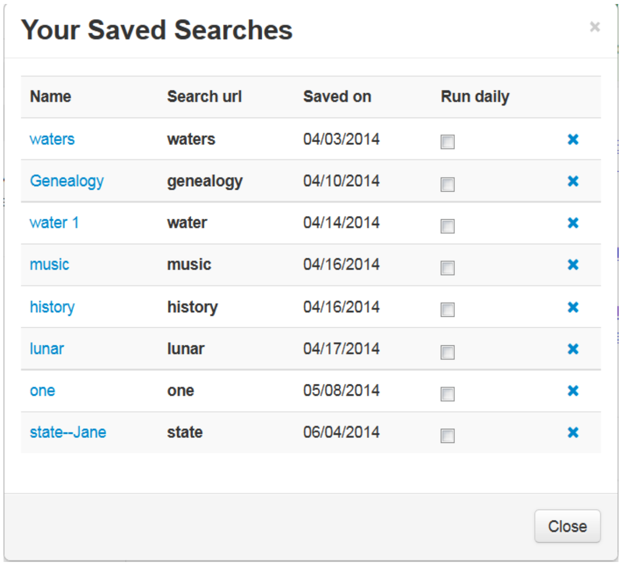
When a public user has searches saved, and is logged in, an option “Saved Searches” will display in the masthead.



Users with staff permission can see their own Saved Searches via the More option from the staff masthead:



When either option is chosen, the list of searches saved is offered.



Your Saved Searches

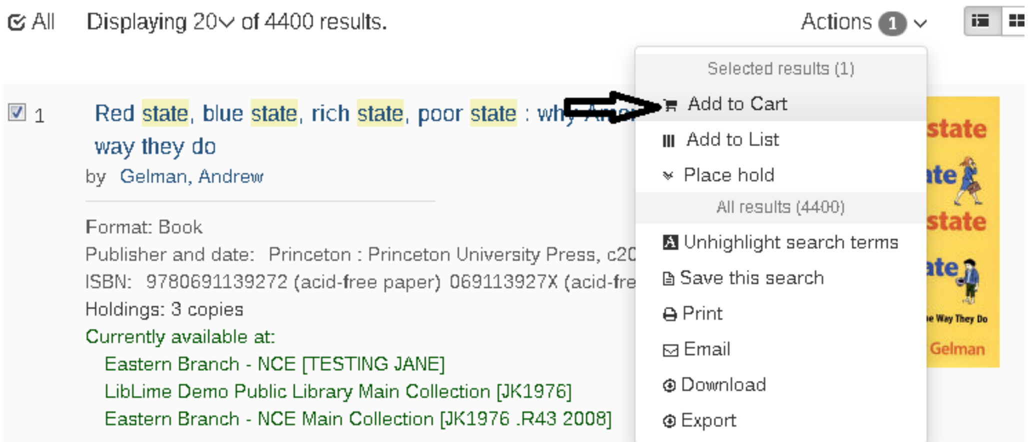
Name	Search url	Saved on	Run daily	
waters	waters	04/03/2014	☐	✖
Genealogy	genealogy	04/10/2014	☐	✖
water 1	water	04/14/2014	☐	✖
music	music	04/16/2014	☐	✖
history	history	04/16/2014	☐	✖
lunar	lunar	04/17/2014	☐	✖
one	one	05/08/2014	☐	✖
state--Jane	state	06/04/2014	☐	✖

Clicking on the name of a saved search will run it. You can delete a saved search by clicking the X at the end of the line.

Note that you can opt to have the search run once a day and send you any newly-added results (not the entire search set). If you enable the messaging preference *New results from scheduled search* the results of the updated search will be sent to you. (This requires running the saved_searches.pl cronjob.) See the section on messaging for more details on messaging preferences.

2.5.2 Cart

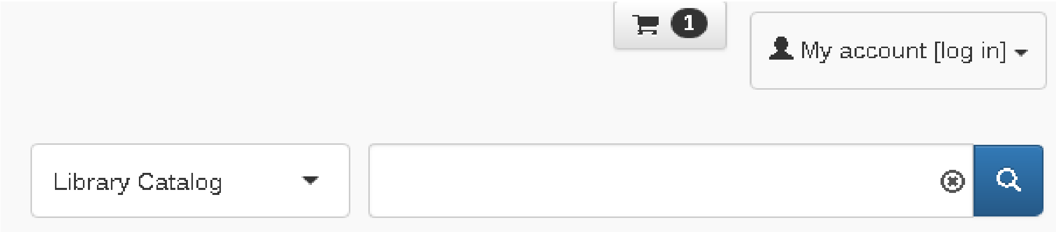
The cart is a holding place for a collection of records. You can add records either from the search results page or from an individual title display.



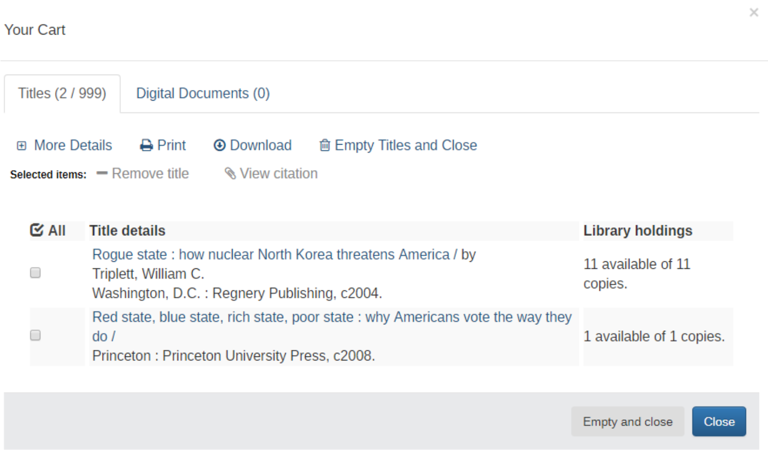
☑ 1 Red state, blue state, rich state, poor state : wh
way they do
by Gelman, Andrew

Format: Book
Publisher and date: Princeton : Princeton University Press, c20
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-fre
Holdings: 3 copies
Currently available at:
Eastern Branch - NCE [TESTING JANE]
LibLime Demo Public Library Main Collection [JK1976]
Eastern Branch - NCE Main Collection [JK1976 .R43 2008]

The masthead no longer shows a permanently visible cart button. When you add items to the cart from a results list, a cart button will show next to the login option, with a count:

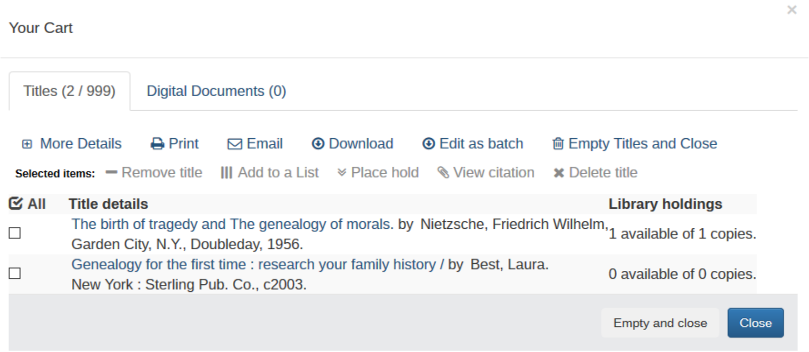


Clicking on the Cart button will open a popup window with the contents of your cart.



☑ All	Title details	Library holdings
☐	Rogue state : how nuclear North Korea threatens America / by Triplett, William C. Washington, D.C. : Regnery Publishing, c2004.	11 available of 11 copies.
☐	Red state, blue state, rich state, poor state : why Americans vote the way they do / Princeton : Princeton University Press, c2008.	1 available of 1 copies.

In the example above, the user is not logged in, so certain options are not available. You must be logged in to email the group of records (MARC format), add to a list, or place holds. To email, your patron account record must have an email address for validation. More advanced staff permissions may allow deleting the group of titles, or the creation of a batch for editing.



Your Cart

Titles (2 / 999) | Digital Documents (0)

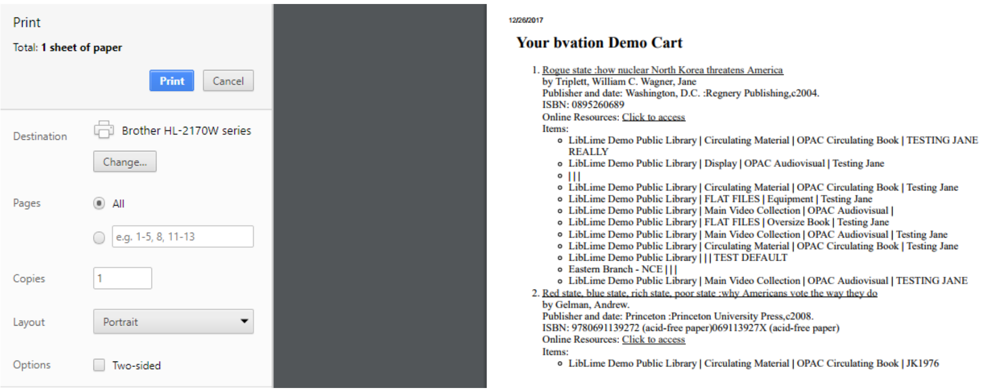
⊞ More Details | Print | Email | Download | Edit as batch | Empty Titles and Close

Selected items: Remove title | Add to a List | Place hold | View citation | Delete title

☑ All	Title details	Library holdings
☐	The birth of tragedy and The genealogy of morals. by Nietzsche, Friedrich Wilhelm, Garden City, N.Y., Doubleday, 1956.	1 available of 1 copies.
☐	Genealogy for the first time : research your family history / by Best, Laura. New York : Sterling Pub. Co., c2003.	0 available of 0 copies.

Empty and close | Close

The cart is not persistent – if you create a cart during one session, it will not remain in place the next time you log in. It's meant as a temporary holding bin for a collection of records during a catalog session. The cart display does not include item data, but the print or download output does:



Print

Total: **1 sheet of paper**

Print | Cancel

Destination: Brother HL-2170W series

Change...

Pages: ● All

○ e.g. 1-5, 8, 11-13

Copies: 1

Layout: Portrait

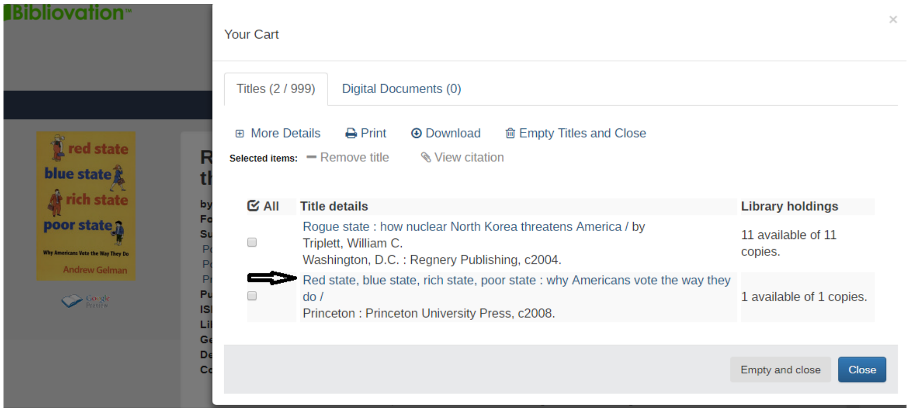
Options: ☐ Two-sided

12/26/2017

Your bvation Demo Cart

1. Rogue state :how nuclear North Korea threatens America
   by Triplett, William C. Wagner, Jane
   Publisher and date: Washington, D.C. :Regnery Publishing,c2004.
   ISBN: 0895260689
   Online Resources: Click to access
   Items:
   - LibLime Demo Public Library | Circulating Material | OPAC Circulating Book | TESTING JANE REALLY
   - LibLime Demo Public Library | Display | OPAC Audiovisual | Testing Jane
   - | | |
   - LibLime Demo Public Library | Circulating Material | OPAC Circulating Book | Testing Jane
   - LibLime Demo Public Library | FLAT FILES | Equipment | Testing Jane
   - LibLime Demo Public Library | Main Video Collection | OPAC Audiovisual |
   - LibLime Demo Public Library | FLAT FILES | Oversize Book | Testing Jane
   - LibLime Demo Public Library | Main Video Collection | OPAC Audiovisual | Testing Jane
   - LibLime Demo Public Library | Circulating Material | OPAC Circulating Book | Testing Jane
   - LibLime Demo Public Library | | | TEST DEFAULT
   - Eastern Branch - NCE | | |
   - LibLime Demo Public Library | Main Video Collection | OPAC Audiovisual | TESTING JANE
2. Red state, blue state, rich state, poor state :why Americans vote the way they do
   by Gelman, Andrew.
   Publisher and date: Princeton :Princeton University Press,c2008.
   ISBN: 9780691139272 (acid-free paper)069113927X (acid-free paper)
   Online Resources: Click to access
   Items:
   - LibLime Demo Public Library | Circulating Material | OPAC Circulating Book | JK1976

The titles in the cart are hyperlinked – if you click on one of the links, the underlying screen will go to that record:



Your Cart

Titles (2 / 999) | Digital Documents (0)

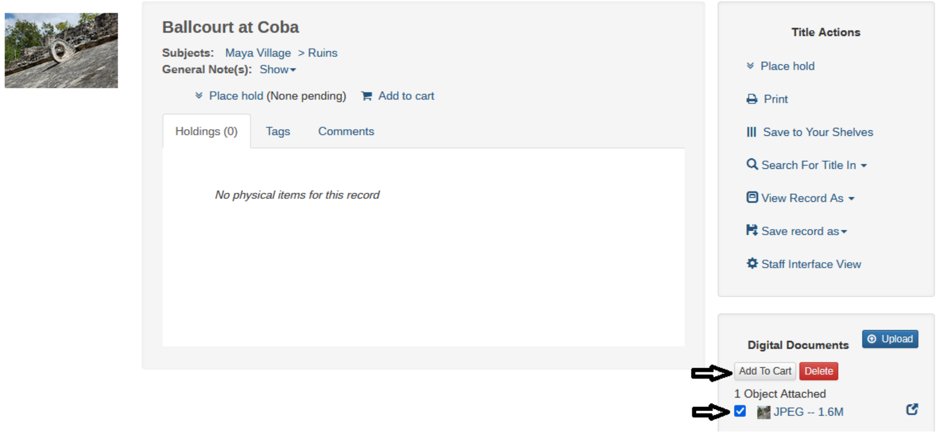
⊞ More Details | Print | Download | Empty Titles and Close

Selected items: Remove title | View citation

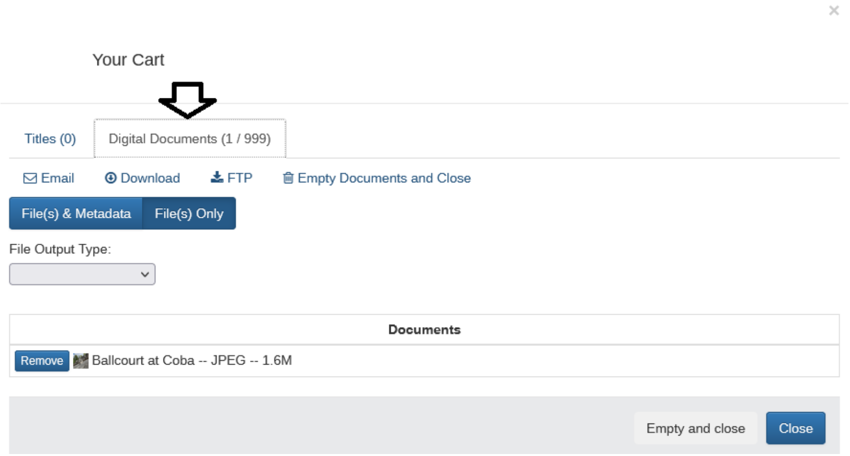
☑ All	Title details	Library holdings
☐	Rogue state : how nuclear North Korea threatens America / by Triplett, William C. Washington, D.C. : Regnery Publishing, c2004.	11 available of 11 copies.
☐	Red state, blue state, rich state, poor state : why Americans vote the way they do / Princeton : Princeton University Press, c2008.	1 available of 1 copies.

Empty and close | Close

For Bibliovation sites with digital objects, you can add the objects themselves to the cart from the title display:



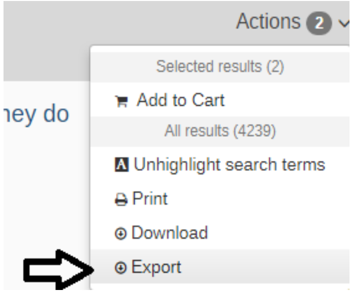
From the cart, you can ftp the digital object files to your site or download directly to your computer:



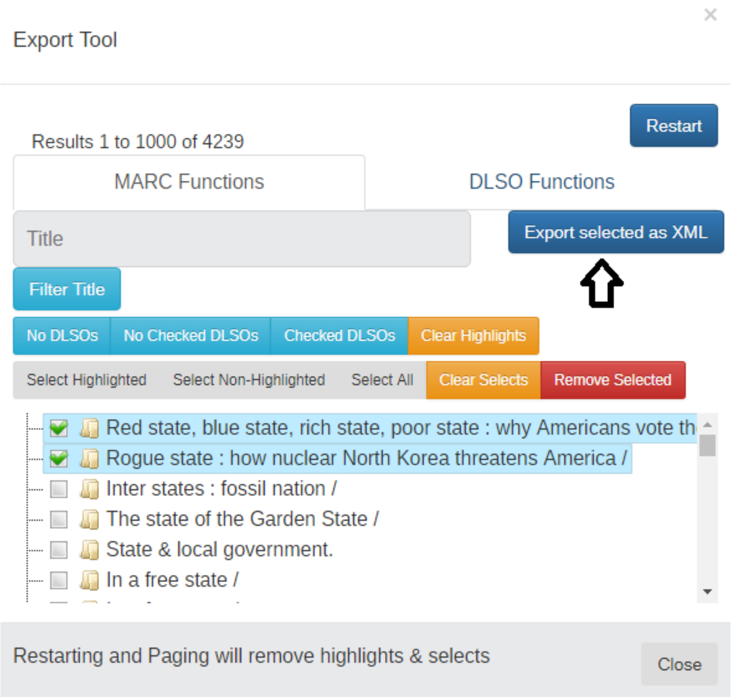
When you are finished with this group of records, you can empty the cart and close the window.

2.5.3 Downloading Full MARC or Digital Objects

Using the cart for downloading records will produce a text output with limited fields (print/download output is controlled by the message template send_bib_batch). If for some reason you need a complete download of the full MARC record from a search results list, you can do so in XML format. From the search results screen, click All Results and select Export:



This brings up a tool which will allow you to select individual records from the results list. Pick the records you want and click Export Selected as XML:



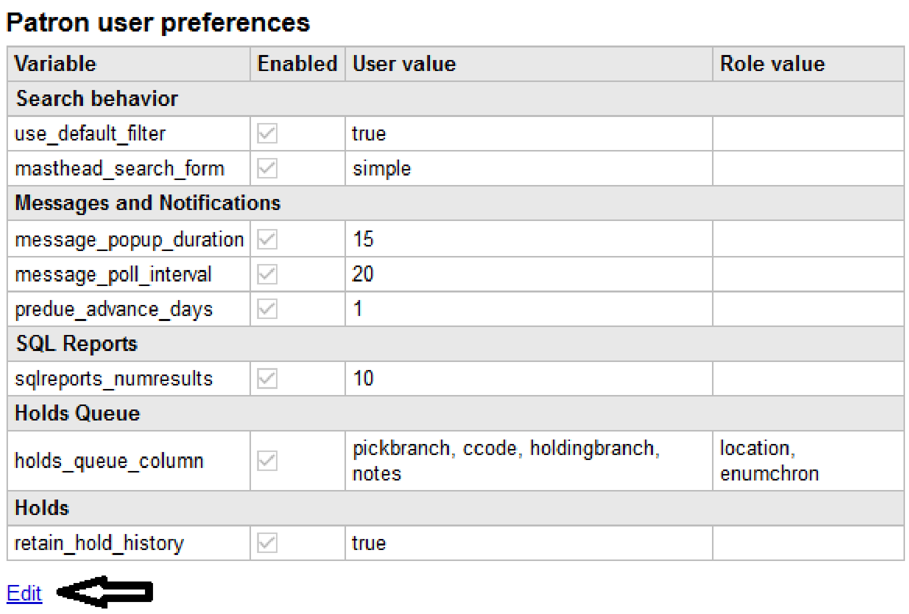
☑ Red state, blue state, rich state, poor state : why Americans vote th
☑ Rogue state : how nuclear North Korea threatens America /
☐ Inter states : fossil nation /
☐ The state of the Garden State /
☐ State & local government.
☐ In a free state /

Restarting and Paging will remove highlights & selects

On a full Bibliovation system, this tool can be used to download the digital objects from a results list. Instead of clicking the title, you would click the digital object under a title entry – see the first title in the screenshot above. Then you would click the Checked DLSOs button to export.

2.5.4 Search Filters and User Preferences

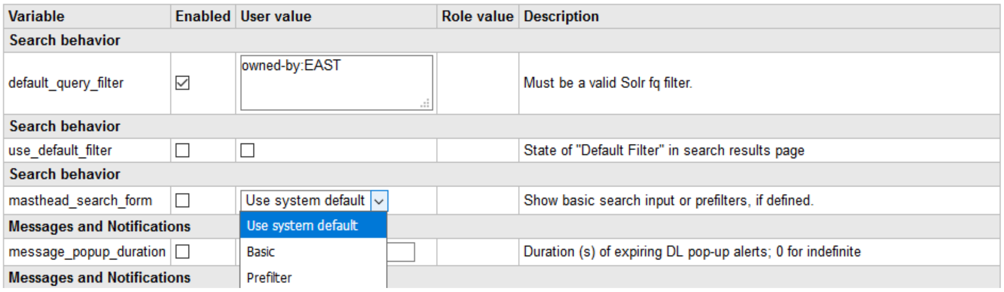
Staff may configure default preferences in a Role patron or an individual patron record. From the main patron display page, click the Edit link under the Patron User Preferences section.



Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
use_default_filter	☑	true	
masthead_search_form	☑	simple	
Messages and Notifications			
message_popup_duration	☑	15	
message_poll_interval	☑	20	
predue_advance_days	☑	1	
SQL Reports			
sqlreports_numresults	☑	10	
Holds Queue			
holds_queue_column	☑	pickbranch, ccode, holdingbranch, notes	location, enumchron
Holds			
retain_hold_history	☑	true	

There are several options in this area. The ones relevant to searching are at the top. Be sure to click the Enabled checkbox as well as changing the setting:

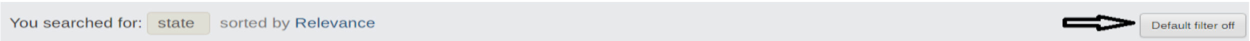


Variable	Enabled	User value	Role value	Description
Search behavior				
default_query_filter	☑	owned-by:EAST		Must be a valid Solr fq filter.
Search behavior				
use_default_filter	☐	☐		State of "Default Filter" in search results page
Search behavior				
masthead_search_form	☐	Use system default		Show basic search input or prefilters, if defined.
Messages and Notifications				
message_popup_duration	☐			Duration (s) of expiring DL pop-up alerts; 0 for indefinite
Messages and Notifications				

Staff can specify some Solr index defaults to be applied to searching for this patron or group of patrons. In most circumstances the defaults are fine. One use for the default filter would be to limit search results for the patron. For example, in a large multi-library system, you might want to limit searches to the patron's home branch by default. You could enter code like this:

owned-by:EAST

(Use the appropriate branchcode.) In the Discovery Layer, the filter is applied automatically, but the patron can turn it off on a search results set by clicking the Default Filter Off button:

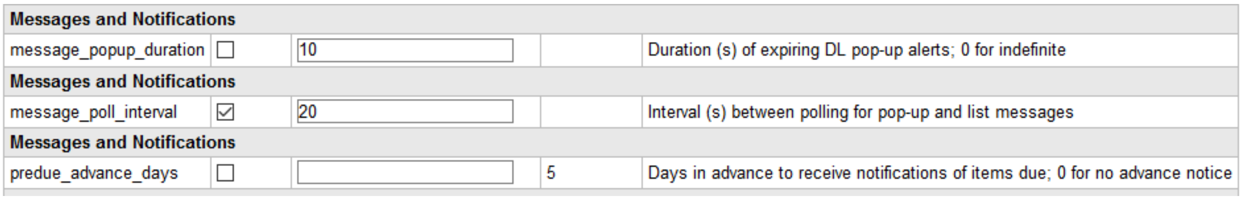


You searched for: state sorted by Relevance

The search re-executes, and the button toggles to Default Filter On.

You must be familiar with the Solr index names and search syntax to set these up properly. Use these options with caution – invalid settings could disable searching altogether. Test on your sandbox first.

If the site has created masthead filters, you can specify the default masthead appearance. See the Discovery Layer Configuration Guide for more information on filters.



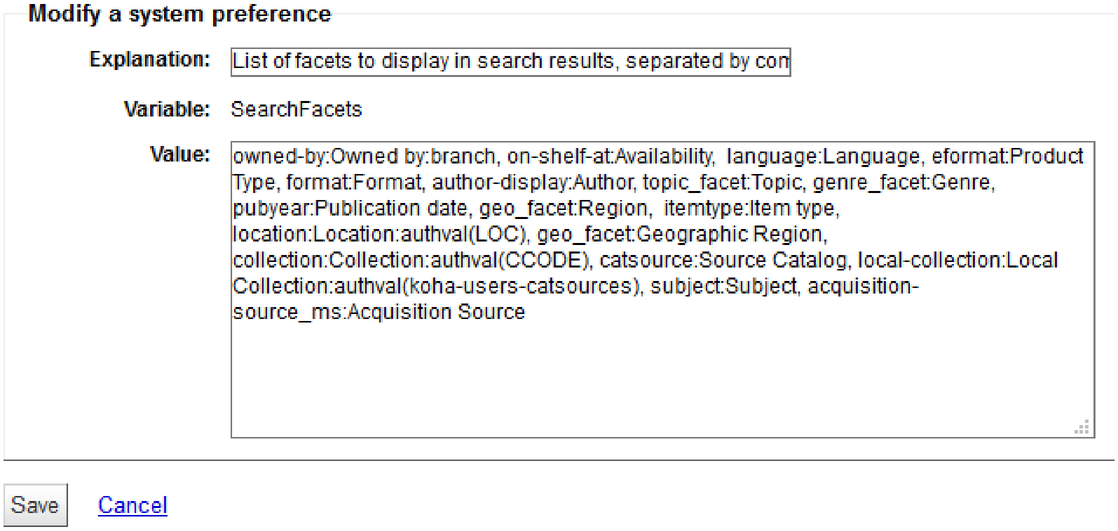
Messages and Notifications				
message_popup_duration	☐	10		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
Messages and Notifications				
message_poll_interval	☑	20		Interval (s) between polling for pop-up and list messages
Messages and Notifications				
predue_advance_days	☐		5	Days in advance to receive notifications of items due; 0 for no advance notice

The Popup Duration setting controls how long a popup message remains on the screen in the Discovery Layer. The default is 10 seconds; users can set that to any duration (in seconds) desired. Setting this to zero will make all popups persist until the user actively closes them.

The Advance Days' Due Notice is the number of days in advance that Advance Notices should be sent. If the patron opts to receive Advance Notices, this is what controls the timing.
Patrons can also set these options in the Discovery Layer under the dashboard General Preferences tab; see that section for more details.

2.5.5 Control of Facets

The search results screen is configured with a default set of facets which users can use to limit results. Sites can control which facets appear (and in what order), and can add new ones as desired. Edit the system preference SearchFacets:



Modify a system preference

Explanation: List of facets to display in search results, separated by con

Variable: SearchFacets

Value: owned-by:Owned by:branch, on-shelf-at:Availability, language:Language, eformat:Product Type, format:Format, author-display:Author, topic_facet:Topic, genre_facet:Genre, pubyear:Publication date, geo_facet:Region, itemtype:Item type, location:Location:authval(LOC), geo_facet:Geographic Region, collection:Collection:authval(CCODE), catsource:Source Catalog, local-collection:Local Collection:authval(koha-users-catsources), subject:Subject, acquisition-source_ms:Acquisition Source

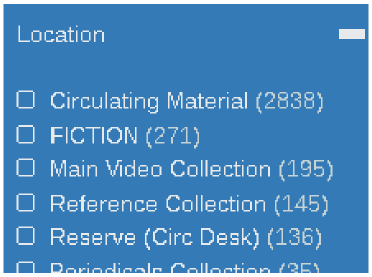
The syntax is the Solr index name (exactly as configured, including upper/lowercase) followed by a colon and the display name you want:

pubyear:Publication date

Entries are separated by commas. For fields which are controlled by authorized values, such as shelving location and collection code, you can add a third parameter with a colon after the display name – the word "authval" and name of the authorized value in parentheses:

location:Location:authval(LOC)

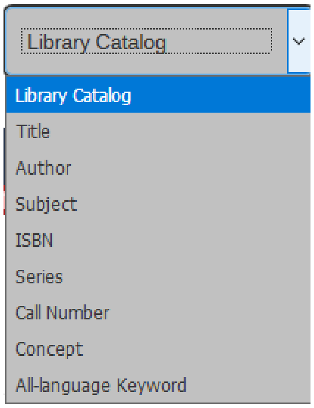
In this example, the shelving location is controlled by the authorized value LOC. Using this parameter means that the facets will show the display text (e.g., Main Video Collection) rather than the actual code (VIDEO):



To configure facets, the data point you want must have its own Solr index, and you must know the exact name of the index. (See Appendix 1 on Solr index names for help.)

2.5.6 Multi-Language Searching

If you search against the index "text-fl"(All-Language Keyword in the default search options) your term will be matched against a set of English synonym translations of various foreign languages. These terms are in a system file. For example, "text-fl:cheese" will match French records that contain the word "fromage" and Spanish ones that have "queso." French, Italian, Spanish, and German are presently supported.

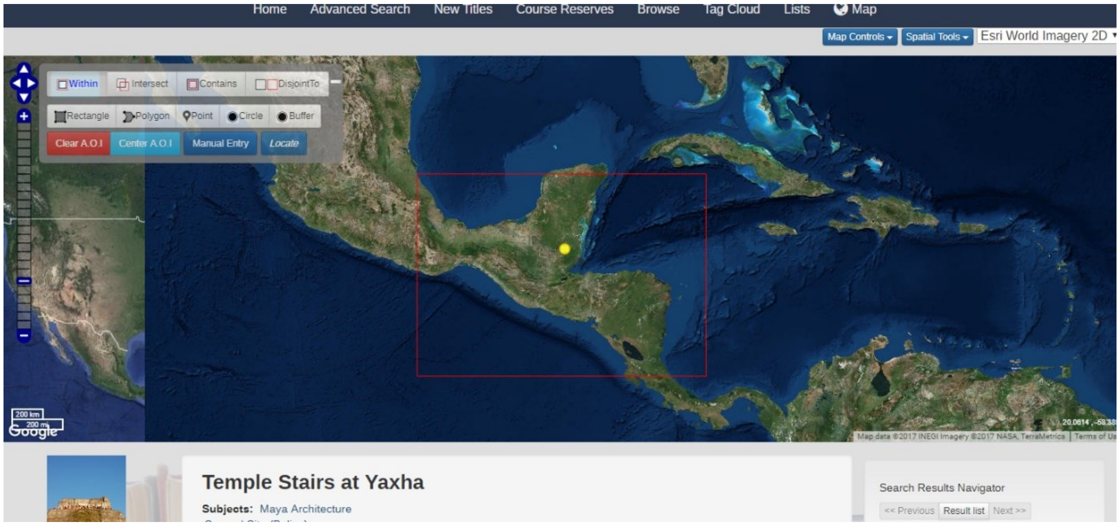


2.5.7 Concept (Synonym) Searching

Similarly, you can search for certain terms and the system will look up possible synonyms (Concept in the default search options). For example, searches for "concept:school" will match the word "school" as well as synonyms for school. The concept field contains all of the record's metadata text as well as the full-text content of the attached digital object if available.

2.6 Geospatial Map Display

Bibliographic records with key data in the 034 field (Coded Cartographic Mathematical Data) will display in a map if the GeoSpatial options are configured upon install. For example, the bibliographic record for the title “Temple Stairs at Yaxha” has coordinates in the 034 field; if users click the Map button to toggle map display, those coordinates show as a yellow dot on the map.



2.6.1 Map Display

By default, Esri World Imagery is used for the base map display. To change the base map, click the pull-down in the top right of the map and select another option, such as Google – Satellite.

Other menu items on the map menu bar are:

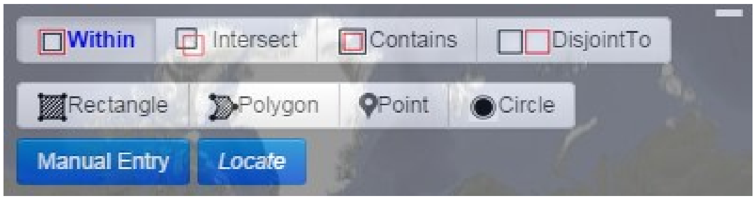
- **Map Controls** –Turn controls on and off using the checkbox. Available controls are Grid display, Overview Map display, Disable Record Pan and Disable Record info. (Record Pan and Record info are enabled after query results are returned.)

- **Spatial Tools** – Uses geospatial coordinates to identify a map area; does not do a catalog search. If you have a set of geospatial coordinates but are not sure what they cover, you can enter the coordinates and click Find. The display will show the map area covered; you can then use another tool to search within that area. To change the type of coordinate system format used to search simply select the desired format from the coordinate list. Available coordinate system formats are DDD, DMS, UTM, MGRS.

2.6.2 Performing a Graphical Search

NOTE: if staff had performed a search and gotten a results list before turning on the Map search, the system will automatically clear the search term when opening the map controls.

The following operations make heavy use of the A.O.I. (Area of Interest) GUI control at the top left of the map. This control, used for graphical and manual geographical search and locate functions, comprises three rows of buttons. Each image has a geographic extent. The middle row defines the supported shapes for the A.O.I. and activates the drawing of the shape on the map. The top row describes the relationship of the image extent to the drawn A.O.I. The bottom row provides a button permitting the manual entry of the A.O.I. and another button to locate country/city/landmarks by name. Note that the entire GUI control can be minimized to an A.O.I. button to reveal the portion of the map obscured by the control. Simply click the "_" icon at the top right of the control.



When first accessing the map display, the A.O.I GUI control should be visible. The first step to creating the A.O.I is to select the type of A.O.I. The default setting is the **Within** Geospatial Search Method.

- **Within** means the A.O.I. is completely within the image extent

- **Intersects** means any part of the image extent touches the A.O.I.

- **Contains** means the image extent is completely contained within the A.O.I,

- **DisjointTo** means that the image extent is outside of the A.O.I.

After selecting a type of A.O.I. select the shape;

- **Rectangle** – To draw a rectangular shape, click on the map with the mouse, holding down the mouse button, drag your mouse until you have the desired A.O.I.

- **Polygon** – To draw a polygon, select Polygon from the A.O.I control, click on the map at your starting point, then click at other points until you have selected your area, double click on the last point to close the polygon.

- **Point** – Select **Point** from the A.O.I control, click a point on the map, a small red circle will appear marking the selected point.

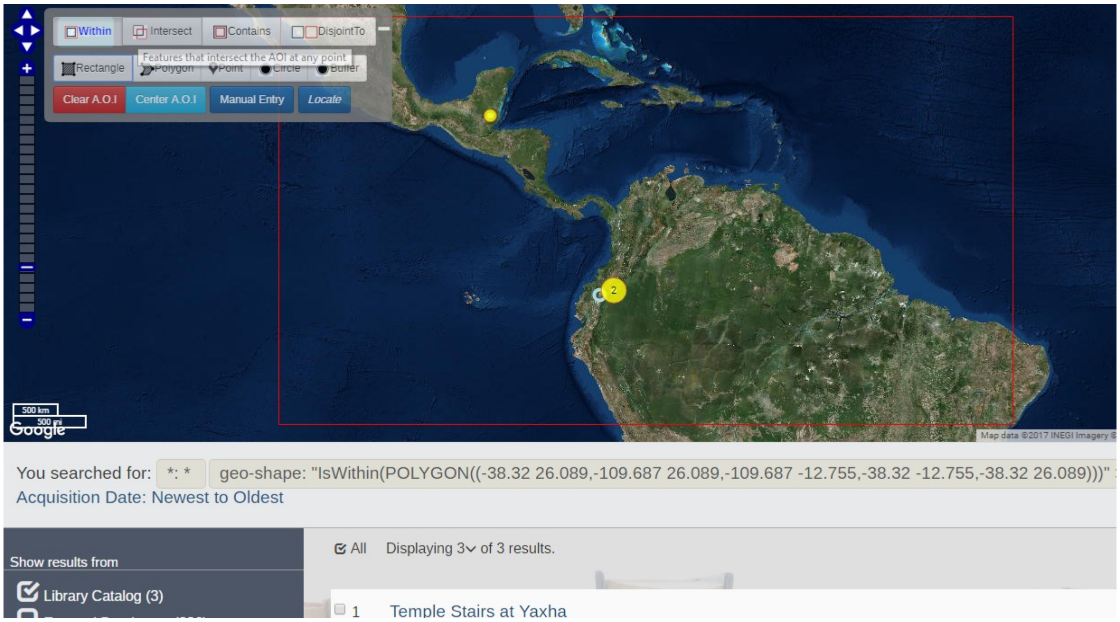
- **Circle –** To draw a circle, select **Circle** from the A.O.I control, click on the map and drag until you have the desired A.O.I.

- **Manual Entry** – to create an A.O.I using coordinates, select the **Manual Entry** button. The A.O.I Manual Input dropdown window will appear which allows you to select either a rectangle or circle and the geospatial coordinate system to use. Enter your coordinates; click **Update** or **Update and Search.**

- **Locate** – Locate will allow you to find an A.O.I by typing in an address or other location. Select the **Locate** button and enter an address or other location. A list of related locations will appear, select a location from the list. To search using that A.O.I click the **Search** button. To go to that location on the map, click **Pan To**. Or select **Close** to close the Locate screen.

To delete the A.O.I, click **Clear A.O.I** on the A.O.I controls. To center the A.O.I on the map display, click **Center A.O.I.**

When an A.O.I is drawn on the map a search will be automatically initiated and the results will display as a list below the map and as "pins" on the map. Multiple results in close geographic proximity will display as a circle with the total number of results. To see individual records zoom in on the map.



You searched for: *: * geo-shape: "IsWithin(POLYGON((-38.32 26.089,-109.687 26.089,-109.687 -12.755,-38.32 -12.755,-38.32 26.089)))"

Acquisition Date: Newest to Oldest

☐ 1 Temple Stairs at Yaxha

2.6.3 Viewing Records

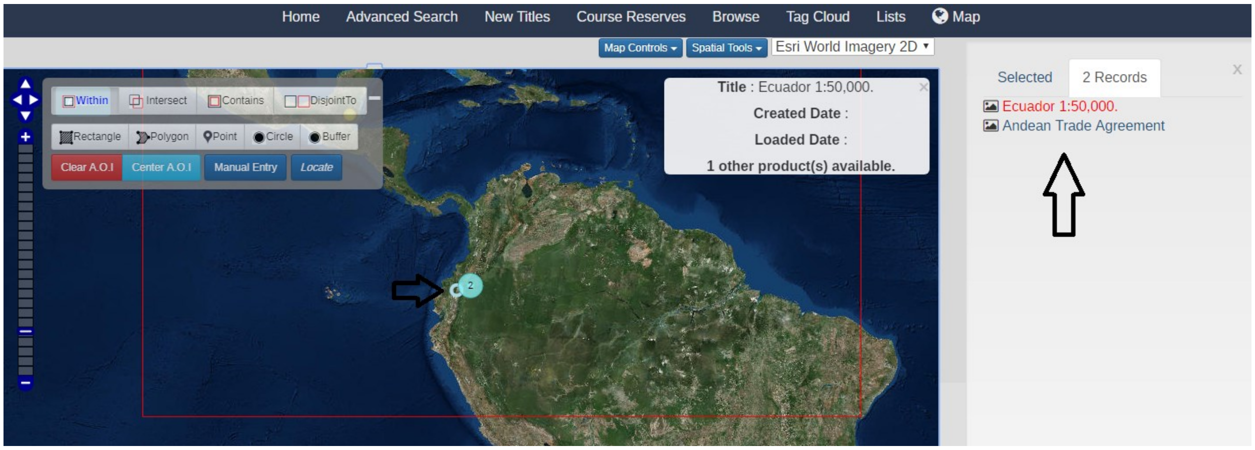
To view record information from the map, hover over the pin and a small window will appear over the map displaying the title, created date and loaded date.

- To view the record in the record info panel to the left of the map, click on the pin (see image below).

- The record info panel shows the record title of the first document in the results list, a thumbnail of that document and shows a list of the digital documents that are attached to the record.

- Note that while the first record is shown in the window, a list of the other records in the list can be viewed by clicking on the tab above the thumbnail.

- Three icons are at the bottom right of the record info panel, select the first to go to the record on the map. Select the second to zoom to the extent on the map and select the third to toggle the extent on and off.



Title : Ecuador 1:50,000.
Created Date :
Loaded Date :
1 other product(s) available.

Ecuador 1:50,000.
Andean Trade Agreement

To view the record and all related information and options, click on the record title in the results list.

2.6.4 Chipping

In the **Document Viewer window**, click the **Chip** tab. Note: only certain file types (NITF, GeoTIFF) support chipping. Unless the document selected supports chipping the **Chip** tab will not be visible.

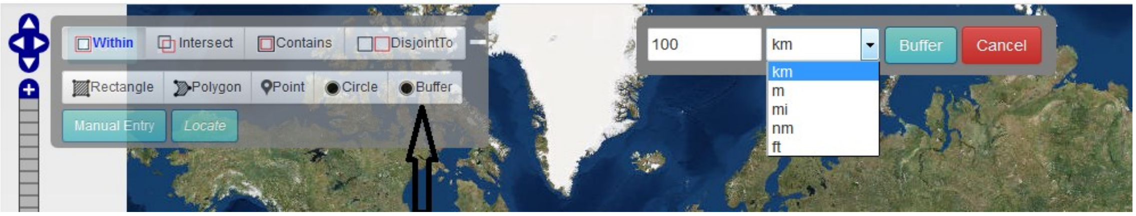
Click in the drawing icon just below the map zoom/pan control. Draw the desired area (rectangle) to chip. Note that the longitude/latitude values are populated automatically. Also note that the format of these values can be converted using the **DDD**, **DMS**, **UTM**, and **MGRS** buttons.

The chip area can also be specified manually. Enter in appropriate long/lat values and click the **Update Map** button.

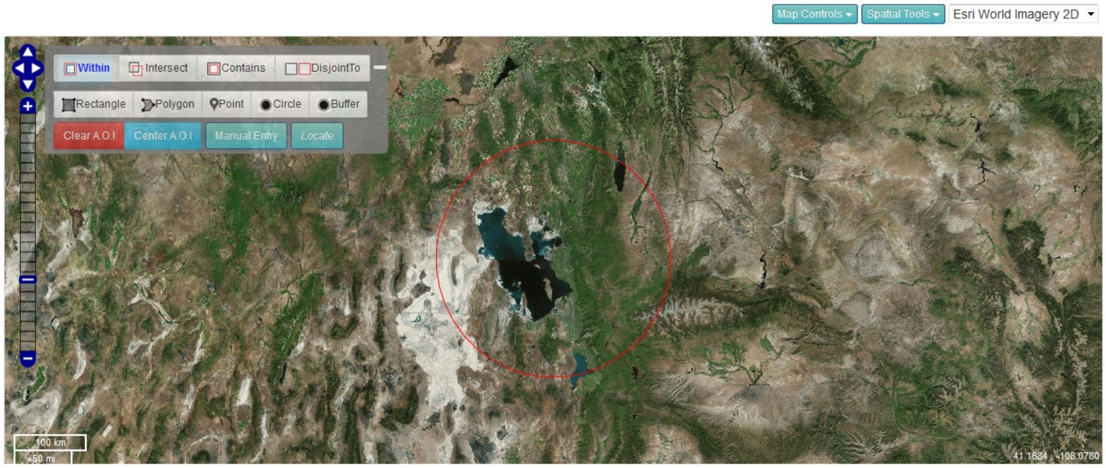
Specify any desired file **Format** conversion using the pull-down selector. Click the **Save** button. The chip will be created and made available for download.

2.6.5 Setting Circle Radius

To specify a search radius around a point, first click the Buffer option. Then click a single point on the map:



A popup box allows you to specify a radius around that point, in several different measurements. Pick the radius and setting you want, and click the Buffer button in that popup. The map search will look for records within that radius:



2.7 Other Discovery Layer Options

Other Discovery Layer options such as Lists, New Titles, and user account settings will be covered in a later section of this manual.

3. Viewing Individual Record

3.1 Discovery Layer View of Individual Bibliographic Record

Individual titles are displayed by clicking on the title link from the results page. In public (Discovery Layer) view, a user will see a display like this:

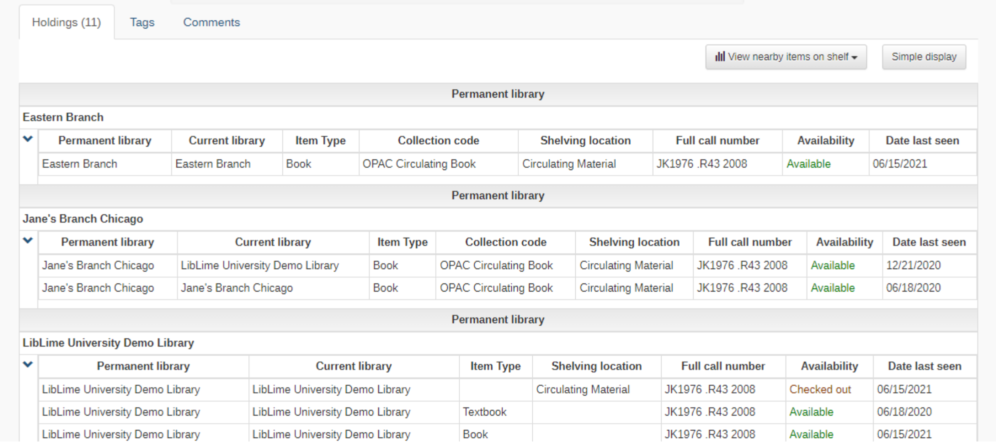
Red state, blue state, rich state, poor state :
why Americans vote the way they do

by Gelman, Andrew.
Format: Book
Language: English (English)
Subjects: Dogs Elections > United States
Show 3 more
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper). ; 069113927X (acid-free paper).
Library of Congress Call Number: JK1976 .R43 2008
Geographic Area Code: n-us---
Description: 233 p. : ill. ; 24 cm.
Contents (as listed on item): Show
System Control Number: (OCoLC)220858594
Online Resources: Table of contents only
General Note(s): Show
Copies: 6 of 11 copies available
Place hold (6 total, 5 active) Add to Cart

If the user is not logged in, certain actions such as Place Hold will be inactive; clicking them will pop up a login window.

Certain fields within the bibliographic record will show as hyperlinks. If you click on them, the system will do a new search against that term (such as author and subject headings).

Item data is shown beneath the bibliographic display. This data gives information about shelving location and availability for loaning.



Permanent library

Eastern Branch

Permanent library	Current library	Item Type	Collection code	Shelving location	Full call number	Availability	Date last seen
Eastern Branch	Eastern Branch	Book	OPAC Circulating Book	Circulating Material	JK1976 .R43 2008	Available	06/15/2021

Permanent library

Jane's Branch Chicago

Permanent library	Current library	Item Type	Collection code	Shelving location	Full call number	Availability	Date last seen
Jane's Branch Chicago	LibLime University Demo Library	Book	OPAC Circulating Book	Circulating Material	JK1976 .R43 2008	Available	12/21/2020
Jane's Branch Chicago	Jane's Branch Chicago	Book	OPAC Circulating Book	Circulating Material	JK1976 .R43 2008	Available	06/18/2020

Permanent library

LibLime University Demo Library

Permanent library	Current library	Item Type	Shelving location	Full call number	Availability	Date last seen
LibLime University Demo Library	LibLime University Demo Library		Circulating Material	JK1976 .R43 2008	Checked out	06/15/2021
LibLime University Demo Library	LibLime University Demo Library	Textbook		JK1976 .R43 2008	Available	06/18/2020
LibLime University Demo Library	LibLime University Demo Library	Book		JK1976 .R43 2008	Available	06/15/2021

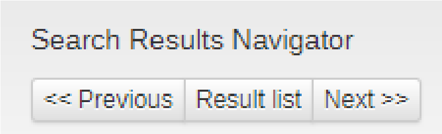
If an item is on hold or in transit, or has some other special status, that will also show:

Availability
In transit On hold

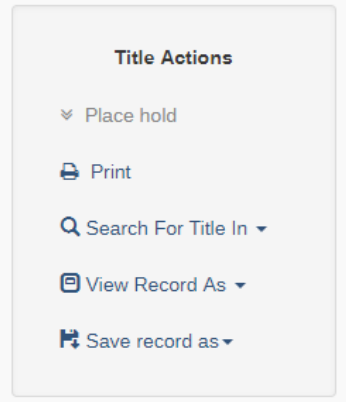
Item records are usually associated with physical items; title records for online resources or digital objects may not have individual item entries. Note that it is possible for sites to customize both the fields and the order in which item data is shown; your site may be different than the screenshots. This is documented in the Superlibrarian Training Guide.

If available, an image of the item's dust jacket may display. Other content may be available on the screen or in tabs (reviews, extracts, etc.) if a site has subscribed to a service like Syndetics or Baker & Taylor.

To the righthand side of the bibliographic display are additional options for navigating through the search result set and for acting further on the bibliographic record displayed. Users can also move back to the full result list or view the next/previous record in the list



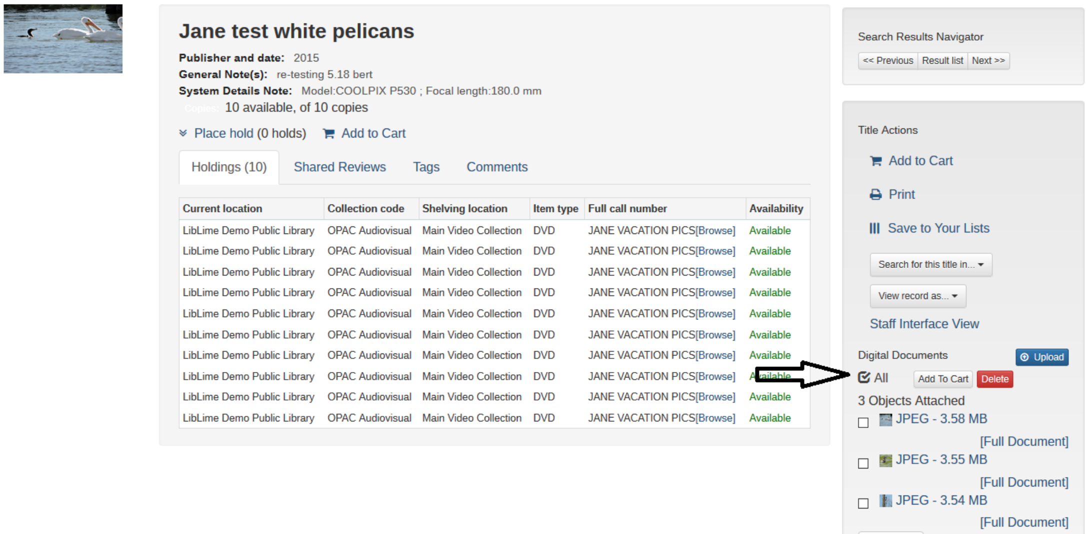
Also displayed to the right of the bibliographic record are further features available related to the title. Each action is used by clicking on the description.



The available actions depend on your site's configuration. You may be able to place a hold, create a Call Slip (Request) or Document Delivery request, search for the title in external sites such as Google Scholar, and view any associated digital objects. If the Cart feature is enabled, you can add the title to your cart. You may also want to view the underlying MARC record. More information on most of those features is found elsewhere in the manual.

3.2 Viewing Digital Objects

If the site is configured for the full Bibliovation system (with digital object functionality), and the title has associated digital objects, links will show at the right-hand side with certain information (object type, size, etc.):



Jane test white pelicans

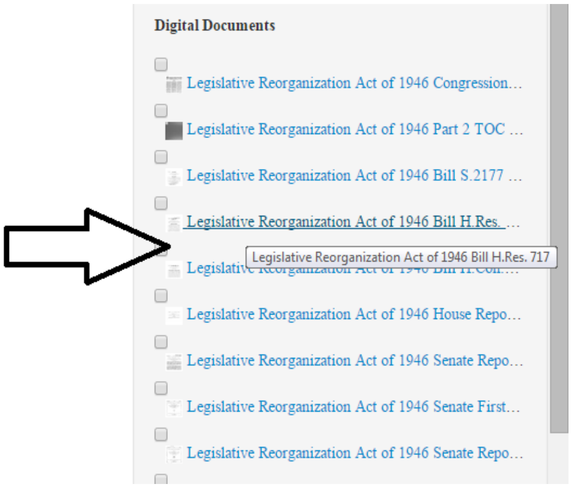
Publisher and date: 2015
General Note(s): re-testing 5.18 bert
System Details Note: Model:COOLPIX P530 ; Focal length:180.0 mm
10 available, of 10 copies

Current location	Collection code	Shelving location	Item type	Full call number	Availability
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	JANE VACATION PICS[Browse]	Available

3 Objects Attached
☐ JPEG - 3.58 MB [Full Document]
☐ JPEG - 3.55 MB [Full Document]
☐ JPEG - 3.54 MB [Full Document]

(If the user has the appropriate permissions, an Upload and/or a Delete link will also appear, allowing a new digital object to be uploaded to this title, or removal of the selected digital object.)

Digital objects show the file type or file name. If there are multiple objects attached, and the names are lengthy, the truncated display makes it hard to tell them apart. A display name can be entered in the 856$y. The display will show that as a tooltip-style popup if the cursor hovers over a name:



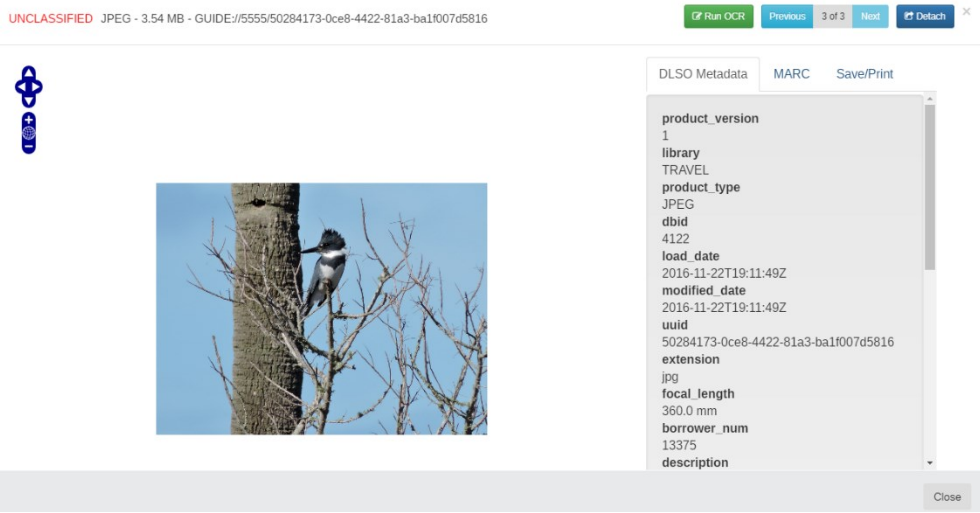
Digital Documents

☐ Legislative Reorganization Act of 1946 Congression…
☐ Legislative Reorganization Act of 1946 Part 2 TOC …
☐ Legislative Reorganization Act of 1946 Bill S.2177 …
☐ Legislative Reorganization Act of 1946 Bill H.Res. …
☐ Legislativ… Legislative Reorganization Act of 1946 Bill H.Res. 717
☐ Legislative Reorganization Act of 1946 House Repo…
☐ Legislative Reorganization Act of 1946 Senate Repo…
☐ Legislative Reorganization Act of 1946 Senate First…
☐ Legislative Reorganization Act of 1946 Senate Repo…

That same entry is used as alt text for screenreader software.

You can add any of the digital objects to your Cart by clicking the checkbox.

Clicking on any of the file links will open the digital object in a popup viewer window:



UNCLASSIFIED JPEG - 3.54 MB - GUIDE://5555/50284173-0ce8-4422-81a3-ba1f007d5816

product_version
1
library
TRAVEL
product_type
JPEG
dbid
4122
load_date
2016-11-22T19:11:49Z
modified_date
2016-11-22T19:11:49Z
uuid
50284173-0ce8-4422-81a3-ba1f007d5816
extension
jpg
focal_length
360.0 mm
borrower_num
13375
description

You will see the object along with certain information about it. Other tabs give you options for downloading or printing the object, or focusing in on particular geographic boundaries.

1. Clicking on the **Save/Print** tab displays number of print, save, save as, and delivery options.

2. Under **Print Options**, the **Print Document** and **Print Metadata** buttons output the image overview graphic and the metadata text, respectively.

3. Under the **Save Options**, four "Download" links are provided to save the specified data in its original format. **Download File**, **Download DLSO Metadata**, **Download MARC XML**, **Download Overview**, **Download Export Info**, and **Download All** (zip file).

4. Under the **Save As Options** the user can once again save the file alone or a package containing the file together with its metadata. However, here you can also convert the file format and choose the package container. (See above for instructions on chipping). Selecting **File Only** provides a pull down list of available conversion types. (Conversions available will vary dependent upon the original file type). The top entry shown in the **File Output Type** pull-down is the original file format, by default. Selecting **File & Metadata** displays two pull downs, **Package Type** (note**:** Bundle **is a .**zip file) and **File Conversion Type**. With all of default settings, click the **Save** button. A "zip" file containing the source file, a thumbnail, an overview, and the metadata is downloaded.

Clicking the **Detach** button in the upper right opens the document viewer in another window.

Click **Close** to close the Document Viewer window and return to the previous view.

3.3 Other Online Resources

Titles with URLs in the 856 field that are not associated with digital objects will show those links in the search results and in the main title display. (856 links for digital objects are hidden in the main title display but will show in the MARC record – be sure not to delete those fields.)

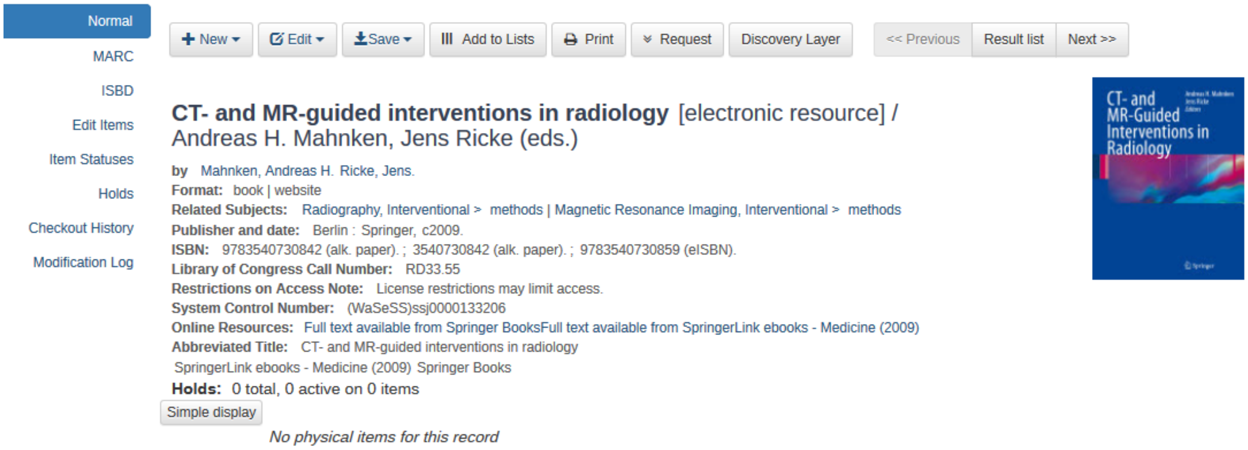
CT- and MR-guided interventions in radiology [electronic resource] /
Andreas H. Mahnken, Jens Ricke (eds.)

by Mahnken, Andreas H. Ricke, Jens.
Format: Book | Website or downloadable
Subjects: Radiography, Interventional > methods
Magnetic Resonance Imaging, Interventional > methods
Publisher and date: Berlin : Springer, c2009.
ISBN: 9783540730842 (alk. paper). ; 3540730842 (alk. paper). ; 9783540730859 (eISBN).
Library of Congress Call Number: RD33.55
Restrictions on Access Note: License restrictions may limit access.
System Control Number: (WaSeSS)ssj0000133206
Online Resources: Full text available from Springer Books
Full text available from SpringerLink ebooks - Medicine (2009)
Abbreviated Title: CT- and MR-guided interventions in radiology
SpringerLink ebooks - Medicine (2009) Springer Books
GoodReads Rating: ☆☆☆☆☆ (0)

Users can click on the link text to go to the online resource.

3.4 Staff View of Individual Bibliographic Record

Staff users are taken into the staff-side display of a title record, with options for editing the record, managing holds, viewing the checkout history, and more. Buttons for Prev, Next, and Back to Results will let you move between title displays without having to return to the results list. **NOTE: The legacy staff display has been replaced by a customizable display similar to the Discovery Layer view; not all screenshots have been updated throughout the manual.**

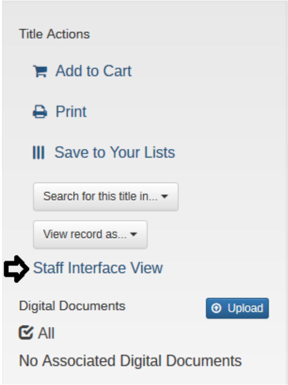


CT- and MR-guided interventions in radiology [electronic resource] /
Andreas H. Mahnken, Jens Ricke (eds.)

by Mahnken, Andreas H. Ricke, Jens.
Format: book | website
Related Subjects: Radiography, Interventional > methods | Magnetic Resonance Imaging, Interventional > methods
Publisher and date: Berlin : Springer, c2009.
ISBN: 9783540730842 (alk. paper). ; 3540730842 (alk. paper). ; 9783540730859 (eISBN).
Library of Congress Call Number: RD33.55
Restrictions on Access Note: License restrictions may limit access.
System Control Number: (WaSeSS)ssj0000133206
Online Resources: Full text available from Springer BooksFull text available from SpringerLink ebooks - Medicine (2009)
Abbreviated Title: CT- and MR-guided interventions in radiology
SpringerLink ebooks - Medicine (2009) Springer Books
Holds: 0 total, 0 active on 0 items

No physical items for this record

From this display, staff can click the Discovery Layer View button to see how the title would appear in public mode. From the Discovery Layer display, you will see an additional link on the title display to switch back into staff view:



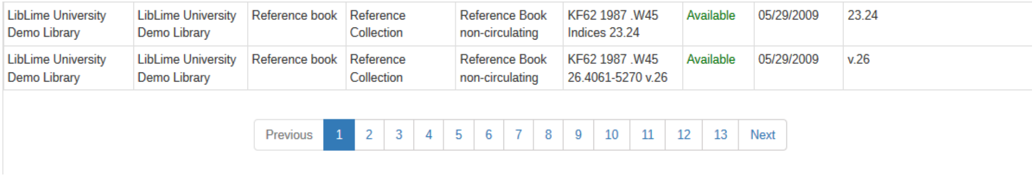
Clicking that link takes you back into the staff interface. What you can do at this screen depends on the permissions assigned to your staff login account. For more information about working with bibliographic records, see the section on creating and editing records later in this manual.

Item data is shown beneath the bibliographic display. This data gives information about availability, item type, shelving location, availability for loaning, and other data points. If an item is on hold or in transit, that will also show:

Availability
In transit to LibLime Demo Public Library since 02/20/2019 On hold

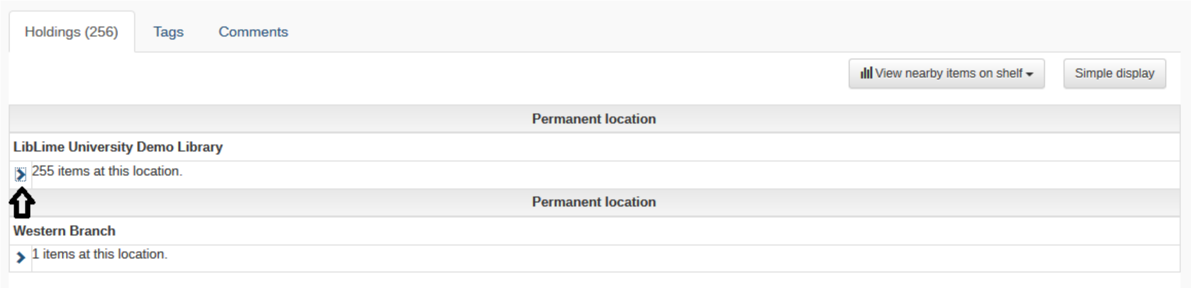
3.5 Records with Large Number of Items

To improve response time, records with more than 30 items attached will break the item display into multiple pages. In Discovery Layer, staff Details, and staff Items screens, users will see screens of 20 items with a pager at the bottom:



LibLime University Demo Library	LibLime University Demo Library	Reference book	Reference Collection	Reference Book non-circulating	KF62 1987 .W45 Indices 23.24	Available	05/29/2009	23.24
LibLime University Demo Library	LibLime University Demo Library	Reference book	Reference Collection	Reference Book non-circulating	KF62 1987 .W45 26.4061-5270 v.26	Available	05/29/2009	v.26

For all screens, if your system is set for simple item display, sorting by any column will sort all items. If the display is grouped by branch, sorting will only sort the items belonging to that branch. You can click the arrow under the branch name to collapse that branch's holdings, so that you can see other branches.



Permanent location

LibLime University Demo Library

255 items at this location.

Permanent location

Western Branch

1 items at this location.

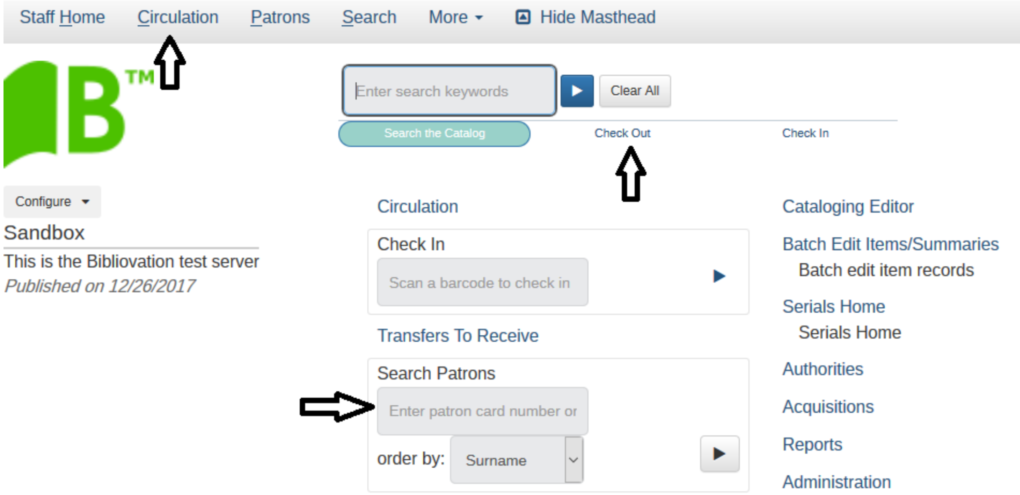
4. Circulation and Material Management

The system has alert sounds for circulation actions. If the system preference soundon is set, actions such as checkout, checkin, screen alerts, etc. will generate an audible sound. This is to alert circulation desk staff to needed action or to provide assurance that the transaction has been completed. A button on the Checkouts tab will allow staff to mute the sounds, if desired at that moment.

4.1 Checking Out

The most frequent circulation activity is checking materials out to a user. In a standard library scenario, a patron will bring an item to the circulation desk. It's assumed that library staff have the item in hand but will need to look up the patron record. Therefore, a patron search is the first step in a checkout.

A checkout can be started from many places in the staff client. On the home landing screen, a search box allows staff to search for a patron record:

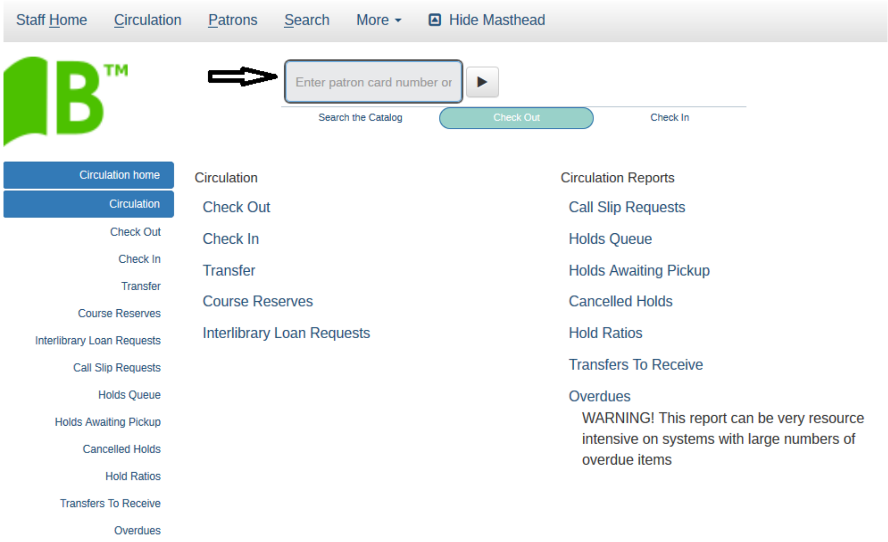


Sandbox

This is the Bibliovation test server

Published on 12/26/2017

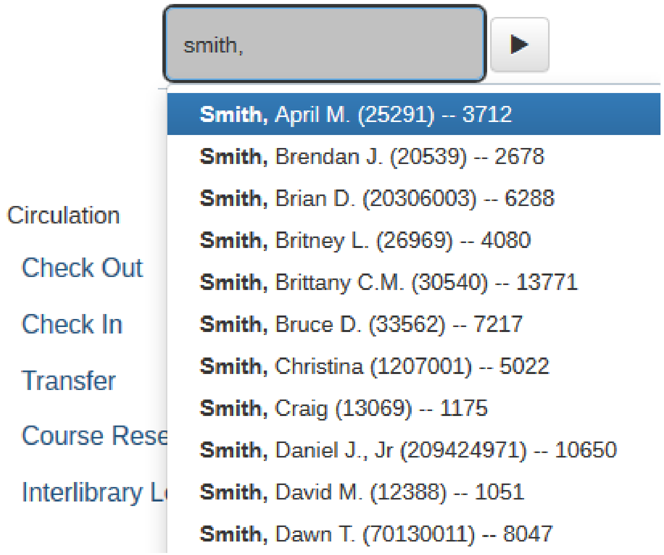
Searches can also be done from the main Circulation menu, or by clicking the Check Out tab at the top of most staff client screens:



WARNING! This report can be very resource intensive on systems with large numbers of overdue items

Scan or enter a name, partial name, or patron cardnumber (barcode) in the search box and click Submit. If the CircAutocompl syspref is turned off, you can truncate the search using an asterisk (*) – for example, Smit* to find all names beginning with that string, or *smith to find all names ending with that string.

If the CircAutocompl syspref is turned on (the preferred setting), the system will show possible matches as you type, and you can select one. NOTE: The feature has been reworked to wait for at least three characters to be typed before trying to find results. Search results are also limited to 25, and you can use a comma to distinguish first and last names (lastname, firstname).

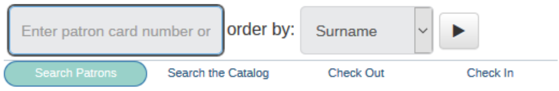


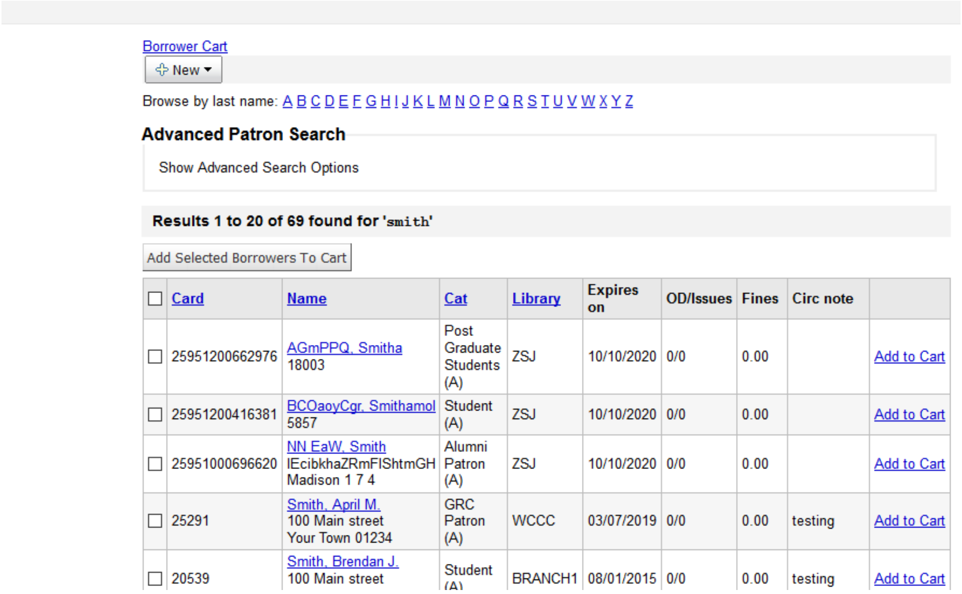
smith,

Smith, April M. (25291) -- 3712
Smith, Brendan J. (20539) -- 2678
Smith, Brian D. (20306003) -- 6288
Smith, Britney L. (26969) -- 4080
Smith, Brittany C.M. (30540) -- 13771
Smith, Bruce D. (33562) -- 7217
Smith, Christina (1207001) -- 5022
Smith, Craig (13069) -- 1175
Smith, Daniel J., Jr (209424971) -- 10650
Smith, David M. (12388) -- 1051
Smith, Dawn T. (70130011) -- 8047

Click on the right patron and you’ll be taken into the patron record, on the Checkout tab. Enter or scan the item’s barcode into the Checkout box.

If that syspref is not turned on, or you don't see the desired user, just click the arrow button rather than pressing the return key. If there is only one match you'll be taken directly into the patron record. If there are multiple matches, you'll get a results list of patron records:

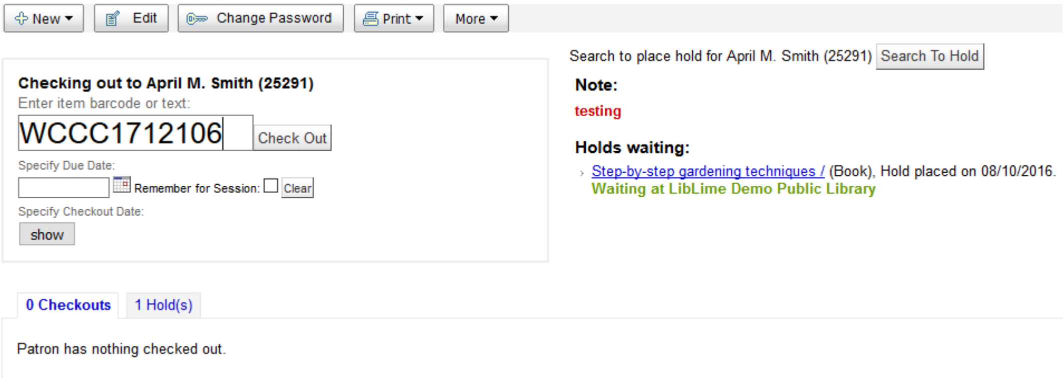




Results 1 to 20 of 69 found for '`smith`'

☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	25951200662976	AGmPPQ, Smitha 18003	Post Graduate Students (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951200416381	BCOaoyCgr, Smithamol 5857	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951000696620	NN EaW, Smith IEcibkhaZRmFIShtmGH Madison 1 7 4	Alumni Patron (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25291	Smith, April M. 100 Main street Your Town 01234	GRC Patron (A)	WCCC	03/07/2019	0/0	0.00	testing	Add to Cart
☐	20539	Smith, Brendan J. 100 Main street	Student	BRANCH1	08/01/2015	0/0	0.00	testing	Add to Cart

Click on the desired patron and you'll be taken into the patron record, on the Details tab. Move to the Checkout tab and enter or scan the item's barcode into the Checkout box:



Checking out to April M. Smith (25291)

Enter item barcode or text:

WCCC1712106

Specify Due Date:

Specify Checkout Date:

Search to place hold for April M. Smith (25291)

Note:

testing

Holds waiting:

- Step-by-step gardening techniques / (Book), Hold placed on 08/10/2016. **Waiting at LibLime Demo Public Library**

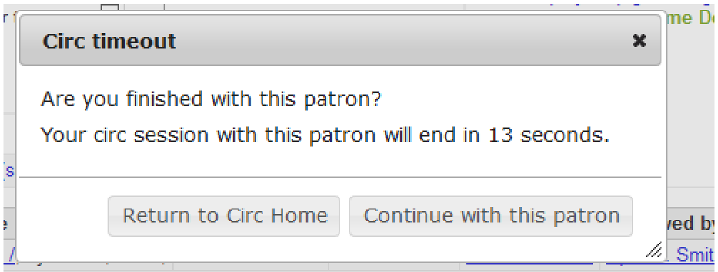
Patron has nothing checked out.

When you've entered all needed data, click the Check Out button to complete the transaction. The item is marked as checked out, and the system remains on that screen so that another item could be processed.

You can continue checking items out to that user, use the Checkout tab at the top of the screen to search for another patron record, or use one of the menus to navigate somewhere else in the staff client.

NOTE: Users with the backdated_checkouts permission will see an additional option to specify the checkout date. This should only be used for testing; never under normal conditions. See the Superlibrarian Guide for more information.

If the syspref CheckoutTimeout has a value, the system will pop up a warning after the specified inactivity period:

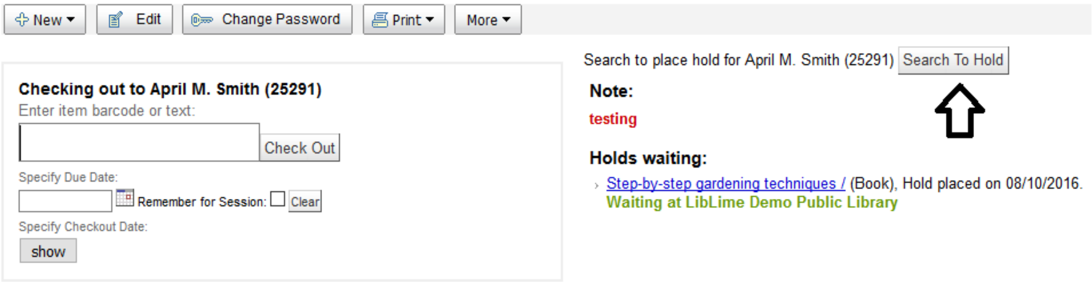


Are you finished with this patron?

Your circ session with this patron will end in 13 seconds.

If you do nothing, the timeout will eventually return the screen to the Circulation menu. Click the Continue with this patron button to remain on the patron screen. This is a privacy feature for environments where the staff screen might be visible to users.

NOTE: A feature called Search To Hold allows staff to place holds for the current patron from the Checkouts tab. This is covered in detail in section 4.11.12 Search To Hold below.



Checking out to April M. Smith (25291)

Enter item barcode or text:

Specify Due Date:

Remember for Session: ☐

Specify Checkout Date:

Search to place hold for April M. Smith (25291)

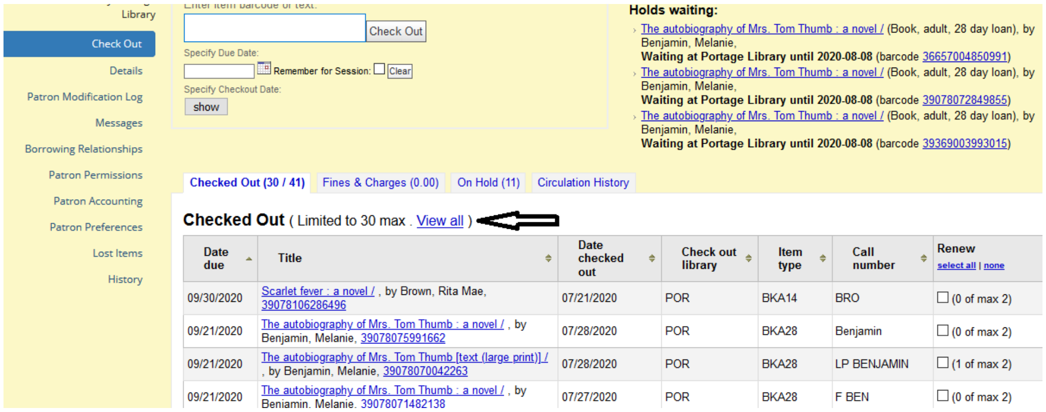
Note:

testing

Holds waiting:

- Step-by-step gardening techniques / (Book), Hold placed on 08/10/2016.
  Waiting at LibLime Demo Public Library

NOTE: Patron records with a large number of checkouts will take a noticeably long time to load. For the Checkout tab only (not the patron Display tab), the list of checkouts at the bottom of the screen is limited to 30. There is a View All link if you need to see the complete list.



Specify Due Date:

Remember for Session: ☐

Specify Checkout Date:

Holds waiting:

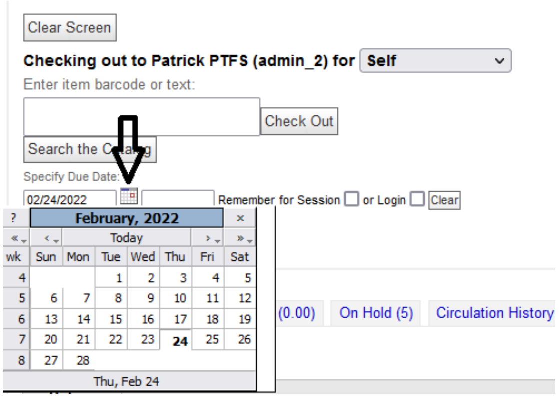
- The autobiography of Mrs. Tom Thumb : a novel / (Book, adult, 28 day loan), by Benjamin, Melanie,
  Waiting at Portage Library until 2020-08-08 (barcode 36657004850991)
- The autobiography of Mrs. Tom Thumb : a novel / (Book, adult, 28 day loan), by Benjamin, Melanie,
  Waiting at Portage Library until 2020-08-08 (barcode 39078072849855)
- The autobiography of Mrs. Tom Thumb : a novel / (Book, adult, 28 day loan), by Benjamin, Melanie,
  Waiting at Portage Library until 2020-08-08 (barcode 39369003993015)

Checked Out (Limited to 30 max . View all)

Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
09/30/2020	Scarlet fever : a novel / , by Brown, Rita Mae, 39078106286496	07/21/2020	POR	BKA14	BRO	☐ (0 of max 2)
09/21/2020	The autobiography of Mrs. Tom Thumb : a novel / , by Benjamin, Melanie, 39078075991662	07/28/2020	POR	BKA28	Benjamin	☐ (0 of max 2)
09/21/2020	The autobiography of Mrs. Tom Thumb [text (large print)] / , by Benjamin, Melanie, 39078070042263	07/28/2020	POR	BKA28	LP BENJAMIN	☐ (1 of max 2)
09/21/2020	The autobiography of Mrs. Tom Thumb : a novel / , by Benjamin, Melanie, 39078071482138	07/27/2020	POR	BKA28	F BEN	☐ (0 of max 2)

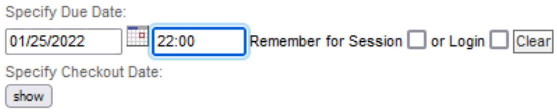
4.1.1 Remembering Alternate Due Date

For most checkouts, you will want the checkout period specified in the circulation rule to automatically take effect. However, at times you may want to check the item out for a shorter or longer period of time. If the option is turned on for staff (with the SpecifyDueDate syspref), you can use the calendar gadget to pick a due date:


Checking out to Patrick PTFS (admin_2) for Self

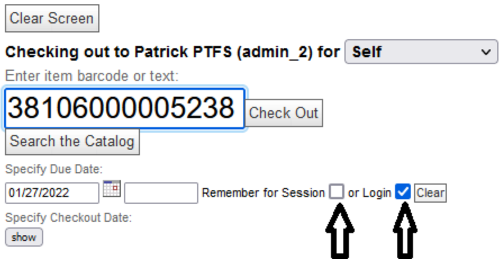
Specify Due Date: 02/24/2022

If the system has at least one hourly loan circ policy defined, an extra box will show next to the Specify Due Date. This will allow staff to specify an alternative time due for hourly loans. For example, if the circ policy would normally set a time due two hours from checkout, staff can opt to extend that:


Specify Due Date: 01/25/2022 22:00

Normally, you would only want the alternate due date to apply to this particular checkout. There are two options which will let you apply it to multiple checkouts. The Remember for Session checkbox will retain the alternate due date you pick for all checkouts while you are on this screen/patron. It will clear when you move to another screen.

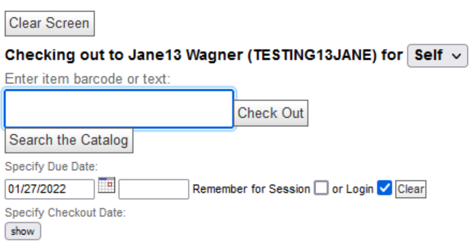
The Or Login checkbox will retain the alternate due date for the whole time the staff person is logged in.


Checking out to Patrick PTFS (admin_2) for Self

Enter item barcode or text: 38106000005238

Specify Due Date: 01/27/2022 Remember for Session ☐ or Login ☑

When you move to another patron’s Checkout tab, you will see the due date and the checkbox retaining those settings.

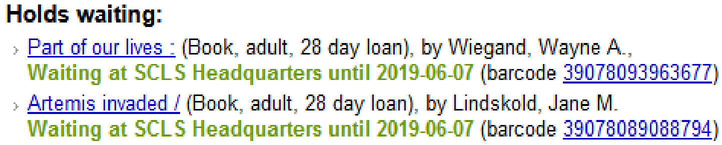

Checking out to Jane13 Wagner (TESTING13JANE) for Self

Specify Due Date: 01/27/2022 Remember for Session ☐ or Login ☑

This option is intended for sites who need to check out materials to multiple users, all with the same duedate, such as textbooks. It may not be appropriate (or needed) for most sites. If you no longer want the settings to apply, use the Clear button next to the checkbox to remove them, or log out and back in.

4.2 Checkout Messages, Warnings, and Blocks

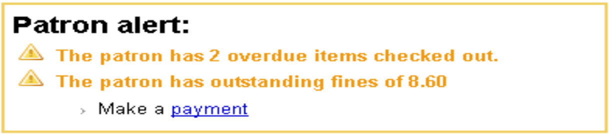
Before you take any action, look at the Patron Checkout screen. It may display various messages, ranging from a simple alert about a waiting hold



Holds waiting:

- Part of our lives : (Book, adult, 28 day loan), by Wiegand, Wayne A., Waiting at SCLS Headquarters until 2019-06-07 (barcode 39078093963677)
- Artemis invaded / (Book, adult, 28 day loan), by Lindskold, Jane M. Waiting at SCLS Headquarters until 2019-06-07 (barcode 39078089088794)

to warnings about overdue items and fines



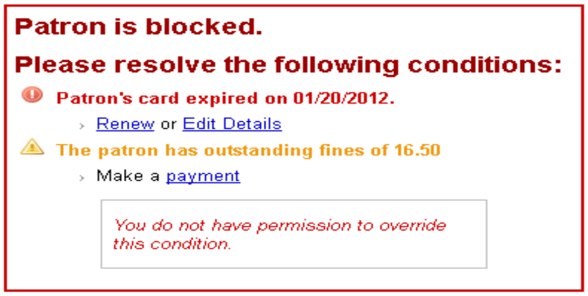
Patron alert:

⚠ The patron has 2 overdue items checked out.

⚠ The patron has outstanding fines of 8.60

- Make a payment

to a block on checking out for various reasons. In the example below, there are two problems. The first is that the patron's card has expired – a Renew link allows the staff person to quickly renew the card. The second problem is outstanding fines over the amount specified by the "Circ block fine threshold" setting in the patron category policy or in other system configuration settings. In this example, the staff person can accept a payment but does not have permission to override that block and continue with a checkout. Either the patron must make a payment, or a more senior staff person with override permissions would have to log in and process the checkout.



Patron is blocked.

Please resolve the following conditions:

❗ Patron's card expired on 01/20/2012.

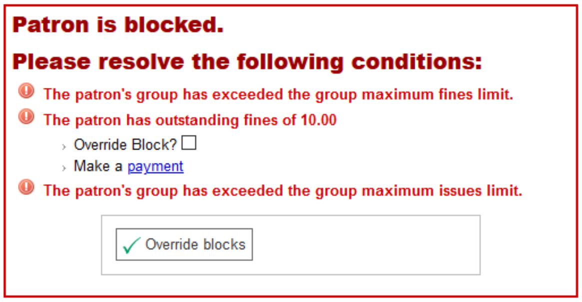
- Renew or Edit Details

⚠ The patron has outstanding fines of 16.50

- Make a payment

You do not have permission to override this condition.

If you are using family groups, and there are group thresholds for fines, holds, or checkouts (see the section Guarantor or Family Group Records), you may see messages specific to that configuration:

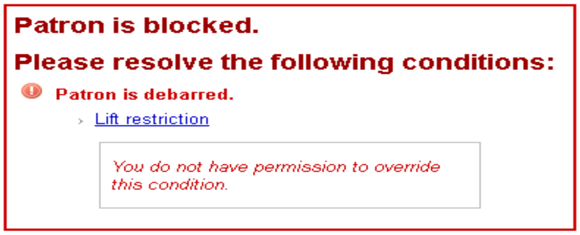


Patron is blocked.

Please resolve the following conditions:

- The patron's group has exceeded the group maximum fines limit.
- The patron has outstanding fines of 10.00
  - Override Block? ☐
  - Make a payment
- The patron's group has exceeded the group maximum issues limit.

A patron's record may be marked as debarred, either manually (by editing the record) or automatically by an overdue notice. In that case, the checkout screen message would reflect that:



Patron is blocked.

Please resolve the following conditions:

- Patron is debarred.
  - Lift restriction

You do not have permission to override this condition.

In this example, the staff person can lift the restriction, but is not allowed to proceed with the checkout without lifting it.

Other screen messages may appear in other situations, especially if the item is on hold for someone else or is already marked as checked out; read the message for information about how to resolve the problem.

There are several manual flags which may be set in the patron record that will show as warnings and block checkouts.

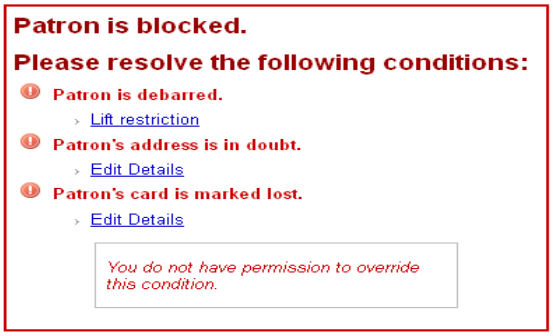
Patron Account Flags

Gone no Address: Yes ● No ○

Debarred: Yes ● No ○

Lost Card: Yes ● No ○

On the checkout tab you may see any/all of these messages:



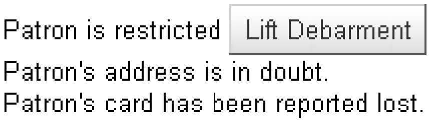
Patron is blocked.

Please resolve the following conditions:

- Patron is debarred.
  - Lift restriction
- Patron's address is in doubt.
  - Edit Details
- Patron's card is marked lost.
  - Edit Details

You do not have permission to override this condition.

On the patron Details page, you may see any/all of these messages:

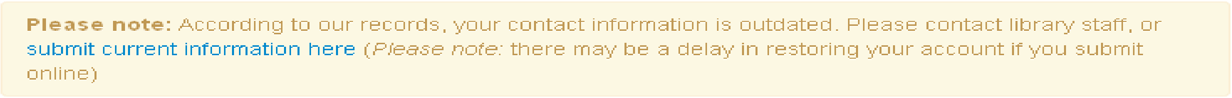


Patron is restricted Lift Debarment
Patron's address is in doubt.
Patron's card has been reported lost.

Gone no Address: if you need the patron to provide correct information before allowing them to place more holds or check out items, choose this account flag. In the patron Details screen, this phrase will appear under the patron's name.

- Patron's address is in doubt.

A message will also appear to the patron at login in the Discovery Layer:

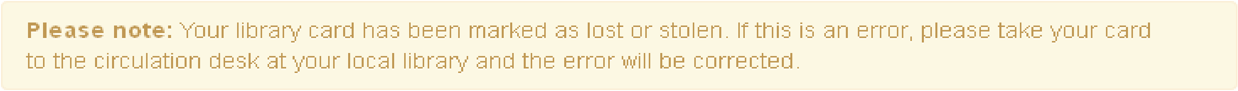


Please note: According to our records, your contact information is outdated. Please contact library staff, or submit current information here (*Please note:* there may be a delay in restoring your account if you submit online)

Lost Card: if the patron has called you to tell you their library card is lost, or a card is found and brought to your library, set this account flag. In the patron Details screen, this phrase will appear under the patron's name.

- Patron's card has been reported lost

A message will also appear to the patron on login in the Discovery Layer:



Please note: Your library card has been marked as lost or stolen. If this is an error, please take your card to the circulation desk at your local library and the error will be corrected.

Debarred: if you wish to manually block a patron from placing holds or checking out items, set this flag in the patron's account. In the patron Details screen, this phrase and button will appear under the patron's name.

- Patron is restricted Lift Debarment

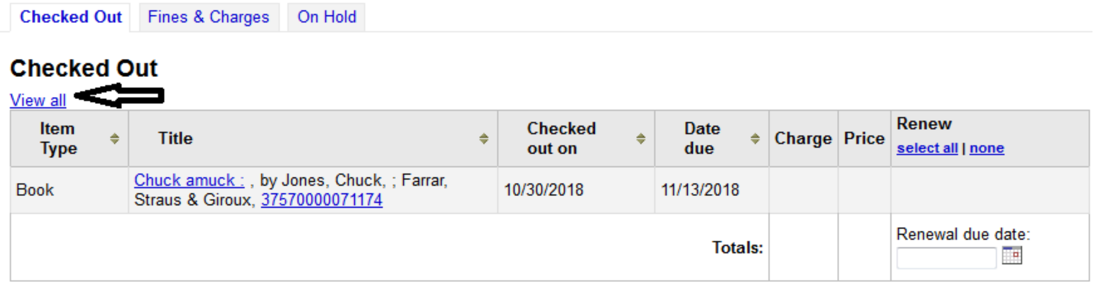
A message will also appear to the patron on login in the Discovery Layer:

Your account has been frozen. Please contact library staff if this is in error.

4.2.1 Limit Number of Current Checkouts Visible

Your site may choose to limit the number of currently checked-out items visible on the patron Checkouts tab. This is done for sites where patrons may have large numbers of items checked out at once, to speed up loading and refreshing of the Checkouts tab.

The syspref ShowCheckoutsRange will specify a date range (such as 1 day or 2 day). The full list of checkouts can be toggled to display with View All/Limit View links (and is always visible on the patron Details tab).



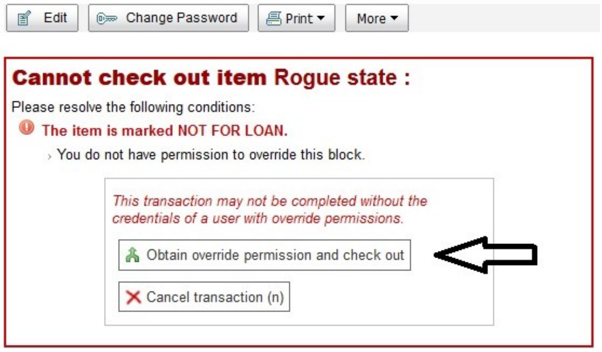
Checked Out

View all

Item Type	Title	Checked out on	Date due	Charge	Price	Renew select all | none
Book	Chuck amuck : , by Jones, Chuck, ; Farrar, Straus & Giroux, 37570000071174	10/30/2018	11/13/2018			
			Totals:			Renewal due date:

4.2.2 Getting a Supervisor Override

If the system is configured for it, staff without permissions to perform certain actions may obtain a temporary supervisor override. In this example, staff are not allowed to check out a Not For Loan item, but may ask for an override:



Cannot check out item Rogue state :

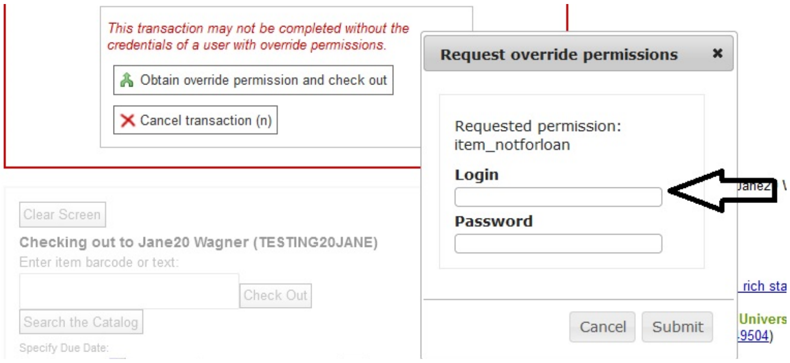
Please resolve the following conditions:

The item is marked NOT FOR LOAN.

› You do not have permission to override this block.

This transaction may not be completed without the credentials of a user with override permissions.

Clicking on the “obtain override” button will open a popup, where a supervisor may enter a login:



This transaction may not be completed without the credentials of a user with override permissions.

Checking out to Jane20 Wagner (TESTING20JANE)

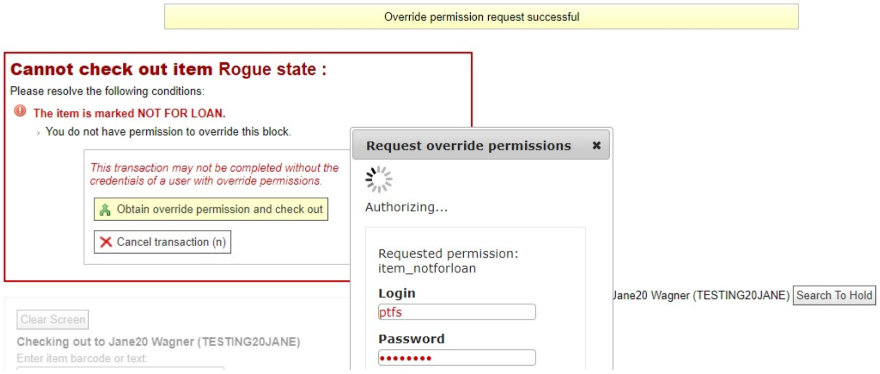
Enter item barcode or text:

Requested permission: item_notforloan

Login

Password

After the supervisor enters login information, a screen message shows that the override was granted:



Override permission request successful

Cannot check out item Rogue state :

Please resolve the following conditions:

The item is marked NOT FOR LOAN.

You do not have permission to override this block.

This transaction may not be completed without the credentials of a user with override permissions.

Authorizing...

Requested permission: item_notforloan

Login: ptfs

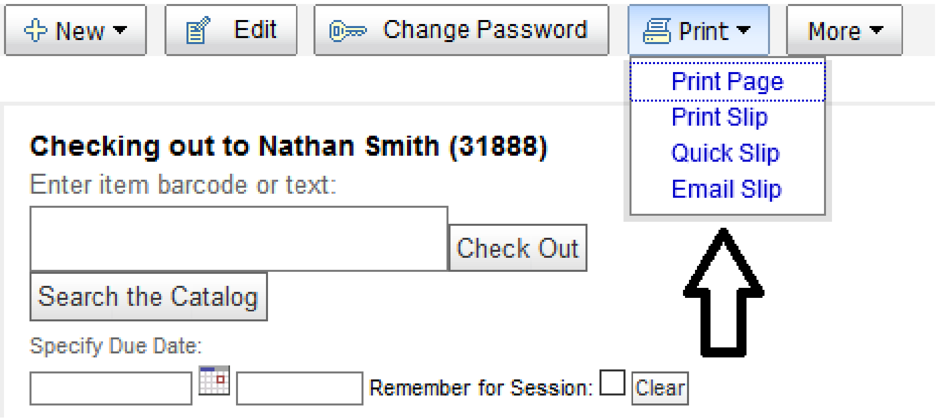
Password: ••••••••

Checking out to Jane20 Wagner (TESTING20JANE)

The transaction is then completed. Note that the override is only valid while on this patron record; if staff move to another record and encounter the same block, the supervisor override must be obtained again.

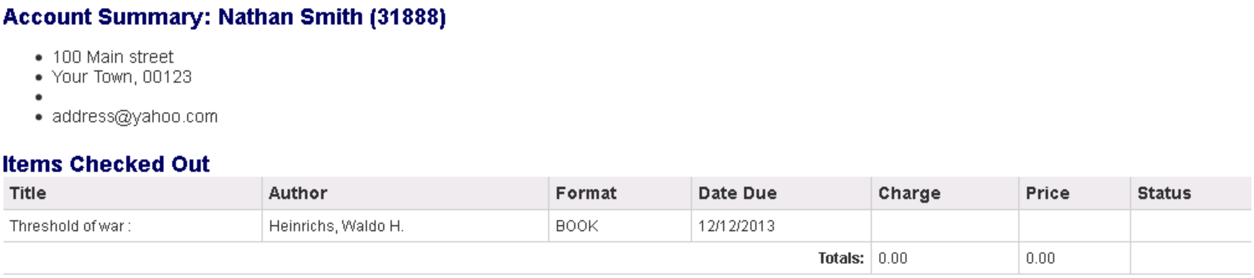
4.3 Receipt Printing

After completing all checkouts, if desired you can print a receipt for the user. (The syspref printcirculationslips must be turned on.) On the Checkouts tab click the Print button. This has four options, Print Page, Print Slip, Quick Slip, and Email Slip:



Checking out to Nathan Smith (31888)

Print Page opens a new browser window with a simplified display; use the browser's print function to print it.



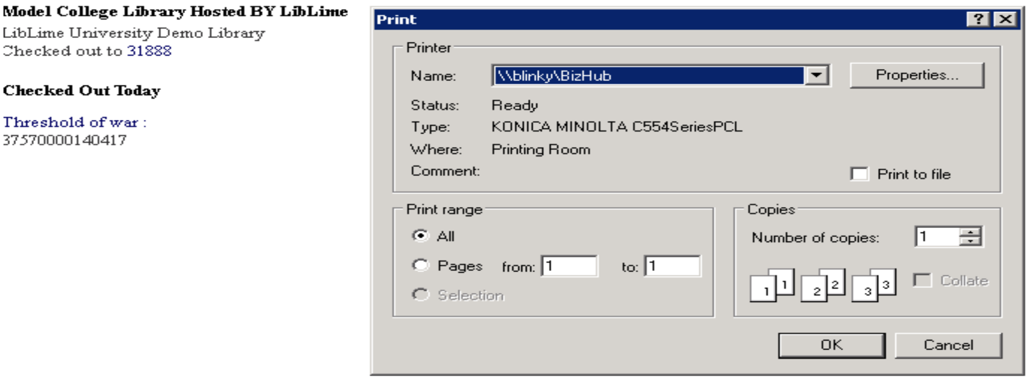
Account Summary: Nathan Smith (31888)

- 100 Main street
- Your Town, 00123
-
- address@yahoo.com

Items Checked Out

Title	Author	Format	Date Due	Charge	Price	Status
Threshold of war :	Heinrichs, Waldo H.	BOOK	12/12/2013			
			Totals:	0.00	0.00	

Print Slip will show all items presently checked out to the user; Print Quick Slip will only show those items checked out today. Both will open a browser window and immediately try to print that screen:



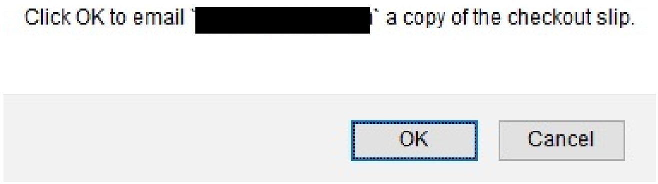
Model College Library Hosted BY LibLime
LibLime University Demo Library
Checked out to 31888

Checked Out Today

Threshold of war :
37570000140417

Note: if the receipt printed is too long, try unchecking the “header and footer” box in the printer settings.

Email slip uses the same message template as Print Slip, but will send it to the patron’s email address. Select that option and you’ll get a popup asking you to confirm:



Click OK to email `[redacted]` a copy of the checkout slip.

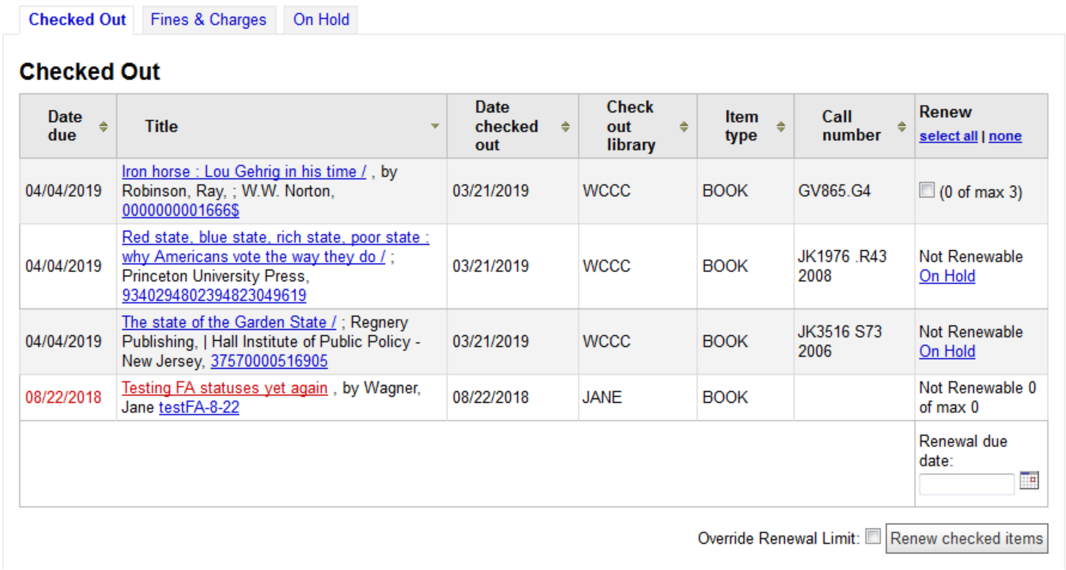
Each branch can specify custom text for these slips; see the Superlibrarian Guide for more information.

You can also print or email receipts from the main patron details page (see Patrons section of the manual).

4.4 Renewing Items for a Patron

The number of renewals allowed is determined by the circulation policy controlling that particular item type/patron category checkout. Patrons have the ability to renew their own materials from their Discovery Layer account, but staff members can also do renewals if needed. On either the patron Checkout tab or the patron Details tab, the screen shows a list of items currently checked out.

NOTE: column order has been arranged to put due date first, and a column for the library where the item was checked out has been added. All columns are sortable using the up/down arrows in the column header. Not all screenshots have been updated to reflect the change:



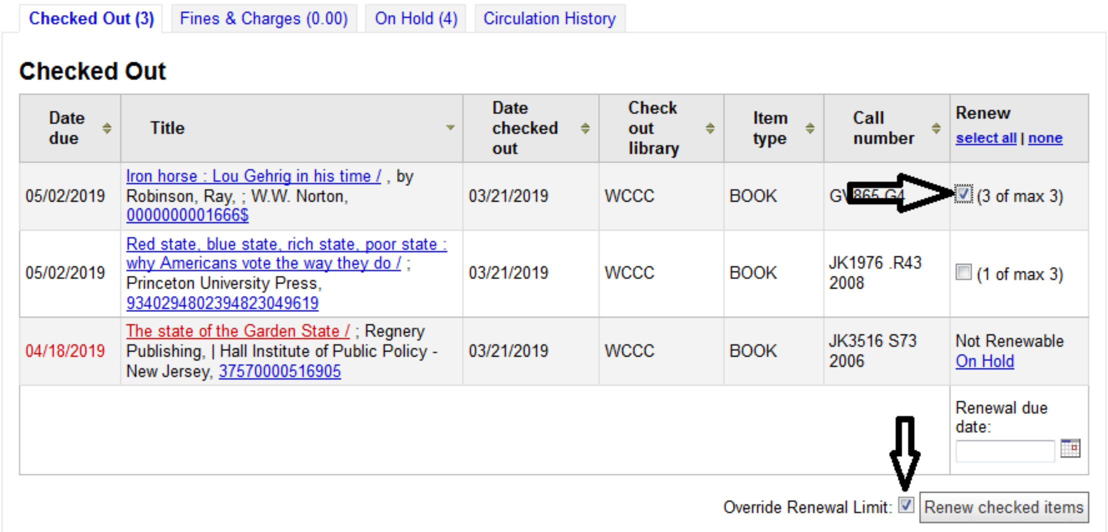
Checked Out

Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
04/04/2019	Iron horse : Lou Gehrig in his time / , by Robinson, Ray, ; W.W. Norton, 0000000001666$	03/21/2019	WCCC	BOOK	GV865.G4	☐ (0 of max 3)
04/04/2019	Red state, blue state, rich state, poor state : why Americans vote the way they do / ; Princeton University Press, 9340294802394823049619	03/21/2019	WCCC	BOOK	JK1976 .R43 2008	Not Renewable On Hold
04/04/2019	The state of the Garden State / ; Regnery Publishing, | Hall Institute of Public Policy - New Jersey, 37570000516905	03/21/2019	WCCC	BOOK	JK3516 S73 2006	Not Renewable On Hold
08/22/2018	Testing FA statuses yet again , by Wagner, Jane testFA-8-22	08/22/2018	JANE	BOOK		Not Renewable 0 of max 0
						Renewal due date:

Override Renewal Limit: ☐ Renew checked items

One column shows renewal status; a note will indicate number of renewals left. In this example, two items are on hold for someone else and thus should not be renewed. Staff cannot override this block. One item is marked as Not Renewable because it has reached the limit on renewals, but another one can be renewed by staff.

Staff can opt to override the renewal limits; click the Override blocked renewals box, and the screen changes to show a renewal link:



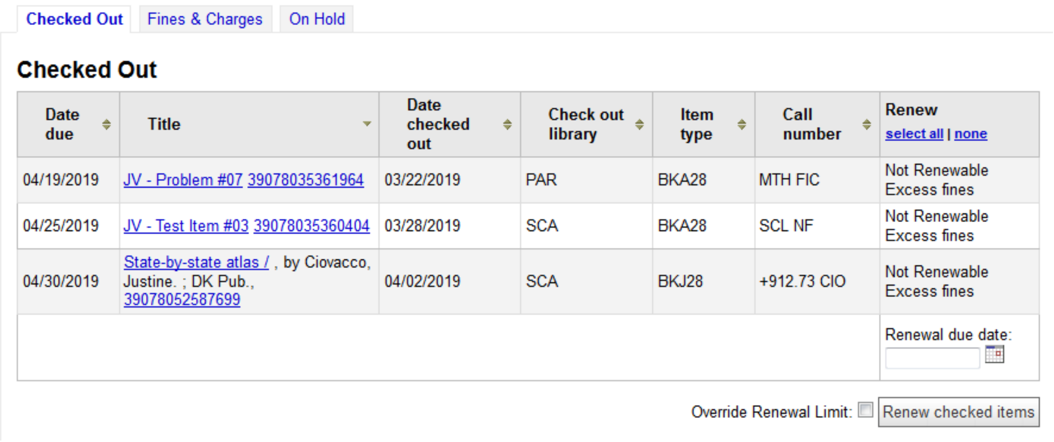
Checked Out

Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
05/02/2019	Iron horse : Lou Gehrig in his time / , by Robinson, Ray, ; W.W. Norton, 0000000001666$	03/21/2019	WCCC	BOOK	GV865.G4	☑ (3 of max 3)
05/02/2019	Red state, blue state, rich state, poor state : why Americans vote the way they do / ; Princeton University Press, 9340294802394823049619	03/21/2019	WCCC	BOOK	JK1976 .R43 2008	☐ (1 of max 3)
04/18/2019	The state of the Garden State / ; Regnery Publishing, | Hall Institute of Public Policy - New Jersey, 37570000516905	03/21/2019	WCCC	BOOK	JK3516 S73 2006	Not Renewable On Hold
						Renewal due date:

Override Renewal Limit: ☑ Renew checked items

Note that the Renew box for that item is not automatically checked; you would need to check it.

When a patron owes more than the threshold in OPACFineNoRenewals syspref, the item shows as not renewable. A screen message of "Not Renewable Excess fines" has been added to alert staff to the reason for the block. This block can also be overridden by staff if desired.



Checked Out

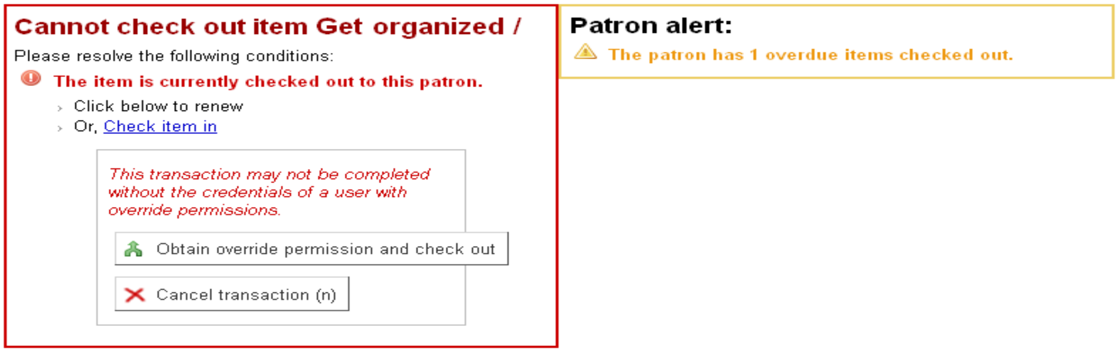
Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
04/19/2019	JV - Problem #07 39078035361964	03/22/2019	PAR	BKA28	MTH FIC	Not Renewable Excess fines
04/25/2019	JV - Test Item #03 39078035360404	03/28/2019	SCA	BKA28	SCL NF	Not Renewable Excess fines
04/30/2019	State-by-state atlas / , by Ciovacco, Justine. ; DK Pub., 39078052587699	04/02/2019	SCA	BKJ28	+912.73 CIO	Not Renewable Excess fines
						Renewal due date:

Override Renewal Limit: ☐ Renew checked items

If a user has multiple items out, you can click the Renew All button to renew everything. Otherwise, check the Renew box for the desired item and click the Renew Checked Items. The renewal will be done and the number of renewals will show in that column. The renewal status for the problem item reverts to Not Renewable.

Renewal loan periods are the same amount of days as the original loan period (controlled by syspref RenewalPeriodBase). When an item is renewed, the system bases the new loan period on the date the item is renewed. The new loan period is NOT an extension of the old loan period, unless the patron renewed the item on the due date.

You could also renew the item by checking it out again to the same patron, on the Checkout tab, although that is usually more difficult. In that case, you would get a warning message, and your system may or may not allow you to override and continue:



Cannot check out item Get organized /

Please resolve the following conditions:

The item is currently checked out to this patron.

- Click below to renew
- Or, Check item in

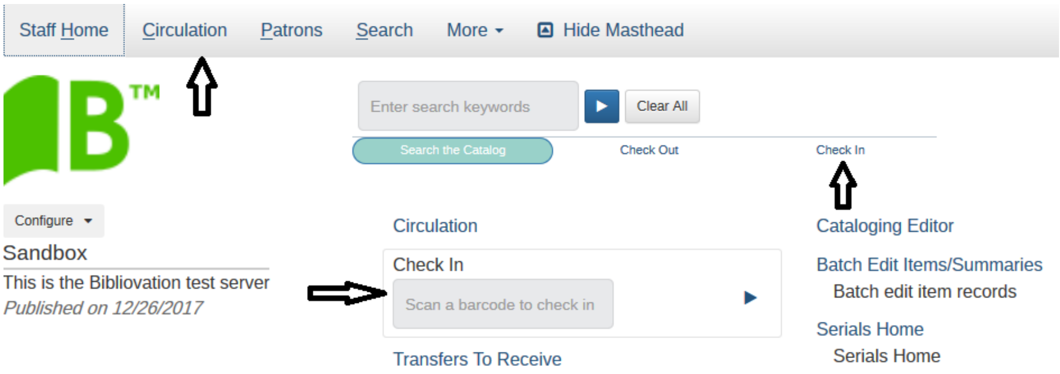
This transaction may not be completed without the credentials of a user with override permissions.

Patron alert:

The patron has 1 overdue items checked out.

4.5 Checking In

In the system, items are checked in not only to return them from a checkout but also to trigger holds, clear transits, and mark lost items as found. Check in items through Circulation, Checkin. You can get to that menu either from the Circulation links on the staff client home page, or from the Circulation menu link at the top of each screen:



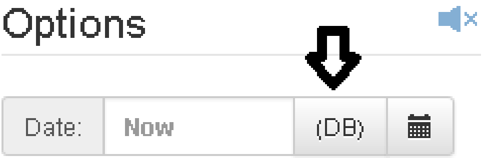
Under Circulation, Check In, scan or type the item’s barcode into the box:

WCCC1712106

Depending on the granular permissions assigned to your staff user account, you may also see options to Forgive Overdue Charges, or use Dropbox Mode.

Forgive Overdue Charges prevents overdue fines from being assessed on the items you are checking it. To exit the Forgive Overdue Charges mode you must un-check the box and then click on the submit button OR un-check the box and check in an item before leaving the checkin screen. If you don't do this, when you leave the check in screen and come back to it later, it will still be in the Forgive Overdue Charges mode.

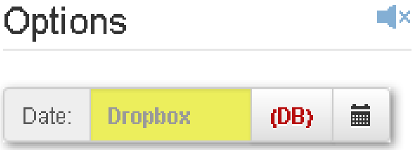
Dropbox Mode is used to check in items from the overnight book drop. Click the DB button.



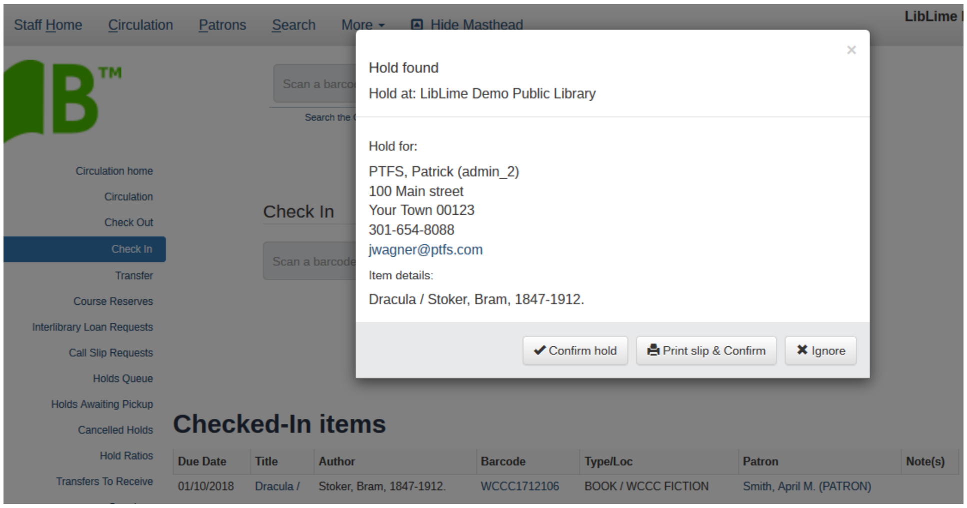
7

Items will be checked in (return date) using the last date, before today, that your library was open. The system automatically sets the last date as determined by your library’s calendar, so it is important that your calendar is accurate. **NOTE: If your library’s hours run past midnight, Dropbox Mode will NOT reset the return date to the previous day. In other words, if your library closes at 1:00 AM on June 2, any item checked in during the day on June 2 with Dropbox Mode will have a return date of June 2.**

When Dropbox is on, the option bar changes appearance:



In any case, click Submit to perform the checkin. If there are outstanding holds, or if the item is being checked in at another branch than the owning library, you will be alerted by screen messages:



Hold found

Hold at: LibLime Demo Public Library

Hold for:

PTFS, Patrick (admin_2)
100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com

Item details:

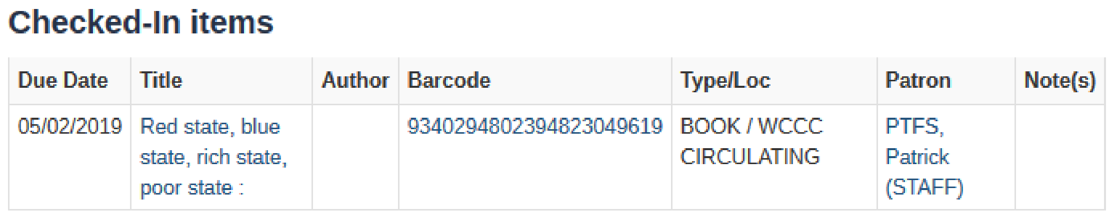
Dracula / Stoker, Bram, 1847-1912.

Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
01/10/2018	Dracula /	Stoker, Bram, 1847-1912.	WCCC1712106	BOOK / WCCC FICTION	Smith, April M. (PATRON)	

At this point, you can confirm the hold and place the item in transit (optionally printing a slip to put in the item), or ignore the hold and keep the item at this location.

If there are no holds, and the item is being checked in at its home location, you will just see a confirmation screen:

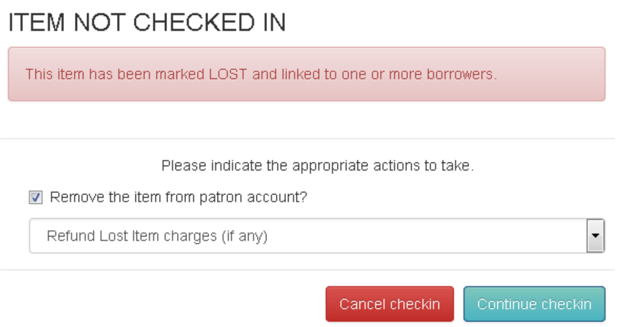


Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
05/02/2019	Red state, blue state, rich state, poor state :		9340294802394823049619	BOOK / WCCC CIRCULATING	PTFS, Patrick (STAFF)	

The screen shows the patron who returned the item, staff and public notes, and policy codes for item type, branchcode, and shelving location. Staff can click on the title/barcode or patron links to go to those records.

Other screen messages may appear in other circumstances. For example, if an item was marked lost, then checked in, the system will alert you with a popup:



ITEM NOT CHECKED IN

This item has been marked LOST and linked to one or more borrowers.

Please indicate the appropriate actions to take.

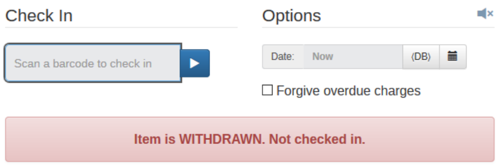
☑ Remove the item from patron account?

Refund Lost Item charges (if any)

See lost item handling for more information.

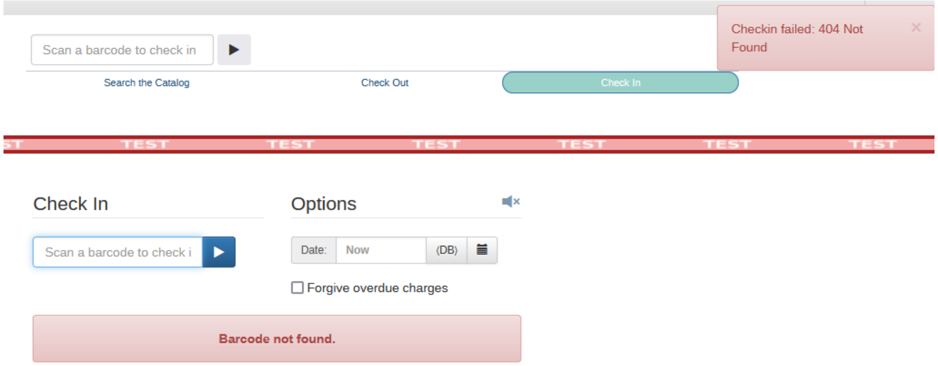
If an item has been marked as withdrawn, it cannot be checked in. You must clear the withdrawn status first.

Checkin Failed: 403 Item is withdrawn.



Item is WITHDRAWN. Not checked in.

If you try to check in a barcode which is not in the system, you'll get a warning message.

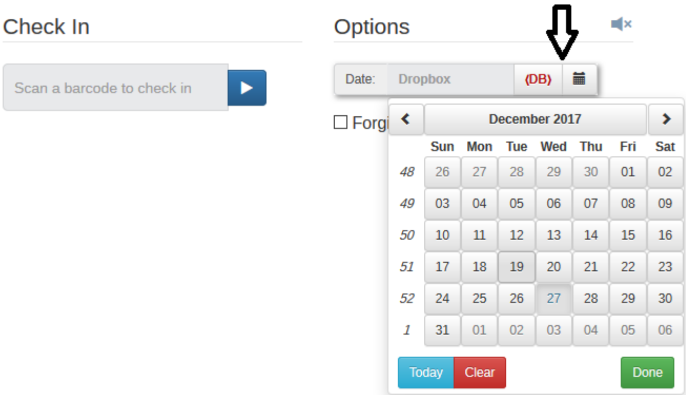


Checkin failed: 404 Not Found

Barcode not found.

4.5.1 Backdate Checkins

The dropbox mode by itself will only set the checkin date one day in the past. Under certain circumstances, libraries may want to mark all checkins for an earlier date. An example of this is when a library has unexpectedly been closed for several days due to bad weather – the library staff do not want to penalize patrons with fines for those days. If a staff user has the circulation permission change_circ_date_and_time, you can use the calendar button on the dropbox feature to set an earlier checkin date:

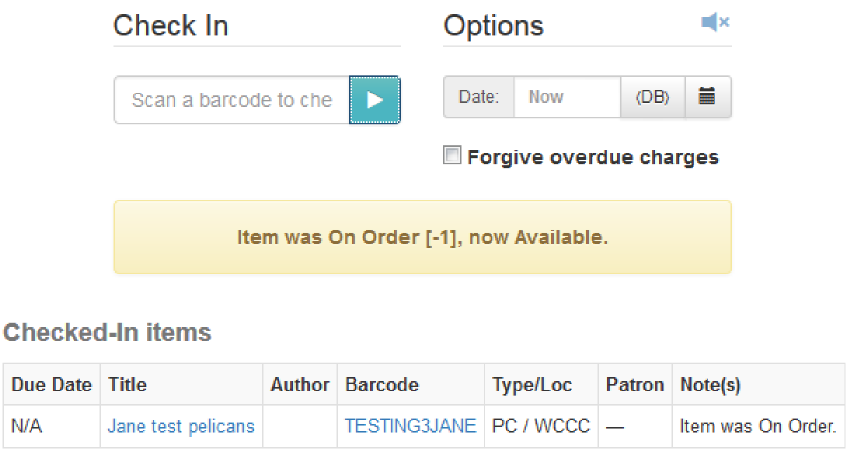


	Sun	Mon	Tue	Wed	Thu	Fri	Sat
48	26	27	28	29	30	01	02
49	03	04	05	06	07	08	09
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
1	31	01	02	03	04	05	06

Use the calendar widget to select a date in the past. When you scan an item barcode, the checkin date will be set to that date, and any accruing fines will be recalculated accordingly. The date will remain in place for all checkins while you are on that screen; it will clear when you move to another screen.

4.5.2 Clearing On Order Status at Checkin

Items on order through acquisitions are created with a notforloan status of -1 (usually labeled as “Ordered” or “On Order”). When an item is received and run through checkin, this feature automatically clears that status, and sets the item to normal availability (a zero setting):



Item was On Order [-1], now Available.

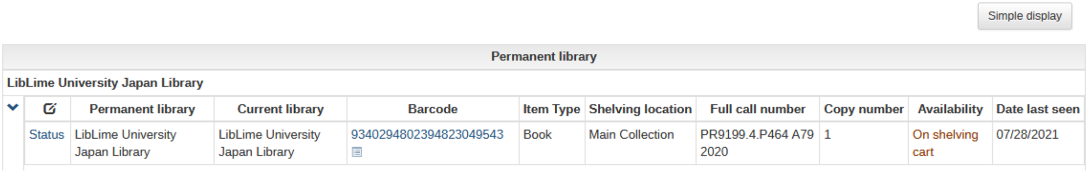
Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
N/A	Jane test pelicans		TESTING3JANE	PC / WCCC	—	Item was On Order.

Note that the system will clear the status for any negative Not For Loan authorized value, not just the -1 used for On Order.

4.5.3 Shelving Cart Display

If configured in the branchcode policy (see the Superlibrarian Guide), a checked-in item will display as being on the shelving cart. The display is automatic and will revert to just “Available” after the specified amount of time. In staff mode:

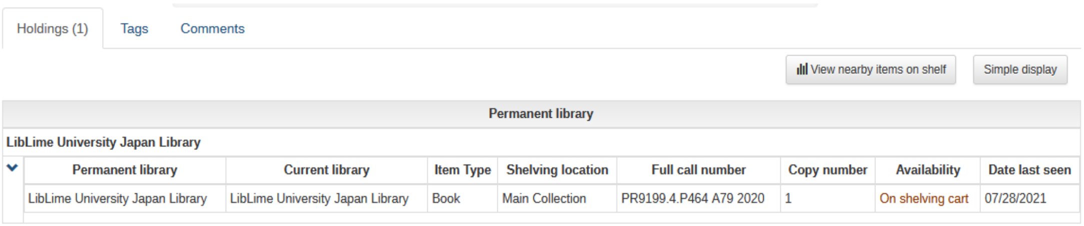


Permanent library

LibLime University Japan Library

	Permanent library	Current library	Barcode	Item Type	Shelving location	Full call number	Copy number	Availability	Date last seen
Status	LibLime University Japan Library	LibLime University Japan Library	9340294802394823049543	Book	Main Collection	PR9199.4.P464 A79 2020	1	On shelving cart	07/28/2021

In the Discovery Layer:



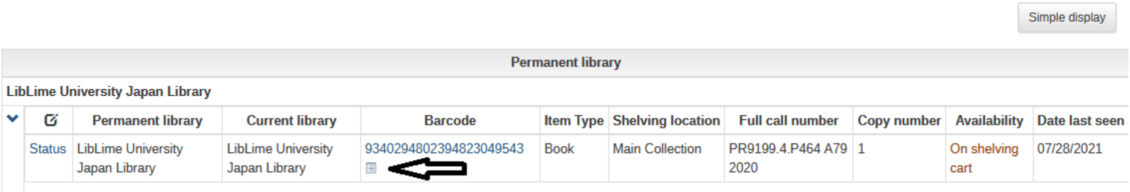
Permanent library

LibLime University Japan Library

Permanent library	Current library	Item Type	Shelving location	Full call number	Copy number	Availability	Date last seen
LibLime University Japan Library	LibLime University Japan Library	Book	Main Collection	PR9199.4.P464 A79 2020	1	On shelving cart	07/28/2021

4.5.4 Checkin Notes

With the appropriate granular permissions (circulate.item_checkin_notes.view, circulate.item_checkin_notes.modify, circulate.item_checkin_notes.delete), staff can create notes on items to be displayed at checkin In the staff title display, click the icon next to a particular item's barcode in the list of items:

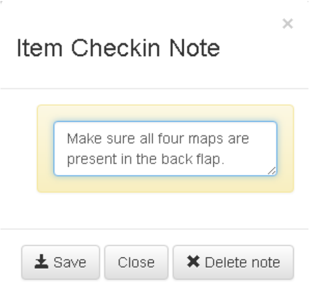


Permanent library

LibLime University Japan Library

	Permanent library	Current library	Barcode	Item Type	Shelving location	Full call number	Copy number	Availability	Date last seen
Status	LibLime University Japan Library	LibLime University Japan Library	9340294802394823049543	Book	Main Collection	PR9199.4.P464 A79 2020	1	On shelving cart	07/28/2021

This opens a popup screen, where you can enter a new note (or delete an existing one):



Item Checkin Note

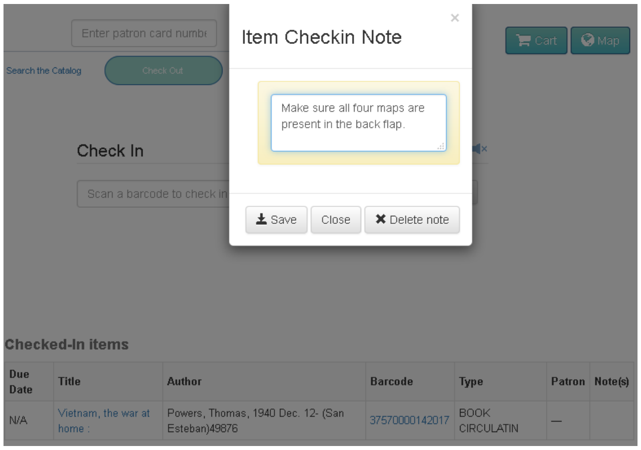
Make sure all four maps are present in the back flap.

When a note is present, the color and appearance of the icon changes:

Barcode

37570000142017

When the item is checked in, the note will show:



Item Checkin Note

Make sure all four maps are present in the back flap.

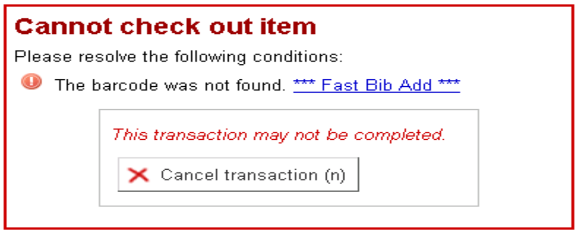
Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note(s)
N/A	Vietnam, the war at home :	Powers, Thomas, 1940 Dec. 12- (San Esteban)49876	37570000142017	BOOK CIRCULATIN	—	

At that point you will have the option to delete the note or retain it for future use. Staff members who only have the View permission will see notes at checkin but will not be able to edit or remove them. Staff members without any permissions can still check in items, but will not see any of the notes.

4.6 Fast Add at Checkout

In certain circumstances, you may need to check out an item that is not in your database. This can happen with ILL items or with old items that may have been missed when the collection was first cataloged online. If a patron has an item to check out and it either has no barcode or that barcode isn't in the database, you will get an error message. You can also trigger this by entering a nonsense or nonexistent barcode:



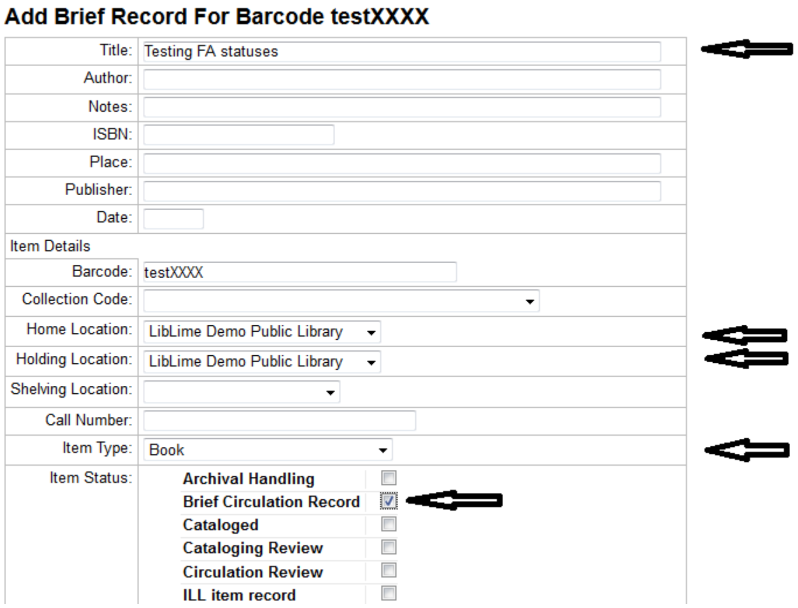
Cannot check out item

Please resolve the following conditions:

The barcode was not found. *** Fast Bib Add ***

This transaction may not be completed.

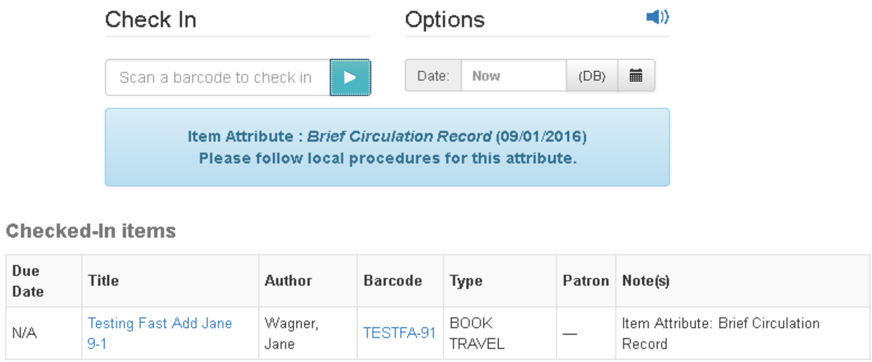
If you have permission to create one, you can click the Fast Bib Add link in this error screen. That brings up an edit screen where you can enter brief information about the item. At minimum, you should enter a title, home and current branches, and item type. Check Brief Circulation Record under Item Status – that custom item status should be configured on your system to clear at checkin (see Superlibrarian Guide). Your site may set policies about creating and using Fast Add records, such as always using a call number of "FAST ADD" or some other identifier. Be sure your library is selected if you have multiple branches. The form picks up and uses the barcode you entered at checkout.



Add Brief Record For Barcode testXXXX

Title: Testing FA statuses
Author:
Notes:
ISBN:
Place:
Publisher:
Date:
Item Details
Barcode: testXXXX
Collection Code:
Home Location: LibLime Demo Public Library
Holding Location: LibLime Demo Public Library
Shelving Location:
Call Number:
Item Type: Book
Item Status:
- Archival Handling ☐
- Brief Circulation Record ☑
- Cataloged ☐
- Cataloging Review ☐
- Circulation Review ☐
- ILL item record ☐

Enter any other information available and click the Confirm Add button at the bottom of the form. The brief title/item records are created, and the item is checked out to the user. When the item is checked in, the Brief Circulation Record setting is cleared, but it triggers a screen warning. The text may vary, depending on your local setup.



Item Attribute : *Brief Circulation Record* (09/01/2016)
Please follow local procedures for this attribute.

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note(s)
N/A	Testing Fast Add Jane 9-1	Wagner, Jane	TESTFA-91	BOOK TRAVEL	—	Item Attribute: Brief Circulation Record

Staff should then put the item aside for cataloging staff to handle. Any other attributes will also prompt staff to send the item for special processing.

4.7 Handling Transits

Any multi-library system that allows borrowing between branches will have to deal with transfers between branches. Items that belong to one branch may be returned at another, or a patron may place a hold on something with a pickup location at another branch. Items may be placed in transit either automatically (by confirming a transfer from a checkin message) or manually. If an item is on hold for pickup at another branch, the popup message will specify that:

Transfer Required : Hold found

Transfer to: LibLime Demo Public Library

Hold for:

PTFS, Patrick (admin_2)
100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com

Item details:

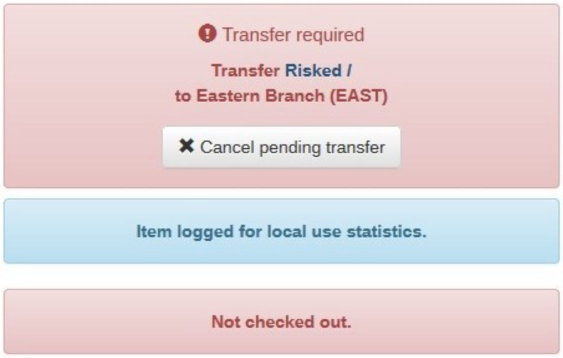
Capturing nature in watercolor / Jamison, Philip, 1925- (San Esteban)32450

When you click to confirm the hold, the item is put in transit status:

Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
N/A	Capturing nature in watercolor /	Jamison, Philip, 1925- (San Esteban)32450	37570000158070	BOOK / WCCC CIRCULATING	—	Transfer to: WCCC

If the item is not on hold, a basic transfer message will appear at checkin, and the item will be put in transit:



Transfer required

Transfer Risked /
to Eastern Branch (EAST)

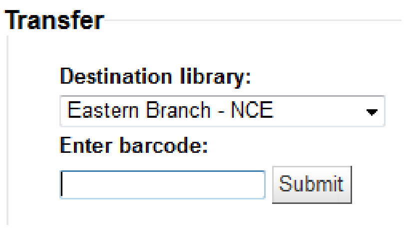
Item logged for local use statistics.

Not checked out.

Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
N/A	Risked /	Haddix, Margaret Peterson. (PJTEST)105675	9340294802394823049625	BOOK / EAST CIRCULATING	—	Transfer to: EAST Item logged for local use statistics.

To put something in transit manually, go to Circulation, Transfer. Select the destination library from the pull-down, and enter the barcode:

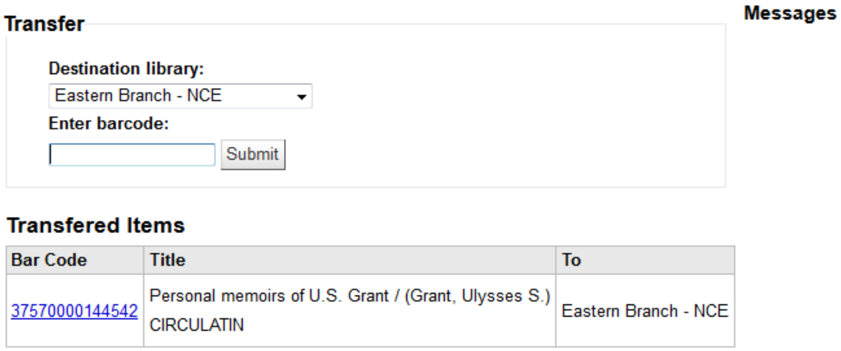


Transfer

Destination library: Eastern Branch - NCE

Enter barcode:

If there are blocks (Administration, Library Transfer Limits), you will see a message at right. If there are no blocks, the item is put in transit.



Transfer

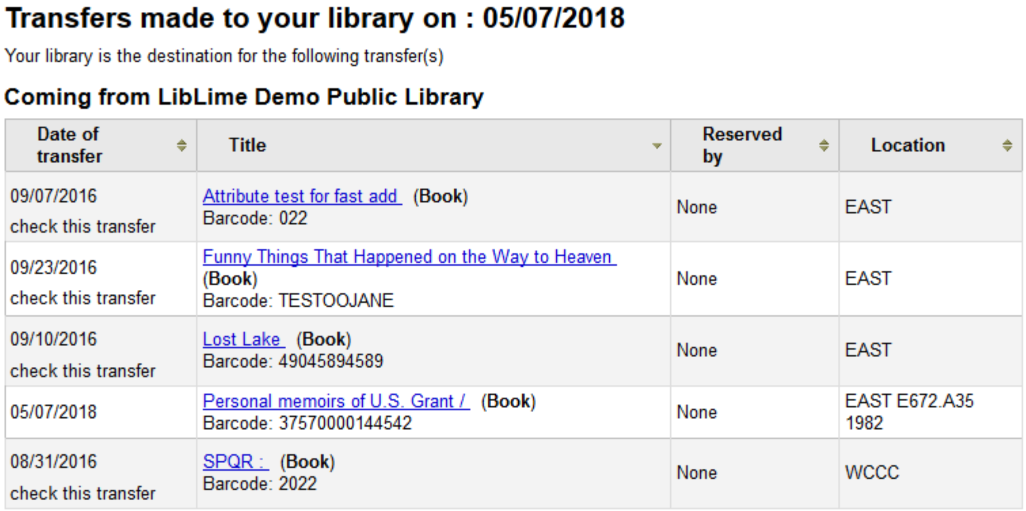
Destination library: Eastern Branch - NCE

Enter barcode:

Transfered Items

Bar Code	Title	To
37570000144542	Personal memoirs of U.S. Grant / (Grant, Ulysses S.) CIRCULATIN	Eastern Branch - NCE

Library staff can always see what items are in transit under Circulation, Transfers to Receive:



Transfers made to your library on : 05/07/2018

Your library is the destination for the following transfer(s)

Coming from LibLime Demo Public Library

Date of transfer	Title	Reserved by	Location
09/07/2016 check this transfer	Attribute test for fast add (**Book**) Barcode: 022	None	EAST
09/23/2016 check this transfer	Funny Things That Happened on the Way to Heaven (**Book**) Barcode: TESTOOJANE	None	EAST
09/10/2016 check this transfer	Lost Lake (**Book**) Barcode: 49045894589	None	EAST
05/07/2018	Personal memoirs of U.S. Grant / (**Book**) Barcode: 37570000144542	None	EAST E672.A35 1982
08/31/2016 check this transfer	SPQR : (**Book**) Barcode: 2022	None	WCCC

When the item physically arrives at the destination, staff must run it through a checkin to clear the transit and trigger any pending holds:

Hold found

Hold at: LibLime Demo Public Library

Hold for:

PTFS, Patrick (admin_2)
100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com

Item details:

Capturing nature in watercolor / Jamison, Philip, 1925- (San Esteban)32450

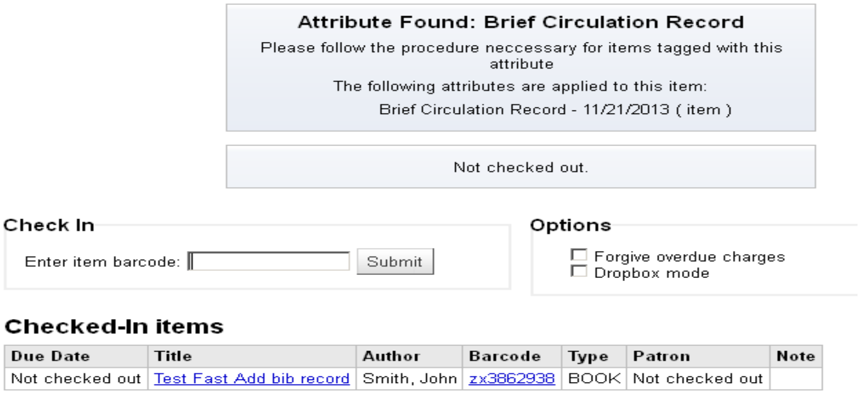
If no holds are pending, the item may be shelved. The checkin will give a "not checked out" message:

Not checked out.

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note
Not checked out	The Atlantic campaign :	Van der Vat, Dan.	37570000061969	BOOK CIRCULATIN	Not checked out	

You may also see messages about brief records, or other types of checkin messages. Deal appropriately with them, as with any checkin.



Attribute Found: Brief Circulation Record

Please follow the procedure neccessary for items tagged with this attribute

The following attributes are applied to this item:

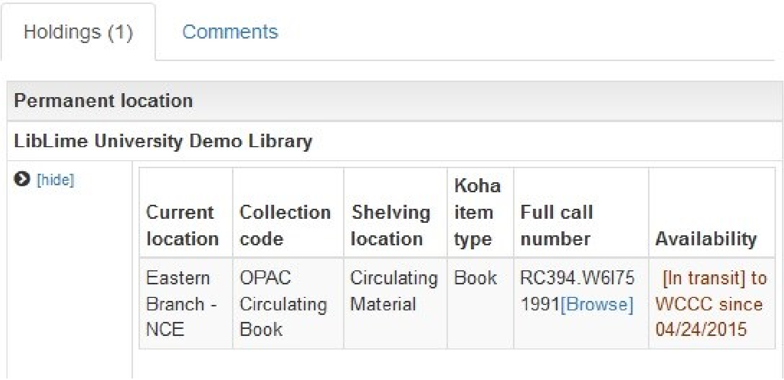
Brief Circulation Record - 11/21/2013 (item)

Not checked out.

Checked-In items

Due Date	Title	Author	Barcode	Type	Patron	Note
Not checked out	Test Fast Add bib record	Smith, John	zx3862938	BOOK	Not checked out	

If an item is in transit, the Discovery Layer display will show the status:



Permanent location

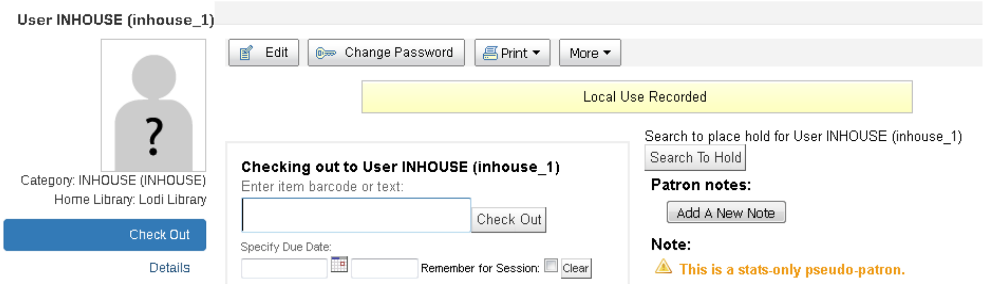
LibLime University Demo Library

Current location	Collection code	Shelving location	Koha item type	Full call number	Availability
Eastern Branch - NCE	OPAC Circulating Book	Circulating Material	Book	RC394.W6I75 1991[Browse]	[In transit] to WCCC since 04/24/2015

4.8 Tracking In-House Use

Some libraries need to keep statistics on items that are used in the library but not checked out. This usage can be done in two ways; the approach is controlled by a new syspref BrowseIncrementOnCheckin.

The older approach which is usually preferred is to use a special patron (turn the syspref OFF for this approach). Create a patron category of type Statistical (see Administration, Patron Categories). Then create a patron record with that category; name it something like INHOUSE USER. Each day, collect materials that have been used and left out on tables in the library. In the system, go to that patron record and check those items out to that user. Instead of doing an actual checkout, this will create an entry in the statistics table for "localuse" (in-house use).



User INHOUSE (inhouse_1)

Local Use Recorded

Category: INHOUSE (INHOUSE)
Home Library: Lodi Library

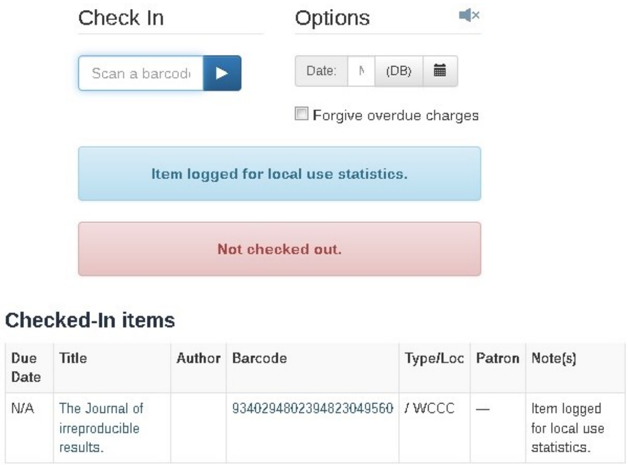
Checking out to User INHOUSE (inhouse_1)
Enter item barcode or text:
Specify Due Date:
Remember for Session: ☐

Search to place hold for User INHOUSE (inhouse_1)

Patron notes:

Note:
⚠ **This is a stats-only pseudo-patron.**

The newer approach allows sites to bypass this setup and record in-house use directly through Circulation, Checkin (turn the syspref ON for this approach). When an item's barcode is run through checkin, the system looks for a number of things – is there a pending hold, has the item been marked as lost, etc. If the item doesn't meet any of those conditions, an entry will be created in the statistics table for "localuse" (as above) and the screen will say so:



Item logged for local use statistics.

Not checked out.

Checked-In items

Due Date	Title	Author	Barcode	Type/Loc	Patron	Note(s)
N/A	The Journal of irreproducible results.		9340294802394823049560	/ WCCC	—	Item logged for local use statistics.

The statistics table entry is identical for either approach. You can later run reports to get counts for these entries.

4.9 Inventory

Inventory means taking stock of your collection and identifying what is actually present. There are two ways to use the Tools, Inventory/Stocktaking feature:

- Use the guided form to define the items you want to take inventory OR
- Upload a barcode file and assign a last seen date to items in bulk (To obtain a barcode file, you will need to scan the barcodes using a handheld scanner, laptop, tablet, or smartphone with the ability to read barcodes and output a text or .csv file)

Alternatively, if your collection is small enough and you can manage it technically, go through your stacks with a laptop logged into the staff client and a barcode scanner, and check in every item. This will update the "last seen" date and will also alert you to any other problems (lost, wrong branch, etc.). You can also use this method for just a portion of your collection, if that's all you need to check at the time.

4.9.1 Uploading a File of Barcodes

Loading a file of barcodes into the tool has the merit of being an actual representation of what is in your stacks, but requires more up-front effort to go and scan everything. You can use a laptop with barcode scanner, and scan everything into a text file, or use a specially-designed scanner which can store and output a file of barcodes. To load a barcode file, open the inventory tool and go to the right-hand side of the screen. Use the Browse button to choose a barcode file to upload (this file is produced from your inventory scanner). Then set the Date Last Seen using the calendar popup.

Inventory/Stocktaking

Select items you want to check

Library: All Locations
Item type: Any
Item location between: (items.itemcallnumber)
...and:
Item Location (items.location) is: Filter location
Not seen since:
Skip copies on loan: ☐
Show: 50 items
Beginning at offset: 0

Submit

Use a barcode file

Barcode file: Browse... test-barcodes.txt
Set date last seen to: 12/27/2017

Submit

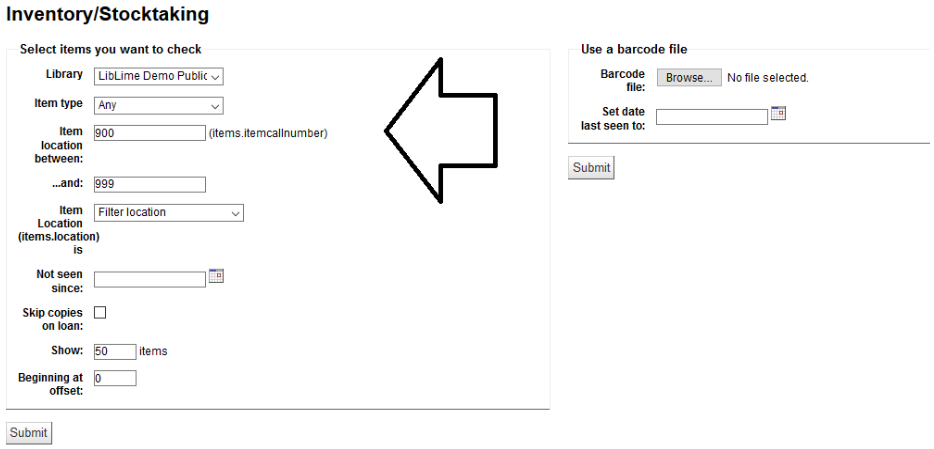
Click Submit and that file of barcodes will be processed.

4 items modified : datelastseen set to 12/27/2017

You can do this as an incremental process – scan a section, upload that file and process, then scan another section.

4.9.2 Using the Inventory Tool

This part of the tool can be used if you want to manage a section at a time (defined by call number, item type, shelving location). An easy way to work with this part of the tool would be to take a laptop out into the stacks, and compare the screen results to the shelf. In this example, it will check a particular call number range at one branch.



Inventory/Stocktaking

Select items you want to check

Library: LibLime Demo Public
Item type: Any
Item location between: 900 (items.itemcallnumber)
...and: 999
Item Location (items.location) is: Filter location
Not seen since:
Skip copies on loan: ☐
Show: 50 items
Beginning at offset: 0

Submit

Use a barcode file

Barcode file: Browse... No file selected.
Set date last seen to:

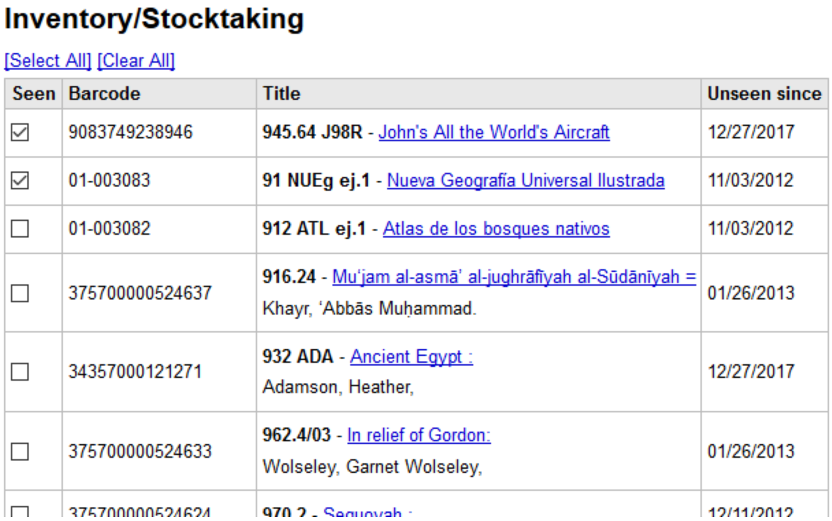
Submit

Make your desired selections on the left-hand side of the screen; you don't have to make a selection on all fields, just the ones you want:

- Library -- Choose which branch you want to take inventory on; Choose All Locations to take inventory on all branches.

- Item type -- Choose an item type to take inventory on.
- Item location between ... and -- Choose a range of item call numbers to take inventory on. The format here is the call number found in the items.itemscallnumber field (for instance, 937.23). You can be very generic; A to Z or 000 to 999 are acceptable ranges.
- Item location – The labeling is somewhat misleading; the above field refers to call number; this field searches the shelving location.
- Not seen since -- Choose a date from the calendar popup.
- Show -- Define how many results you want to view on a page.
- Beginning at offset -- Tells the system where in the list of results to start display. For instance, if this field is set to '0', the results set will start displaying at the beginning of the range defined. However, if the field is set to something like '50' then the results set will start displaying at the 50th item defined by the range you have set. This field MUST be a numeric value.

When you have made all your selections, click Submit. The system then displays screens of the matching items. To mark items as seen, check the box next to each item you want to add and click the Mark Seen or Mark Seen and Continue button at the bottom of the screen. You can also use the Select All or Clear All links at the bottom to affect everything on the screen.

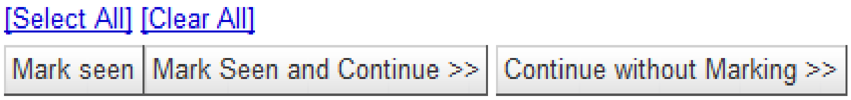


Inventory/Stocktaking

[Select All] [Clear All]

Seen	Barcode	Title	Unseen since
☑	9083749238946	**945.64 J98R** - John's All the World's Aircraft	12/27/2017
☑	01-003083	**91 NUEg ej.1** - Nueva Geografía Universal Ilustrada	11/03/2012
☐	01-003082	**912 ATL ej.1** - Atlas de los bosques nativos	11/03/2012
☐	375700000524637	**916.24** - Mu'jam al-asmā' al-jughrāfīyah al-Sūdānīyah = Khayr, 'Abbās Muḥammad.	01/26/2013
☐	34357000121271	**932 ADA** - Ancient Egypt : Adamson, Heather,	12/27/2017
☐	375700000524633	**962.4/03** - In relief of Gordon: Wolseley, Garnet Wolseley,	01/26/2013
☐	375700000524624	**970.2** - Sequoyah :	12/11/2012

Scroll to the bottom for the action buttons:



Mark Seen will flag only the records on this particular screen. Mark Seen and Continue will flag these records and continue to the next screen. In the initial setup screen, you can set the Show field to a high number (like 200) if you want to minimize the number of times you must click Mark Seen and Continue.

4.9.3 Cleaning Up Inventory Problems

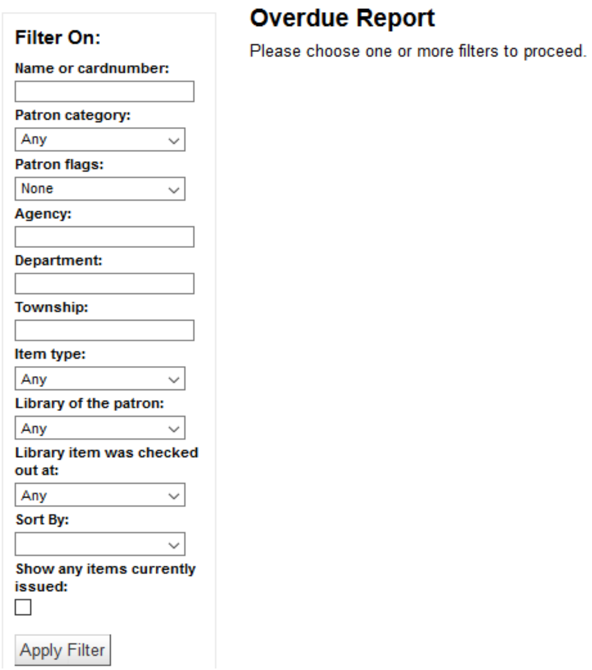
Once finished with either form of inventory, you can run the inventory tool again to see what items were not seen during the first pass. You can also create a SQL report to select items whose last seen date is either NULL or less than the date you selected to start inventory. This list is your “cleanup” list. Here’s a sample SQL report with a limiter on item’s homebranch – change as needed (**note that syntax has changed from earlier releases, due to table structure changes**):

```
select biblio.title, biblio.author, items.barcode, items.itemcallnumber, items.location,
items.homebranch, items.holdingbranch, mutation_time from items JOIN biblio on
(items.biblionumber = biblio.biblionumber) left join mutation_times on (record_id =
CONCAT(items.itemnumber,'') and record_type = 'item.seen') where items.homebranch =
'MAIN' AND (mutation_time IS NULL or mutation_time < '2018-01-01') order by
items.cn_sort
```

The items.cn_sort field is the internal sorting field used for call numbers – it’s more reliable than the actual call number for report sorting.

4.10 Overdue Report

The overdue report is one of several delivered reports that may be useful in monitoring circulation. From the main Circulation menu, click Overdues. There is a screen warning; the report can require a lot of system resources on large systems. If your site has the FilterBeforeOverdueReport syspref turned on, you will be required to select one or more filters (branch, patron category, etc.) before you can run the report.



Overdue Report

Please choose one or more filters to proceed.

Filter On:

Name or cardnumber:

Patron category: Any

Patron flags: None

Agency:

Department:

Township:

Item type: Any

Library of the patron: Any

Library item was checked out at: Any

Sort By:

Show any items currently issued: ☐

These options are also available after the report is run, if you need to redo your selections.

789 Items Overdue as of 12/02/2013 (filtered)

Due Date	Patron	Library	Title	Barcode	Fines Accrued	Call number
01/11/2000	[redacted]	WCCC	The Norton anthology of English literature / , by Abrams, M. H.	[redacted]	10.00	ITEM LOST; NOT ON SHELF
01/11/2000	[redacted]	WCCC	The Norton anthology of English literature / , by Abrams, M. H.	[redacted]	10.00	ITEM LOST; NOT ON SHELF
04/27/2000	[redacted]	WCCC	Infamy : , by Toland, John.	[redacted]	10.00	D767.92.T63 1982
04/27/2000	[redacted]	WCCC	December 7, 1941 : , by Prange, Gordon William,	[redacted]	10.00	D767.92.P7215 1988
04/27/2000	[redacted]	WCCC	Thou shalt not kill / , by Ryzuk, Mary S.	[redacted]	10.00	HV6534.W47R9 1990x

This report can be useful to track outstanding overdue items and their accrued fines. You can also download the list as a .csv file. Although obscured in this screen shot, there are links to the patron's patron record and display of the patron's phone number.

4.11 Holds

Placing a hold on a title or an item allows staff and patrons to reserve materials that are currently checked out, on the shelf at another location or otherwise temporarily unavailable for immediate checkout. Depending on how your system is configured, holds may not be allowed for materials presently on the shelf at the patron's location. In most multi-library systems all resources are shared, and a title-level hold at any library may be filled by any available copy in the system. Some libraries restrict holds to only their own items/patrons; this can be done through the circulation rules. Some sites may set hold rules in the title record (see cataloging section on Individual Record Holds Control below).

When more than one patron places a hold on the same title, the name of each patron is placed in a hold queue (waiting list) in the date order of request. When an item that can fill holds is checked in at any eligible library, the system will trap that item for the first active hold with that check-in location selected as the pickup location. If there is no active hold at that check-in location, the item will be trapped for the first active hold in the queue, regardless of pickup location.

Patrons may place a hold from the Discovery Layer (if syspref RequestOnOpac is on), or staff can place a hold for a patron. If your system is configured to allow on-shelf holds (syspref AllowOnShelfHolds), then holds can be placed for items which are currently available. In that case, the request would show on the Holds Queue report; staff would need to locate the item, run it through checkin to trigger the hold, and place it on the holds shelf for pickup. The syspref ReservesMaxPickUpDelay sets how long a patron has to come and get the item – seven days is a common setting, but it depends on library policies. After that time, the hold can be canceled and the item is available for the next user.

Holds can also be suspended (by staff or the patron) either for an indefinite period or to resume on a specific date.

4.11.1 Item-Level versus Title-Level Holds

A title-level hold means that any copy of a particular title can fill the hold. An item-level hold means that only that particular copy can fill the hold – even if other copies are available, the patron's hold will wait for that copy to become available. A site may disable item-level holds in the Discovery Layer with the syspref OPACItemHolds. This will force patrons to always place title-level holds. Staff can always place item-level holds if needed. For most titles with multiple identical copies, a title-level hold is preferred. Only use item-level holds when a particular copy is needed, such as a specified volume of a magazine or DVD set.

A new feature allows sites to control whether holds on a particular title are restricted to title-level or item-level – see the section Individual Record Holds Control under cataloging.

4.11.2 Placing a Hold for a Patron

If staff need to place a hold for a patron, the first step is to search for the title. In the staff client, bring the title record to the screen. You can either click the Place Hold button at the top, or the Holds tab at the left.

Friends. The one with all the parties (DVD) [videorecording] /

by Bright, Kevin, 1955-; Aniston, Jennifer; Cox, Courteney, 1964-; Kudrow, Lisa; LeBlanc, Matt; Perry, Matthew, 1969-; Schwimmer, David, 1966-. Warner Bros. Television.; Bright/Kauffman/Crane Productions (Firm); Warner Home Video (Firm) .

Type: Visual Material

Publisher: Burbank, CA : Warner Home Video, c2004.

Edition: Fullscreen ; closed-captioned.

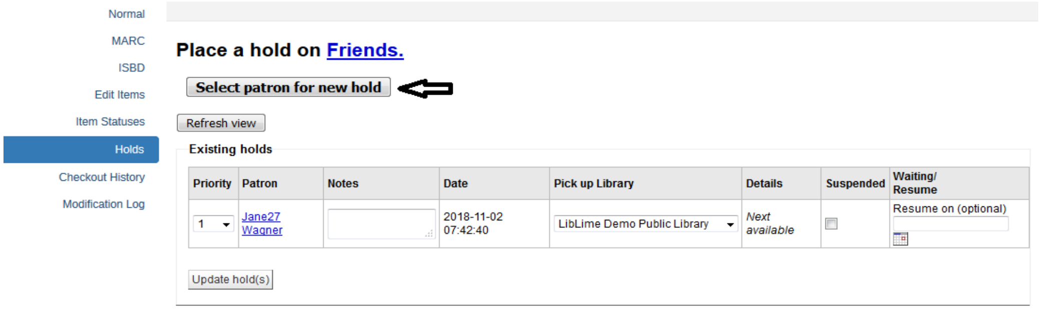
Description: 1 videodisc (165 min.) : sd., col. ; 4 3/4 in.

General Note: Originally broadcast on NBC 1994-1995; Originally released as a television program on NBC; original airdates between 1994 and 2003. Episodes include added footage not seen int he original broadcast; 245 subfield display test.

Summary: Parties episodes of the comedy series "Friends.".

System Details Note: DVD, Region 1; Dolby Digital, Dual-layer format; DVD-ROM minimum requirements: InterActual Player (included), Microsoft Windows 98SE with Microsoft IE 5.5, a DVD-ROM drive and a Direct-Show compatible DVD

Either brings you into the Holds tab, where you'll see any existing holds. To place a new one, the first step is to search for the patron record.

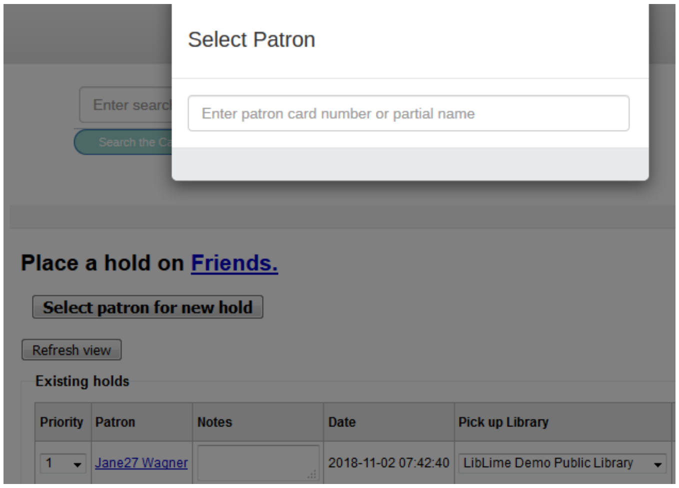


Place a hold on Friends.

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
1	Jane27 Wagner		2018-11-02 07:42:40	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)

Click the Select Patron button and enter a name or cardnumber in the popup.



Select Patron

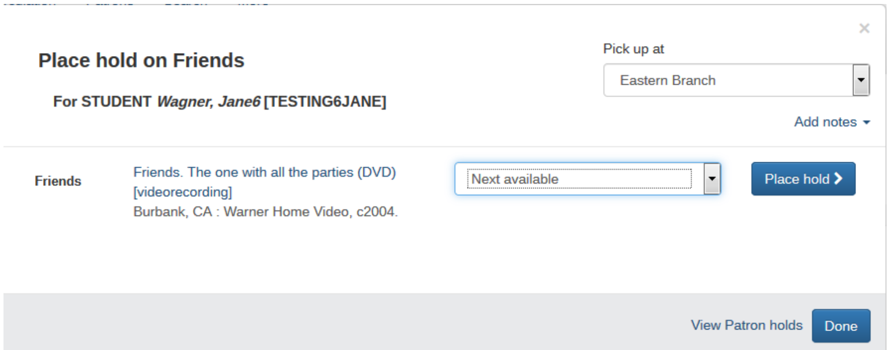
Enter patron card number or partial name

Place a hold on Friends.

Existing holds

Priority	Patron	Notes	Date	Pick up Library
1	Jane27 Wagner		2018-11-02 07:42:40	LibLime Demo Public Library

The next step uses the Discovery Layer holds interface. Note that there are some changes on this screen from previous versions. The patron's name now shows, rather than the cardnumber.



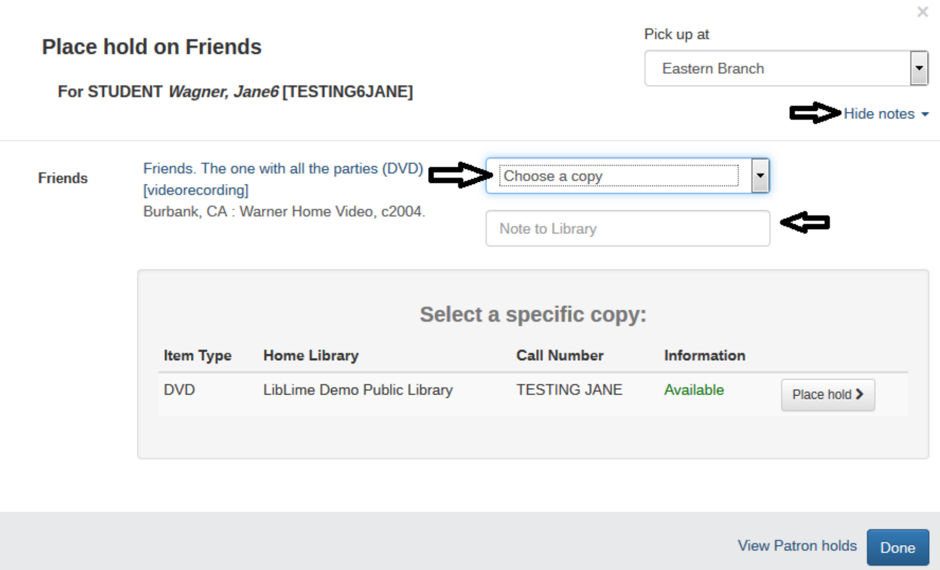
Place hold on Friends

For STUDENT *Wagner, Jane6* [TESTING6JANE]

Pick up at: Eastern Branch

Friends — Friends. The one with all the parties (DVD) [videorecording] Burbank, CA : Warner Home Video, c2004. — Next available

The pickup location defaults to the patron's home library; change it if needed. There is a toggle link for Add Notes, which will open an optional note field for additional information (see screenshot below). The default setting is to place a title-level hold (pulldown set to Next Available). However, you could change that to Choose a Copy and then select a particular item for an item-level hold:



Place hold on Friends

For STUDENT *Wagner, Jane6* [TESTING6JANE]

Pick up at: Eastern Branch

Friends — Friends. The one with all the parties (DVD) [videorecording] Burbank, CA : Warner Home Video, c2004. — Choose a copy

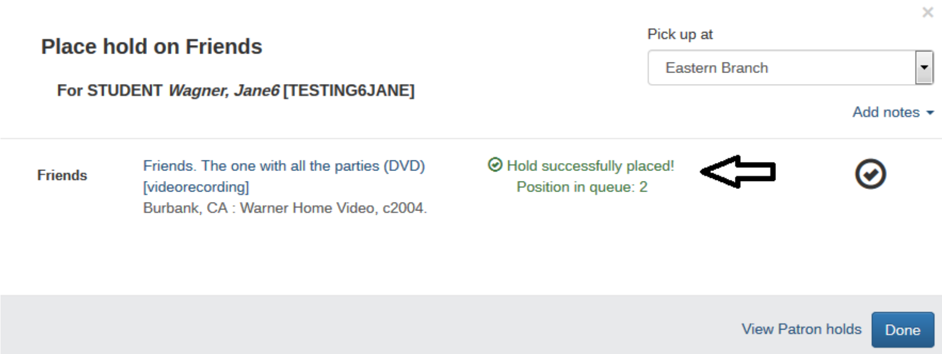
Note to Library

Select a specific copy:

Item Type	Home Library	Call Number	Information	
DVD	LibLime Demo Public Library	TESTING JANE	Available	Place hold

If there is only one item attached, that choice is irrelevant. If configured, there may be an option to trigger a recall if appropriate – see that section for more details on recalls.

After making your selections, click the Place Hold button next to the specific copy or the one on the top line for a title-level hold. The holds screen changes to show current status:



Place hold on Friends

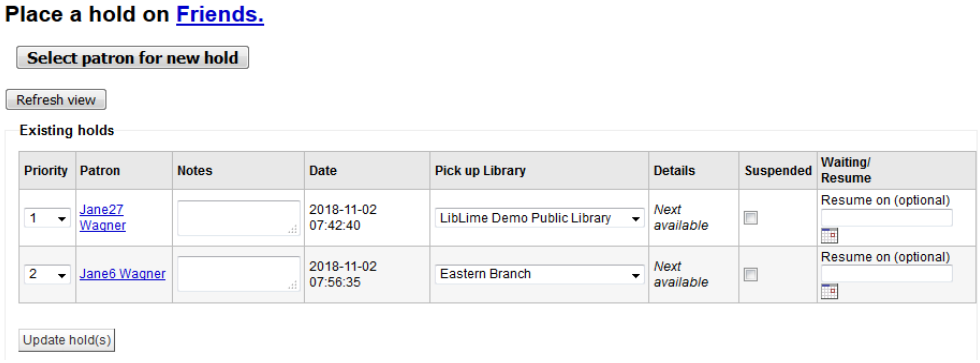
For STUDENT *Wagner, Jane6* [TESTING6JANE]

Friends

Friends. The one with all the parties (DVD) [videorecording]
Burbank, CA : Warner Home Video, c2004.

Hold successfully placed!
Position in queue: 2

The View Patron Holds link will take you to the staff display of that patron's record, so that you can check holds and other information. Click Done to close the holds popup; the screen now automatically refreshes to show the latest hold placed.



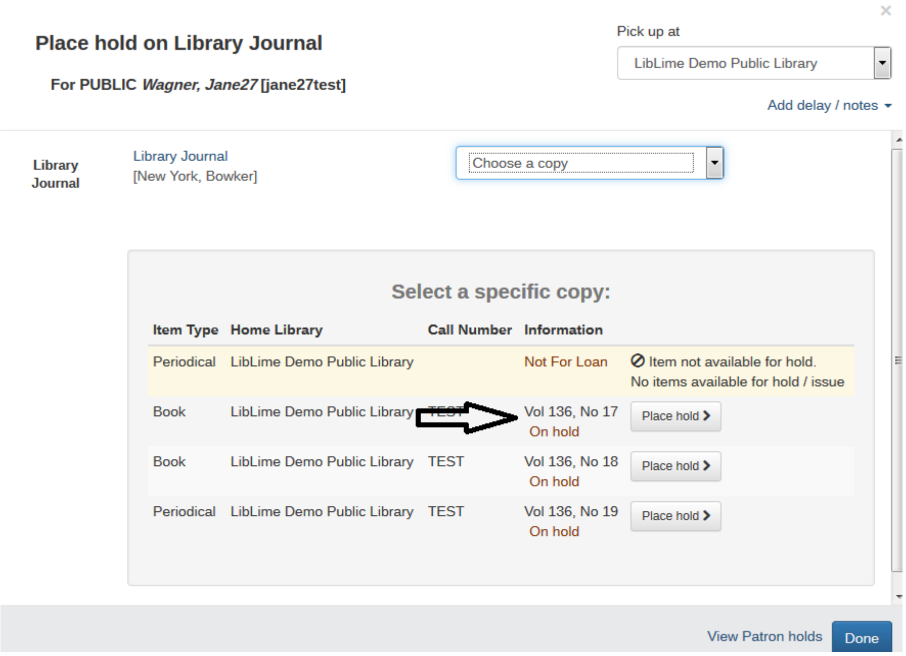
Place a hold on Friends.

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
1	Jane27 Wagner		2018-11-02 07:42:40	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
2	Jane6 Wagner		2018-11-02 07:56:35	Eastern Branch	*Next available*	☐	Resume on (optional)

You can then place holds on the title for other patrons, or move on to another screen.

Note that if you're placing a hold on a serials title with enumchron data, that data now shows on the holds screen:



Place hold on Library Journal

For PUBLIC *Wagner, Jane27* [jane27test]

Pick up at: LibLime Demo Public Library

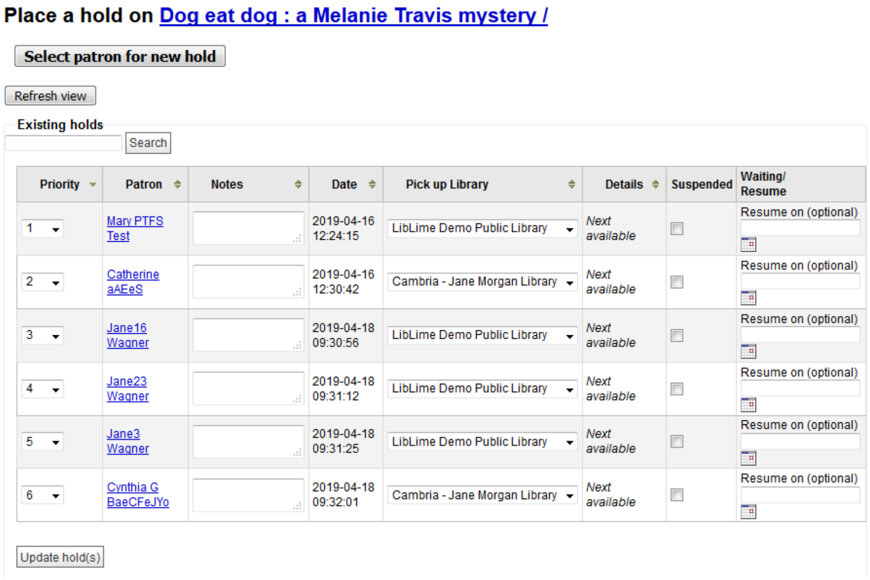
Library Journal — Library Journal [New York, Bowker]

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Periodical	LibLime Demo Public Library		Not For Loan	⊘ Item not available for hold. No items available for hold / issue
Book	LibLime Demo Public Library	TEST	Vol 136, No 17 On hold	Place hold >
Book	LibLime Demo Public Library	TEST	Vol 136, No 18 On hold	Place hold >
Periodical	LibLime Demo Public Library	TEST	Vol 136, No 19 On hold	Place hold >

4.11.2.1 Search and Sort Options

The list of holds on a title now has sorting and searching options. Each column can be sorted by clicking the up/down arrows in the column header.



Place a hold on Dog eat dog : a Melanie Travis mystery /

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
1	Mary PTFS Test		2019-04-16 12:24:15	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
2	Catherine aAEeS		2019-04-16 12:30:42	Cambria - Jane Morgan Library	*Next available*	☐	Resume on (optional)
3	Jane16 Wagner		2019-04-18 09:30:56	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
4	Jane23 Wagner		2019-04-18 09:31:12	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
5	Jane3 Wagner		2019-04-18 09:31:25	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
6	Cynthia G BaeCFeJYo		2019-04-18 09:32:01	Cambria - Jane Morgan Library	*Next available*	☐	Resume on (optional)

In addition, a search box above the table allows staff to search for a particular text string – patron name, library name, etc. This can be useful for titles with many holds.

Place a hold on Dog eat dog : a Melanie Travis mystery /

cambria

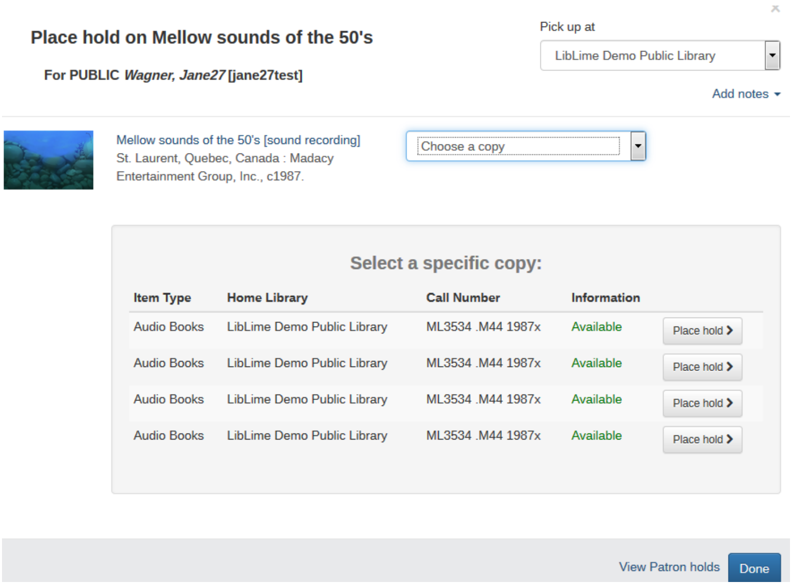
Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
2	Catherine aAEeS		2019-04-16 12:30:42	Cambria - Jane Morgan Library	*Next available*	☐	Resume on (optional)
6	Cynthia G BaeCFeJYo		2019-04-18 09:32:01	Cambria - Jane Morgan Library	*Next available*	☐	Resume on (optional)

Click the Clear button next to the search box or the Refresh View button to restore the original display.

4.11.2.2 Placing Holds on Multiple Items on the Same Title

If permitted in the item type policy (see Superlibrarian Guide), you may place holds on more than one item on the same title. The intended use is for titles like periodicals or DVD sets, where the title has items for different issues or parts – a user might want to place a hold on issues 33 and 35 of a magazine, for example. Staff can place multiple holds for a patron, or a patron can do it (see the Discovery Layer section on placing holds).

After searching for the patron record (as above) and getting the Place Hold popup, first set the Pickup Location if needed. That will then be in place for all holds. Then, select Choose Any Item:



Place hold on Mellow sounds of the 50's

For PUBLIC *Wagner, Jane27* [jane27test]

Pick up at: LibLime Demo Public Library

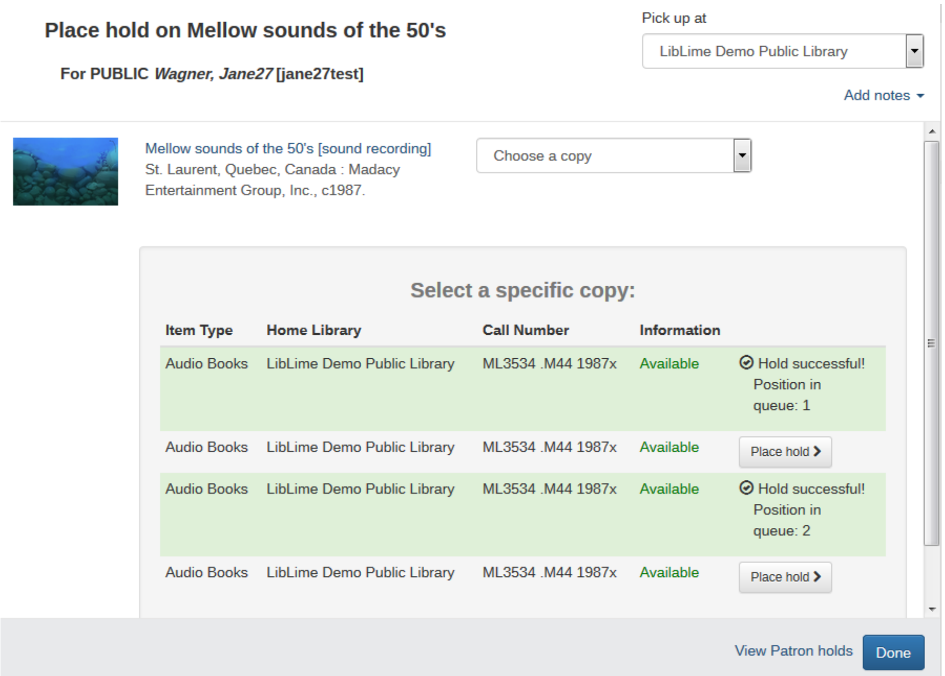
Mellow sounds of the 50's [sound recording]
St. Laurent, Quebec, Canada : Madacy Entertainment Group, Inc., c1987.

Choose a copy

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold ›
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold ›
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold ›
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold ›

This will show the items attached. Click the Place Hold button next to each item for which you want to place a hold. The screen will update with the status of each hold as you do.



Place hold on Mellow sounds of the 50's

For PUBLIC *Wagner, Jane27* [jane27test]

Pick up at: LibLime Demo Public Library

Mellow sounds of the 50's [sound recording]
St. Laurent, Quebec, Canada : Madacy Entertainment Group, Inc., c1987.

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Hold successful! Position in queue: 1
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Hold successful! Position in queue: 2
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x	Available	Place hold

When finished, click Done to see all the holds:

Place a hold on Mellow sounds of the 50's

Existing holds

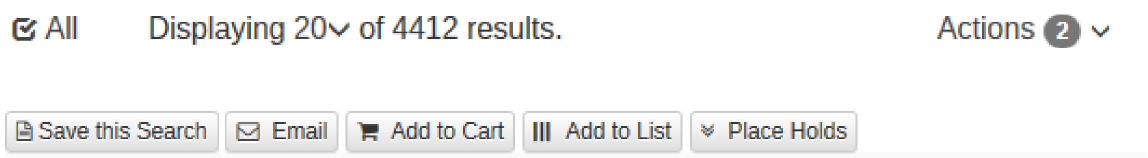
Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
1	Jane27 Wagner		2018-11-02 08:10:46	LibLime Demo Public Library	*Only item* 37570000422088	☐	Resume on (optional)
2	Jane27 Wagner		2018-11-02 08:10:54	LibLime Demo Public Library	*Only item* 934029480239482304966 0	☐	Resume on (optional)

4.11.2.3 Placing Holds and Other Actions from the Results List

NOTE: By default, these buttons are hidden. If a site wants to use them, this CSS will make them show:

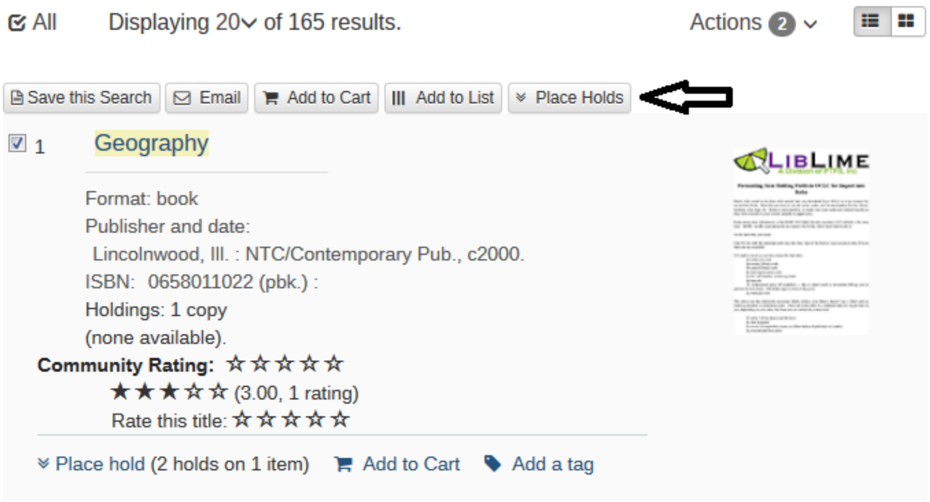
div.search-action-btns { display: block; }

If configured to show, when more than one title is selected from the results list a set of buttons will show at the top of the results list screen:



These replicate options under the Actions dropdown, but are pulled out here for greater visibility. You can place holds on multiple items, save the search, or add to the cart or a list.

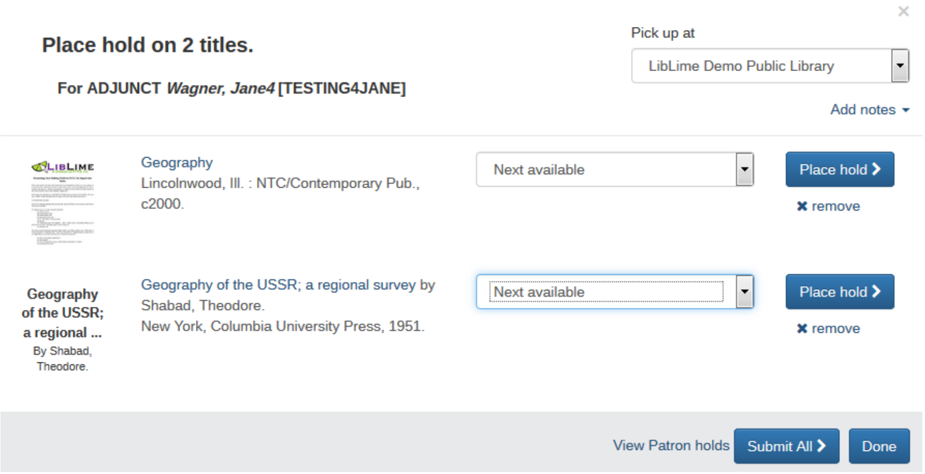
With regard to holds, you can place a hold for a patron on a single title in the results list by clicking the Place Hold link at the bottom of each title entry. You can also place holds on multiple titles from the results list. To do so, check off entries. When you do, the buttons will appear at the top of the results list:



☑ 1 Geography

Format: book
Publisher and date:
Lincolnwood, Ill. : NTC/Contemporary Pub., c2000.
ISBN: 0658011022 (pbk.) :
Holdings: 1 copy
(none available).
Community Rating: ☆☆☆☆☆
★★★☆☆ (3.00, 1 rating)
Rate this title: ☆☆☆☆☆

Click the Place Holds button, and after searching for the patron’s name, you’ll be placed into a holds popup with all the selected titles:


Place hold on 2 titles.

For ADJUNCT *Wagner, Jane4* [TESTING4JANE]

Pick up at: LibLime Demo Public Library

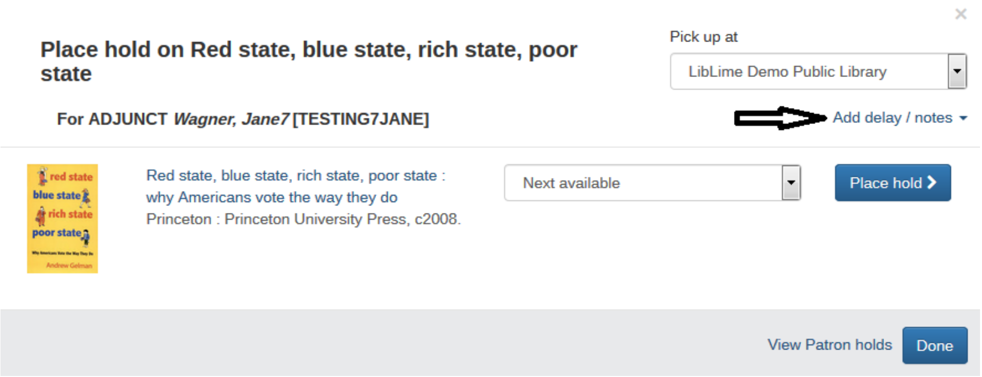
Geography
Lincolnwood, Ill. : NTC/Contemporary Pub., c2000.
Next available

Geography of the USSR; a regional survey by Shabad, Theodore.
New York, Columbia University Press, 1951.
Next available

If desired, you can choose a specific copy rather than Next Available. Be sure to click the Place Hold button on each title. Click Done when finished.

4.11.2.4 Hold Date in the Future

If the syspref AllowHoldDateInFuture is on (rarely used), you will have an option of specifying a start date when placing a hold:



Place hold on Red state, blue state, rich state, poor state

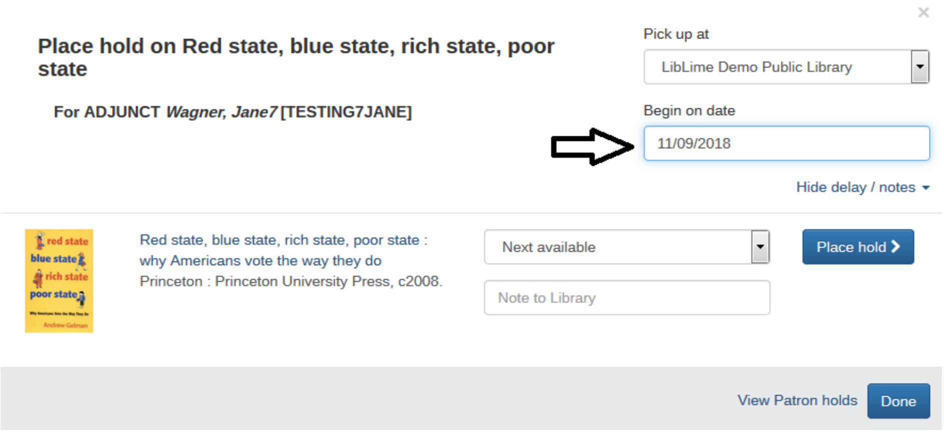
For ADJUNCT *Wagner, Jane7* [TESTING7JANE]

Pick up at: LibLime Demo Public Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Next available

Click the Add Delay toggle and you can enter a start date (a calendar widget will come up).



Place hold on Red state, blue state, rich state, poor state

For ADJUNCT *Wagner, Jane7* [TESTING7JANE]

Pick up at: LibLime Demo Public Library

Begin on date: 11/09/2018

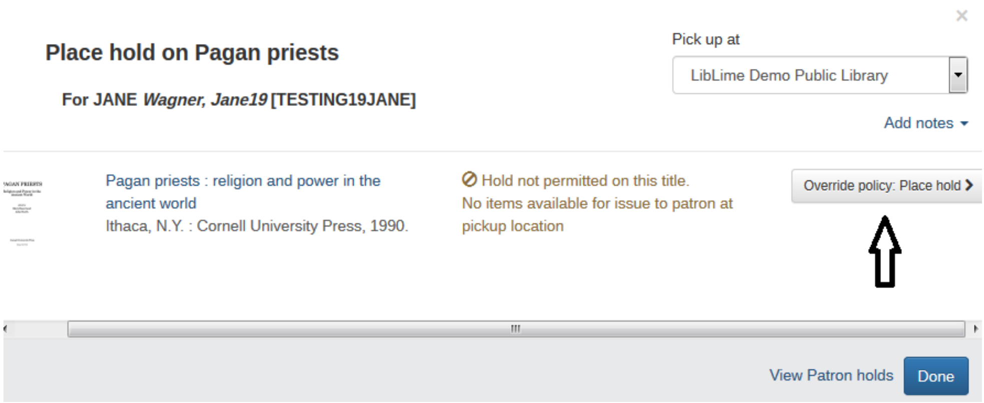
Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Next available

The hold will become active on that date. This option is not recommended for general use.

4.11.2.5 Overriding a Hold Block for a Patron

If a patron is blocked from placing a hold for some reason, such as a limit on number of concurrent holds, staff with the circulation.OR_hold_policy_block permission will be able to override the block:



Place hold on Pagan priests

For JANE *Wagner, Jane19* [TESTING19JANE]

Pick up at

LibLime Demo Public Library

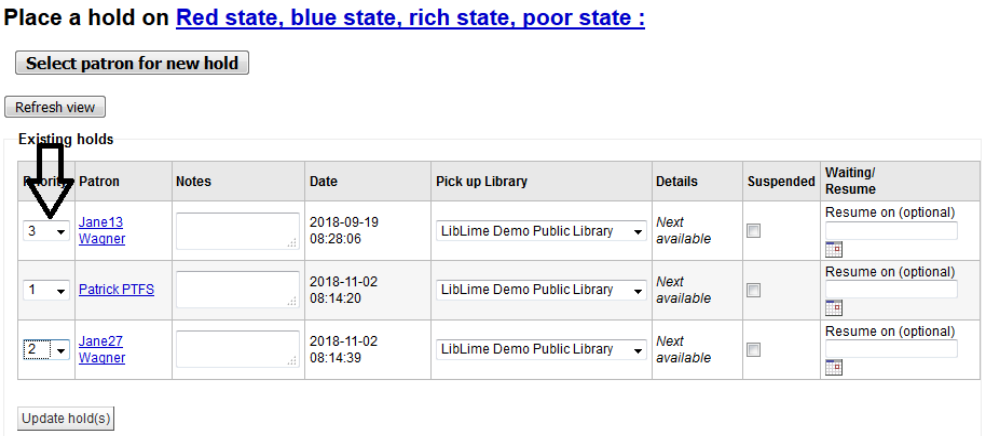
Add notes

Pagan priests : religion and power in the ancient world
Ithaca, N.Y. : Cornell University Press, 1990.

Hold not permitted on this title.
No items available for issue to patron at pickup location

4.11.3 Reordering the Priority Queue

If there are multiple holds on a title, staff can change the priority or delete a hold altogether. Priority is based on the order in which holds were placed, and under normal circumstances you will leave it alone. However, occasionally you may want to allow a patron to get an item out of order. On the Holds tab, if you click the pull-down in the Priority column, you can change the order by changing the number for each entry.

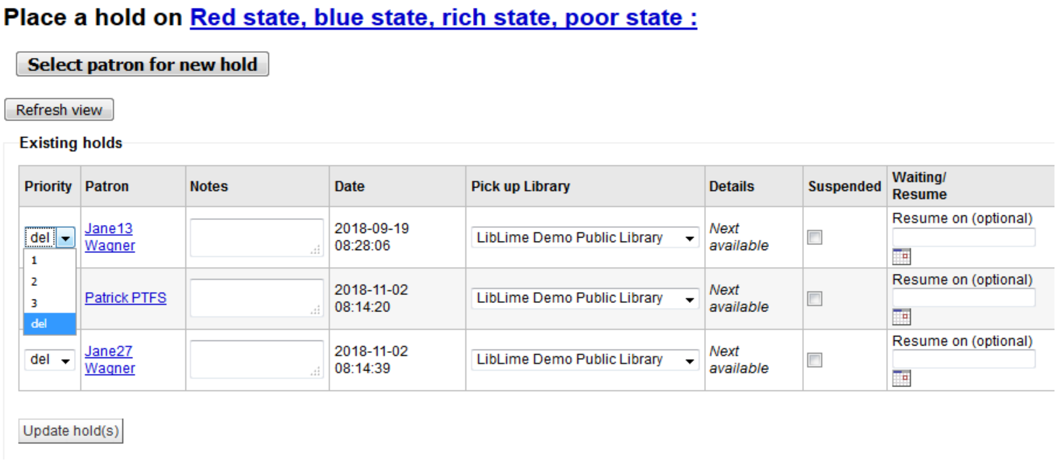


Place a hold on Red state, blue state, rich state, poor state :

Existing holds

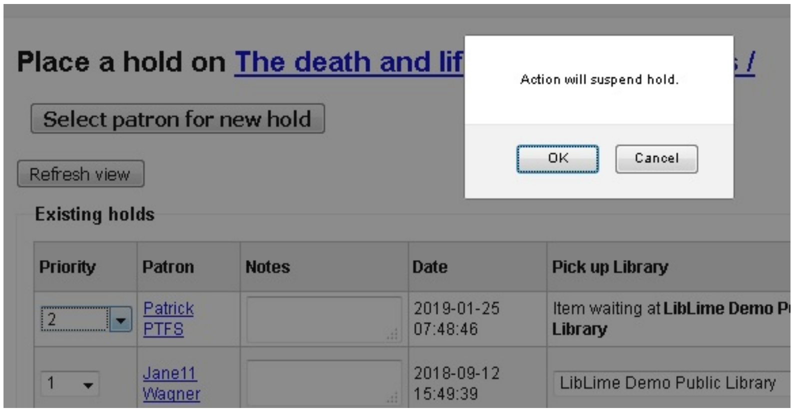
Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
3	Jane13 Wagner		2018-09-19 08:28:06	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
1	Patrick PTFS		2018-11-02 08:14:20	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)
2	Jane27 Wagner		2018-11-02 08:14:39	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)

You can also delete a hold or change the pickup library.



Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
del	Jane13 Wagner		2018-09-19 08:28:06	LibLime Demo Public Library	Next available	☐	Resume on (optional)
	Patrick PTFS		2018-11-02 08:14:20	LibLime Demo Public Library	Next available	☐	Resume on (optional)
del	Jane27 Wagner		2018-11-02 08:14:39	LibLime Demo Public Library	Next available	☐	Resume on (optional)

When you've changed all the entries, click the Update Holds button to record the changes. You cannot change priority on a hold that is in transit. If a hold is waiting ("triggered") and you try to reprioritize it, you will get a warning:



Action will suspend hold.

Priority	Patron	Notes	Date	Pick up Library
2	Patrick PTFS		2019-01-25 07:48:46	Item waiting at **LibLime Demo P Library**
1	Jane11 Wagner		2018-09-12 15:49:39	LibLime Demo Public Library

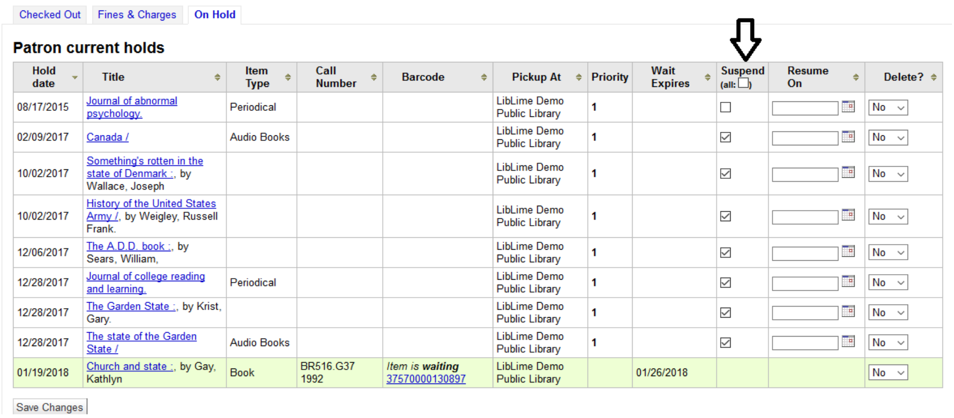
Clicking OK will remove the "waiting" status and suspend that hold. You must click Update Holds to finish your priority changes.

If you delete a hold, the others will reorder priority automatically – no need to manually change priority.

4.11.4 Suspending Holds

Holds that have not been triggered can be suspended either by the user through the Discovery Layer (see that section) or by staff members. A hold can be suspended indefinitely, until the patron chooses to resume it, or it can be suspended with a "resume on" date. A cron job (misc/cronjobs/holds/resume_suspended_reserves.pl) runs nightly to reactivate any suspended holds for the current date.

To suspend a hold in staff mode, go to either the patron record or the title record. In the patron record, scroll to the bottom of the Details screen and click the On Hold tab. You will see all holds for that patron:

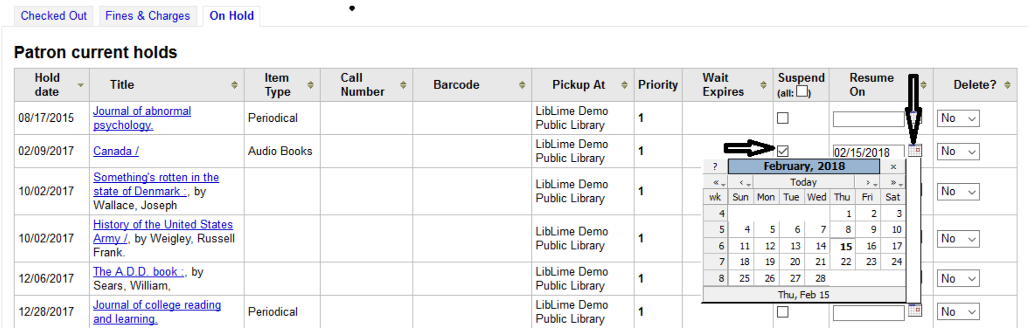

Checked Out | Fines & Charges | **On Hold**

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Pickup At	Priority	Wait Expires	Suspend (all: ☐)	Resume On	Delete?
08/17/2015	Journal of abnormal psychology.	Periodical			LibLime Demo Public Library	1		☐		No
02/09/2017	Canada /	Audio Books			LibLime Demo Public Library	1		☑		No
10/02/2017	Something's rotten in the state of Denmark :, by Wallace, Joseph				LibLime Demo Public Library	1		☑		No
10/02/2017	History of the United States Army /, by Weigley, Russell Frank.				LibLime Demo Public Library	1		☑		No
12/06/2017	The A.D.D. book :, by Sears, William,				LibLime Demo Public Library	1		☑		No
12/28/2017	Journal of college reading and learning.	Periodical			LibLime Demo Public Library	1		☑		No
12/28/2017	The Garden State :, by Krist, Gary.				LibLime Demo Public Library	1		☑		No
12/28/2017	The state of the Garden State /	Audio Books			LibLime Demo Public Library	1		☑		No
01/19/2018	Church and state :, by Gay, Kathlyn	Book	BR516.G37 1992	*Item is* ***waiting*** 37570000130897	LibLime Demo Public Library		01/26/2018			No

Save Changes

In the column header, you can click the All checkbox in the Suspend column to suspend all (except Waiting holds) at once. This does not allow you to enter a "resume on" date. You can also use the checkbox on each line to select Yes for the hold(s) you want to suspend. If you want to specify a resume date, click the calendar button to open the gadget. Move to the desired date and click it:


Checked Out | Fines & Charges | **On Hold**

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Pickup At	Priority	Wait Expires	Suspend (all: ☐)	Resume On	Delete?
08/17/2015	Journal of abnormal psychology.	Periodical			LibLime Demo Public Library	1		☐		No
02/09/2017	Canada /	Audio Books			LibLime Demo Public Library	1		☑	02/15/2018	No
10/02/2017	Something's rotten in the state of Denmark :, by Wallace, Joseph				LibLime Demo Public Library	1				No
10/02/2017	History of the United States Army /, by Weigley, Russell Frank.				LibLime Demo Public Library	1				No
12/06/2017	The A.D.D. book :, by Sears, William,				LibLime Demo Public Library	1				No
12/28/2017	Journal of college reading and learning.	Periodical			LibLime Demo Public Library	1		☐		No

? **February, 2018** ×

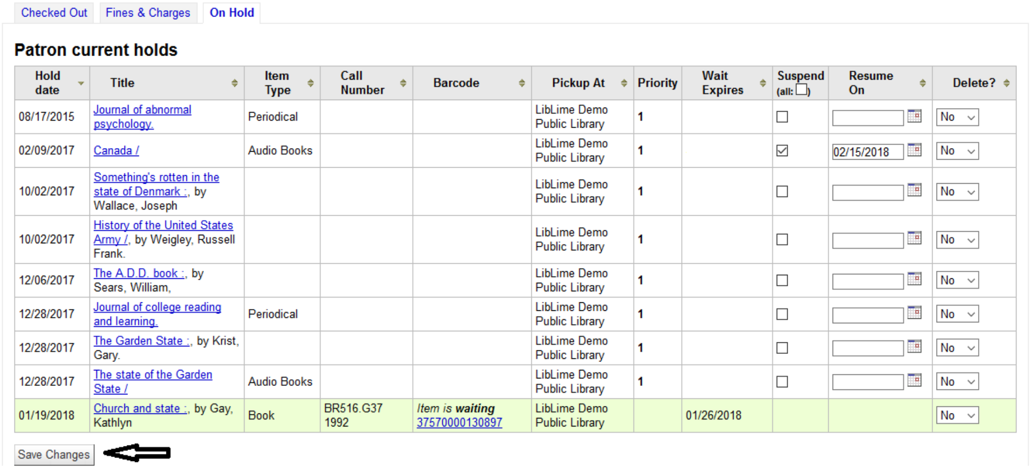
« ‹ Today › »

wk	Sun	Mon	Tue	Wed	Thu	Fri	Sat
4					1	2	3
5	4	5	6	7	8	9	10
6	11	12	13	14	**15**	16	17
7	18	19	20	21	22	23	24
8	25	26	27	28			

Thu, Feb 15

Entering a date will automatically check the Suspend box.

Click the Save Changes button at the bottom when you are finished, and the hold will show as suspended. If a date was selected, it will display:


Checked Out | Fines & Charges | **On Hold**

Patron current holds

Hold date	Title	Item Type	Call Number	Barcode	Pickup At	Priority	Wait Expires	Suspend (all: ☐)	Resume On	Delete?
08/17/2015	Journal of abnormal psychology.	Periodical			LibLime Demo Public Library	1		☐		No
02/09/2017	Canada /	Audio Books			LibLime Demo Public Library	1		☑	02/15/2018	No
10/02/2017	Something's rotten in the state of Denmark :, by Wallace, Joseph				LibLime Demo Public Library	1		☐		No
10/02/2017	History of the United States Army /, by Weigley, Russell Frank.				LibLime Demo Public Library	1		☐		No
12/06/2017	The A.D.D. book :, by Sears, William,				LibLime Demo Public Library	1		☐		No
12/28/2017	Journal of college reading and learning.	Periodical			LibLime Demo Public Library	1		☐		No
12/28/2017	The Garden State :, by Krist, Gary.				LibLime Demo Public Library	1		☐		No
12/28/2017	The state of the Garden State /	Audio Books			LibLime Demo Public Library	1		☐		No
01/19/2018	Church and state :, by Gay, Kathlyn	Book	BR516.G37 1992	*Item is* ***waiting*** 37570000130897	LibLime Demo Public Library		01/26/2018			No

Save Changes

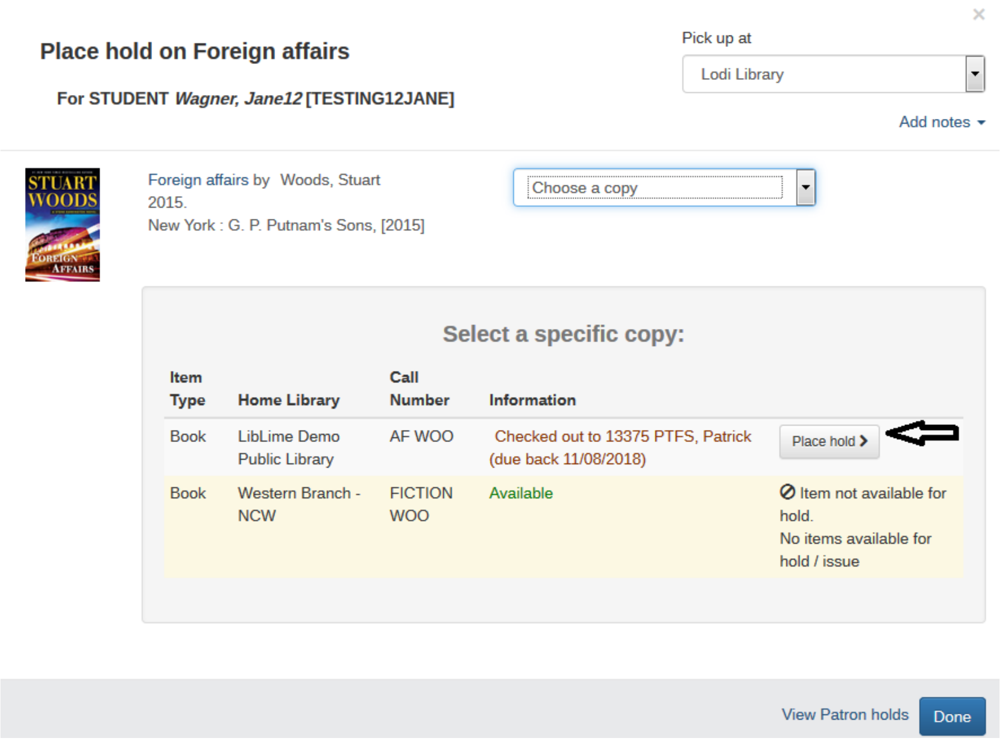
4.11.5 Recalls

A recall can be placed on an item that is loaned to another patron, if your system is configured to allow it (see system administration). Recalls are more active than regular hold requests. Regular hold requests wait for the item to be returned, while recall requests actively notify the borrower that the item is required and shortens the due date. A recall can only be placed if the item is currently checked out. Depending on your system configuration, recalls can be placed in staff mode, by the patron in the Discovery Layer, or both.

Recalling the item will:

- Shorten the loan period for the borrower, although the borrower will always be able to keep the book for a specified length of time (the "guarantee period" in the circulation policy). The loan period will be shortened according to the recall return interval setting in the circulation policy.
- Send a notice to the borrower to inform him/her that the loan period has changed, and that the item must be returned to the library, usually with a shortened due date. (**NOTE that the individual patron or the Role record must have the messaging option for recall notices enabled**.)

In staff mode, you can opt to issue a recall when you place a hold for a patron, if a recall policy applies to the existing checkout and your staff login has permission to do so. On the Place Hold popup, first select Choose A Copy in the top bar for a specific copy, then click Place Hold next to the checked-out item that you want to recall.



Place hold on Foreign affairs

For STUDENT *Wagner, Jane12* [TESTING12JANE]

Pick up at: Lodi Library

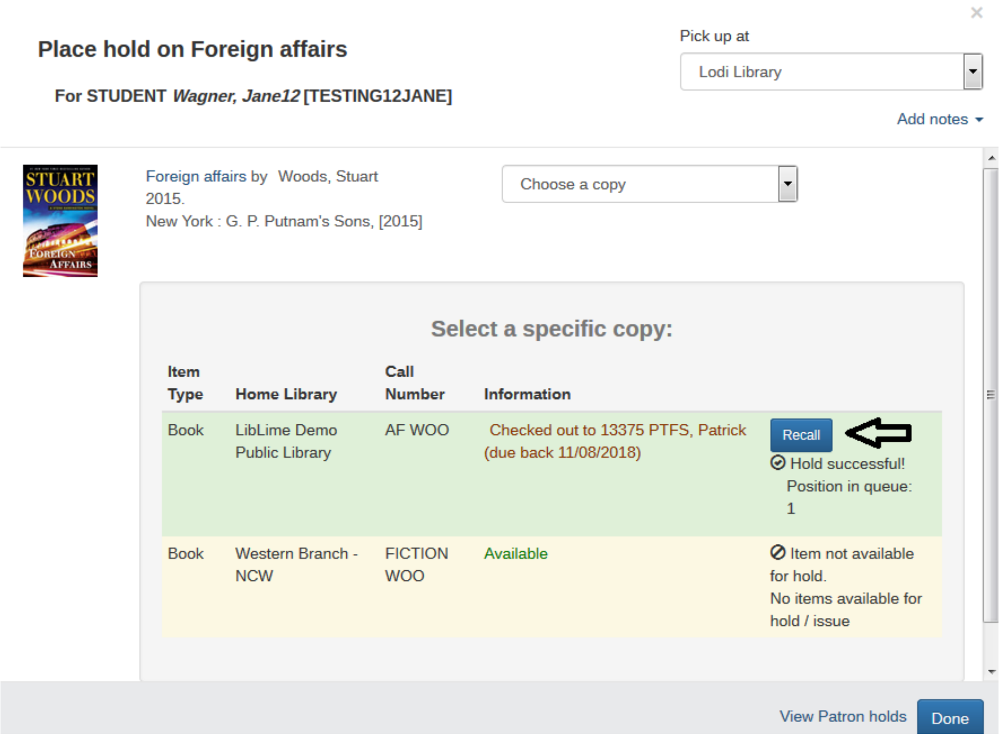
Foreign affairs by Woods, Stuart
2015.
New York : G. P. Putnam's Sons, [2015]

Choose a copy

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	AF WOO	Checked out to 13375 PTFS, Patrick (due back 11/08/2018)	Place hold ›
Book	Western Branch - NCW	FICTION WOO	Available	⊘ Item not available for hold. No items available for hold / issue

Once you click Place Hold, if the item is eligible for recall, a Recall button will appear next to the item:



Place hold on Foreign affairs

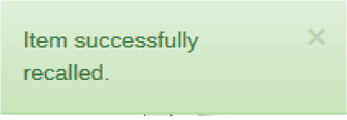
For STUDENT *Wagner, Jane12* [TESTING12JANE]

Foreign affairs by Woods, Stuart
2015.
New York : G. P. Putnam's Sons, [2015]

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	AF WOO	Checked out to 13375 PTFS, Patrick (due back 11/08/2018)	Recall Hold successful! Position in queue: 1
Book	Western Branch - NCW	FICTION WOO	Available	Item not available for hold. No items available for hold / issue

You must click the Recall button to initiate the recall. **NOTE: This is a change from earlier versions, where the hold and recall were done in one step**. You'll get a popup message if the recall was successful, but the main holds screen won't change.



Item successfully recalled.

The system will then generate a Recall notice to the current user. The default text will read something like this:

Message Details

Endpoint	email
Message Type	recall
Subject	Item Recall Notice
Content	The item "Foreign affairs /" (barcode 39202000021046) has been recalled for checkout by another patron. Please return the item on or before that date.
Delivered	
Created	2018-11-02 08:26:50

The notice text can be modified as desired (see Notices). When an item has been recalled, the patron will no longer be able to renew it through the Discovery Layer.

NOTE: Placing a hold with a recall will NOT move that patron to the head of the priority queue. The recall is issued, prompting the original borrower to return the item, but the first entry in the holds priority list will be the hold that's triggered. If you are placing a recall for a particular patron and want to make sure that patron gets the item first, you must manually reorder the holds priority list to make that patron first.

4.11.6 Triggering a Hold

As mentioned in the Circulation, Checkin section, when an item is checked in the system will see if there is a hold. If so, a screen message will alert staff.

Hold found

Hold at: LibLime Demo Public Library

Hold for:

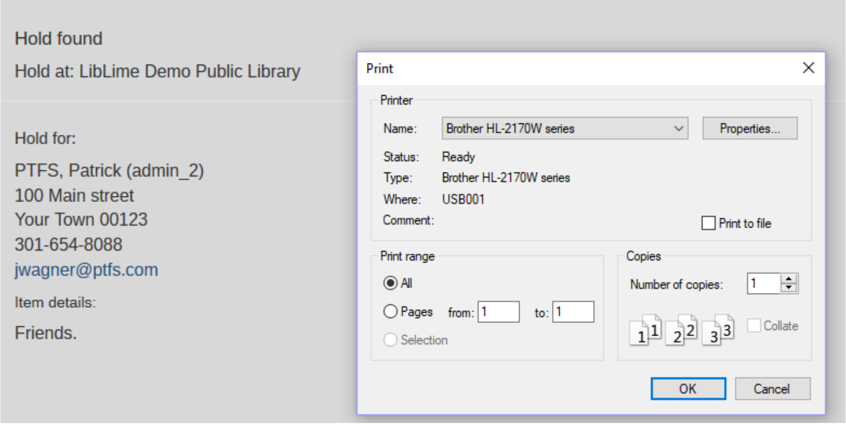
PTFS, Patrick (admin_2)
100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com

Item details:

Friends.

Usually you will confirm the hold (with or without printing a hold slip to place in the item). Under rare circumstances you might want to ignore the hold so that you can give the item to someone else.

If you click Print Slip and Confirm, the system will open a popup window with information about the hold:



Hold found

Hold at: LibLime Demo Public Library

Hold for:

PTFS, Patrick (admin_2)
100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com

Item details:

Friends.

Print

Printer

Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series
Where: USB001
Comment:

☐ Print to file

Print range

● All
○ Pages from: 1 to: 1
○ Selection

Copies

Number of copies: 1

☐ Collate

Print the page and put it in the item on the hold shelf.

Any item arriving from transit or whose status is otherwise in doubt should always be run through checkin. If there are no alerts, the item can be shelved.

As soon as a hold is triggered, an email message is sent to the patron saying the item is available. The text of this message can be customized by an administrator under Tools, Notices. (Note: The patron must have the Hold Filled messaging option turned on.)

4.11.6.1 Triggering Holds When Waiting Holds are Cancelled

When a hold has already been triggered and is waiting, a staff person may cancel that hold for various reasons. In the title record's hold screen, change Waiting to Delete and click Update Holds.

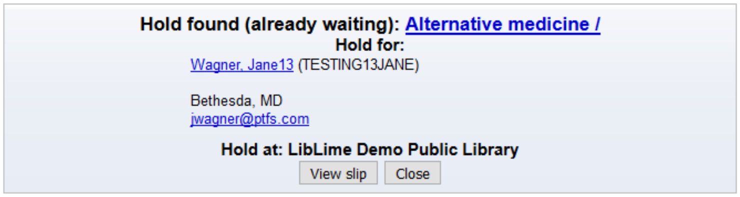
Place a hold on Alternative medicine /

Patron:
Enter patron card number or partial name:

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
Waiting	Patrick PTFS		2016-07-21 00:00:00	Item waiting at **LibLime Demo Public Library**	37570000543438		Waiting since 04/24/2017
1	Jane13 Wagner		2017-12-28 08:59:21	LibLime Demo Public Library	*Next available*	☐	Resume on (optional)

If there is another hold on the title/item, a popup screen will alert staff that another hold has been triggered, and offer an option to print a hold slip:



Hold found (already waiting): Alternative medicine /
Hold for:
Wagner, Jane13 (TESTING13JANE)

Bethesda, MD
jwagner@ptfs.com

Hold at: LibLime Demo Public Library

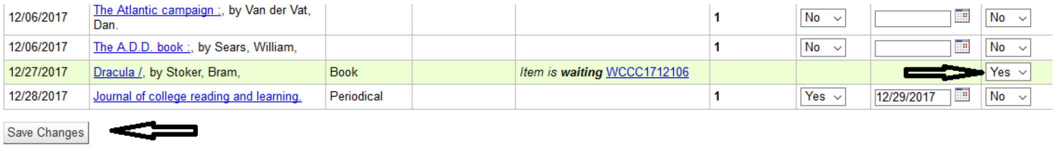
Place a hold on Alternative medicine /

Patron:
Enter patron card number or partial name:

Existing holds

Priority	Patron	Notes	Date	Pick up Library	Details	Suspended	Waiting/ Resume
Waiting	Jane13 Wagner		2017-12-28 08:59:21	Item waiting at **LibLime Demo Public Library**	37570000543438		Waiting since 12/28/2017

If the hold is deleted from the patron's record:



12/06/2017	The Atlantic campaign :, by Van der Vat, Dan.				**1**	No		No
12/06/2017	The A.D.D. book :, by Sears, William,				**1**	No		No
12/27/2017	Dracula /, by Stoker, Bram,	Book		*Item is **waiting*** WCCC1712106				Yes
12/28/2017	Journal of college reading and learning.	Periodical			**1**	Yes	12/29/2017	No

A similar popup will alert staff:

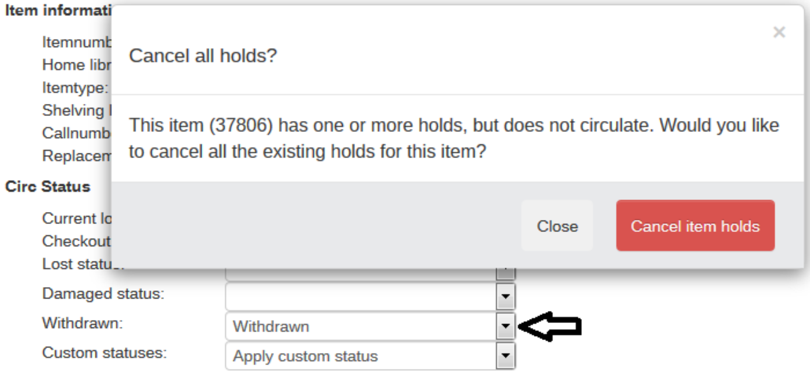
Hold found (already waiting): Vietnam, the war at home :
Hold for:
Wagner, Jane13 (TESTING13JANE)
jwagner@ptfs.com
Hold at: LibLime University Demo Library

In either case, the next hold has already been triggered and is waiting. The staff person should print the hold slip and put the item back on the holds shelf for pickup, or put it in transit if needed.

Note that patrons cannot cancel holds that are waiting in the Discovery Layer interface, unless the patron (or Role) has been given the granular permission cancel_waiting_holds.

4.11.7 Hold Handling for Lost or Withdrawn Items

An item with existing holds (item-level hold, or title-level for the only item) may need to be marked as lost or withdrawn. If that happens, the system will cancel the holds and (if configured) send a hold cancellation notice to the patron. For example, an item with an item-level hold was marked as withdrawn:



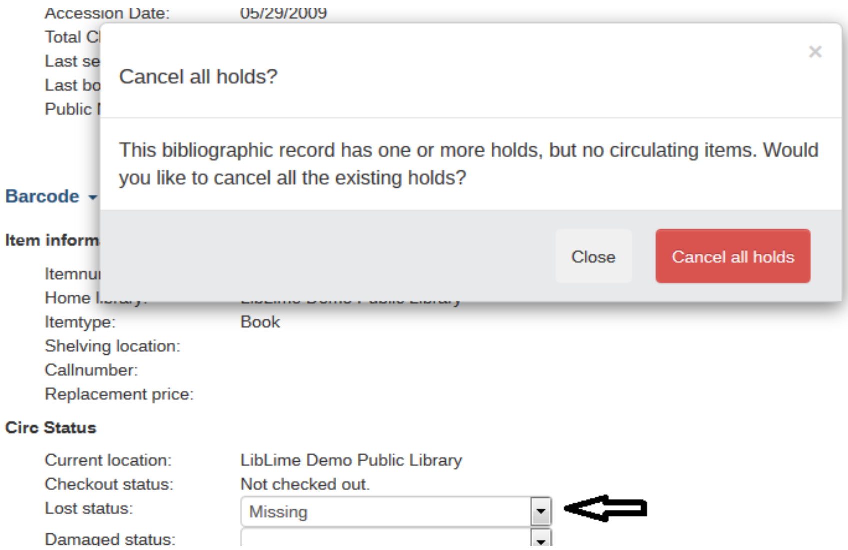
Cancel all holds?

This item (37806) has one or more holds, but does not circulate. Would you like to cancel all the existing holds for this item?

Withdrawn: Withdrawn

Custom statuses: Apply custom status

In this screenshot, the last available item has been marked as lost (Missing). All holds will be cancelled:



Accession Date: 05/29/2009

Total C

Last se

Last bo

Public I

Barcode

Item inform

Itemnu

Home l

Itemtype: Book

Shelving location:

Callnumber:

Replacement price:

Circ Status

Current location: LibLime Demo Public Library

Checkout status: Not checked out.

Lost status: Missing

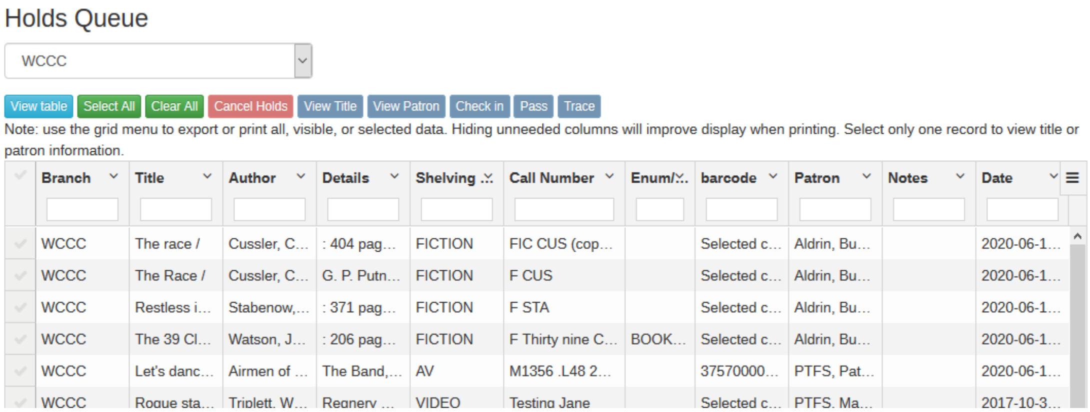
Damaged status:

Cancel all holds?

This bibliographic record has one or more holds, but no circulating items. Would you like to cancel all the existing holds?

4.11.8 Holds Queue Report

If your library allows on-shelf holds, staff will need to know which items to pull from the shelves to fill those holds. Under Circulation, run the Holds Queue report (selecting a branch from the pulldown if needed) to see what items are needed. NOTE: Author and Copy Number fields have been added. Copy Number is part of the Call Number field. (Not all screenshots have been updated.)



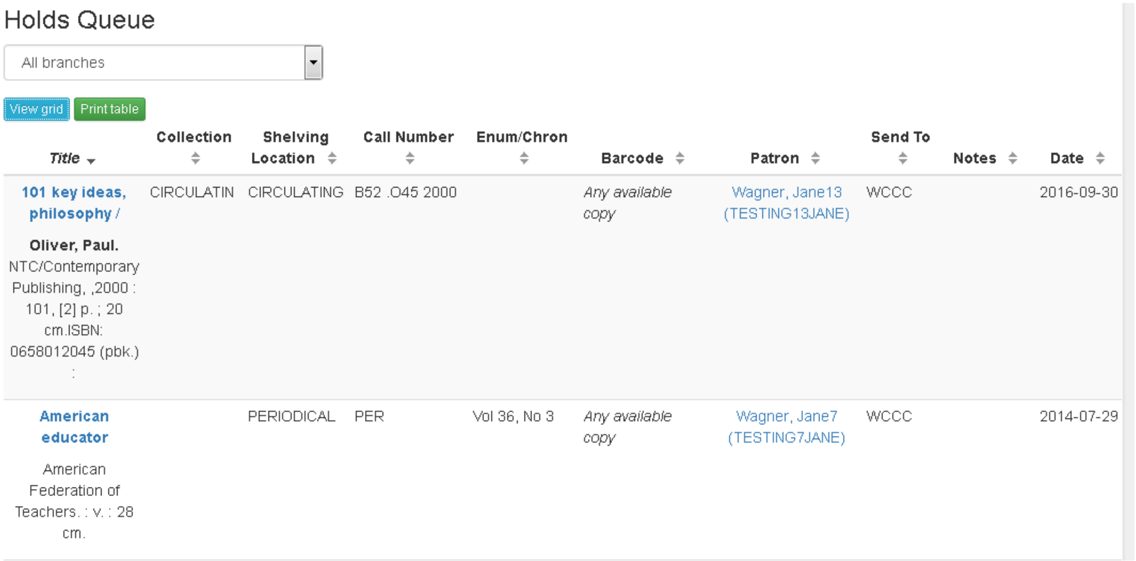
Holds Queue

WCCC

Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

Branch	Title	Author	Details	Shelving ...	Call Number	Enum/...	barcode	Patron	Notes	Date
WCCC	The race /	Cussler, C...	: 404 pag...	FICTION	FIC CUS (cop...		Selected c...	Aldrin, Bu...		2020-06-1...
WCCC	The Race /	Cussler, C...	G. P. Putn...	FICTION	F CUS		Selected c...	Aldrin, Bu...		2020-06-1...
WCCC	Restless i...	Stabenow,...	: 371 pag...	FICTION	F STA		Selected c...	Aldrin, Bu...		2020-06-1...
WCCC	The 39 Cl...	Watson, J...	: 206 pag...	FICTION	F Thirty nine C...	BOOK...	Selected c...	Aldrin, Bu...		2020-06-1...
WCCC	Let's danc...	Airmen of ...	The Band,...	AV	M1356 .L48 2...		37570000...	PTFS, Pat...		2020-06-1...
WCCC	Rogue sta...	Triplett, W...	Regnery ...	VIDEO	Testing Jane		Selected c...	PTFS, Ma...		2017-10-3...

Note that the holds queue report has been redone from earlier versions, with interactive headers. You can see a screen similar to the old version by clicking the blue View Table button at the top:

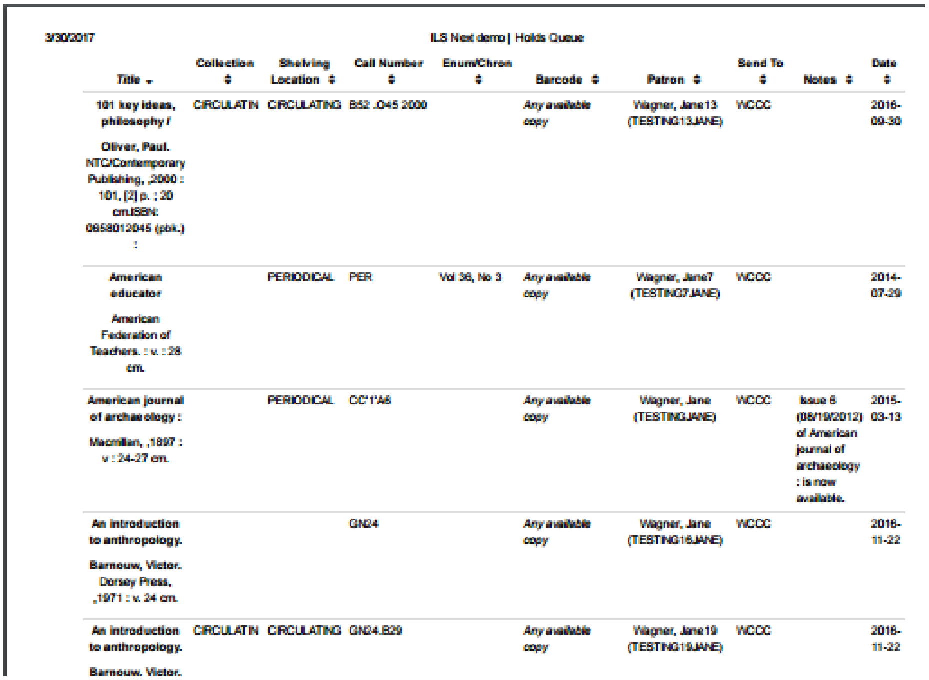


Holds Queue

All branches

Title	Collection	Shelving Location	Call Number	Enum/Chron	Barcode	Patron	Send To	Notes	Date
101 key ideas, philosophy / **Oliver, Paul.** NTC/Contemporary Publishing, ,2000 : 101, [2] p. ; 20 cm.ISBN: 0658012045 (pbk.) :	CIRCULATIN	CIRCULATING	B52 .O45 2000		*Any available copy*	Wagner, Jane13 (TESTING13JANE)	WCCC		2016-09-30
American educator American Federation of Teachers. : v. : 28 cm.		PERIODICAL	PER	Vol 36, No 3	*Any available copy*	Wagner, Jane7 (TESTING7JANE)	WCCC		2014-07-29

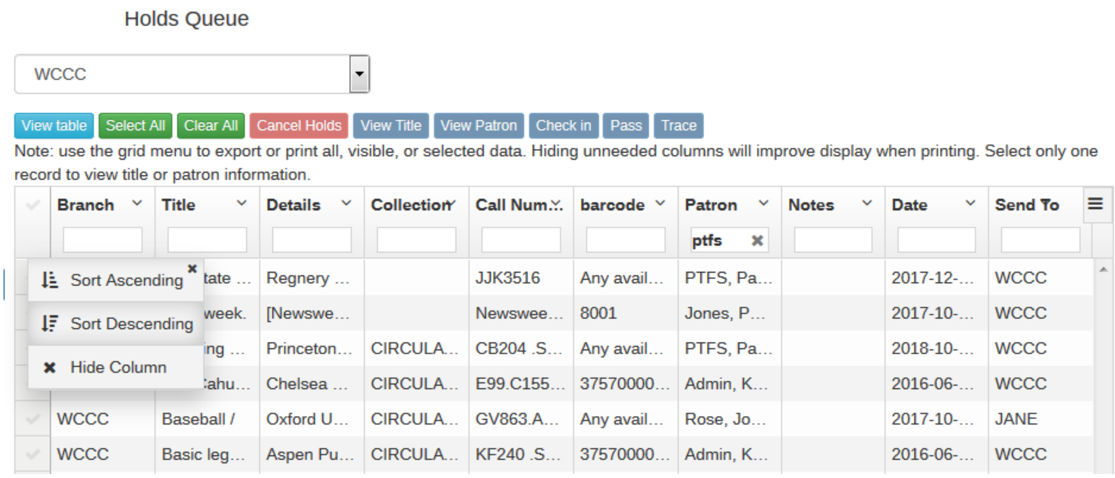
This interface does not have the expanded functionality of the new one. You can print the list – use the Print Table button at the top of this screen (see below for how to print the grid interface):



3/30/2017 ILS Next demo | Holds Queue

Title	Collection	Shelving Location	Call Number	Enum/Chron	Barcode	Patron	Send To	Notes	Date
101 key ideas, philosophy / **Oliver, Paul.** NTC/Contemporary Publishing, ,2000 : 101, [2] p. ; 20 cm.ISBN: 0658012045 (pbk.) :	CIRCULATIN	CIRCULATING	B52 .O45 2000		*Any available copy*	Wagner, Jane13 (TESTING13JANE)	WCCC		2016-09-30
American educator American Federation of Teachers. : v. : 28 cm.		PERIODICAL	PER	Vol 36, No 3	*Any available copy*	Wagner, Jane7 (TESTING7JANE)	WCCC		2014-07-29
American journal of archaeology : Macmillan, ,1897 : v : 24-27 cm.		PERIODICAL	CC'1'A6		*Any available copy*	Wagner, Jane (TESTINGJANE)	WCCC	Issue 6 (08/19/2012) of American journal of archaeology : is now available.	2015-03-13
An introduction to anthropology. Barnouw, Victor. Dorsey Press, ,1971 : v. 24 cm.			GN24		*Any available copy*	Wagner, Jane (TESTING16JANE)	WCCC		2016-11-22
An introduction to anthropology. Barnouw, Victor.	CIRCULATIN	CIRCULATING	GN24.B29		*Any available copy*	Wagner, Jane19 (TESTING19JANE)	WCCC		2016-11-22

Click View Grid to return to the new interface. You can filter the report by typing a value in one of the header columns, or sort by clicking on a header's down-arrow symbol:

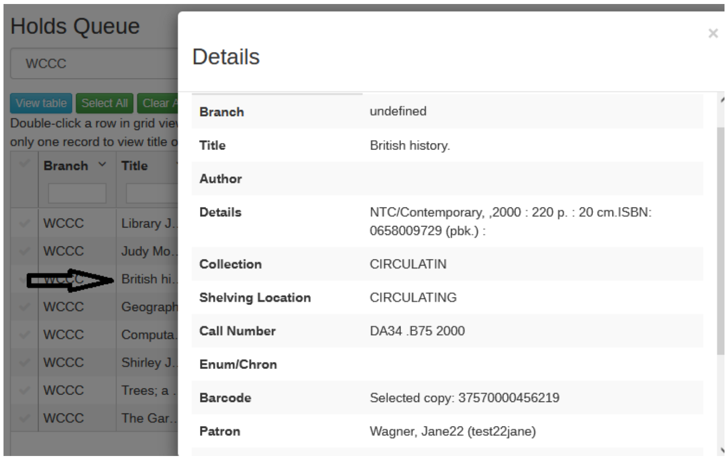


Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

Branch	Title	Details	Collection	Call Num…	barcode	Patron	Notes	Date	Send To
						ptfs			
	tate …	Regnery …		JJK3516	Any avail…	PTFS, Pa…		2017-12-…	WCCC
	week.	[Newswe…		Newswee…	8001	Jones, P…		2017-10-…	WCCC
	ing …	Princeton…	CIRCULA…	CB204 .S…	Any avail…	PTFS, Pa…		2018-10-…	WCCC
	ahu…	Chelsea …	CIRCULA…	E99.C155…	37570000…	Admin, K…		2016-06-…	WCCC
WCCC	Baseball /	Oxford U…	CIRCULA…	GV863.A…	Any avail…	Rose, Jo…		2017-10-…	JANE
WCCC	Basic leg…	Aspen Pu…	CIRCULA…	KF240 .S…	37570000…	Admin, K…		2016-06-…	WCCC

You can hide columns or export data (to .csv or .pdf for printing) using the grid icon in the upper right. To hide a column, click it in the dropdown. If you have set filters, you can clear them with the Clear Filters option in the dropdown.

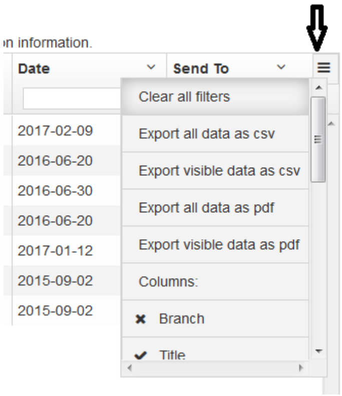
To see the full content of a particular entry, doubleclick it. That brings up a popup window with all the data:



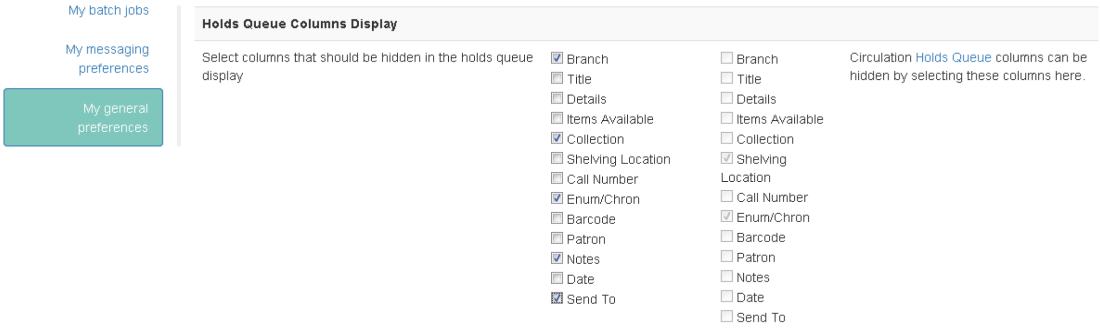
Details

Branch	undefined
Title	British history.
Author	
Details	NTC/Contemporary, ,2000 : 220 p. : 20 cm.ISBN: 0658009729 (pbk.) :
Collection	CIRCULATIN
Shelving Location	CIRCULATING
Call Number	DA34 .B75 2000
Enum/Chron	
Barcode	Selected copy: 37570000456219
Patron	Wagner, Jane22 (test22jane)

Note that for exporting, you can either choose to export only the data currently visible, based on filters, or all data in the holds queue. Open your export file (.csv or .pdf) and manipulate or print the data as desired.



If you always want to hide certain columns, you can do so in your account user preference settings. Click your user name in the “Hello Name” link at top right of the screen, then go to My General Preferences.



Holds Queue Columns Display

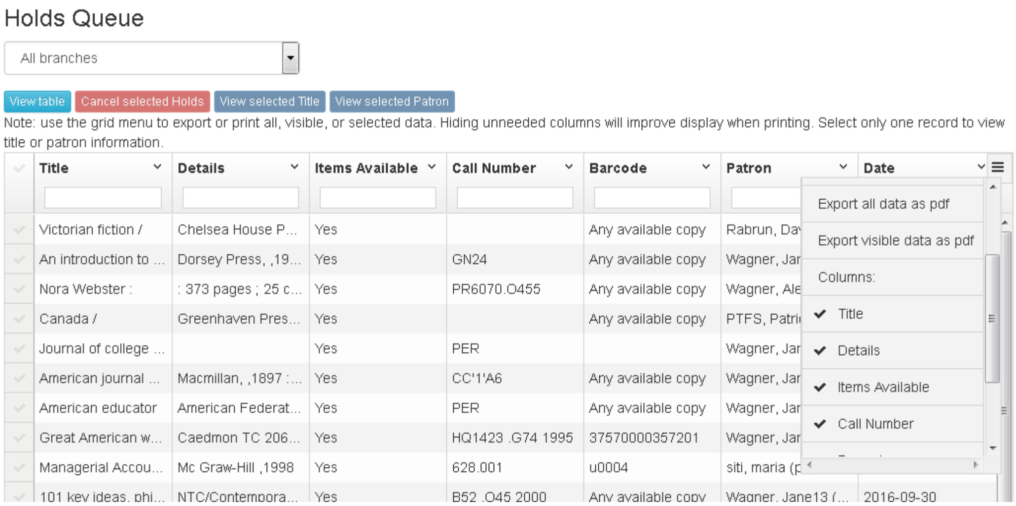
Select columns that should be hidden in the holds queue display

- ☑ Branch
- ☐ Title
- ☐ Details
- ☐ Items Available
- ☑ Collection
- ☐ Shelving Location
- ☐ Call Number
- ☑ Enum/Chron
- ☐ Barcode
- ☐ Patron
- ☑ Notes
- ☐ Date
- ☑ Send To

- ☐ Branch
- ☐ Title
- ☐ Details
- ☐ Items Available
- ☐ Collection
- ☑ Shelving Location
- ☐ Call Number
- ☑ Enum/Chron
- ☐ Barcode
- ☐ Patron
- ☐ Notes
- ☐ Date
- ☐ Send To

Circulation Holds Queue columns can be hidden by selecting these columns here.

After a browser refresh, those columns are hidden in your holds queue display:

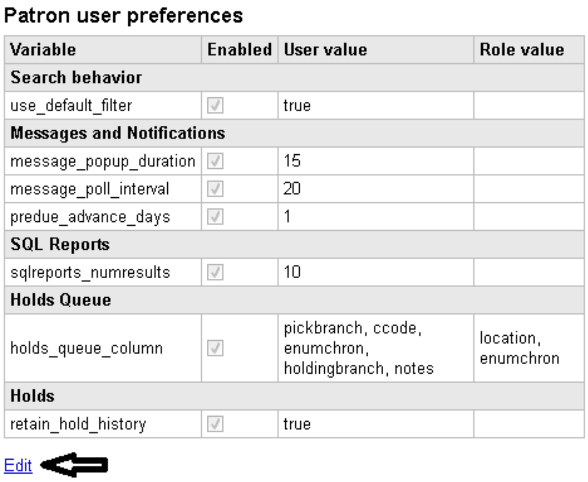


Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

Title	Details	Items Available	Call Number	Barcode	Patron	Date
Victorian fiction /	Chelsea House P…	Yes		Any available copy	Rabrun, Dav	
An introduction to …	Dorsey Press, ,19…	Yes	GN24	Any available copy	Wagner, Jar	
Nora Webster :	: 373 pages ; 25 c…	Yes	PR6070.O455	Any available copy	Wagner, Ale	
Canada /	Greenhaven Pres…	Yes		Any available copy	PTFS, Patri	
Journal of college …		Yes	PER		Wagner, Jar	
American journal …	Macmillan, ,1897 :…	Yes	CC'1'A6	Any available copy	Wagner, Jar	
American educator	American Federat…	Yes	PER	Any available copy	Wagner, Jar	
Great American w…	Caedmon TC 206…	Yes	HQ1423 .G74 1995	37570000357201	Wagner, Jar	
Managerial Accou…	Mc Graw-Hill ,1998	Yes	628.001	u0004	siti, maria (p	
101 key ideas. phi…	NTC/Contempora…	Yes	B52 .O45 2000	Any available copy	Wagner, Jane13 (…	2016-09-30

Note that they are not available in the option pulldown – to see those columns again you’ll need to change your user preferences.

You can also set the preferred columns in any staff or Role record, under the User Preferences section:

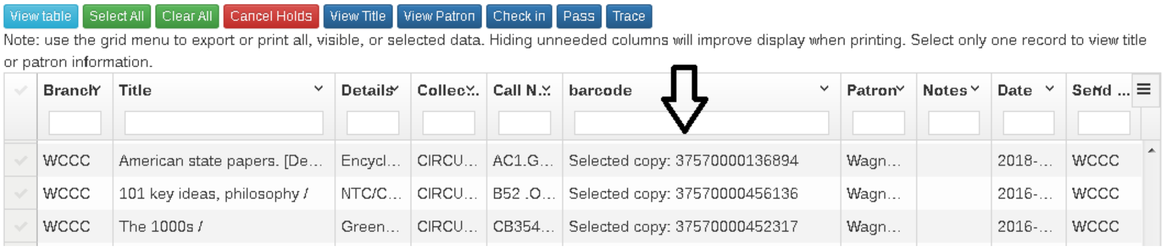


Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
use_default_filter	☑	true	
Messages and Notifications			
message_popup_duration	☑	15	
message_poll_interval	☑	20	
predue_advance_days	☑	1	
SQL Reports			
sqlreports_numresults	☑	10	
Holds Queue			
holds_queue_column	☑	pickbranch, ccode, enumchron, holdingbranch, notes	location, enumchron
Holds			
retain_hold_history	☑	true	

The holds queue report is built by a cron job (build_holds_queue.pl). Administrators can control the timing of the job with the HoldsQueueSchedule syspref, or it can be left at the default setup. The timing depends on your library's needs. It could be run once a day or every couple of hours. That script completely rebuilds the queue each time it runs. Staff can use this list to pull items from the shelf, or identify items needed from other branches.

The script identifies an item to fill a hold (the "selected copy" entry). In large multi-library or consortia sites, this is based on an algorithm derived from the settings in several system preferences. Most sites will be OK with the default settings.



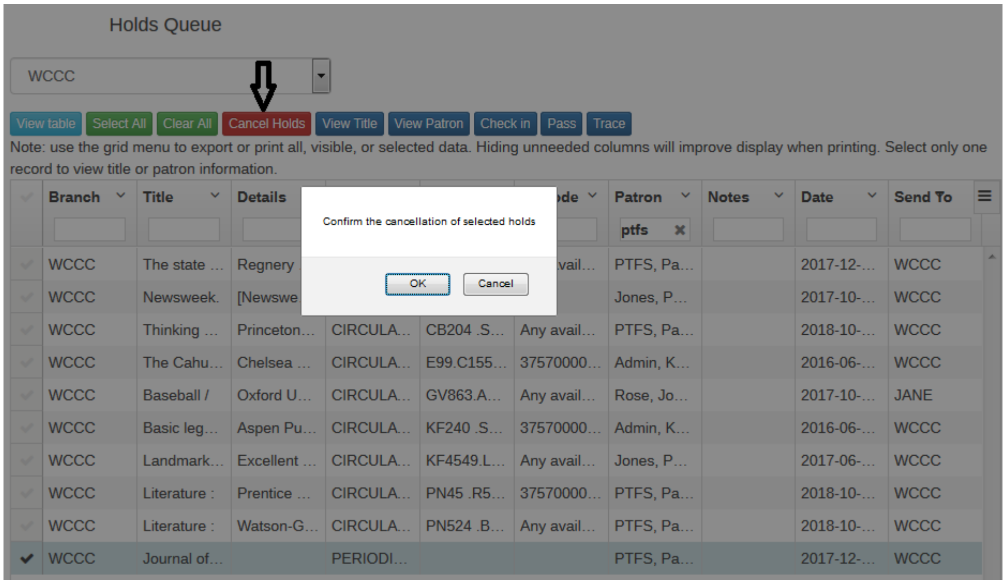
Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

Branch	Title	Details	Collec…	Call N…	barcode	Patron	Notes	Date	Send …
WCCC	American state papers. [De…	Encycl…	CIRCU…	AC1.G…	Selected copy: 37570000136894	Wagn…		2018-…	WCCC
WCCC	101 key ideas, philosophy /	NTC/C…	CIRCU…	B52 .O…	Selected copy: 37570000456136	Wagn…		2016-…	WCCC
WCCC	The 1000s /	Green…	CIRCU…	CB354…	Selected copy: 37570000452317	Wagn…		2016-…	WCCC

When an item is checked in and can fill a hold, the system looks for the first active hold in the queue for that title. If that item is unavailable, the hold request needs to be passed on to the next item in the sequence that can fill the hold.

As items are pulled from the shelves, check them in to trap that item for the hold request. (See below; items can be checked in directly from the holds queue screen.) Once you have trapped your library's item for a hold request, that request for that patron will be removed from the holds queue after the next run of the cron job.

There is a button for canceling selected holds. To select a record, click on it and it becomes highlighted. Click the Cancel Hold button and you'll get a popup asking you to confirm the cancellation.



Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

Confirm the cancellation of selected holds

Branch	Title	Details			de	Patron	Notes	Date	Send To
						ptfs			
WCCC	The state …	Regnery			vail…	PTFS, Pa…		2017-12-…	WCCC
WCCC	Newsweek.	[Newswe				Jones, P…		2017-10-…	WCCC
WCCC	Thinking …	Princeton…	CIRCULA…	CB204 .S…	Any avail…	PTFS, Pa…		2018-10-…	WCCC
WCCC	The Cahu…	Chelsea …	CIRCULA…	E99.C155…	37570000…	Admin, K…		2016-06-…	WCCC
WCCC	Baseball /	Oxford U…	CIRCULA…	GV863.A…	Any avail…	Rose, Jo…		2017-10-…	JANE
WCCC	Basic leg…	Aspen Pu…	CIRCULA…	KF240 .S…	37570000…	Admin, K…		2016-06-…	WCCC
WCCC	Landmark…	Excellent …	CIRCULA…	KF4549.L…	Any avail…	Jones, P…		2017-06-…	WCCC
WCCC	Literature :	Prentice …	CIRCULA…	PN45 .R5…	37570000…	PTFS, Pa…		2018-10-…	WCCC
WCCC	Literature :	Watson-G…	CIRCULA…	PN524 .B…	Any avail…	PTFS, Pa…		2018-10-…	WCCC
WCCC	Journal of…		PERIODI…			PTFS, Pa…		2017-12-…	WCCC

If the patron has Cancel Hold notifications turned on, a message of the appropriate type (email, list, popup) will be generated and sent to the patron.

Note that this does not automatically trigger the next hold on the title, or alert staff that there is another hold.

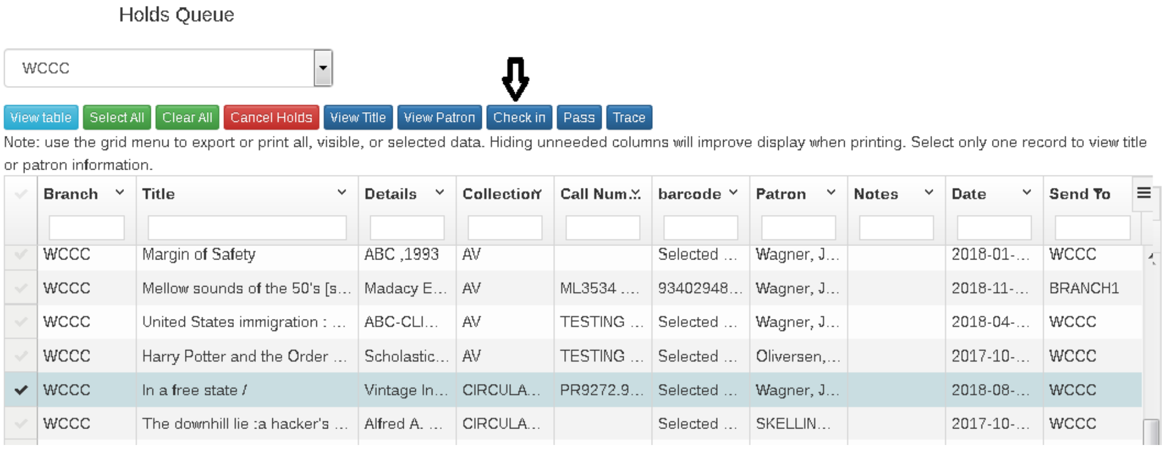
If your library does not allow on-shelf holds, the report does not need to be run regularly. However, staff should check it occasionally to make sure something hasn't slipped into the queue. For example, a staff person might have placed an on-shelf hold for a patron, but neglected to retrieve the item and trigger the hold.

4.11.8.1 Checkin/Pass/Trace Options

NOTE: New options in the holds queue are primarily designed for multi-library or consortia sites, but the checkin and trace options can be used by single-library sites if desired.

Three buttons at the top of the holds queue add extra functionality.

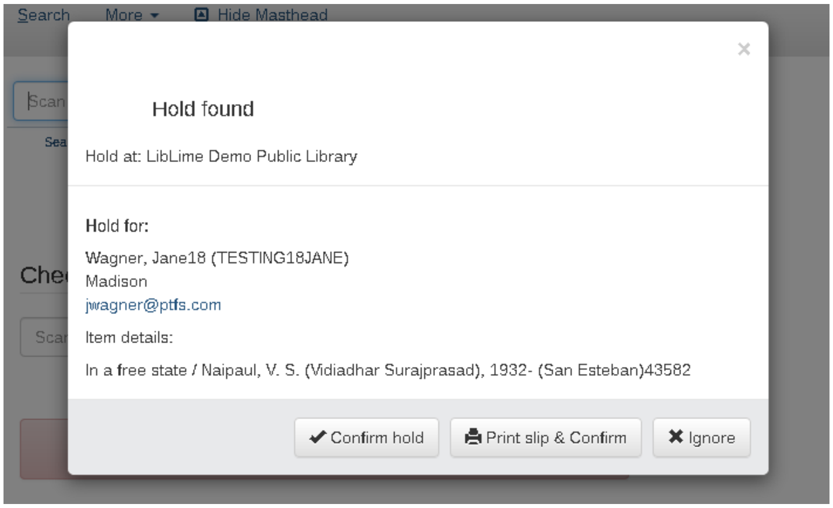
The Check In button allows staff to run an item through checkin directly from the holds queue, triggering the waiting hold without leaving the overall list. Click on the entry to select it, and then click the Check In button:



Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

	Branch	Title	Details	Collection	Call Num…	barcode	Patron	Notes	Date	Send To
✓	WCCC	Margin of Safety	ABC ,1993	AV		Selected …	Wagner, J…		2018-01-…	WCCC
✓	WCCC	Mellow sounds of the 50's [s…	Madacy E…	AV	ML3534 ….	93402948…	Wagner, J…		2018-11-…	BRANCH1
✓	WCCC	United States immigration : …	ABC-CLI…	AV	TESTING …	Selected …	Wagner, J…		2018-04-…	WCCC
✓	WCCC	Harry Potter and the Order …	Scholastic…	AV	TESTING …	Selected …	Oliversen,…		2017-10-…	WCCC
✓	WCCC	In a free state /	Vintage In…	CIRCULA…	PR9272.9…	Selected …	Wagner, J…		2018-08-…	WCCC
✓	WCCC	The downhill lie :a hacker's …	Alfred A. …	CIRCULA…		Selected …	SKELLIN…		2017-10-…	WCCC

This opens a new browser window, with the selected barcode being checked in:



Hold found

Hold at: LibLime Demo Public Library

Hold for:

Wagner, Jane18 (TESTING18JANE)
Madison
jwagner@ptfs.com

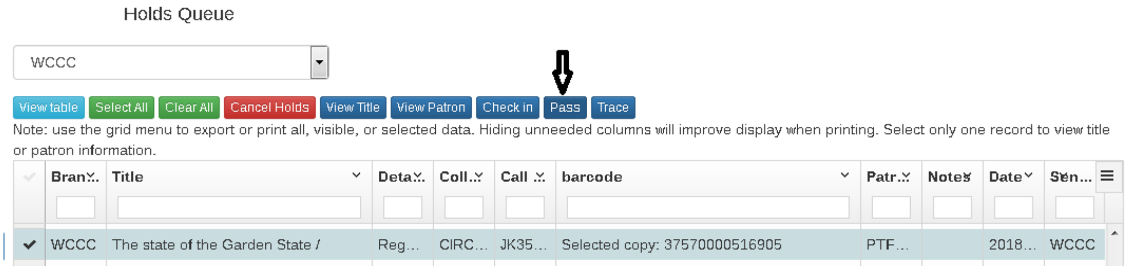
Item details:

In a free state / Naipaul, V. S. (Vidiadhar Surajprasad), 1932- (San Esteban)43582

After confirming the hold and printing the slip, close this browser window. The holds queue will still be open in the original window, but that item will have been removed.

If staff do not use the holds queue checkin button, but rather trigger a hold through Circulation, Checkin, the item will be removed from the underlying table. If the holds queue screen is still open in another window, though, staff will need to refresh the screen before that item disappears.

If for some reason the library does not want to use the selected copy to fill the hold, staff can Pass the request to the next library in the holds sequence that has an available copy, after the next time the cron job updates the data. Click on the entry to select it, then click the Pass button:



Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

	Bran…	Title	Deta…	Coll…	Call …	barcode	Patr…	Notes	Date	Sen…
✔	WCCC	The state of the Garden State /	Reg…	CIRC…	JK35…	Selected copy: 37570000516905	PTF…		2018…	WCCC

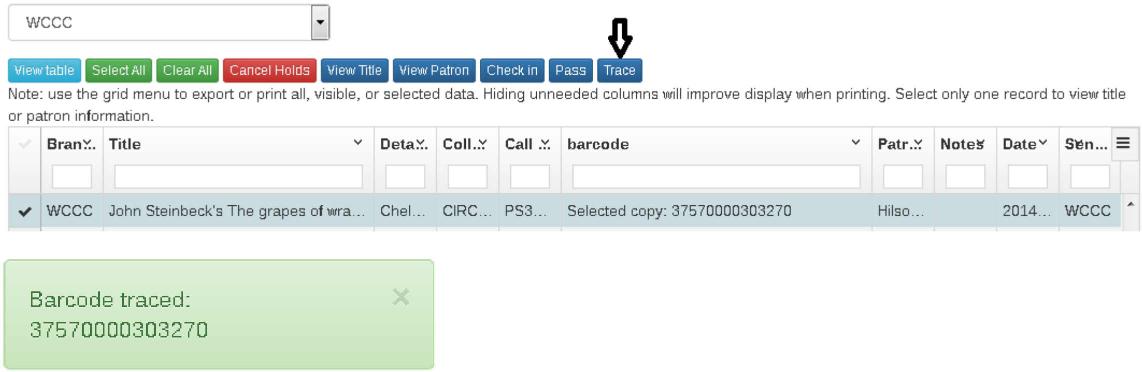
A popup will confirm that the item has been passed:

Barcode passed: 37570000516905

The hold request will show on the holds queue of the next library in the holds sequence that has an Available copy, after the next time the cron job updates the data.

If staff are unable to find the selected copy on the shelf, marking the item as Trace will remove it from the holds queue report and send the request to the next library in the holds sequence that has an available copy, after the next time the cron job updates the data.

Click on the entry to select it, and then click the Trace button.

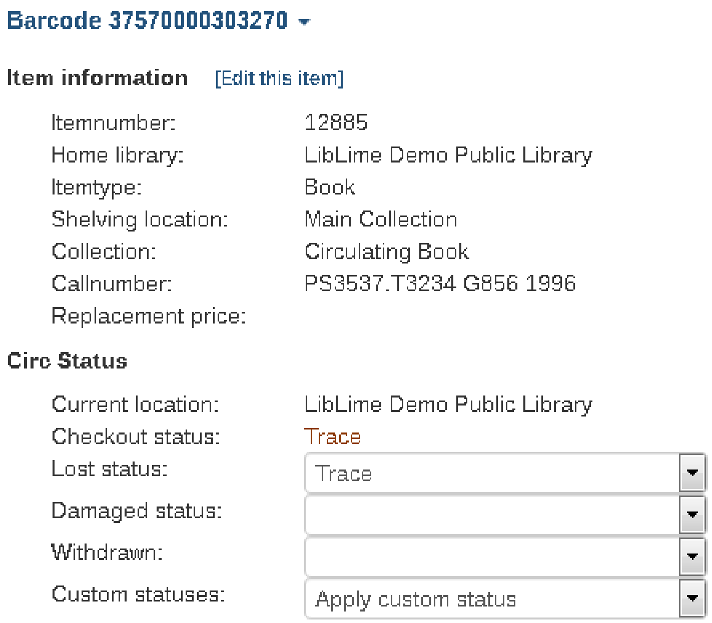


Note: use the grid menu to export or print all, visible, or selected data. Hiding unneeded columns will improve display when printing. Select only one record to view title or patron information.

	Bran..	Title	Deta..	Coll..	Call ..	barcode	Patr..	Notes	Date	Sen...
✓	WCCC	John Steinbeck's The grapes of wra…	Chel…	CIRC…	PS3…	Selected copy: 37570000303270	Hilso…		2014…	WCCC

Barcode traced: 37570000303270

That will change the lost status and availability in the item record to Trace. The item record has the status set:



Barcode 37570000303270

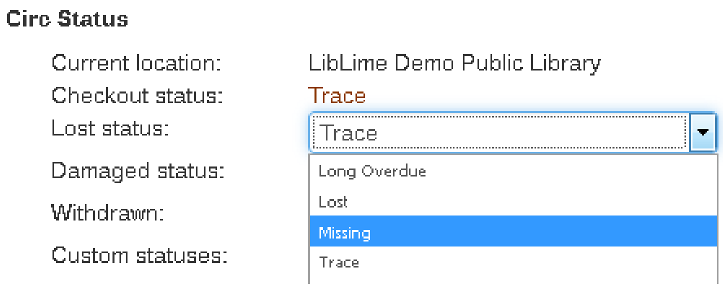
Item information [Edit this item]

Itemnumber: 12885
Home library: LibLime Demo Public Library
Itemtype: Book
Shelving location: Main Collection
Collection: Circulating Book
Callnumber: PS3537.T3234 G856 1996
Replacement price:

Circ Status

Current location: LibLime Demo Public Library
Checkout status: Trace
Lost status: Trace
Damaged status:
Withdrawn:
Custom statuses: Apply custom status

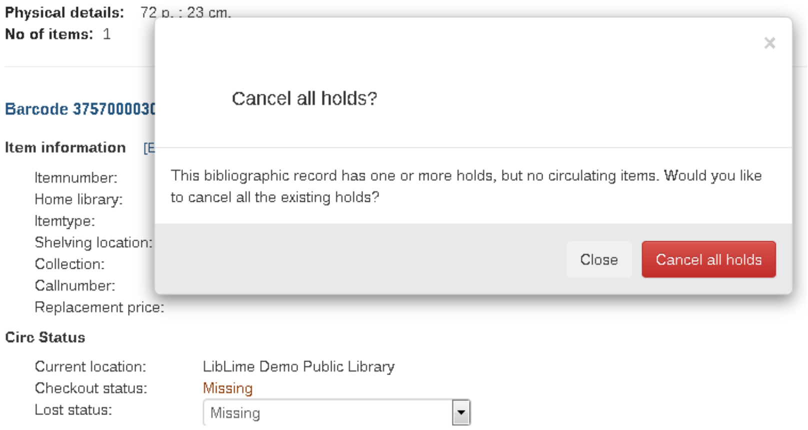
The Trace status does NOT cancel the hold; if available, another item will be selected in the next run of the cron job. Library staff should search for the item (a report to search for Trace lost statuses may be helpful). If it is not found after a thorough scan of the shelves, the item's Lost status can be updated to Missing. That indicates that the item has been searched for but remains unfound.



Circ Status

Current location: LibLime Demo Public Library
Checkout status: Trace
Lost status: Trace
Damaged status:
Withdrawn:
Custom statuses:

Changing an item's lost status to Missing will automatically cancel all holds on the item and (if messaging options are enabled) notify the patron(s).



Physical details: 72 p. : 23 cm.
No of items: 1

Barcode 375700003

Item information

Itemnumber:
Home library:
Itemtype:
Shelving location:
Collection:
Callnumber:
Replacement price:

Cancel all holds?

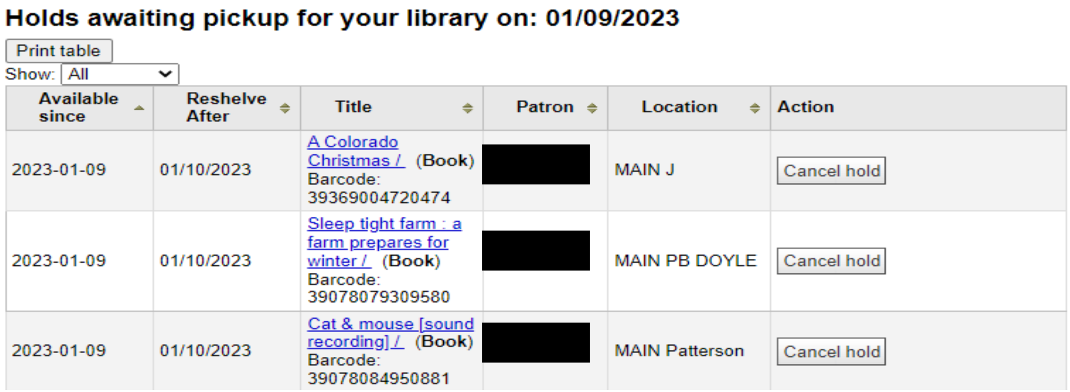
This bibliographic record has one or more holds, but no circulating items. Would you like to cancel all the existing holds?

Circ Status

Current location: LibLime Demo Public Library
Checkout status: Missing
Lost status: Missing

4.11.9 Clearing the Holds Shelf

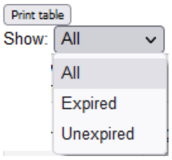
Once a hold has been triggered, and the email notice has been sent, the patron has a certain number of days to come and pick up the item. This time period is specified in the syspref ReservesMaxPickUpDelay. When setting this preference, keep in mind that the checkin date will count as day 1. When that time period has expired, staff will need to identify items which were not picked up and clear that hold. Under Circulation, use the Holds Awaiting Pickup report to see what is on your holds shelf.



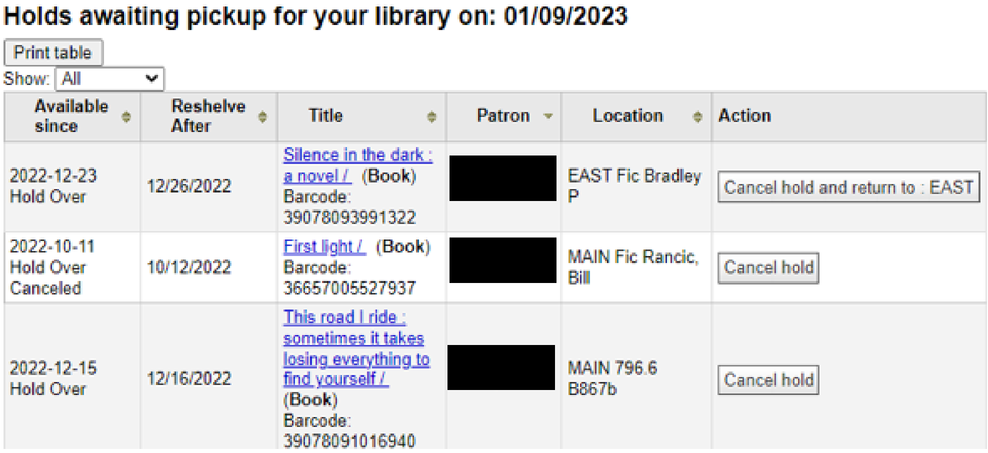
Holds awaiting pickup for your library on: 01/09/2023

Available since	Reshelve After	Title	Patron	Location	Action
2023-01-09	01/10/2023	A Colorado Christmas / (Book) Barcode: 39369004720474	[redacted]	MAIN J	Cancel hold
2023-01-09	01/10/2023	Sleep tight farm : a farm prepares for winter / (Book) Barcode: 39078079309580	[redacted]	MAIN PB DOYLE	Cancel hold
2023-01-09	01/10/2023	Cat & mouse [sound recording] / (Book) Barcode: 39078084950881	[redacted]	MAIN Patterson	Cancel hold

The default view is All holds, including current and expired. Use the pulldown at the top to limit display to expired or active:



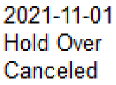
The report will identify holds which have expired in the "Reshelve After" column. You can use the column headers to sort the report (e.g., by Location) or you have the option to print it.



Holds awaiting pickup for your library on: 01/09/2023

Available since	Reshelve After	Title	Patron	Location	Action
2022-12-23 Hold Over	12/26/2022	Silence in the dark : a novel / (Book) Barcode: 39078093991322	[redacted]	EAST Fic Bradley P	Cancel hold and return to : EAST
2022-10-11 Hold Over Canceled	10/12/2022	First light / (Book) Barcode: 36657005527937	[redacted]	MAIN Fic Rancic, Bill	Cancel hold
2022-12-15 Hold Over	12/16/2022	This road I ride : sometimes it takes losing everything to find yourself / (Book) Barcode: 39078091016940	[redacted]	MAIN 796.6 B867b	Cancel hold

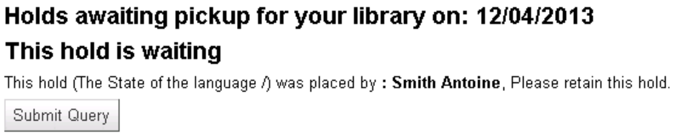
If a waiting hold is cancelled for some reason, the title will remain on this report for seven days, but a note will be added:


2021-11-01
Hold Over
Canceled

Staff can then pull the title from the holds shelf and process normally.

You can use this report in two ways. If you print it and take it to the holds shelf to pull expired holds, you can then just run those items through checkin. That will automatically clear them from this report and will check for any new holds or transit needs. If none are found, the item may be reshelved.

Alternatively, you can click the button under the Action column to cancel the hold. If the item needs to be put into transit, the button will say so. If there is another hold on the item, the system will give a screen message.


Holds awaiting pickup for your library on: 12/04/2013

This hold is waiting

This hold (The State of the language /) was placed by : **Smith Antoine**, Please retain this hold.

NOTE: This option triggers the next hold and sends a notice to the patron, but does NOT give you the option to print a hold slip. You can run the item through checkin, and it will trigger the same hold for the same patron, and give you the option to print a slip. However, doing it this way will generate two hold pickup notices to the patron.

You could also create a custom SQL report to identify expired holds and patrons; here is some sample SQL:

```
SELECT reserves.reservedate, reserves.waitingdate, reserves.reservenotes,
borrowers.cardnumber, borrowers.surname, borrowers.firstname, borrowers.branchcode,
biblio.title FROM reserves JOIN borrowers on (reserves.borrowernumber =
borrowers.borrowernumber) JOIN biblio on (reserves.biblionumber =
biblio.biblionumber) WHERE reserves.waitingdate  < date(NOW() - interval 7 day) AND
priority = 0 ORDER BY reserves.waitingdate
```

You could add a branchcode limiter or change the number of days as needed. The report output can be downloaded to Excel.

4.11.10 Cancelled Holds

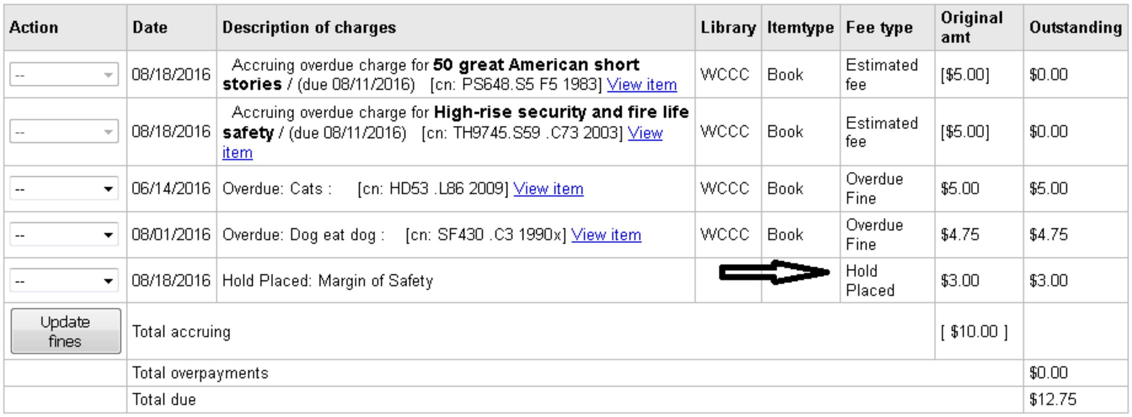
Waiting holds expire after a given time; a report under Circulation (Cancelled Holds) lists items to be pulled from the holds shelf. Those items should then be run through checkin to trigger any new holds, and reshelved.

Cancelled Holds

Reserve No.	Title	Borrower	Placed On	Cancelled	Branch
306	Journal of college reading and learning.	PTFS, Admin	2016-07-21	2016-07-21	LibLime University Demo Library
305	Vietnam, the war at home :	PTFS, Admin	2016-07-21	2016-07-21	LibLime University Demo Library
304	Vietnam, the war at home :	Wagner, Jane14	2016-07-21	2016-07-21	LibLime University Demo Library
303	Vietnam, the war at home :	Wagner, Jane13	2016-07-21	2016-07-21	LibLime University Demo Library
302	Vietnam, the war at home :	PTFS, Admin	2016-07-12	2016-07-21	LibLime University Demo Library
296	Great American women's speeches.	Wagner, Jane15	2016-06-22	2016-06-22	LibLime University Demo Library
295	Great American women's speeches.	Wagner, Jane15	2016-06-22	2016-06-22	LibLime University Demo Library

4.11.11 Hold Fees

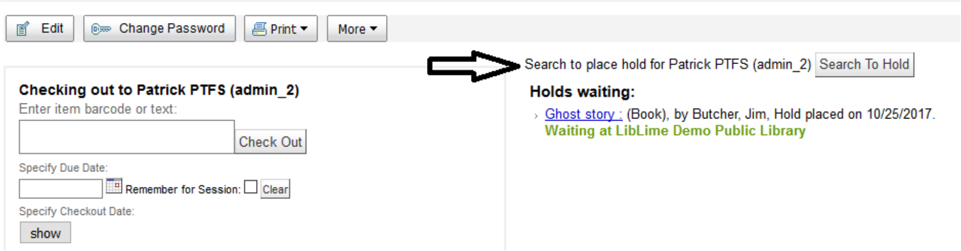
If configured in the item type policy, the patron category policy, or both, users can be charged a fee to place a hold. The fee is charged when the hold is triggered. If there are fees in both policies, the user is charged the higher of the two:



Action	Date	Description of charges	Library	Itemtype	Fee type	Original amt	Outstanding
--	08/18/2016	Accruing overdue charge for **50 great American short stories** / (due 08/11/2016) [cn: PS648.S5 F5 1983] View item	WCCC	Book	Estimated fee	[$5.00]	$0.00
--	08/18/2016	Accruing overdue charge for **High-rise security and fire life safety** / (due 08/11/2016) [cn: TH9745.S59 .C73 2003] View item	WCCC	Book	Estimated fee	[$5.00]	$0.00
--	06/14/2016	Overdue: Cats : [cn: HD53 .L86 2009] View item	WCCC	Book	Overdue Fine	$5.00	$5.00
--	08/01/2016	Overdue: Dog eat dog : [cn: SF430 .C3 1990x] View item	WCCC	Book	Overdue Fine	$4.75	$4.75
--	08/18/2016	Hold Placed: Margin of Safety			Hold Placed	$3.00	$3.00
Update fines	Total accruing					[$10.00]	
	Total overpayments						$0.00
	Total due						$12.75

4.11.12 Search To Hold

A feature on the patron's Checkouts tab will allow staff to place a hold for that patron starting from the patron record:



Search to place hold for Patrick PTFS (admin_2)

Checking out to Patrick PTFS (admin_2)

Enter item barcode or text:

Specify Due Date:

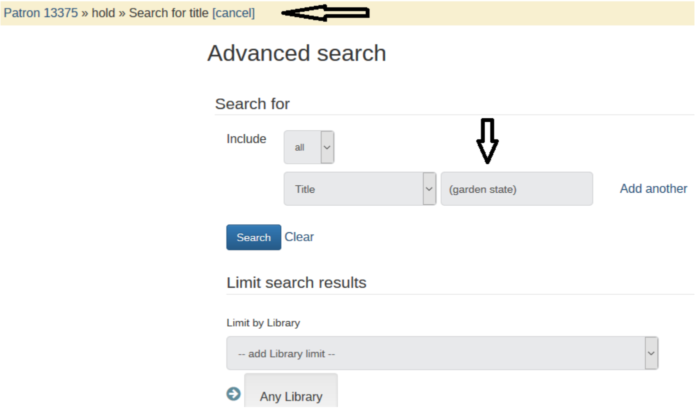
Remember for Session: ☐

Specify Checkout Date:

Holds waiting:

Ghost story : (Book), by Butcher, Jim, Hold placed on 10/25/2017.
Waiting at LibLime Demo Public Library

Click the Search to Hold button, and it opens the Advanced Search page, with a header line indicating that you are searching to place a hold for that patron:



Patron 13375 » hold » Search for title [cancel]

Title: (garden state)

Enter your search criteria and click the Search button. The results list will still show the header line, and each entry in the results list will have an option to place the hold for that patron:

Patron 13375 » hold » Search for title [cancel]

You searched for: title: (garden state) suppress: [0 TO 1] ✖ sorted by Relevance

☑ Library Catalog (0)
☐ EBSCO Databases (106420)
☐ External Databases (0)

☐ LibLime Demo Public Library (3)

☐ Anywhere (3)

Displaying 3 of 3 results.

☐ 1 The state of the Garden State
by Riccards, Michael P
Format: Book
Publisher and date: Regnery Publishing, Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.
Holdings: 4 copies
Currently available at:
LibLime Demo Public Library [JJK3516]
LibLime Demo Public Library Display [Testing Jane]
LibLime Demo Public Library Main Collection [JK3516 S73 2006]
and 1 other location.
★★★★☆ (4.00, 1 rating)
Rate this title: ☆☆☆☆☆

Place hold for patron 13375 (2 holds on 4 items)

You can click on a title from the results list to confirm it is the desired title, but you will need to return to the results list to place the hold. From the results list, click on the "Place hold for patron ####" to select that title. The standard Holds popup will appear:

Place hold on The state of the Garden State

For STAFF *PTFS, Patrick* [admin_2]

Pick up at LibLime Demo Public Library

The state of the Garden State

The state of the Garden State
Regnery Publishing,
Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.

Next available

When you click the Place Hold button and then the Done button in that popup, you will be returned to the patron's Checkouts tab. If you then look at the Holds tab at the bottom, you'll see the new hold.

This procedure is somewhat less flexible than the normal procedure to place a hold for a patron; it's intended for situations where the patron record is already displayed (usually at the Circulation desk while checking out other items) and the patron asks staff to place a hold at that point.

4.12 Call Slips, Document Delivery, and other RFI Forms

Call Slip and Document Delivery functionality allows patrons to place requests on items in closed stacks or remote storage for retrieval by the staff.

Call slip allows an item to be requested for quick retrieval from closed stacks or storage for the patron to borrow. How quickly this is turned around is determined by local policies but very little time is needed to fill call slip requests, as the call slip queue is updated continuously. Once the item is received it can be checked out to the patron.

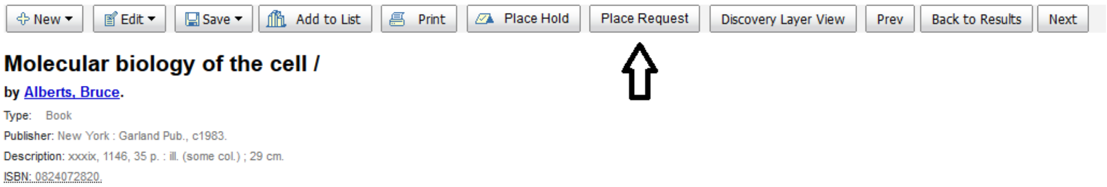
Document Delivery handles requests for copies of articles. In this case the patron requests the item by title of the publication and provides the article citation information. The work cited is copied and given to the patron; it is not loaned.

Other forms have been added to allow patrons to open informational tickets; see below.

There are several system preferences and steps needed to set up call slips and/or document delivery; see that section under in the Superlibrarian Training and Configuration Guide. The policies are applied in the circulation rules, so the option may not be visible or available on all items.

4.12.1 Placing a Request for a Patron

Most requests are placed from the Discovery Layer (see that section), but staff can also place a request for a patron. To do so, search for a title and click the Place Request button.



Molecular biology of the cell /

by Alberts, Bruce.

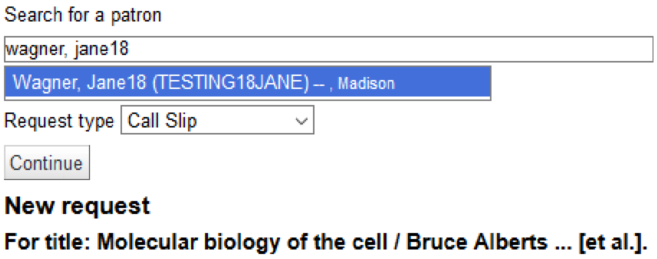
Type: Book

Publisher: New York : Garland Pub., c1983.

Description: xxxix, 1146, 35 p. : ill. (some col.) ; 29 cm.

ISBN: 0824072820.

At the New Request Screen for call slip, search for the name of the patron making the request and the type of request desired:



Search for a patron

wagner, jane18

Wagner, Jane18 (TESTING18JANE) -- , Madison

Request type: Call Slip

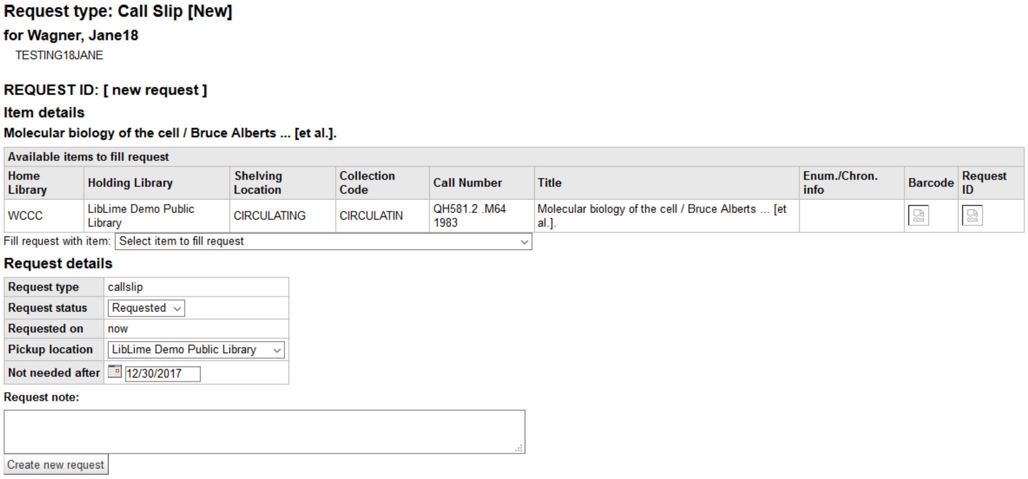
New request

For title: Molecular biology of the cell / Bruce Alberts ... [et al.].

After clicking Continue, you must provide item and request details. These include:

- Request Type (call slip or document delivery);
- Request Status (Requested, In Process, In Transit, Waiting for Pickup);
- Request on: (date, i.e. "now");
- Pickup location (defaults to local branch);
- Not Needed After (date): this is the expiration date;
- Document Delivery Details: (article title, authors, pages, vol/issue/date, chapter);
- Request Note

When the form is completed, click Create new request to proceed:



Request type: Call Slip [New]

for Wagner, Jane18

TESTING18JANE

REQUEST ID: [new request]

Item details

Molecular biology of the cell / Bruce Alberts ... [et al.].

Available items to fill request

Home Library	Holding Library	Shelving Location	Collection Code	Call Number	Title	Enum./Chron. info	Barcode	Request ID
WCCC	LibLime Demo Public Library	CIRCULATING	CIRCULATIN	QH581.2 .M64 1983	Molecular biology of the cell / Bruce Alberts ... [et al.].			

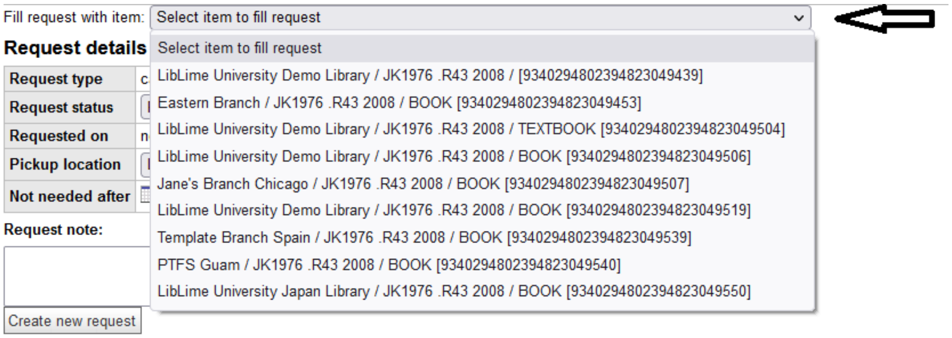
Fill request with item: Select item to fill request

Request details

Request type	callslip
Request status	Requested
Requested on	now
Pickup location	LibLime Demo Public Library
Not needed after	12/30/2017

Request note:

Note that you can specify a specific item to fill the request; patrons can also do so through the Discovery Layer.


Fill request with item: Select item to fill request

Request details

Request type
Request status
Requested on
Pickup location
Not needed after
Request note:

Select item to fill request
LibLime University Demo Library / JK1976 .R43 2008 / [9340294802394823049439]
Eastern Branch / JK1976 .R43 2008 / BOOK [9340294802394823049453]
LibLime University Demo Library / JK1976 .R43 2008 / TEXTBOOK [9340294802394823049504]
LibLime University Demo Library / JK1976 .R43 2008 / BOOK [9340294802394823049506]
Jane's Branch Chicago / JK1976 .R43 2008 / BOOK [9340294802394823049507]
LibLime University Demo Library / JK1976 .R43 2008 / BOOK [9340294802394823049519]
Template Branch Spain / JK1976 .R43 2008 / BOOK [9340294802394823049539]
PTFS Guam / JK1976 .R43 2008 / BOOK [9340294802394823049540]
LibLime University Japan Library / JK1976 .R43 2008 / BOOK [9340294802394823049550]

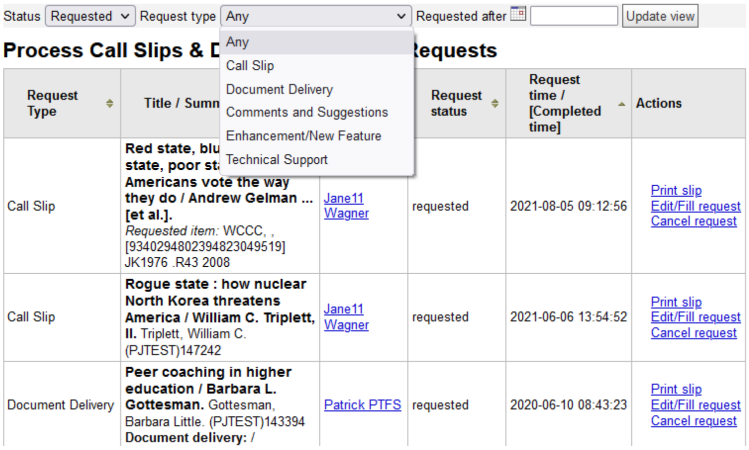
A Document Delivery request screen is similar but contains additional fields for specifying pages, journal title, etc.

4.12.2 Managing Requests

To retrieve and manage the submitted requests go to Circulation, Call Slip requests.

WARNING! This report can be very resource intensive on systems with large numbers of overdue items

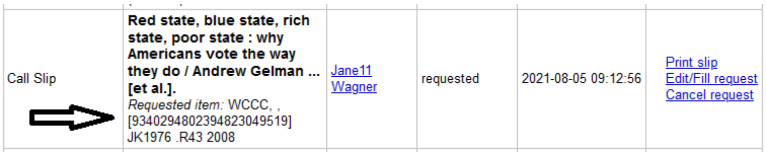
From here, you can choose the type and status of request that you want to process. For request type, you can select Call Slip, Document Delivery, or Any to see all requests. Select the request status, request type, and date (if applicable) and click Update view. The list of current requests for that status is displayed:


Status: Requested; Request type: Any; Requested after:

Process Call Slips & D **equests**

Request Type	Title / Summ		Request status	Request time / [Completed time]	Actions
Call Slip	**Red state, blu state, poor st Americans vote the way they do / Andrew Gelman ... [et al.].** *Requested item:* WCCC, , [9340294802394823049519] JK1976 .R43 2008	Jane11 Wagner	requested	2021-08-05 09:12:56	Print slip Edit/Fill request Cancel request
Call Slip	**Rogue state : how nuclear North Korea threatens America / William C. Triplett, II.** Triplett, William C. (PJTEST)147242	Jane11 Wagner	requested	2021-06-06 13:54:52	Print slip Edit/Fill request Cancel request
Document Delivery	**Peer coaching in higher education / Barbara L. Gottesman.** Gottesman, Barbara Little. (PJTEST)143394 **Document delivery: /**	Patrick PTFS	requested	2020-06-10 08:43:23	Print slip Edit/Fill request Cancel request

If a particular item was specified when the request was created, this screen will reflect that:

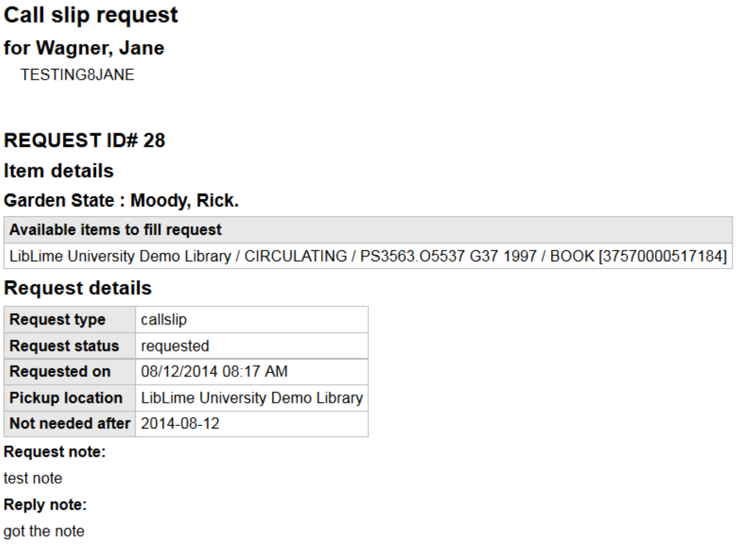


Call Slip	**Red state, blue state, rich state, poor state : why Americans vote the way they do / Andrew Gelman ... [et al.].** *Requested item:* WCCC, , [9340294802394823049519] JK1976 .R43 2008	Jane11 Wagner	requested	2021-08-05 09:12:56	Print slip Edit/Fill request Cancel request

You can sort any of the columns using the arrows in the header fields.

The actions available here include:

- Print Slip—this will open a new browser window so you can print a slip. It should be done after you’ve checked the stacks and done the Edit/Fill Request step, to update the request.



Call slip request

for Wagner, Jane

TESTING8JANE

REQUEST ID# 28

Item details

Garden State : Moody, Rick.

Available items to fill request
LibLime University Demo Library / CIRCULATING / PS3563.O5537 G37 1997 / BOOK [37570000517184]

Request details

Request type	callslip
Request status	requested
Requested on	08/12/2014 08:17 AM
Pickup location	LibLime University Demo Library
Not needed after	2014-08-12

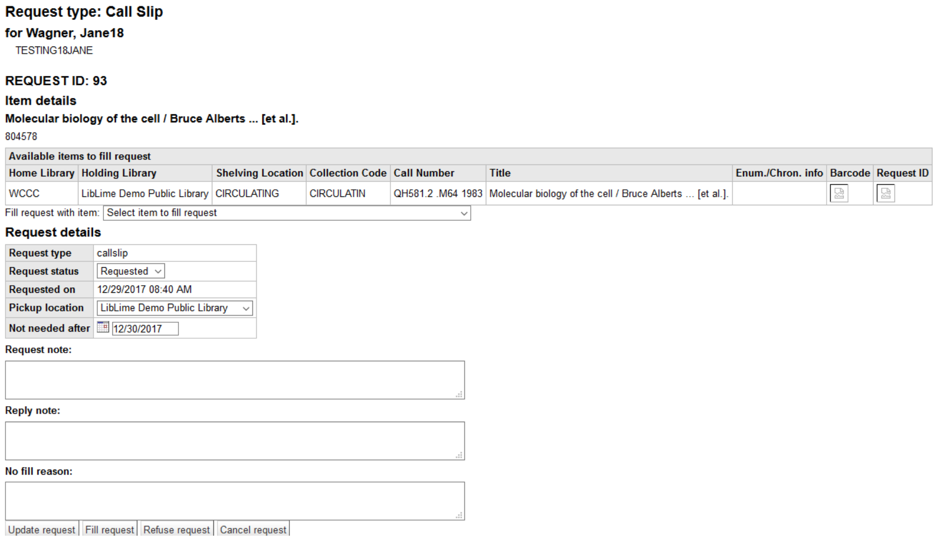
Request note:

test note

Reply note:

got the note

- Edit/Fill request—this allows you to comment on the status of the request and/or fill it. If you are going to fill/edit the request you are taken to this screen where you can add a note for the patron and then *Update*, *Fill*, *Refuse* or *Cancel* the request:



Request type: Call Slip

for Wagner, Jane18

TESTING18JANE

REQUEST ID: 93

Item details

Molecular biology of the cell / Bruce Alberts ... [et al.].

804578

Available items to fill request								
Home Library	**Holding Library**	**Shelving Location**	**Collection Code**	**Call Number**	**Title**	**Enum./Chron. info**	**Barcode**	**Request ID**
WCCC	LibLime Demo Public Library	CIRCULATING	CIRCULATIN	QH581.2 .M64 1983	Molecular biology of the cell / Bruce Alberts ... [et al.].			

Fill request with item: Select item to fill request

Request details

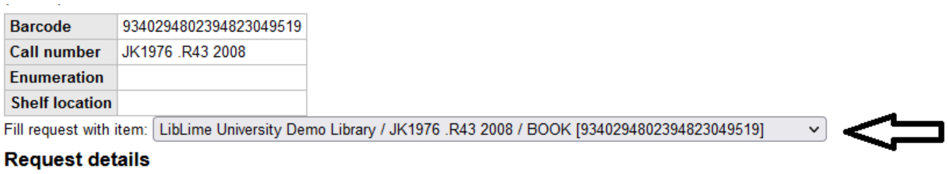
Request type	callslip
Request status	Requested
Requested on	12/29/2017 08:40 AM
Pickup location	LibLime Demo Public Library
Not needed after	12/30/2017

Request note:

Reply note:

No fill reason:

If a specific item was specified in the request, this screen will show that item already selected:



Barcode	9340294802394823049519
Call number	JK1976 .R43 2008
Enumeration	
Shelf location	

Fill request with item: LibLime University Demo Library / JK1976 .R43 2008 / BOOK [9340294802394823049519]

Request details

Staff can select a different item if necessary before continuing to update and fill the request.

The Discovery Layer My Requests tab will show the current status of all patron requests:

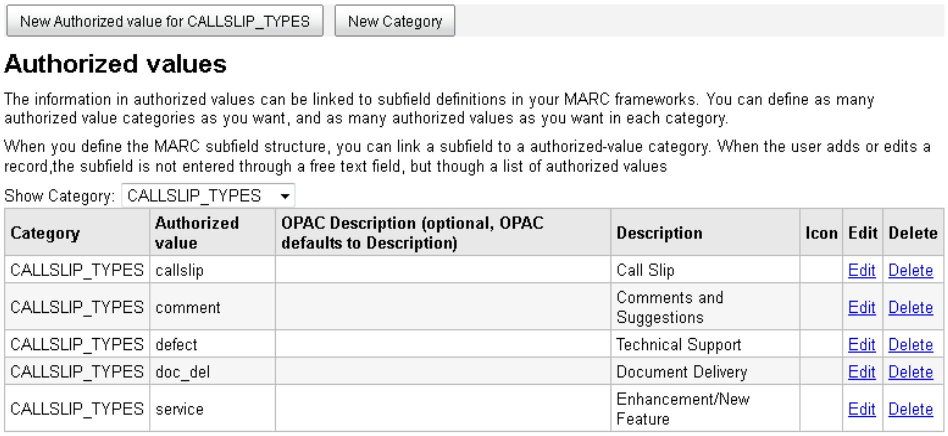
My Requests

Type	Title	Pick up location	Requested on	Not needed after	Notes	Status
Technical Support	Search doesn't work		12/29/2017		Why Not?	cancelled
Call Slip	Molecular biology of the cell /	LibLime Demo Public Library	12/29/2017	12/30/2017		completed
Comments and Suggestions	The library should have my book		12/29/2017		I wrote This Is My Book	not_filled Response from library: We already have it.

- Cancel request—selecting the Cancel request link allows you cancel the request directly, with no option to provide an explanation for the action to the patron. The request will simply appear as “cancelled.”

4.12.3 Other Request Forms

Three informational forms have been added; these are Comments and Suggestions, Technical Support, and Enhancement/New Feature. These forms can be relabeled under Administration, Authorized Values, CALLSLIP_TYPES:



Authorized values

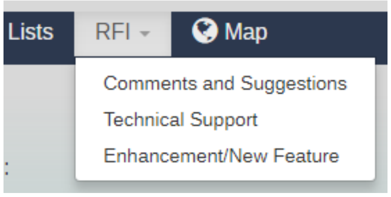
The information in authorized values can be linked to subfield definitions in your MARC frameworks. You can define as many authorized value categories as you want, and as many authorized values as you want in each category.

When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user adds or edits a record,the subfield is not entered through a free text field, but though a list of authorized values

Show Category: CALLSLIP_TYPES

Category	Authorized value	OPAC Description (optional, OPAC defaults to Description)	Description	Icon	Edit	Delete
CALLSLIP_TYPES	callslip		Call Slip		Edit	Delete
CALLSLIP_TYPES	comment		Comments and Suggestions		Edit	Delete
CALLSLIP_TYPES	defect		Technical Support		Edit	Delete
CALLSLIP_TYPES	doc_del		Document Delivery		Edit	Delete
CALLSLIP_TYPES	service		Enhancement/New Feature		Edit	Delete

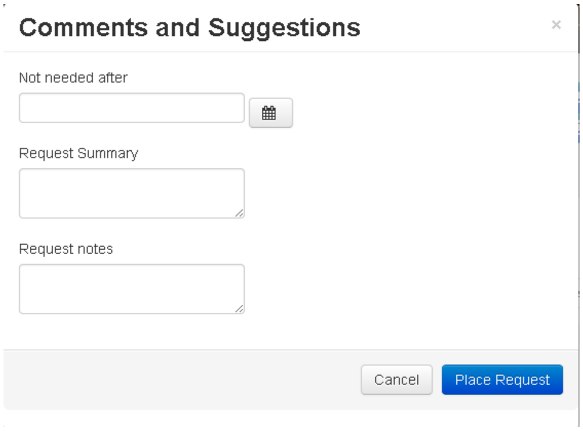
Changing the description will change what displays in the RFI pulldown in the Discovery Layer masthead:



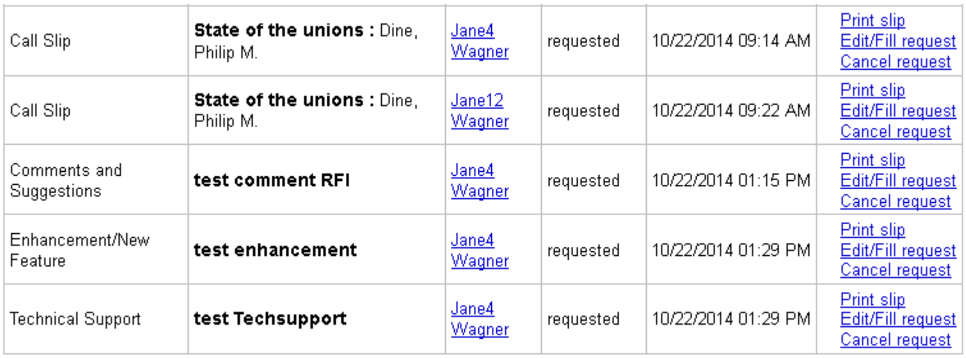
You can hide an informational form by editing it and leaving the Description field blank, or remove its entry from the authorized value altogether (do NOT remove the callslip or doc_del entries). You can also hide the whole RFI section with this entry in the Inline Styles block of the Discovery Layer Configuration Editor (see that manual)

nav li.rfi { display: none; }

However, you cannot add a new form. You are limited to the three delivered forms. All three types produce a request form:



When a user places one of these requests, those requests show in the staff Process Call Slips interface; staff can respond and close requests there.



Call Slip	**State of the unions :** Dine, Philip M.	Jane4 Wagner	requested	10/22/2014 09:14 AM	Print slip Edit/Fill request Cancel request
Call Slip	**State of the unions :** Dine, Philip M.	Jane12 Wagner	requested	10/22/2014 09:22 AM	Print slip Edit/Fill request Cancel request
Comments and Suggestions	**test comment RFI**	Jane4 Wagner	requested	10/22/2014 01:15 PM	Print slip Edit/Fill request Cancel request
Enhancement/New Feature	**test enhancement**	Jane4 Wagner	requested	10/22/2014 01:29 PM	Print slip Edit/Fill request Cancel request
Technical Support	**test Techsupport**	Jane4 Wagner	requested	10/22/2014 01:29 PM	Print slip Edit/Fill request Cancel request

for Wagner, Jane

TESTING JANE
jwagner@liblime.com

REQUEST ID: 38

Request details

Request type	comment
Request status	Requested
Requested on	10/22/2014 01:15 PM
Not needed after	10/22/2014

Subject: test comment RFI

Request note: test Jane

Reply note: test reply

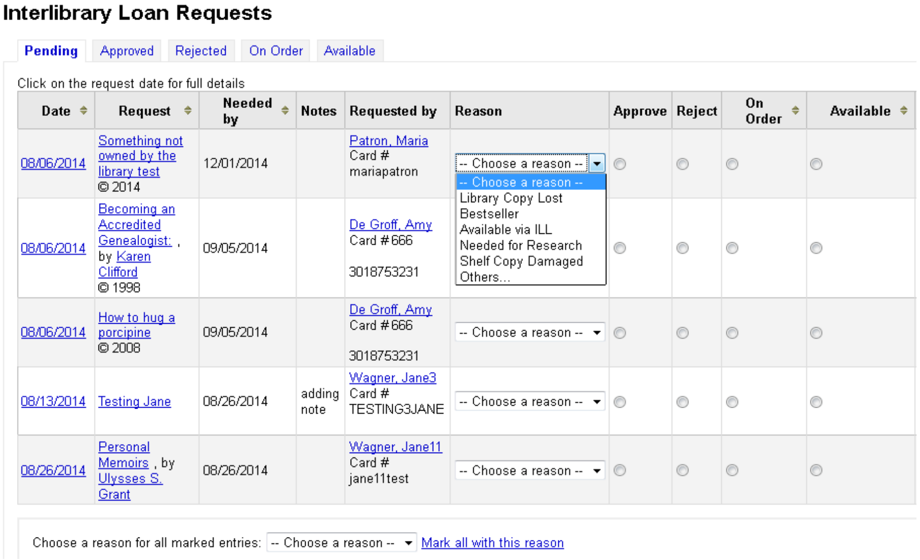
No fill reason:

4.13 Interlibrary Loan

If the syspref ILLRequests is on, users can place Interlibrary Loan requests through the Discovery Layer (see that section). Staff users can monitor ILL requests under the Circulation module main page:

WARNING! This report can be very resource intensive on systems with large numbers of overdue items

On that screen, staff will see tabs for pending, approved, rejected, on-order, or available requests. To update status on a request, use the pulldown to select a predefined reason. If you click "others" you can type a reason into the field. Then click the relevant button (Approve, Reject, etc.) and click the Change Status button at the bottom of the page. You can select one reason and apply it to all requests on the tab if desired:



Interlibrary Loan Requests

Click on the request date for full details

Date	Request	Needed by	Notes	Requested by	Reason	Approve	Reject	On Order	Available
08/06/2014	Something not owned by the library test © 2014	12/01/2014		Patron, Maria Card # mariapatron	-- Choose a reason --	○	○	○	○
08/06/2014	Becoming an Accredited Genealogist: , by Karen Clifford © 1998	09/05/2014		De Groff, Amy Card # 666 3018753231		○	○	○	○
08/06/2014	How to hug a porcipine © 2008	09/05/2014		De Groff, Amy Card # 666 3018753231	-- Choose a reason --	○	○	○	○
08/13/2014	Testing Jane	08/26/2014	adding note	Wagner, Jane3 Card # TESTING3JANE	-- Choose a reason --	○	○	○	○
08/26/2014	Personal Memoirs , by Ulysses S. Grant	08/26/2014		Wagner, Jane11 Card # jane11test	-- Choose a reason --	○	○	○	○

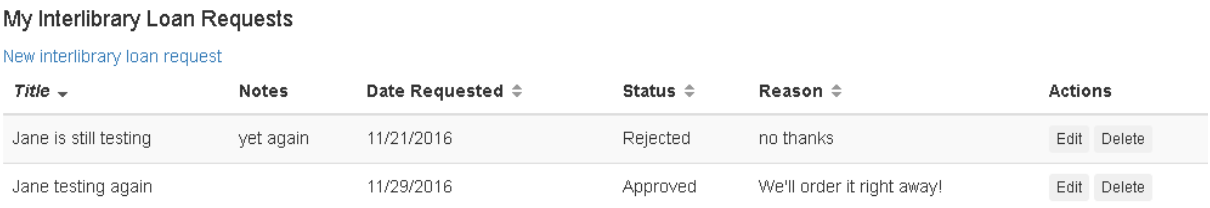
Choose a reason for all marked entries: -- Choose a reason -- Mark all with this reason

08/26/2014	Personal Memoirs , by Ulysses S. Grant	08/26/2014		Wagner, Jane11 Card # jane11test	Library's copy is available back to list	○	●	○	○

Choose a reason for all marked entries: -- Choose a reason -- Mark all with this reason

Once a pending request has been updated, it moves to the appropriate tab (Rejected, etc.).

The patron will always see the current status of a request in the Discovery Layer along with the reason; depending on messaging preferences the patron may receive a notice of some kind as well.



My Interlibrary Loan Requests

New interlibrary loan request

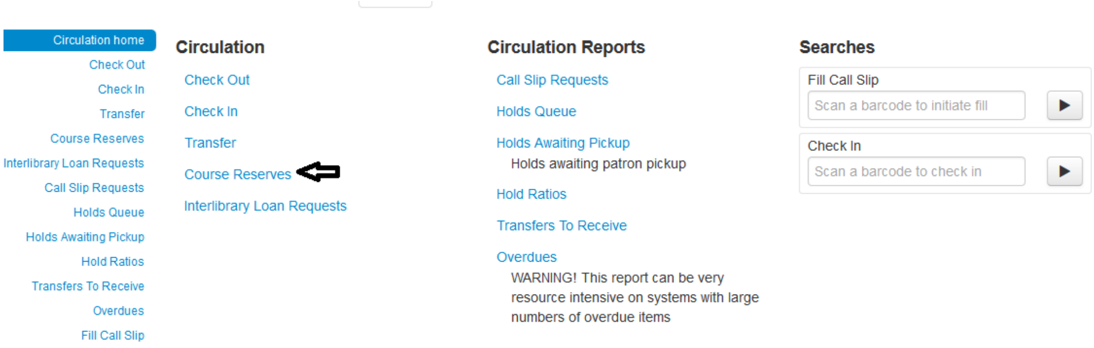
Title	Notes	Date Requested	Status	Reason	Actions
Jane is still testing	yet again	11/21/2016	Rejected	no thanks	Edit Delete
Jane testing again		11/29/2016	Approved	We'll order it right away!	Edit Delete

4.14 Course Reserves

Course Reserves functionality allows staff to group together materials tied to specified courses so they can be checked out for short periods of time (two hours, overnight, etc.). If enabled (syspref CourseReserves), courses and reserve items are visible in staff mode and in the Discovery Layer.

4.14.1 Creating Courses

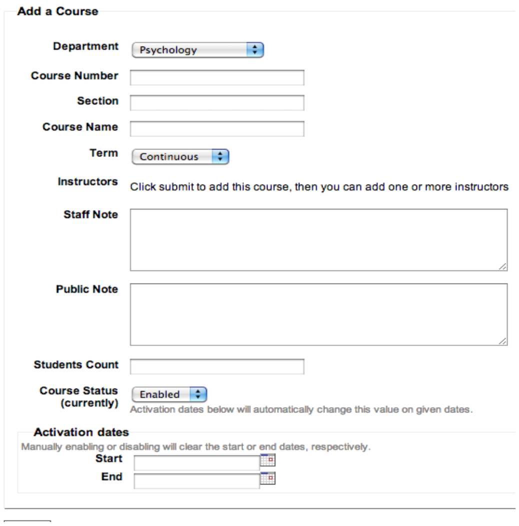
Courses are created under Circulation, Course Reserves:



Holds awaiting patron pickup

WARNING! This report can be very resource intensive on systems with large numbers of overdue items

Click the **New Course** button to add a course:



Add a Course

Department: Psychology

Course Number

Section

Course Name

Term: Continuous

Instructors: Click submit to add this course, then you can add one or more instructors

Staff Note

Public Note

Students Count

Course Status (currently): Enabled

Activation dates below will automatically change this value on given dates.

Activation dates

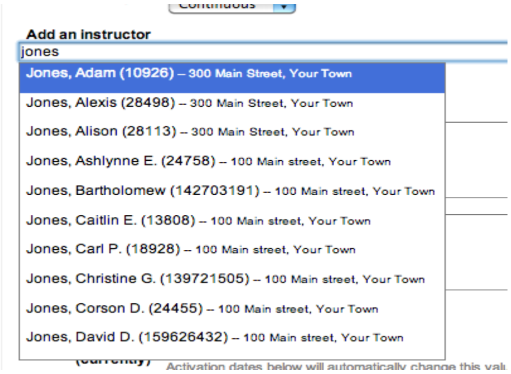
Manually enabling or disabling will clear the start or end dates, respectively.

Start

End

All of the fields are optional except for Course Name.

If the course is taught by instructors, click the **Submit** button to save the course and you will be automatically prompted to enter an Instructor's name. Instructors must have patron records in the system. Begin typing the instructor's last name and a list of matches will appear:



Add an instructor

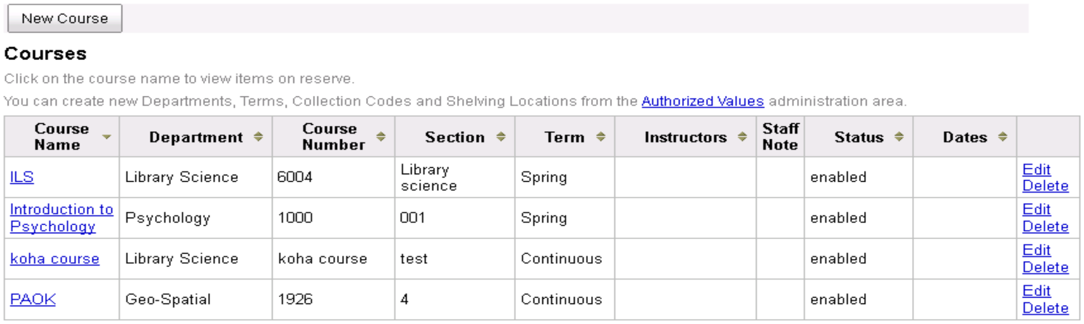
jones

Jones, Adam (10926) – 300 Main Street, Your Town
Jones, Alexis (28498) – 300 Main Street, Your Town
Jones, Alison (28113) – 300 Main Street, Your Town
Jones, Ashlynne E. (24758) – 100 Main street, Your Town
Jones, Bartholomew (142703191) – 100 Main street, Your Town
Jones, Caitlin E. (13808) – 100 Main street, Your Town
Jones, Carl P. (18928) – 100 Main street, Your Town
Jones, Christine G. (139721505) – 100 Main street, Your Town
Jones, Corson D. (24455) – 100 Main street, Your Town
Jones, David D. (159626432) – 100 Main street, Your Town

Click the **Submit** button again to link the Instructor to the Course. (**NOTE**: Course Reserves requires the CircAutocompl syspref to be on to add instructors.)

4.14.2 Adding Items to Courses

Once a course has been created, it will display under Circulation, Course Reserves:



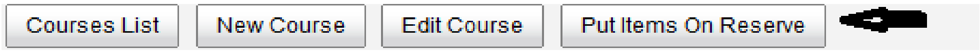
Courses

Click on the course name to view items on reserve.

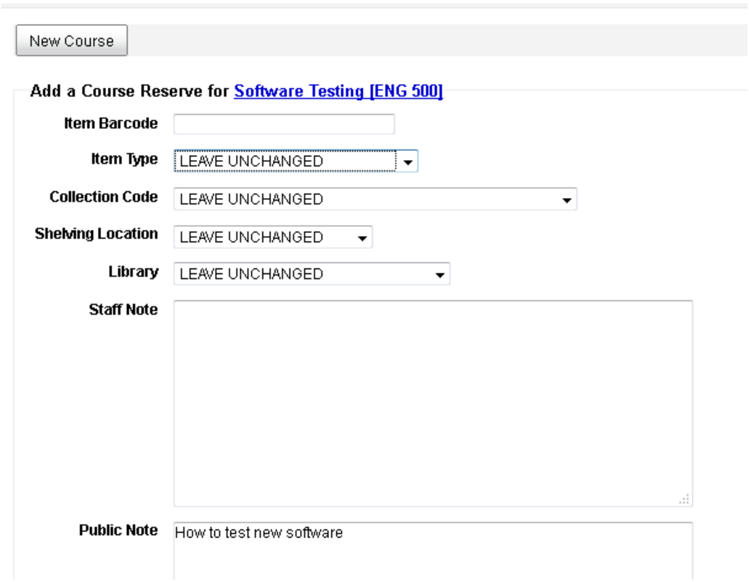
You can create new Departments, Terms, Collection Codes and Shelving Locations from the Authorized Values administration area.

Course Name	Department	Course Number	Section	Term	Instructors	Staff Note	Status	Dates	
ILS	Library Science	6004	Library science	Spring			enabled		Edit Delete
Introduction to Psychology	Psychology	1000	001	Spring			enabled		Edit Delete
koha course	Library Science	koha course	test	Continuous			enabled		Edit Delete
PAOK	Geo-Spatial	1926	4	Continuous			enabled		Edit Delete

From the list of Courses, clicking on any course name will open the Course. You can then add items to the Course:



A bibliographic record and item (holdings) record must already exist in the database before it can be put on Reserve. Search for the item to be added by entering its barcode at this screen.



Add a Course Reserve for Software Testing [ENG 500]

Item Barcode

Item Type: LEAVE UNCHANGED

Collection Code: LEAVE UNCHANGED

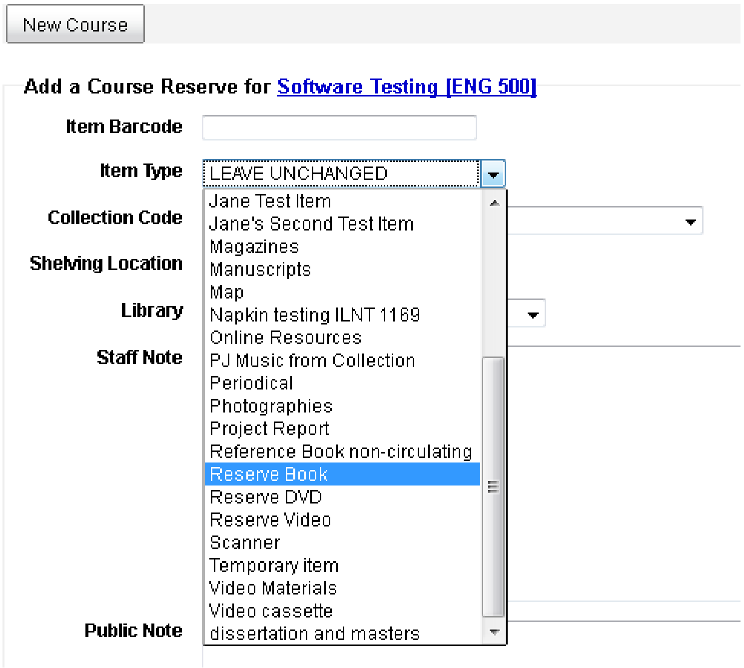
Shelving Location: LEAVE UNCHANGED

Library: LEAVE UNCHANGED

Staff Note

Public Note: How to test new software

You can choose to leave the item type, collection code, shelving location, or branch at the original settings, or change them to new settings appropriate for course reserves. This would be especially important for item types, so that items on reserve can have different circulation rules.



Add a Course Reserve for Software Testing [ENG 500]

Item Barcode

Item Type: LEAVE UNCHANGED

Collection Code

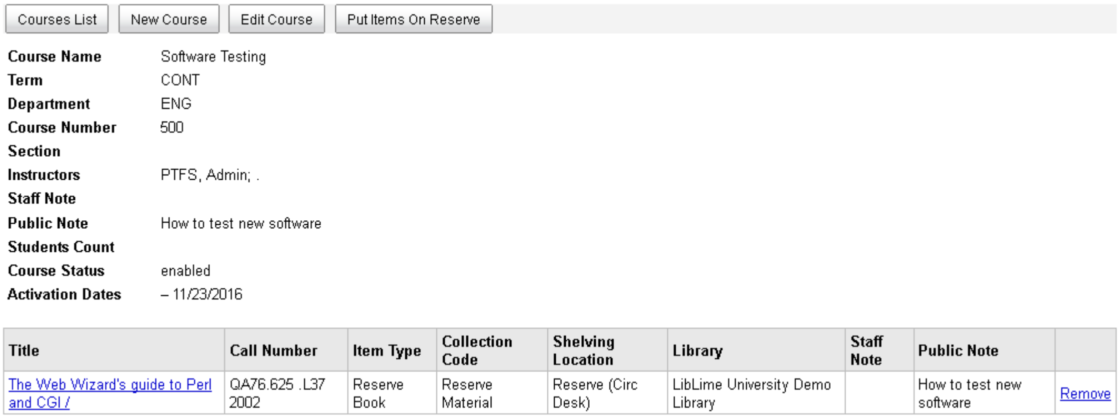
Shelving Location

Library

Staff Note

Public Note

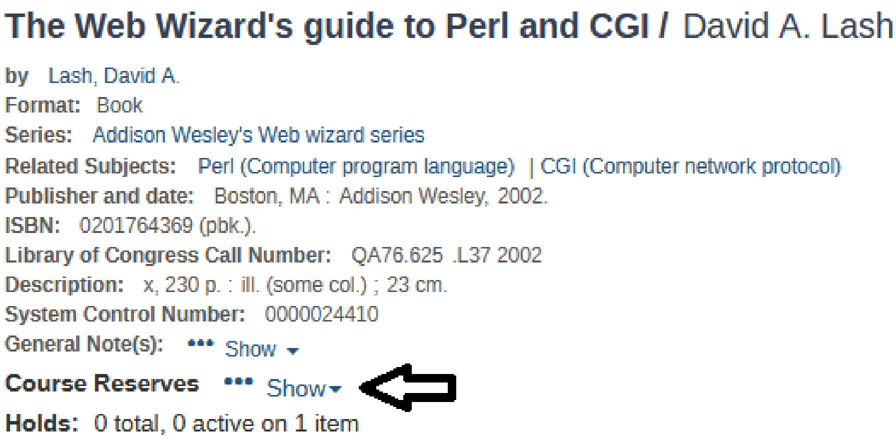
Click Submit to save the record. From the list of courses, if you click on a course name, you will see the items that have been linked to that course:



Course Name	Software Testing
Term	CONT
Department	ENG
Course Number	500
Section	
Instructors	PTFS, Admin; .
Staff Note	
Public Note	How to test new software
Students Count	
Course Status	enabled
Activation Dates	– 11/23/2016

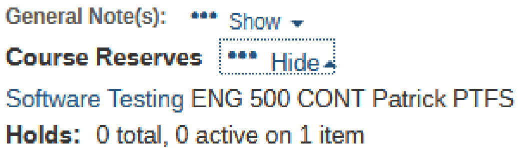
Title	Call Number	Item Type	Collection Code	Shelving Location	Library	Staff Note	Public Note	
The Web Wizard's guide to Perl and CGI /	QA76.625 .L37 2002	Reserve Book	Reserve Material	Reserve (Circ Desk)	LibLime University Demo Library		How to test new software	Remove

The staff bib display shows a link to the course reserves information:


The Web Wizard's guide to Perl and CGI / David A. Lash

by Lash, David A.
Format: Book
Series: Addison Wesley's Web wizard series
Related Subjects: Perl (Computer program language) | CGI (Computer network protocol)
Publisher and date: Boston, MA : Addison Wesley, 2002.
ISBN: 0201764369 (pbk.).
Library of Congress Call Number: QA76.625 .L37 2002
Description: x, 230 p. : ill. (some col.) ; 23 cm.
System Control Number: 0000024410
General Note(s): ••• Show
Course Reserves ••• Show
Holds: 0 total, 0 active on 1 item

Click the Show link and the information displays:

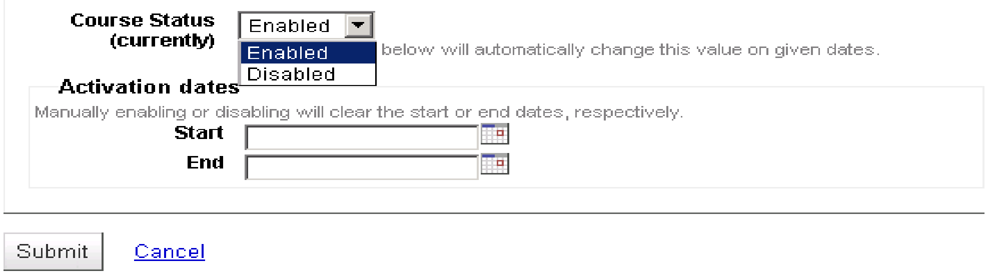

General Note(s): ••• Show
Course Reserves ••• Hide
Software Testing ENG 500 CONT Patrick PTFS
Holds: 0 total, 0 active on 1 item

4.14.3 Suspending or Deleting Courses

Materials designated for Course Reserve will retain any temporary item type, collection code and shelving location settings for as long as their corresponding course is Enabled (and will display those settings in the Discovery Layer).

If a course will not be repeated, it can be deleted. **NOTE: any items currently checked out will need to be checked in, and all items removed from the course list, before a course can be deleted**. To delete a course, click the Delete link from the main course display page (Circulation, Course Reserves).

If a course is not taught every semester, you may want to keep the course itself, but suspend it. From the main course display page, click the Edit link and scroll down to the bottom of the course setup page. Use the Course Status pull-down to select Disabled:



Course Status (currently) Enabled

below will automatically change this value on given dates.

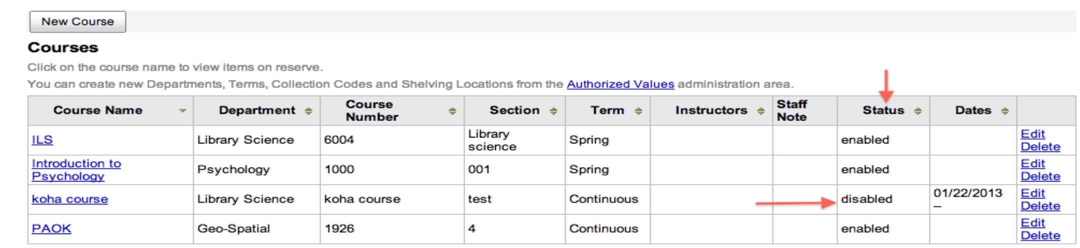
Activation dates

Manually enabling or disabling will clear the start or end dates, respectively.

Start

End

When the course is created or edited, you can also enter specific start and end dates, which will suspend or unsuspend the course automatically. The course should be set as disabled for a future start date. This requires the manage_coursereserves.pl cron job; your system administrator should make sure it is running.



Courses

Click on the course name to view items on reserve.

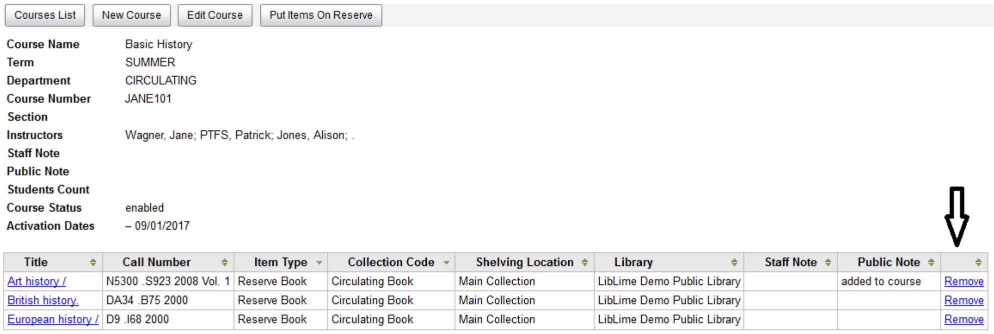
You can create new Departments, Terms, Collection Codes and Shelving Locations from the Authorized Values administration area.

Course Name	Department	Course Number	Section	Term	Instructors	Staff Note	Status	Dates	
ILS	Library Science	6004	Library science	Spring			enabled		Edit Delete
Introduction to Psychology	Psychology	1000	001	Spring			enabled		Edit Delete
koha course	Library Science	koha course	test	Continuous			disabled	01/22/2013 –	Edit Delete
PAOK	Geo-Spatial	1926	4	Continuous			enabled		Edit Delete

The course and its materials still exist, but are inactive and won’t show in the Discovery Layer. If you had assigned a temporary item type or other fields, the item reverts to its permanent setting as long as the course is deactivated. If you reactivate the course, those temporary settings are put back into place.

4.14.4 Removing an Item From a Course

You can remove an individual item from a course. From the course page, click the Remove link next to the item:



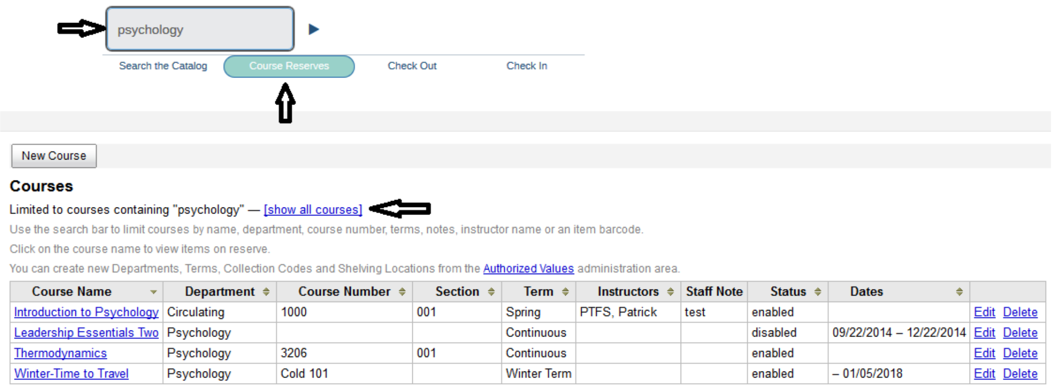
Course Name Basic History
Term SUMMER
Department CIRCULATING
Course Number JANE101
Section
Instructors Wagner, Jane; PTFS, Patrick; Jones, Alison; .
Staff Note
Public Note
Students Count
Course Status enabled
Activation Dates – 09/01/2017

Title	Call Number	Item Type	Collection Code	Shelving Location	Library	Staff Note	Public Note	
Art history /	N5300 .S923 2008 Vol. 1	Reserve Book	Circulating Book	Main Collection	LibLime Demo Public Library		added to course	Remove
British history.	DA34 .B75 2000	Reserve Book	Circulating Book	Main Collection	LibLime Demo Public Library			Remove
European history /	D9 .I68 2000	Reserve Book	Circulating Book	Main Collection	LibLime Demo Public Library			Remove

If temporary settings (item type, collection code, etc.) were assigned when the item was added to the course, those will be removed and the item will revert to its original settings.

4.14.5 Searching Course Reserves

In staff mode, you can search for particular courses by name, department, course number, terms, notes, instructor name or an item barcode. On the main course reserves screen, the Course Reserves search option is the default in the top search bar. Enter a search term, and the display will filter to show only matching courses:



Courses

Limited to courses containing "psychology" — [show all courses]

Use the search bar to limit courses by name, department, course number, terms, notes, instructor name or an item barcode.

Click on the course name to view items on reserve.

You can create new Departments, Terms, Collection Codes and Shelving Locations from the Authorized Values administration area.

Course Name	Department	Course Number	Section	Term	Instructors	Staff Note	Status	Dates	
Introduction to Psychology	Circulating	1000	001	Spring	PTFS, Patrick	test	enabled		Edit Delete
Leadership Essentials Two	Psychology			Continuous			disabled	09/22/2014 – 12/22/2014	Edit Delete
Thermodynamics	Psychology	3206	001	Continuous			enabled		Edit Delete
Winter-Time to Travel	Psychology	Cold 101		Winter Term			enabled	– 01/05/2018	Edit Delete

4.15 Kiosk Selfcheck

Bibliovation offers a URL-based kiosk shelfcheck option. Note this is completely separate from selfcheck machines. There are three relevant system preferences (CheckoutKiosk, CheckoutKioskConfig, and CheckoutKioskAuth – see the system preference section of the superlibrarian guide for details on configuration). The kiosk is browser-based but it is restricted by IP address, so only computers in the specified range (usually the library itself) are allowed to use it.

Once configured, patrons at allowed workstations would go to a URL formed like

https://my.site.url/app/checkout-kiosk

Library Self Checkout

Welcome to the kiosk

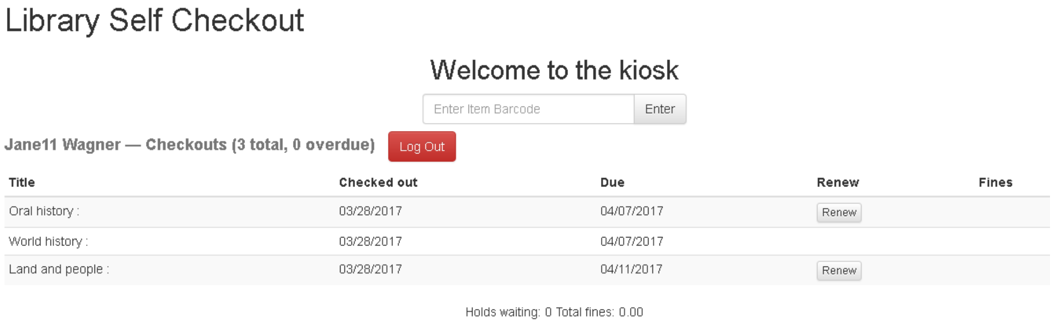
jane11test

Please enter your cardnumber to start.

Header and footer text can be configured in one of the system preferences. The patron would type or scan a cardnumber and click the Enter button. If that cardnumber doesn't exist, or the patron is blocked for some reason (including overdue items or fines), a popup error will alert the patron to see library staff:


Unable to log in, please see a librarian

If the patron is allowed to check items out, the next screen will show any existing checkouts (with a renew option and information about pending holds and fines).


Library Self Checkout

Welcome to the kiosk

Jane11 Wagner — Checkouts (3 total, 0 overdue)

Title	Checked out	Due	Renew	Fines
Oral history :	03/28/2017	04/07/2017	Renew	
World history :	03/28/2017	04/07/2017		
Land and people :	03/28/2017	04/11/2017	Renew	

Holds waiting: 0 Total fines: 0.00

Type or scan in an item barcode and the item will be checked out to the patron; the list of checkouts should be updated with the new entry. You will also see a popup indicating success:


Issued barcode: 37570000450204

If the checkout can't be completed for some reason (item is non-circulating or checked out to another user), you'll get a different popup:


Unable to issue barcode: 37570000492354-test

After a certain period of inactivity (specified in one of the sysprefs), the screen will reset to the entry point.

If configured in the syspref, patrons can do a name search instead of entering a cardnumber at the first screen. This has limitations, however. Patrons must enter the name to be searched as

firstname lastname

and it must exactly match the entry in the firstname and surname fields of the patron record, including any punctuation. The search is not case-sensitive.

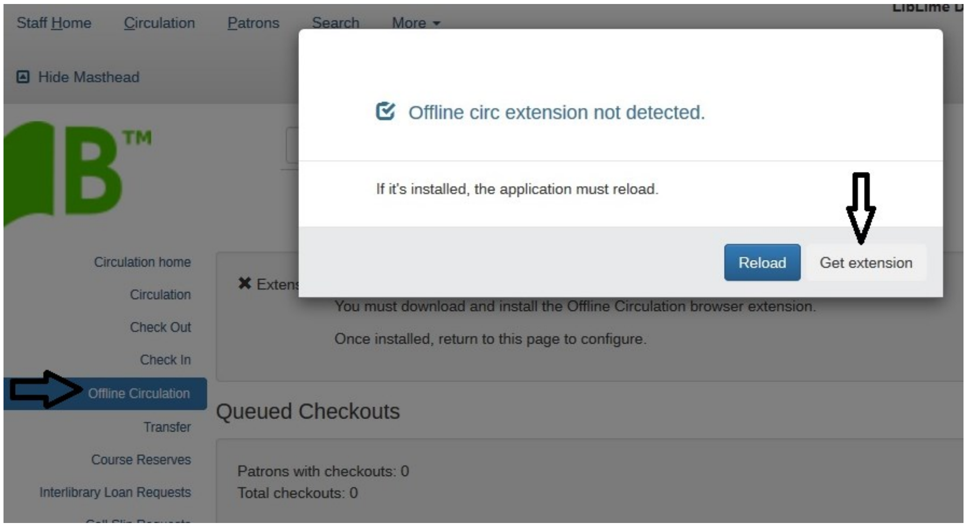
4.16 Offline Circulation

A browser-based offline circulation tool has replaced the external software used in some previous versions. It will simply record patron and item barcodes for checkouts when the catalog or the network is unavailable; that data can be loaded into the catalog when connectivity is restored.

NOTE: At present, the extension is only available in Firefox; we are working on a Chrome version.

4.16.1 Adding the Extension

The first step is to add an extension to your browser. When you first go to Circulation, Offline Circulation, the system will test for the presence of the extension. If it isn't found, you will be prompted to add it:



Offline circ extension not detected.

If it's installed, the application must reload.

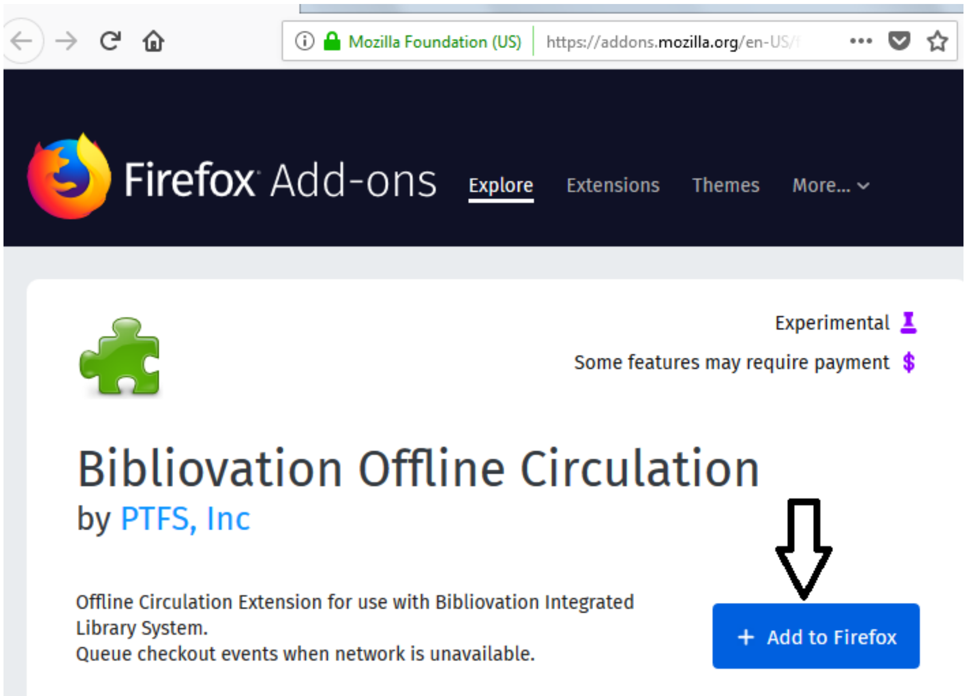
You must download and install the Offline Circulation browser extension.

Once installed, return to this page to configure.

Queued Checkouts

Patrons with checkouts: 0
Total checkouts: 0

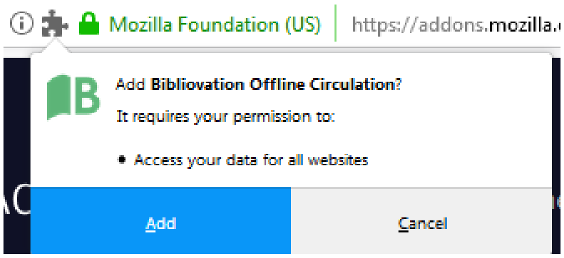
That will take you to a site where you can download the extension:



Bibliovation Offline Circulation
by PTFS, Inc

Offline Circulation Extension for use with Bibliovation Integrated Library System.
Queue checkout events when network is unavailable.

You may be asked to allow the extension to access data:

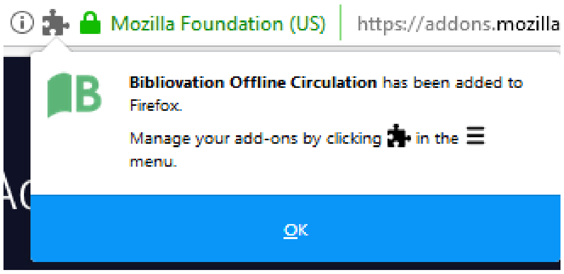


Add **Bibliovation Offline Circulation**?

It requires your permission to:

- Access your data for all websites

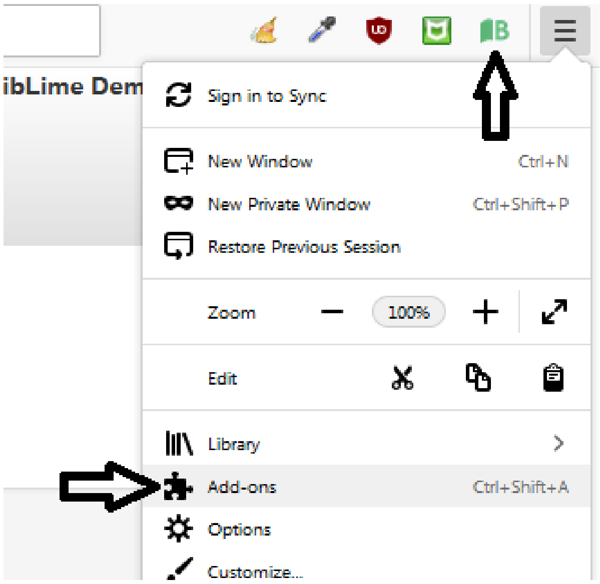
The browser will tell you when the extension has been added:



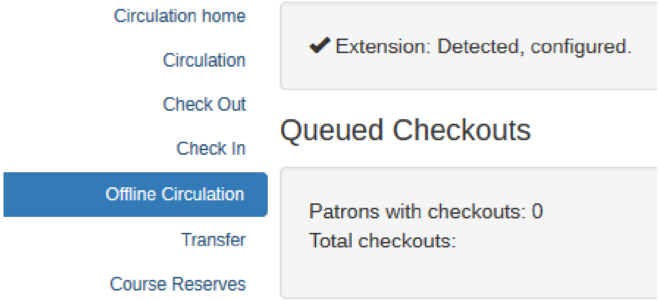
Bibliovation Offline Circulation has been added to Firefox.

Manage your add-ons by clicking ✱ in the ☰ menu.

Your browser may add the extension to the browser's toolbar, with a green B icon. You can also reach it under the Extensions menu (the jigsaw puzzle icon).



Once you have added the extension, go back into the Circulation, Offline Circulation screen (exit and return if needed). The system will check again, and will tell you that the extension is present.



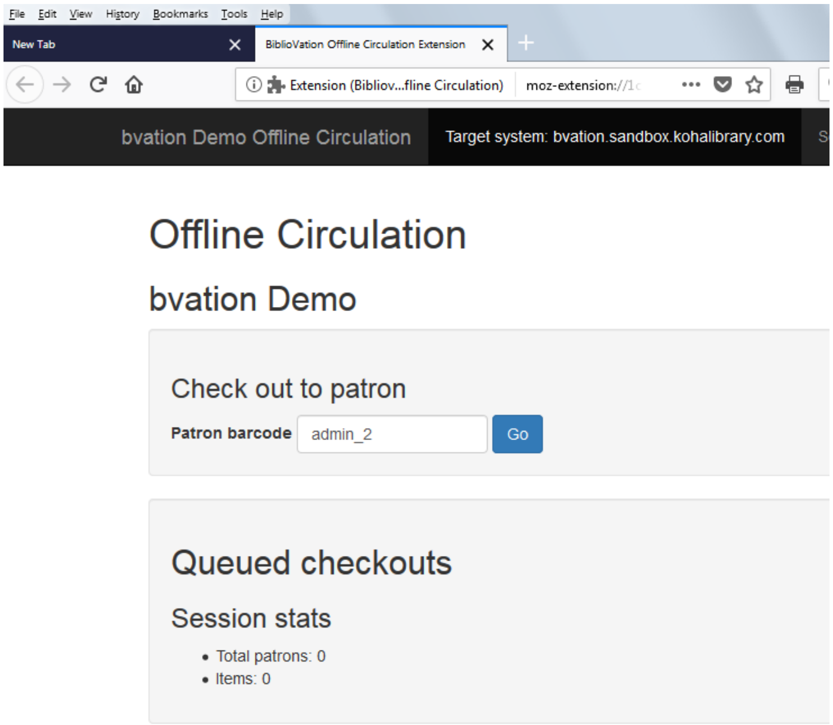
✔ Extension: Detected, configured.

Queued Checkouts

Patrons with checkouts: 0
Total checkouts:

4.16.2 Using the Offline Circulation Extension

If your catalog is offline, or you lose network connectivity, open the Offline Circ tool in your browser by clicking on either the green B in the header, or going under the Extensions menu (see screenshot above). That will open the tool in a new window or tab. The first screen asks for the patron barcode:



bvation Demo Offline Circulation

Target system: bvation.sandbox.kohalibrary.com

Offline Circulation

bvation Demo

Check out to patron

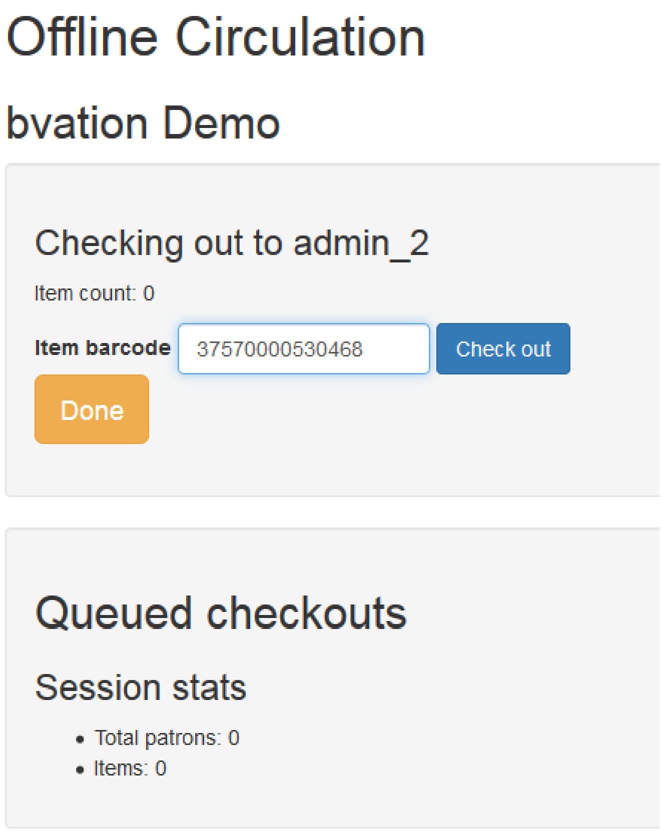
Patron barcode admin_2 Go

Queued checkouts

Session stats

- Total patrons: 0
- Items: 0

Enter a barcode and click the Go button. The next screen asks for the item barcode:



Offline Circulation

bvation Demo

Checking out to admin_2

Item count: 0

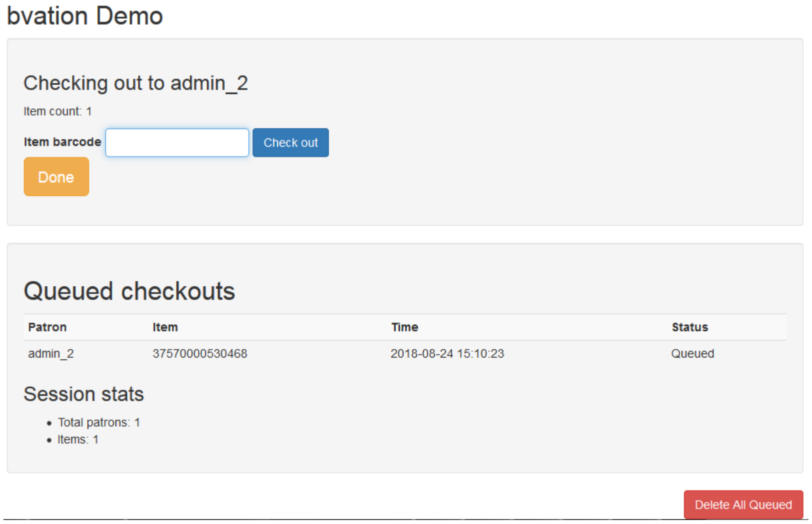
Item barcode 37570000530468

Queued checkouts

Session stats

- Total patrons: 0
- Items: 0

When you click the Check Out button, the screen shows that transaction at the bottom:



bvation Demo

Checking out to admin_2

Item count: 1

Item barcode

Queued checkouts

Patron	Item	Time	Status
admin_2	37570000530468	2018-08-24 15:10:23	Queued

Session stats

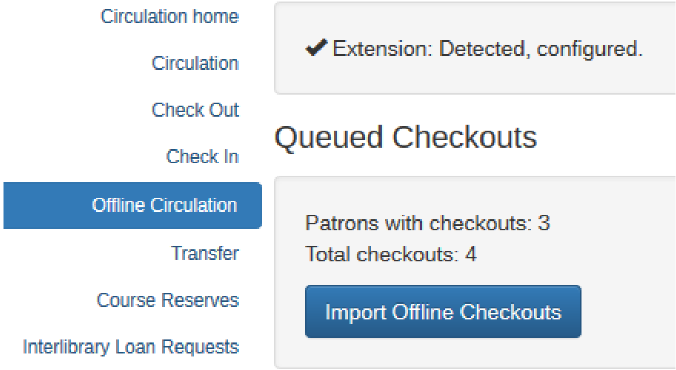
- Total patrons: 1
- Items: 1

You can enter another item barcode to continue checking out to the same patron, or click Done to go back to the first screen. There, you can enter another patron cardnumber and check items out to that patron. The screen at the bottom will show all transactions queued up. The icon in the browser bar will also show the count of transactions waiting to be loaded:

If you reopen the tool, those transactions will display. You can continue adding new transactions as needed.

4.16.3 Loading Transactions

When connectivity is restored, you need to load the offline transactions into your system. Go back into Circulation, Offline Circulation. If there are transactions waiting to be loaded, the system will see them and give you an option to load them:

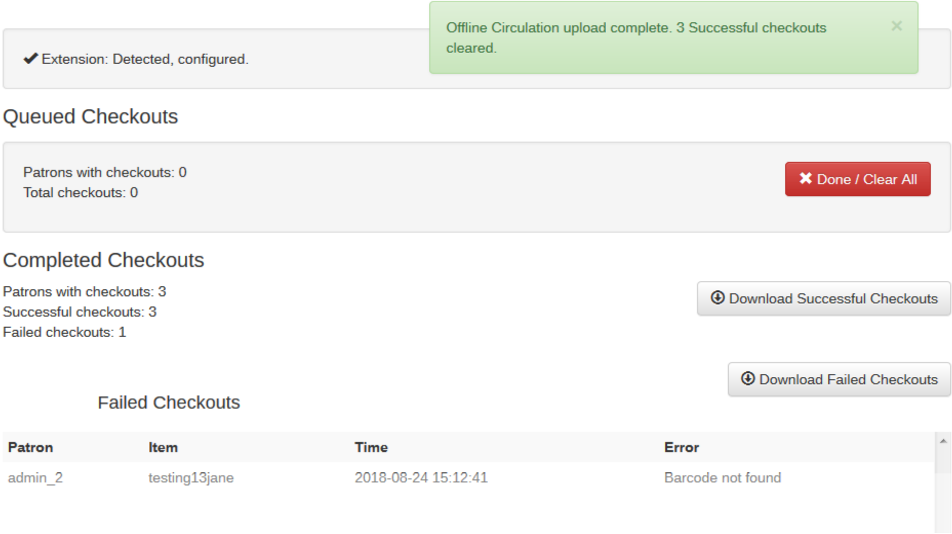


✔ Extension: Detected, configured.

Queued Checkouts

Patrons with checkouts: 3
Total checkouts: 4

When you import the transactions, the system will attempt to check those items out to those patrons. You'll get a report on screen with the results:



Offline Circulation upload complete. 3 Successful checkouts cleared.

✔ Extension: Detected, configured.

Queued Checkouts

Patrons with checkouts: 0
Total checkouts: 0

Completed Checkouts

Patrons with checkouts: 3
Successful checkouts: 3
Failed checkouts: 1

Failed Checkouts

Patron	Item	Time	Error
admin_2	testing13jane	2018-08-24 15:12:41	Barcode not found

Note that you can download .csv files with the successful and the failed checkout transactions. Loading the transactions clears the queue so that the next time you go into the offline circ tool, it's empty and waiting for new transactions.

Successful checkouts will show on the patron record, with the duedate based on the normal circulation rule.

Note that the offline tool cannot check for problems, like barred patrons or an item on hold and waiting for someone else. It will process those transactions as normal checkouts.

5. Patrons

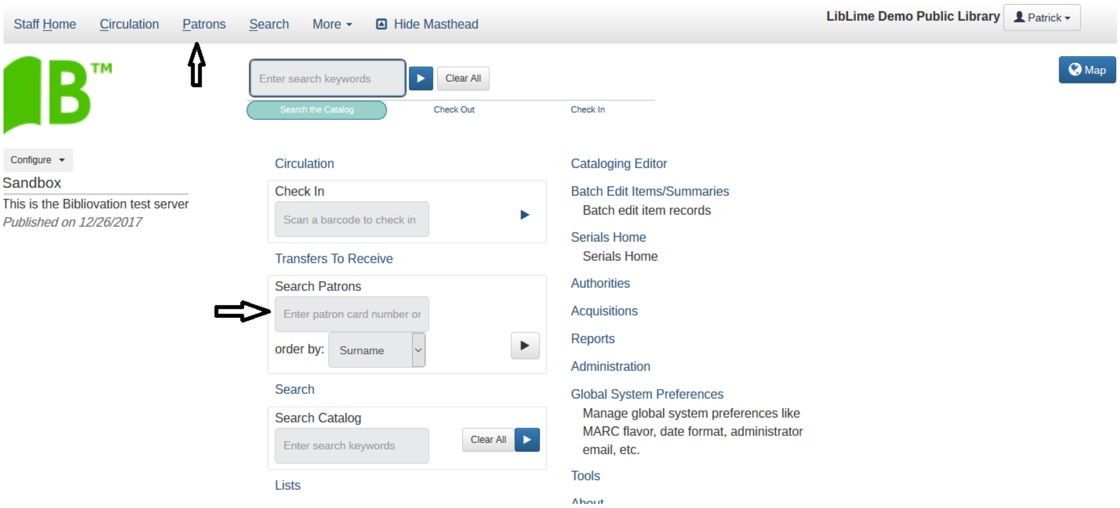
Both library users and library staff must have patron records in the system, but those records are configured differently. Staff user records can also be used for borrowing if desired. This section will primarily discuss patron records; see the next section for staff and patron permissions, messaging options, and Role (default) settings.

NOTE: If Patron Record Access control is configured (see Superlibrarian Guide), depending on settings library staff will only be able to view/create/edit/delete patron records belonging to the staff person's branch.

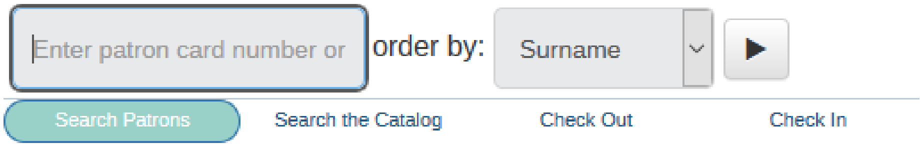
NOTE: The create/edit screen for a patron record has been rearranged to make the branch and category policy selections more prominent. This is a screen change from earlier versions.

5.1 Searching and Displaying Patrons

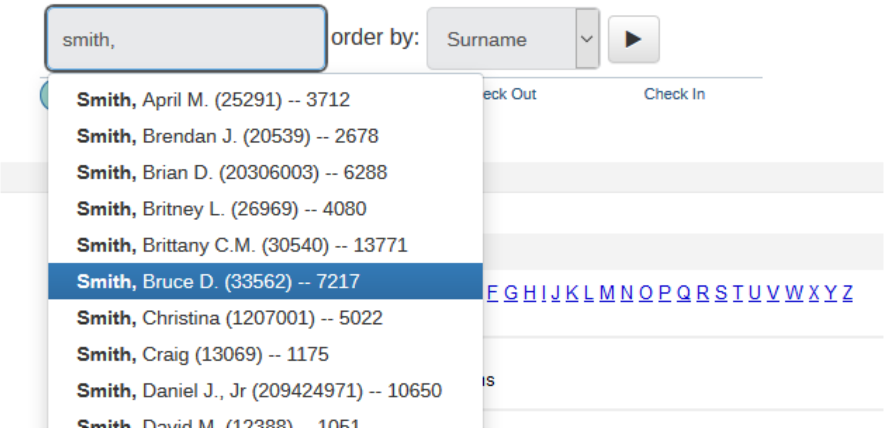
A patron search is the first step in a checkout, and you can get to a patron record that way. In addition, though, you can bypass the circulation menus and search directly for a patron record. From the initial menu, you can click the Patrons link in the top menu bar, or enter a name or cardnumber in the search box under Patrons and click OK.



If you click the top menu bar link, or the Patrons link (without searching), you'll be taken to the main Patrons screen. At the top will be a search box.

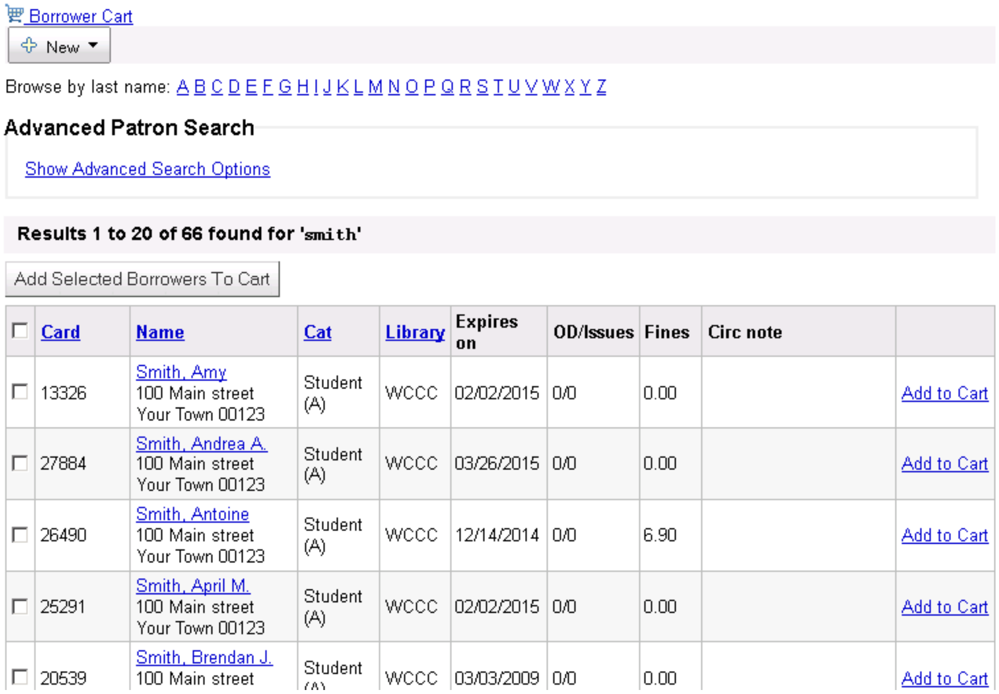


You can search on partial/full name or cardnumber (patron barcode) in this search box or the search box on the main page. You can also browse by last name (click on a letter to move to that point). If the CircAutocompl syspref is off, you can truncate the search using an asterisk (*) – for example, Smit* to find all names beginning with that string, or *smith to find all names ending with that string. If the syspref is on, you'll get a dropdown box matching the string as you type:



Smith, April M. (25291) -- 3712
Smith, Brendan J. (20539) -- 2678
Smith, Brian D. (20306003) -- 6288
Smith, Britney L. (26969) -- 4080
Smith, Brittany C.M. (30540) -- 13771
Smith, Bruce D. (33562) -- 7217
Smith, Christina (1207001) -- 5022
Smith, Craig (13069) -- 1175
Smith, Daniel J., Jr (209424971) -- 10650
Smith, David M. (12388) -- 1051

From any search/browse, you'll get a results list.

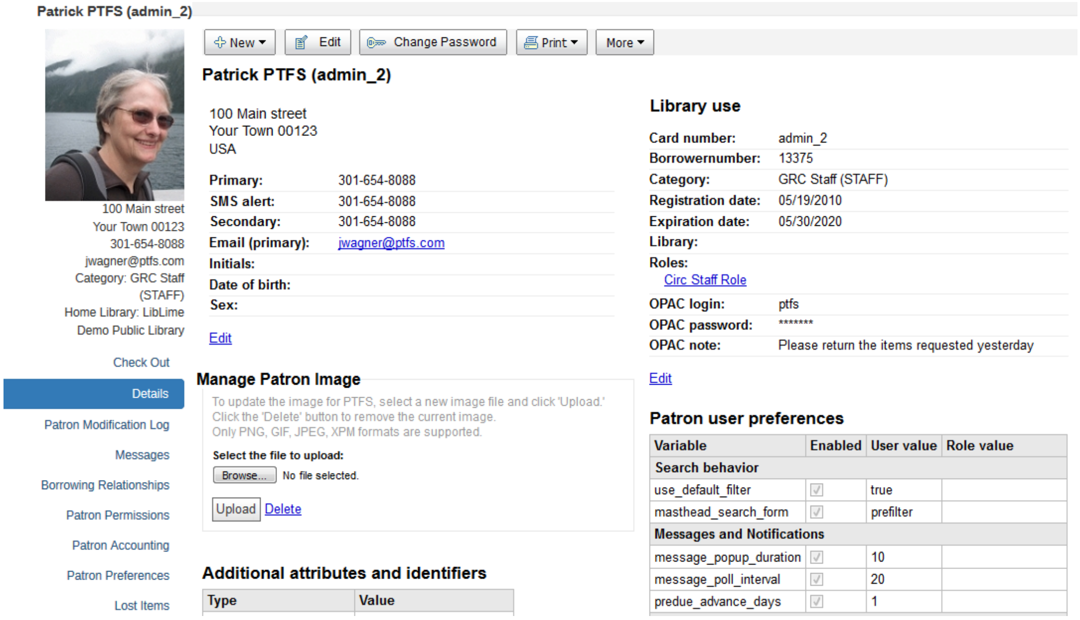


Results 1 to 20 of 66 found for 'smith'

☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	13326	Smith, Amy 100 Main street Your Town 00123	Student (A)	WCCC	02/02/2015	0/0	0.00		Add to Cart
☐	27884	Smith, Andrea A. 100 Main street Your Town 00123	Student (A)	WCCC	03/26/2015	0/0	0.00		Add to Cart
☐	26490	Smith, Antoine 100 Main street Your Town 00123	Student (A)	WCCC	12/14/2014	0/0	6.90		Add to Cart
☐	25291	Smith, April M. 100 Main street Your Town 00123	Student (A)	WCCC	02/02/2015	0/0	0.00		Add to Cart
☐	20539	Smith, Brendan J. 100 Main street	Student	WCCC	03/03/2009	0/0	0.00		Add to Cart

If there is more than one screen of results, there will be links at the bottom of the screen to page through the results. Click on the name you want, and you'll be taken into the patron record Details tab.

The Details tab has information about the patron – address, home branch, patron category, cardnumber, etc.



Patrick PTFS (admin_2)

100 Main street
Your Town 00123
301-654-8088
jwagner@ptfs.com
Category: GRC Staff (STAFF)
Home Library: LibLime Demo Public Library

Patrick PTFS (admin_2)

100 Main street
Your Town 00123
USA

Primary: 301-654-8088
SMS alert: 301-654-8088
Secondary: 301-654-8088
Email (primary): jwagner@ptfs.com
Initials:
Date of birth:
Sex:

Manage Patron Image

To update the image for PTFS, select a new image file and click 'Upload.'
Click the 'Delete' button to remove the current image.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload: No file selected.

Additional attributes and identifiers

Type	Value

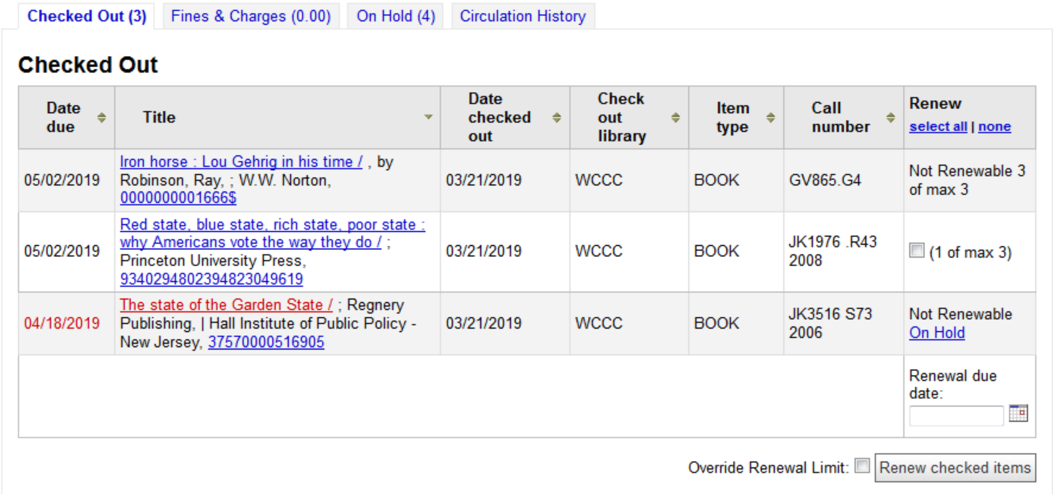
Library use

Card number: admin_2
Borrowernumber: 13375
Category: GRC Staff (STAFF)
Registration date: 05/19/2010
Expiration date: 05/30/2020
Library:
Roles: Circ Staff Role
OPAC login: ptfs
OPAC password: *******
OPAC note: Please return the items requested yesterday

Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
use_default_filter	☑	true	
masthead_search_form	☑	prefilter	
Messages and Notifications			
message_popup_duration	☑	10	
message_poll_interval	☑	20	
predue_advance_days	☑	1	

From this screen, staff can edit the overall record or specific sections such as user preferences, messaging options, etc. At the bottom is a set of tabs for existing checkouts, holds, fines, and circulation history (see History section below). The tabs have a count or amount owed as appropriate. Entries on the list of checkouts and list of holds can be sorted by clicking the up/down arrows in the column headers. Overdue items show in red.



Checked Out (3) | Fines & Charges (0.00) | On Hold (4) | Circulation History

Checked Out

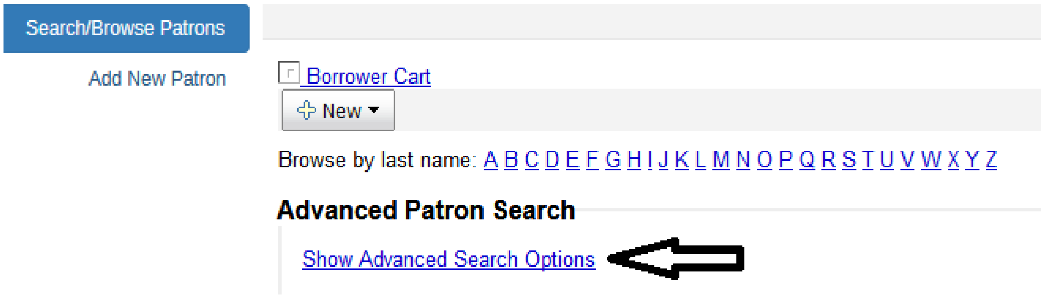
Date due	Title	Date checked out	Check out library	Item type	Call number	Renew select all | none
05/02/2019	Iron horse : Lou Gehrig in his time / , by Robinson, Ray, ; W.W. Norton, 0000000001666$	03/21/2019	WCCC	BOOK	GV865.G4	Not Renewable 3 of max 3
05/02/2019	Red state, blue state, rich state, poor state : why Americans vote the way they do / ; Princeton University Press, 9340294802394823049619	03/21/2019	WCCC	BOOK	JK1976 .R43 2008	☐ (1 of max 3)
04/18/2019	The state of the Garden State / ; Regnery Publishing, | Hall Institute of Public Policy - New Jersey, 37570000516905	03/21/2019	WCCC	BOOK	JK3516 S73 2006	Not Renewable On Hold
						Renewal due date:

Override Renewal Limit: ☐ Renew checked items

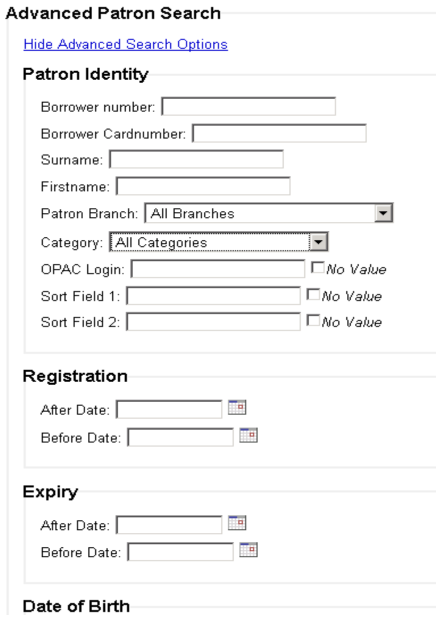
NOTE: If your site is configured to restrict patron view/edit/create, you may only see patrons belonging to your own branch. Depending on the permissions given, you will not be able to view or edit patrons from other branches.

5.1.1 Advanced Patron Searching

If you need to search on other data than name and cardnumber, click the Show Advanced Search Options link on the main patron screen.



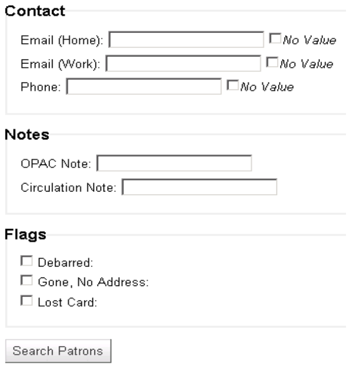
Almost every field in the patron record is searchable using this feature. You can search one data field or multiple fields at the same time. Use this feature to search for unique identifiers in the patron record, such as phone number or email address.



Patron Branch: All Branches

Category: All Categories

You could search for all patrons with a particular patron category, or patrons with no login ID, or patrons with a particular city, or patrons with no email address, or patrons who have been debarred. You could also combine a search, such as patrons with Child-type categories whose date of birth is before a specified date.



After making your selections, click the Search Patrons button and you'll get a results list.

5.1.2 Partial Patron Barcode Searching

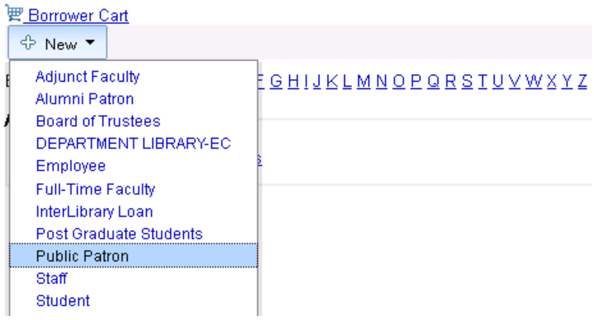
If your site has configured patron barcode prefixes for each branch, you can now search for patrons with just a partial barcode. For example, if your patron prefix is 29178, and the patron's full barcode is 29178022248523, you can enter a search string of just 022248523. The system will apply the prefix for the branch to which you belong, so this will only work for your own patrons. You will need to enter the full barcode to find patrons from other branches.

5.2 Creating a Patron

NOTE: Library staff will need the following granular permission to be able to create a patron record:

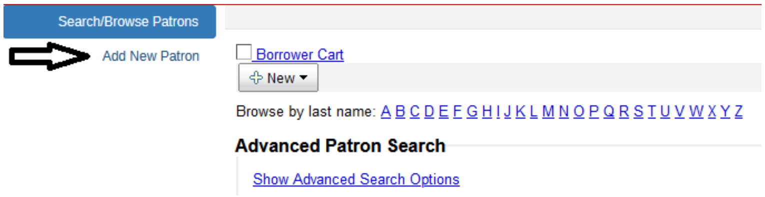
permissions -- Set user permissions (controls editing patron category and roles also)

Always search for the patron before creating a new record; you don't want duplicates in your system. To create a library user patron record, go to Patrons and click New. A list of the configured patron categories will display; select the appropriate one.



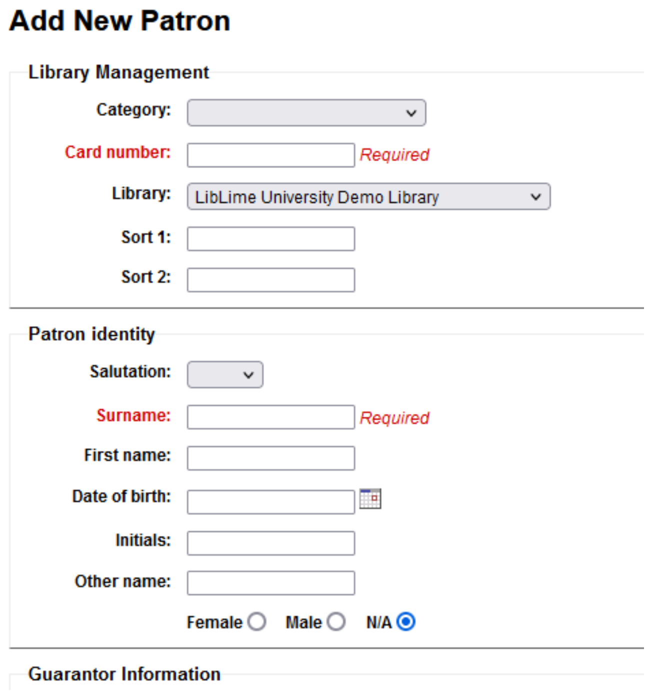
Patron categories have been established by your system administrator based on your site's needs (see Administration, Patron Categories). Most patron categories will be either adult or child; library staff must use a category defined as staff.

The Add New Patron link in the sidebar will also create a new patron, but does not give an option to select the patron category in advance. The default value may be inappropriate.



The screen for either creating or editing a patron moves those fields to the top as a visual cue to staff to set the fields properly.

Whichever approach is taken, an edit screen opens and can start entering information. Your library may not use many of the fields and some might be hidden from display. The screenshots may not match your system's display.



Add New Patron

Library Management

Category:

Card number: Required

Library: LibLime University Demo Library

Sort 1:

Sort 2:

Patron identity

Salutation:

Surname: Required

First name:

Date of birth:

Initials:

Other name:

Female ○ Male ○ N/A ●

Guarantor Information

In the Library Management section, make sure you enter a cardnumber (patron barcode). Your system might be configured to create one automatically (syspref autoMemberNum); if not, scan the barcode being assigned to the user, or type one. The cardnumber MUST be unique. Select or verify the appropriate patron category. Also verify that the Library is appropriate for the patron; the system will default to the library of the staff person creating the record.

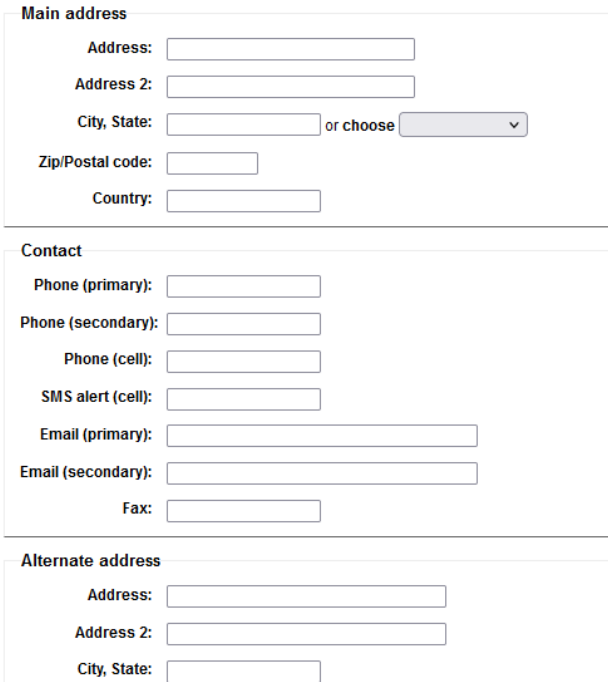
Sort 1 and Sort 2 are optional fields for specific types of data which don't fit elsewhere. Your site may have them hidden or relabeled.

Next, enter the patron's name and address information. The fields that must be completed are name, cardnumber, and email. Your site may have designated other fields as required; those will have a red screen warning (see above screenshot). Email address is especially important because without one, email notices cannot be sent. **Be aware that if there is no value in the primary email field, the system will roll over to the secondary email field; if there is a value in that field, the notices will be sent to that address**.

You may want to include the patron's mailing address or other fields on notices; fill out whatever fields your library policy requires. The Initials field is used for middle initials or middle names.

Some of the fields are only relevant to specialized or international libraries. There are also sections for guarantor links (parent/child or other family relationships) and alternative addresses, such as student local and permanent address. The system administrator may hide fields as needed to make it easier for library staff to identify and enter the needed field data. During your implementation, your system administrator will have identified needed fields – follow the policies and usage set by your site.

As mentioned above, some fields may be set in the system configuration as required; you won't be able to save the record without entering them (see the BorrowerMandatoryField syspref). There is also a syspref (UserRequiredDetails) which can prompt users at login to add required field data to their account information. These do not have to be the same fields as the BorrowerMandatoryField syspref. See the Discovery Layer section for how that function appears to the user at login.



In the contact area, you have entries for multiple phone and email addresses. Use the Primary email field for the primary email address. This is the field that will be used to send notices. Along the same lines, use the primary phone field for the best contact number. In businesses and organizations, that may be the person's work number. In public libraries, it may be the home number. (In earlier versions, these fields were actually labeled as "home" and "work" – primary and secondary are better descriptions of the function.)

The only field here used automatically by the system is the email address; the other fields are informational for library staff but may be included on notices and reports. Some sites have privacy rules against collecting personal information such as address or phone number; always follow your site's procedures.

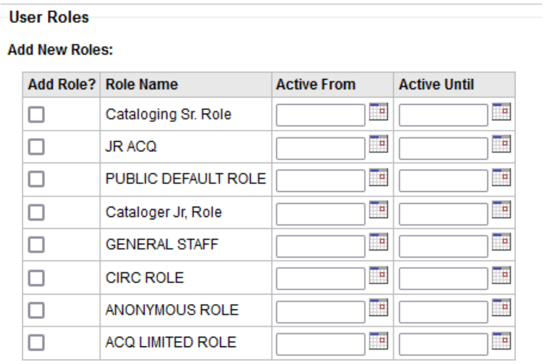
NOTE: The SMS alert number field is now visible. At present, it is only used by sites subscribing to the Talking Tech phone notification service (for delivery by text message). Delivery by voicemail uses the primary phone number. See the Superlibrarian Guide section on Talking Tech. Sites not using Talking Tech may want to hide the field in the edit screen to prevent data being added to the field.

Be aware that the system stores the city and state in one field (the city field). Enter data as, for example,

Bethesda, MD

in that field. There is a separate field for zip code.

Next, the screen will have a section for linking the patron record to Role records (see the section on permissions and Roles). This is primarily used for staff records, and only in those cases where a staff person needs a set of permissions beyond the default Role. Usually you will ignore this section.



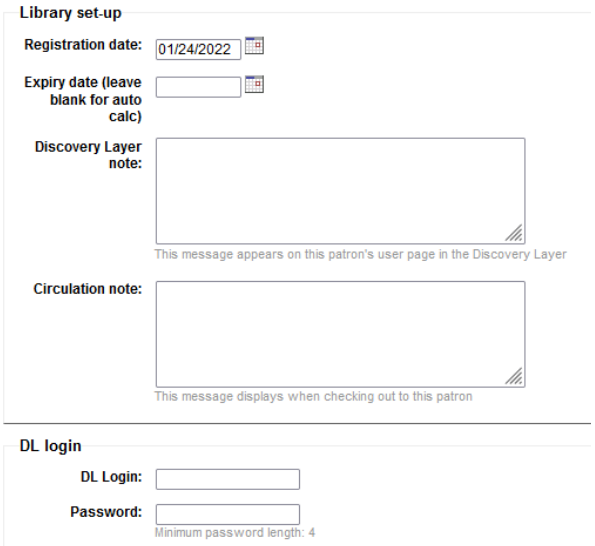
User Roles

Add New Roles:

Add Role?	Role Name	Active From	Active Until
☐	Cataloging Sr. Role		
☐	JR ACQ		
☐	PUBLIC DEFAULT ROLE		
☐	Cataloger Jr, Role		
☐	GENERAL STAFF		
☐	CIRC ROLE		
☐	ANONYMOUS ROLE		
☐	ACQ LIMITED ROLE		

If you do need to give additional permissions to someone, note that you can specify an expiration date. This is useful for temporary assignments.

Next are fields for the expiration date and user login.



Library set-up

Registration date: 01/24/2022

Expiry date (leave blank for auto calc):

Discovery Layer note:

This message appears on this patron's user page in the Discovery Layer

Circulation note:

This message displays when checking out to this patron

DL login

DL Login:

Password:

Minimum password length: 4

The system will pick up the current date as the enrollment date. The patron category policy has a defined enrollment period; if you leave the Expiry Date field blank, the system will calculate the expiration date based on that period. You can enter a manual date if you need a shorter or longer enrollment period for this patron. **NOTE: The registration (enrollment) date cannot be edited later, after the record is created.**

There are two note fields in the record. Discovery Layer Note is for messages that will be visible to the patron when logged into the Discovery Layer. It can be a useful way to communicate something that isn't urgent or isn't covered by one of the standard messaging options. Circulation Note is for messages that will display to staff on the Checkout screen. This can be used for warnings, reminders, or other information needed at checkout. These are intended for notes which should stay on the record long-term – see the separate section on Borrower Notes for more ephemeral notes.

The DL login section is needed if you want your patrons to be able to log into the Discovery Layer. Common practice is for the login ID to be the same as the cardnumber, since the login ID field must also be unique. **NOTE: a user can log in either with the defined userid (DL Login field) or the cardnumber – if the value entered does not match the DL Login, it will try to match against a cardnumber.**

When you create a patron, you will see the password as you type it in. The password is then stored in encrypted form and you will never be able to read it again. You can change it, but you can't tell a patron what it is. The patron can change passwords in the Discovery Layer, so you may set a rather generic initial password (such as last name) when you first create the account.

The last section, Patron Messaging Preferences, will be covered in detail later.

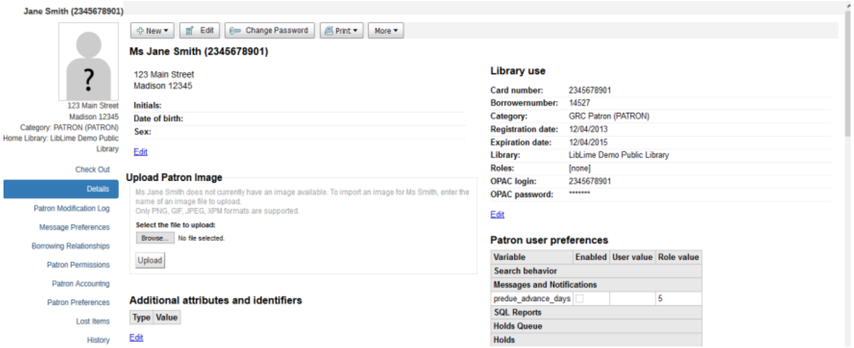
When you have entered all the needed information, scroll to the bottom and click Save. The system will do some integrity checking. If you've tried to use a cardnumber already assigned to someone else, for example, you'll get a warning.

Home › Patrons › Add Adult patron smith Jane

Add Adult patron Jane smith

The following fields are wrong. Please fix them.
Cardnumber already in use.

Fix the problem and click Save again. When the record is saved, you'll be taken into the main patron details screen. Notice that the expiration date has been added.



Jane Smith (2345678901)

123 Main Street
Madison 12345
Category: PATRON (PATRON)
Home Library: LibLime Demo Public Library

Ms Jane Smith (2345678901)

123 Main Street
Madison 12345

Initials:
Date of birth:
Sex:

Upload Patron Image

Ms Jane Smith does not currently have an image available. To import an image for Ms Smith, enter the name of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload: No file selected.

Additional attributes and identifiers

Type	Value

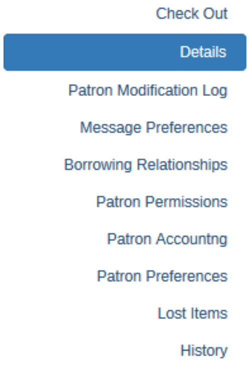
Library use

Card number: 2345678901
Borrowernumber: 14527
Category: GRC Patron (PATRON)
Registration date: 12/04/2013
Expiration date: 12/04/2015
Library: LibLime Demo Public Library
Roles: [none]
OPAC login: 2345678901
OPAC password: *******

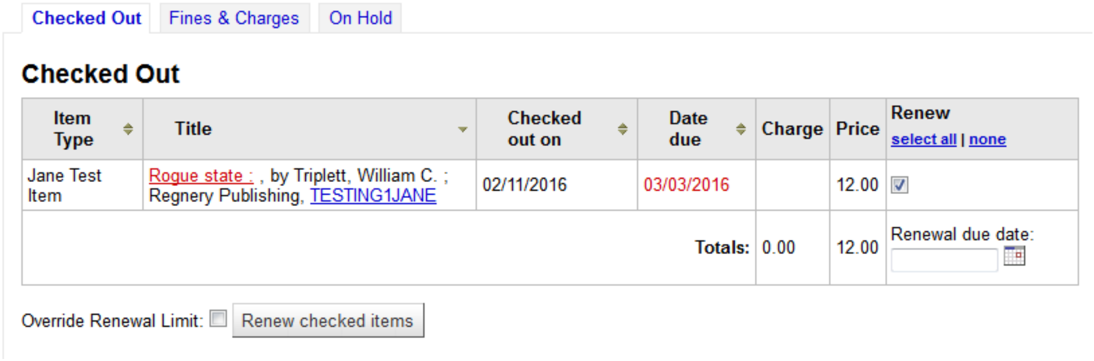
Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
Messages and Notifications			
predue_advance_days	☐		5
SQL Reports			
Holds Queue			
Holds			

From this screen you can use the side tabs to move to other functions for this patron (check out, fines, etc.).



If you scroll to the bottom of the page, there are tabs with information on current checkouts, fines, and holds.



Checked Out

Item Type	Title	Checked out on	Date due	Charge	Price	Renew select all | none
Jane Test Item	Rogue state : , by Triplett, William C. ; Regnery Publishing, TESTING1JANE	02/11/2016	03/03/2016		12.00	☑
			Totals:	0.00	12.00	Renewal due date:

Override Renewal Limit: ☐ Renew checked items

You can take actions on the various side or bottom tabs as needed (check out or renew items, cancel holds, pay fines, etc.).

5.2.1 Validate Codabar Barcode

If the ValidateCodabar syspref is on, patron barcodes (cardnumber field) must be entered as valid codabar number. If you try to enter an invalid number, the screen will show an error.

Library Management

Card number: test1 ✗ Enter a valid Codabar number. *Required*

You will be unable to save the patron record until you enter a valid number.

5.2.2 Password Length

For security reasons, user records must be given a password. Your system administrator can define a minimum length in the syspref minPasswordLength. When creating or editing a patron, you will see a screen message and warning when a password is too short:

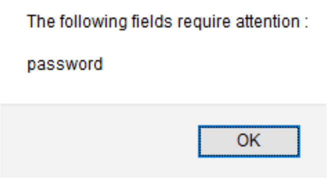
OPAC login

OPAC Login: 27707

Password: abc *Length is too short, minimum 4 required*

Minimum password length: 4

If you try to save a record without a valid-length password, you will get a popup warning:



The following fields require attention :

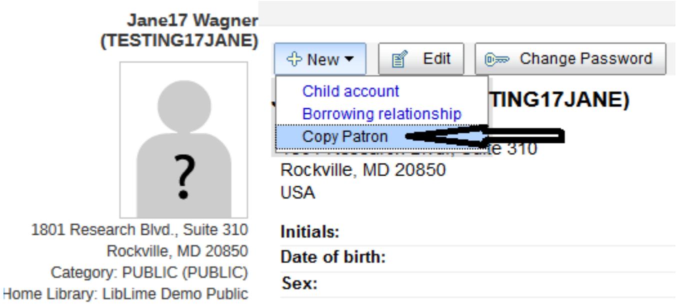
password

You must enter a valid-length password before you can save the record.

NOTE: if the minPasswordLength syspref is empty, the system will not attempt to enforce a password length. The system will also allow you to leave a password field blank if desired (primarily for LDAP sites that don't use the patron record login credentials).

5.2.3 Copying an Existing Patron

If you are registering several family members at once, or users who share an address, you can create the first patron and then copy it. The last name and address information will be copied over to the new record. Go to the patron record you want to copy, and click New, Copy Patron:



Jane17 Wagner (TESTING17JANE)

TING17JANE)

Rockville, MD 20850
USA

Initials:
Date of birth:
Sex:

1801 Research Blvd., Suite 310
Rockville, MD 20850
Category: PUBLIC (PUBLIC)
Home Library: LibLime Demo Public

That opens an edit screen with the last name, address, and patron category copied from the original record. Fill in first name, email, cardnumber, and any other information you want, and save.

NOTE: If your site is configured to use family groups, and the first patron is a member of a family group, that setting will not transfer to the new patron. You will need to create the family relationship on the new patron.

Add General Public patron Wagner

Patron identity

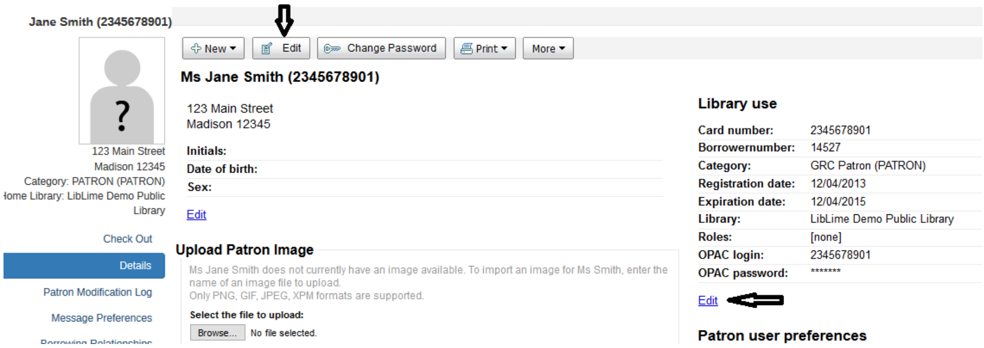
Salutation:
Surname: Wagner *Required*
First name:
Date of birth:
Initials:
Other name:
Female ○ **Male** ○ **N/A** ●

Main address

Address: 1801 Research Blvd., Suite 310
Address 2:
City, State: Rockville, MD or choose
Zip/Postal code: 20850
Country:

5.3 Editing a Patron

From a patron Details display screen, you can edit the entire record, or segments of it. For the entire record, click the Edit button on the toolbar. For just one segment, click the text Edit link below that display.



Ms Jane Smith (2345678901)

123 Main Street
Madison 12345

Category: PATRON (PATRON)
Home Library: LibLime Demo Public Library

Initials:
Date of birth:
Sex:

Ms Jane Smith does not currently have an image available. To import an image for Ms Smith, enter the name of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.

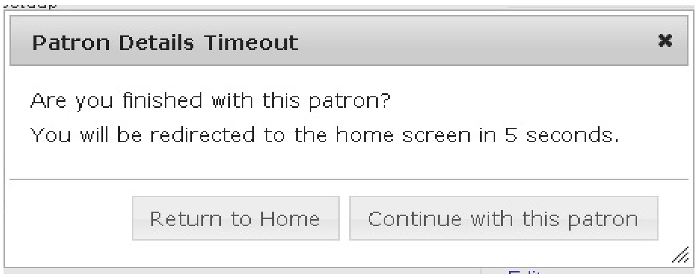
Select the file to upload: No file selected.

Card number: 2345678901
Borrowernumber: 14527
Category: GRC Patron (PATRON)
Registration date: 12/04/2013
Expiration date: 12/04/2015
Library: LibLime Demo Public Library
Roles: [none]
OPAC login: 2345678901
OPAC password: *******

You will be taken into a full or partial edit screen; the same display as for creating a patron. Make your changes and click Save. See the above section on creating a patron for a description of the various fields.

5.3.1 Patron Display Timeout

If the syspref PatronDetailsTimeout is set, and the screen is left on the patron record display, after inactivity for the specified amount of time you will get a popup message:

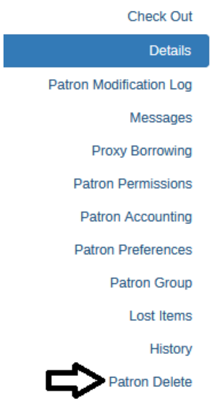


Are you finished with this patron?
You will be redirected to the home screen in 5 seconds.

If you do not respond, the display will change to the staff home page. This is a privacy setting; the intended use is for sites with staff screens visible to patrons. (The CheckoutTimeout syspref described in section 4.1 applies to the patron checkout display, not the general patron record display.)

5.3.2 Deleting a Patron

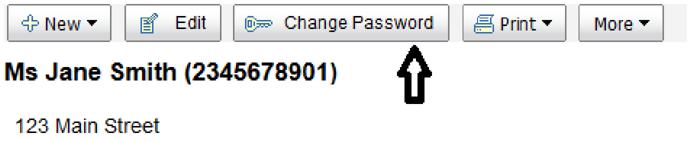
In previous versions, the option to delete a patron was found under the More dropdown. As a result of changes needed for the family group setup, the Delete link has been moved to the sidebar menu:



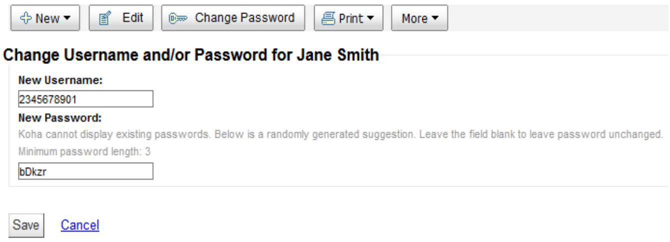
Otherwise the functionality is unchanged. You must clear any existing holds, fines, or checkouts before deleting a patron record.

5.4 Changing Passwords for Patrons

Patrons can change their own passwords through the Discovery Layer (if configured), but staff can also change passwords for patrons. In the patron Details screen, you can either edit the full record and scroll down to the DL Login section, or just click the Change Password button on the toolbar.



Using the Change Password button opens an edit screen where you can change either/both the user login ID and password.



Change Username and/or Password for Jane Smith

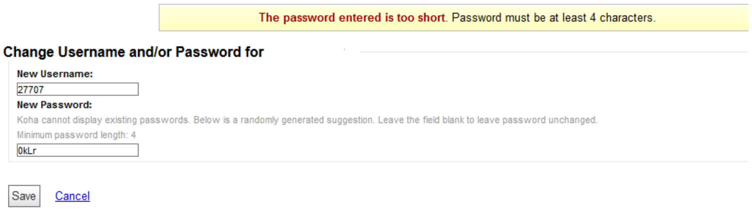
New Username:
2345678901

New Password:
Koha cannot display existing passwords. Below is a randomly generated suggestion. Leave the field blank to leave password unchanged.
Minimum password length: 3
bDkzr

Save Cancel

The existing password is stored as encrypted text, so what you see as a current entry in the New Password box is not the real password. As you type a new password, it will be plain text and visible. Once you click Save, it will be encrypted. Passwords are case sensitive.

As noted above, you must enter a password that is long enough to match the system requirement. If you enter one that is too short, you will be alerted:



The password entered is too short. Password must be at least 4 characters.

Change Username and/or Password for

New Username: 27707

New Password:

Koha cannot display existing passwords. Below is a randomly generated suggestion. Leave the field blank to leave password unchanged.

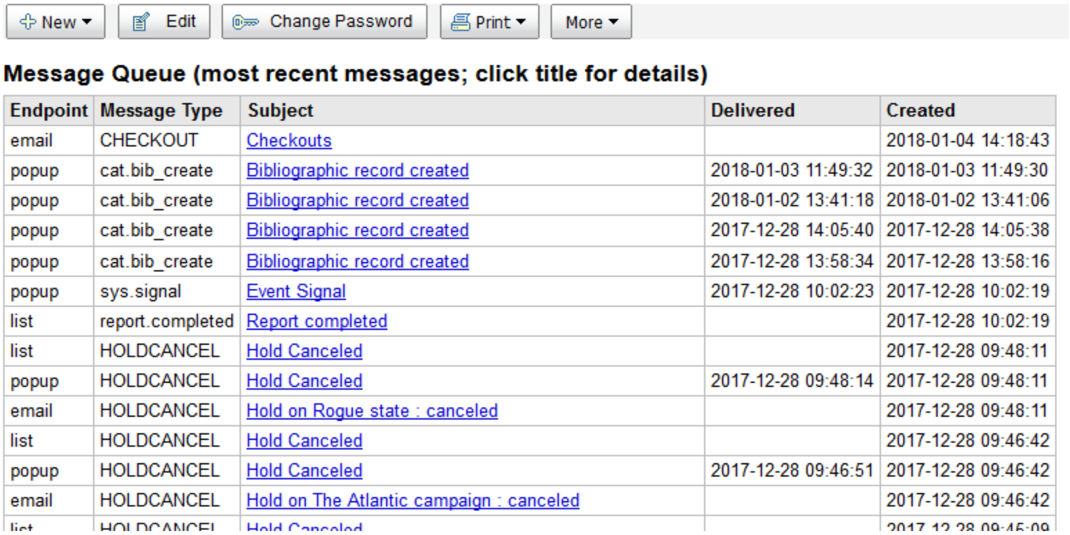
Minimum password length: 4

0kLr

5.5 Messages

Patrons can opt in or out of notification for various types of notices. **Unlike previous versions, this includes overdue notices; be sure to turn that setting on.** Library staff can set defaults or edit an individual patron's settings. There are many delivery methods possible, including email, popup, list (in the Discovery Layer) and RSS feed. See the separate Messaging Options section for more information about types of messages and about setting defaults.

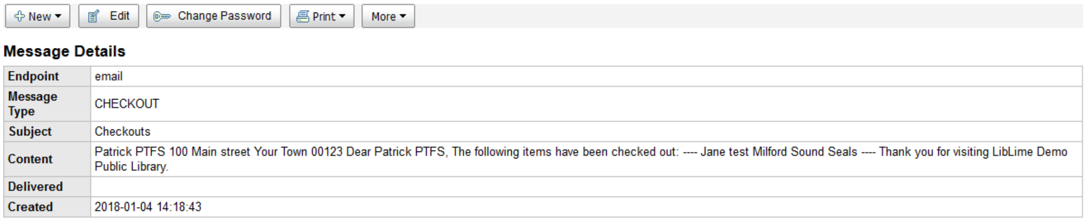
Library staff can see a record of notices sent to a patron by clicking the Messaging tab on the left side of the patron display screen.



Message Queue (most recent messages; click title for details)

Endpoint	Message Type	Subject	Delivered	Created
email	CHECKOUT	Checkouts		2018-01-04 14:18:43
popup	cat.bib_create	Bibliographic record created	2018-01-03 11:49:32	2018-01-03 11:49:30
popup	cat.bib_create	Bibliographic record created	2018-01-02 13:41:18	2018-01-02 13:41:06
popup	cat.bib_create	Bibliographic record created	2017-12-28 14:05:40	2017-12-28 14:05:38
popup	cat.bib_create	Bibliographic record created	2017-12-28 13:58:34	2017-12-28 13:58:16
popup	sys.signal	Event Signal	2017-12-28 10:02:23	2017-12-28 10:02:19
list	report.completed	Report completed		2017-12-28 10:02:19
list	HOLDCANCEL	Hold Canceled		2017-12-28 09:48:11
popup	HOLDCANCEL	Hold Canceled	2017-12-28 09:48:14	2017-12-28 09:48:11
email	HOLDCANCEL	Hold on Rogue state : canceled		2017-12-28 09:48:11
list	HOLDCANCEL	Hold Canceled		2017-12-28 09:46:42
popup	HOLDCANCEL	Hold Canceled	2017-12-28 09:46:51	2017-12-28 09:46:42
email	HOLDCANCEL	Hold on The Atlantic campaign : canceled		2017-12-28 09:46:42
list	HOLDCANCEL	Hold Canceled		2017-12-28 09:45:09

Clicking on one of the message subjects will open the content of that message:



Message Details

Endpoint	email
Message Type	CHECKOUT
Subject	Checkouts
Content	Patrick PTFS 100 Main street Your Town 00123 Dear Patrick PTFS, The following items have been checked out: ---- Jane test Milford Sound Seals ---- Thank you for visiting LibLime Demo Public Library.
Delivered	
Created	2018-01-04 14:18:43

Patrons can see their messages in the Discovery Layer by clicking the My Messages tab in their account section.

Staff can also monitor all notices by creating a SQL report to watch the message table. This report will show the most recent notices first, with details about date/time and status.

```
SELECT message_endpoints.message_endpoint_type, message_types.code,
message_types.description, messages.created_time, message_endpoints.delivered_time,
message_endpoints.delivery_status, borrowers.cardnumber, borrowers.surname,
borrowers.firstname, message_endpoints.title, message_endpoints.content from
message_endpoints INNER JOIN borrowers on (message_endpoints.user_id =
borrowers.borrowernumber) INNER JOIN messages ON (messages.id =
message_endpoints.message_id) INNER JOIN message_types on
(messages.message_type_id = message_types.id) order by messages.created_time desc
```

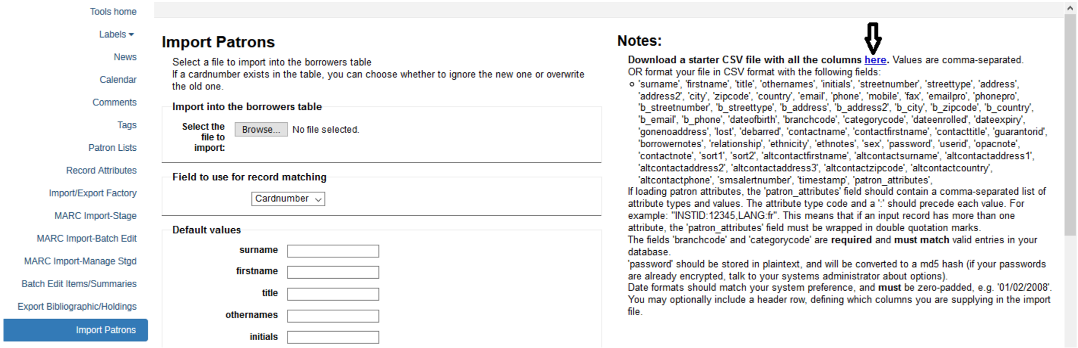
This will show all types of messages; if you want to limit to a particular type, such as email, add a WHERE limiter before the “order by” section:

```
WHERE message_endpoint_type = 'email'
```

This report is useful to confirm that messages are being generated, or to verify that a particular patron received a notice (add a WHERE borrowernumber = ‘12345’ limiter if needed).

5.6 Importing Patrons

Many organizations need to batch-load patrons with data from a central database such as a registrar’s office. If you have permission, you can do this under Tools, Import Patrons. You will need to create a .csv file with the borrower table fields. You can download a sample .csv file from the tool.



Import Patrons

Select a file to import into the borrowers table
If a cardnumber exists in the table, you can choose whether to ignore the new one or overwrite the old one.

Import into the borrowers table

Select the file to import: No file selected.

Field to use for record matching

Cardnumber

Default values

surname
firstname
title
othernames
initials

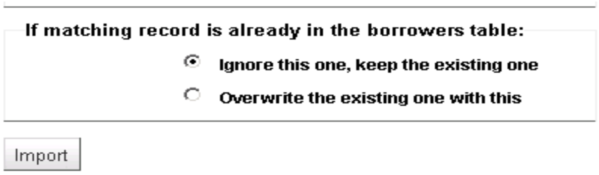
Notes:

Download a starter CSV file with all the columns here. Values are comma-separated.
OR format your file in CSV format with the following fields:

- 'surname', 'firstname', 'title', 'othernames', 'initials', 'streetnumber', 'streettype', 'address', 'address2', 'city', 'zipcode', 'country', 'email', 'phone', 'mobile', 'fax', 'emailpro', 'phonepro', 'b_streetnumber', 'b_streettype', 'b_address', 'b_address2', 'b_city', 'b_zipcode', 'b_country', 'b_email', 'b_phone', 'dateofbirth', 'branchcode', 'categorycode', 'dateenrolled', 'dateexpiry', 'gonenoaddress', 'lost', 'debarred', 'contactname', 'contactfirstname', 'contacttitle', 'guarantorid', 'borrowernotes', 'relationship', 'ethnicity', 'ethnotes', 'sex', 'password', 'userid', 'opacnote', 'contactnote', 'sort1', 'sort2', 'altcontactfirstname', 'altcontactsurname', 'altcontactaddress1', 'altcontactaddress2', 'altcontactaddress3', 'altcontactzipcode', 'altcontactcountry', 'altcontactphone', 'smsalertnumber', 'timestamp', 'patron_attributes',

If loading patron attributes, the 'patron_attributes' field should contain a comma-separated list of attribute types and values. The attribute type code and a ':' should precede each value. For example: "INSTID:12345,LANG:fr". This means that if an input record has more than one attribute, the 'patron_attributes' field must be wrapped in double quotation marks.
The fields 'branchcode' and 'categorycode' are **required** and **must match** valid entries in your database.
'password' should be stored in plaintext, and will be converted to a md5 hash (if your passwords are already encrypted, talk to your systems administrator about options).
Date formats should match your system preference, and **must** be zero-padded, e.g. '01/02/2008'.
You may optionally include a header row, defining which columns you are supplying in the import file.

The program works by trying to match on existing records using the patron cardnumber or (in some cases) a unique patron attribute. If a match is found, the import process specifies whether to overwrite the existing record with the new one, or to ignore the new one and keep the existing record.



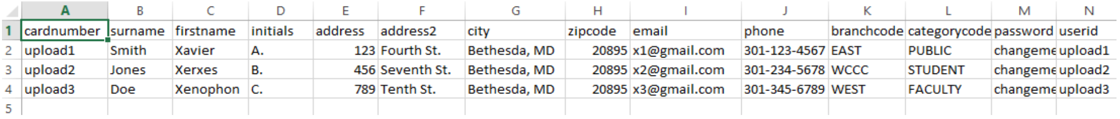
If matching record is already in the borrowers table:

● Ignore this one, keep the existing one
○ Overwrite the existing one with this

You can also fill in default values for various fields; these will be used for every record in the import.

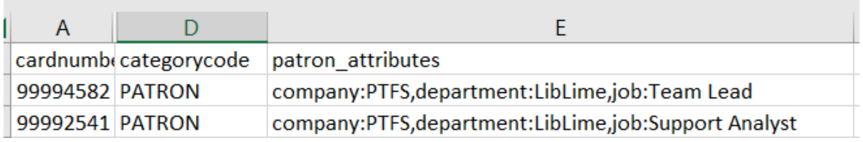
Be aware that if a field exists in the .csv file, it will automatically overwrite that field in the existing patron record, even if the incoming field is empty. For example, if you include the login ID and password fields (userid, password), but don't supply a value, those fields will be wiped. For this reason, ONLY include in the .csv file the fields you want to update, plus the required fields of surname, branchcode, and categorycode (the patron's last name, home library code, and patron category code). Delete the other columns rather than leaving them blank. **Any import must include those three fields, and you must use the policy code rather than the description**. For example, if your patron category code is FAC and the description is Faculty, use FAC in the import file. **Policy codes are case sensitive** – you must enter the code exactly as it was created. **NOTE**: You should delete the borrowernumber column from the template .csv file – the system will create this internal number at load, and including it in the upload file could create problems.

Here's how a sample upload might look in Excel:



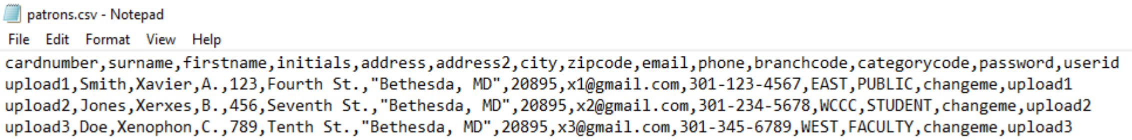
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	cardnumber	surname	firstname	initials	address	address2	city	zipcode	email	phone	branchcode	categorycode	password	userid
2	upload1	Smith	Xavier	A.	123	Fourth St.	Bethesda, MD	20895	x1@gmail.com	301-123-4567	EAST	PUBLIC	changeme	upload1
3	upload2	Jones	Xerxes	B.	456	Seventh St.	Bethesda, MD	20895	x2@gmail.com	301-234-5678	WCCC	STUDENT	changeme	upload2
4	upload3	Doe	Xenophon	C.	789	Tenth St.	Bethesda, MD	20895	x3@gmail.com	301-345-6789	WEST	FACULTY	changeme	upload3
5														

If your site uses the patron attributes fields, you will want to make sure the output file is formatted so that all three attributes are listed under one column using the heading **patron_attributes.** Each of the lines should be listed with the heading, colon, and value, then separated by commas with no spaces. The example below shows three patron attribute fields with the headings company, department and job:



A	D	E
cardnumbe	categorycode	patron_attributes
99994582	PATRON	company:PTFS,department:LibLime,job:Team Lead
99992541	PATRON	company:PTFS,department:LibLime,job:Support Analyst

Once you've saved the file as a .csv, it will look something like this:



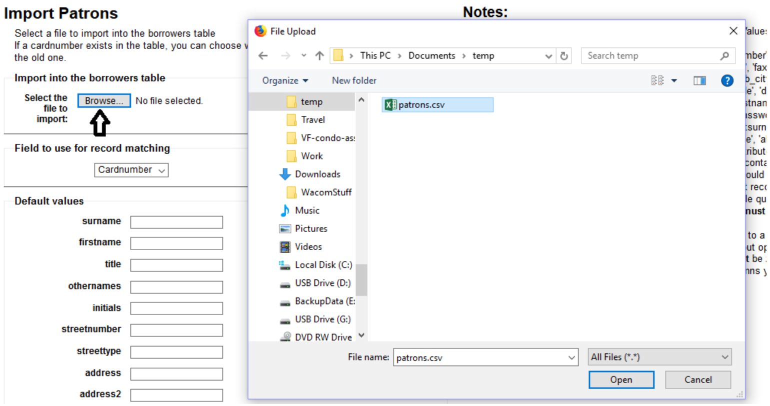
```
cardnumber,surname,firstname,initials,address,address2,city,zipcode,email,phone,branchcode,categorycode,password,userid
upload1,Smith,Xavier,A.,123,Fourth St.,"Bethesda, MD",20895,x1@gmail.com,301-123-4567,EAST,PUBLIC,changeme,upload1
upload2,Jones,Xerxes,B.,456,Seventh St.,"Bethesda, MD",20895,x2@gmail.com,301-234-5678,WCCC,STUDENT,changeme,upload2
upload3,Doe,Xenophon,C.,789,Tenth St.,"Bethesda, MD",20895,x3@gmail.com,301-345-6789,WEST,FACULTY,changeme,upload3
```

You can use an upload file to modify existing records as well as add new records. For example, if you want to change the patron expiration date for a group of patrons, you would include the cardnumber field (for matching) and the dateexpiry field with the new date, plus the surname, branchcode, and categorycode fields. Eliminate all other columns/fields from your .csv file. The order of the fields is not important, but your data and headers must be in the same order throughout.

You must enter all dates in the form of YYYY-MM-DD. The screen may display them differently, but the underlying table needs them in this format. A .csv file for this purpose might look something like this:

```
cardnumber,dateexpiry,surname,branchcode,categorycode
20539,2015-08-01,Smith,MAIN,STUDENT
22991,2015-08-01,Smith,MAIN,STUDENT
209424971,2015-08-01,Smith,MAIN,STUDENT
```

For either new patrons or modifications, do NOT put spaces between the comma-separated fields. If a field contains a space or a comma (like city, state), you must surround that field with quotation marks. When your .csv file is ready, click Browse in the tool and navigate to your file. Select it and click Open in the popup:



Import Patrons

Select a file to import into the borrowers table
If a cardnumber exists in the table, you can choose
the old one.

Import into the borrowers table

Select the file to import: No file selected.

Field to use for record matching: Cardnumber

Default values: surname, firstname, title, othernames, initials, streetnumber, streettype, address, address2

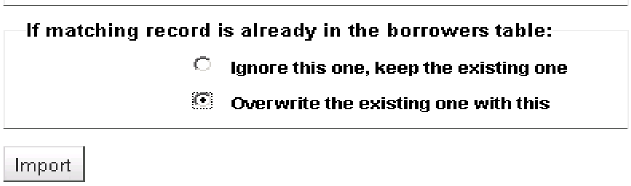
File Upload

This PC › Documents › temp

File name: patrons.csv

All Files (*.*)

That puts the filename into the tool. Then make sure your other settings are what you want, and click Import at the bottom of the screen:

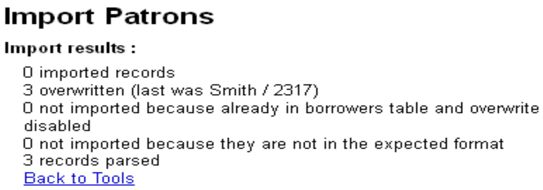


If matching record is already in the borrowers table:

○ Ignore this one, keep the existing one

● Overwrite the existing one with this

The system will process the import file and give you a summary results screen.

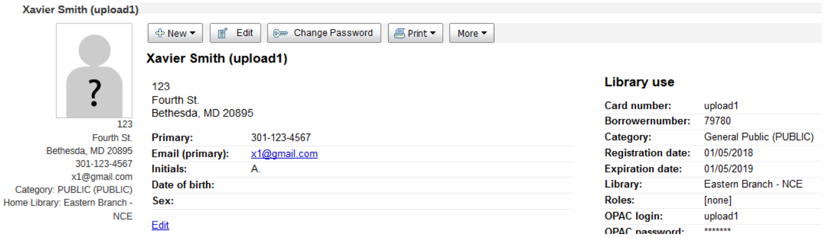


Import Patrons

Import results :

0 imported records
3 overwritten (last was Smith / 2317)
0 not imported because already in borrowers table and overwrite disabled
0 not imported because they are not in the expected format
3 records parsed
Back to Tools

Your patron records are now loaded and searchable:



Xavier Smith (upload1)

123
Fourth St.
Bethesda, MD 20895
301-123-4567
x1@gmail.com
Category: PUBLIC (PUBLIC)
Home Library: Eastern Branch - NCE

Xavier Smith (upload1)

123
Fourth St.
Bethesda, MD 20895

Primary: 301-123-4567
Email (primary): x1@gmail.com
Initials: A.
Date of birth:
Sex:

Library use

Card number: upload1
Borrowernumber: 79780
Category: General Public (PUBLIC)
Registration date: 01/05/2018
Expiration date: 01/05/2019
Library: Eastern Branch - NCE
Roles: [none]
OPAC login: upload1
OPAC password: *******

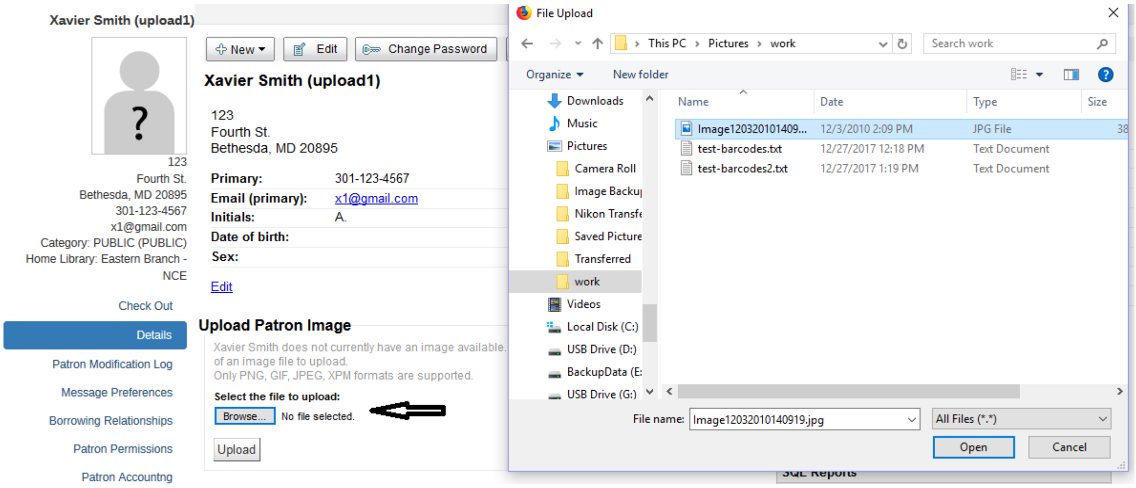
5.7 Upload Patron Images

If configured (syspref patronimages), the system can display a picture of the patron in staff mode. This is primarily used in school and public library settings, but may be helpful in special libraries as well. The image file should be no larger than 520K, and the recommended size of the image is about 200x300 pixels.

There are two ways to load a patron image, individually in the patron record, or as a batch.

5.7.1 Loading an Individual Image From the Patron Record

In the patron Details screen, you can click the Browse button in the patron image section to locate an image file. Then browse to the file on your computer and select it:



Xavier Smith (upload1)

123
Fourth St.
Bethesda, MD 20895
301-123-4567
x1@gmail.com
Category: PUBLIC (PUBLIC)
Home Library: Eastern Branch - NCE

Xavier Smith (upload1)

123
Fourth St.
Bethesda, MD 20895

Primary: 301-123-4567
Email (primary): x1@gmail.com
Initials: A.
Date of birth:
Sex:

Upload Patron Image

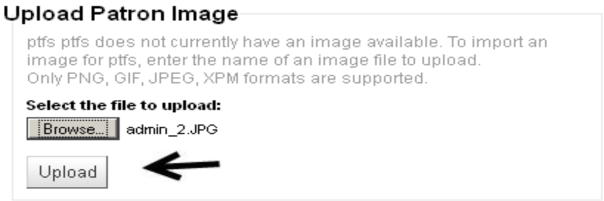
Xavier Smith does not currently have an image available. of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:
No file selected.

Name	Date	Type	Size
Image120320101409...	12/3/2010 2:09 PM	JPG File	38
test-barcodes.txt	12/27/2017 12:18 PM	Text Document	
test-barcodes2.txt	12/27/2017 1:19 PM	Text Document	

File name: Image12032010140919.jpg
All Files (*.*)

When the file name appears on the screen, click the Upload button:

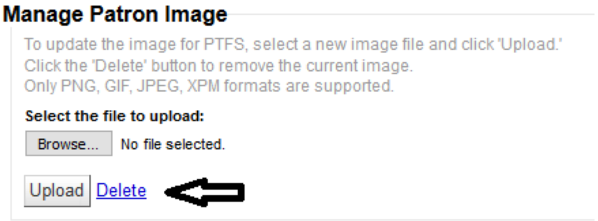


Upload Patron Image

ptfs ptfs does not currently have an image available. To import an image for ptfs, enter the name of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:
admin_2.JPG

The image now appears in the screen display, and a Delete link appears in the Patron Image section. You would use that link to remove a picture.

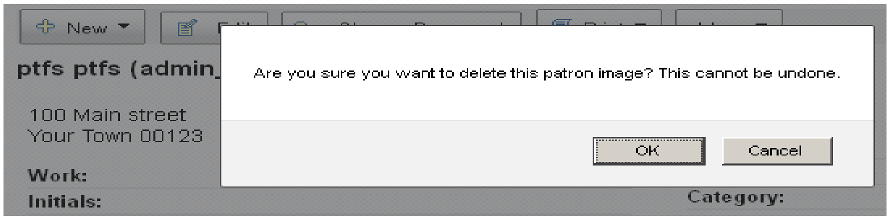


Manage Patron Image

To update the image for PTFS, select a new image file and click 'Upload.'
Click the 'Delete' button to remove the current image.
Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:
No file selected.

The Delete command uses a popup window to warn you the action cannot be undone; if you click OK to proceed, the image file is removed.


ptfs ptfs (admin_

100 Main street
Your Town 00123

Work:
Initials:
Category:

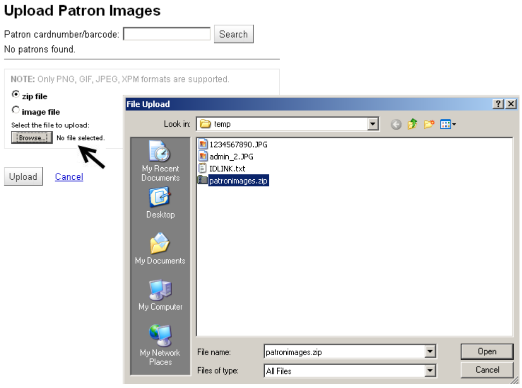
Are you sure you want to delete this patron image? This cannot be undone.

5.7.2 Loading a Batch of Images or an Individual Image

You can also load a batch of images at once. For this feature, you will need to provide a link between the image file name and the patron's cardnumber. The simplest way is to name the image with the cardnumber. In the directory with your images, create a text file named either DATALINK.TXT or IDLINK.TXT. In that file (one entry per line), enter the patron cardnumber followed by either a comma or a tab, then the image file name. For example:

```
admin_2,admin_2.JPG
1234567890,1234567890.JPG
```

When you have matched all the image files with patron cardnumbers, save the text file. Then create a .zip file containing all the images plus your text file. In Tools, Upload Patron Images, make sure the zip file radio button is clicked. Then click the Browse button and locate your .zip file; click Open to select it.


Upload Patron Images

Patron cardnumber/barcode:
No patrons found.

NOTE: Only PNG, GIF, JPEG, XPM formats are supported.

● zip file
○ image file

Select the file to upload:
No file selected.

Look in: temp

1234567890.JPG
admin_2.JPG
IDLINK.txt
patronimages.zip

File name: patronimages.zip
Files of type: All Files

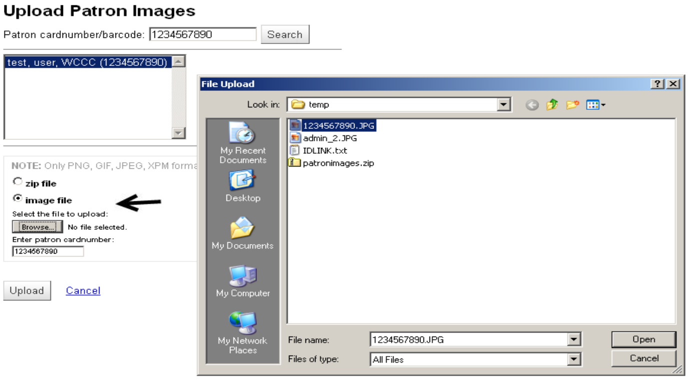
Then click the Upload button. The system will unpack the .zip file, match the images and cardnumbers, and give you a report on the process.


Patron Image(s) Successfully Uploaded

Unpacking completed
1 directorie(s) scanned.
1 directorie(s) processed.
2 image(s) moved into the database:
admin_2.JPG - Cardnumber: admin_2 imported successfully.
1234567890.JPG - Cardnumber: 1234567890 imported successfully.

Be aware that if your upload file contains a cardnumber that is not in the patron table, the import will stop at that point. It will show an error and the rest of the images will not load.

Note that you can also load individual images through this tool rather than in the patron record. To do so, select the Image File radio button. You can either search for and select the patron barcode in the top field, or just enter it in the bottom section. Then click Browse to locate your image file, select it, and click Open.



Upload Patron Images

Patron cardnumber/barcode: 1234567890

test, user, WCCC (1234567890)

NOTE: Only PNG, GIF, JPEG, XPM forma

○ zip file
● image file

Select the file to upload: No file selected.

Enter patron cardnumber: 1234567890

Look in: temp

File name: 1234567890.JPG

Files of type: All Files

Then click the Upload button and the image file will load:

Patron Image(s) Successfully Uploaded

Unpacking completed
1 directorie(s) scanned.
1 directorie(s) processed.
1 image(s) moved into the database:
1234567890.JPG - Cardnumber: 1234567890 imported successfully.

Images loaded through the tool cannot be deleted as a batch, but can be deleted individually, through the link in the patron record.

5.8 Guarantor or Family Group Records

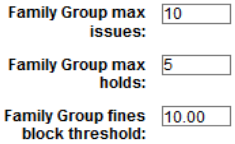
Libraries which have age restrictions on borrowing usually will create Child patron categories. Staff want to be able to link a child to a parent record, so that the responsible adult is easily identifiable. Additional development now provides the ability to link multiple records (child and adult) to one “head of household” record so that both staff and that user can see a summary of all outstanding checkouts, holds, and charges for the entire family unit.

Note that the guarantor or parent/child relationship can still be used for just one link (child to parent); a group is not required.

IMPORTANT NOTE: By design, creating a link from a parent to a child patron category record will overwrite any existing address data with the address from the parent record. Changing the address in the parent record will update address fields in ALL linked records (child and adult).

5.8.1 Configuration

See the Superlibrarian Guide – there are a couple of configuration settings that can be used with this module. In the Patron Category policy, a new section allows setting thresholds to block circulation (checkouts, holds) for members of a family group, if current transactions for all members of the group exceed certain thresholds:



Family Group max issues: 10

Family Group max holds: 5

Family Group fines block threshold: 10.00

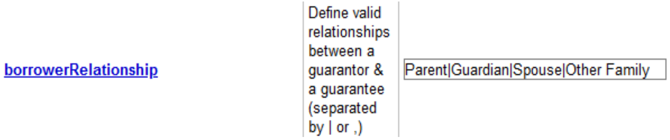
This is optional and will only affect patrons defined as members of a family group. If all the patron categories for the group members have the same settings, then any combination of checkouts or holds by all the group that reaches these thresholds will block further checkouts or holds for anyone in that group. **NOTE: The total counts of holds, checkouts, and fines for all members of the family are used to compare against a particular category's limits**. If some categories have limits and others don't, the group patrons belonging to those categories will be blocked, but group patrons in other categories will not be blocked. If there are different thresholds in different category policies, each member of the group will be limited by the thresholds in that person's patron category, based on the count of all family member activity.

For example, if a person's patron category allows up to 10 holds, and that person has placed 3 holds, but other members of the family have placed 7 holds, that person will be blocked from placing another hold, because the total number of holds for the group is now at 10. Another family member, with a hold limit of 5, would have been blocked as soon as the total number of holds for the group reached 5.

Accruing fines on overdue items will not count against the total fine amount unless the site has chosen to include those in general (by turning off the ExcludeAccruingInTotal syspref).

NOTE: these settings have no effect on patrons who are not members of a family group.

The family group also makes use of the borrowerRelationship syspref to define the type of relationship:



borrowerRelationship	Define valid relationships between a guarantor & a guarantee (separated by | or ,)	Parent|Guardian|Spouse|Other Family

This is informational; it doesn't affect any policies. (NOTE: this syspref is also used in proxy relationships; see below.)

There are also two new circulation permissions, circulate.OR_exceed_group_maxissues and circulate.OR_exceed_group_maxfines, which can be assigned to staff to allow override of the group threshold blocks.

NOTE: The borrowers log (if enabled) does NOT record any data relating to the creation or removal of family group relationships.

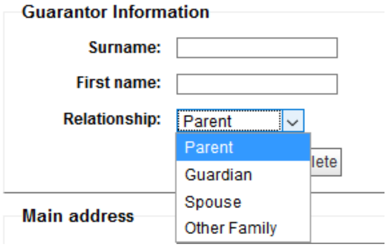
5.8.2 Creating the Group Relationships

There are two ways to establish a family relationship.

5.8.2.1 Creating the Link from the Child Record

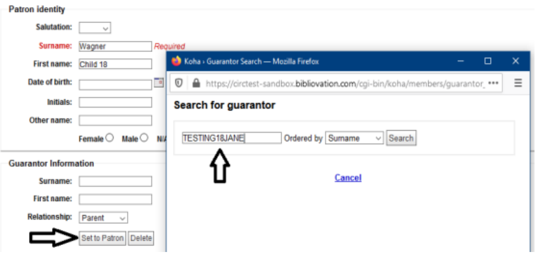
The first is the traditional way of setting it from a child record, but this will now work for all types of patrons. First, search for and identify the parent/head of household record; copy its barcode.

Then search for the child (or other family member record) and edit it. Near the top of the edit screen there is a section for Guarantor information:



Relationship: Parent

The options in the Relationship pulldown will be those set in the borrowerRelationship syspref (above). Click the Set to Patron button. This brings up a search popup window; paste the parent's barcode into the search box:



Surname: Wagner

First name: Child 18

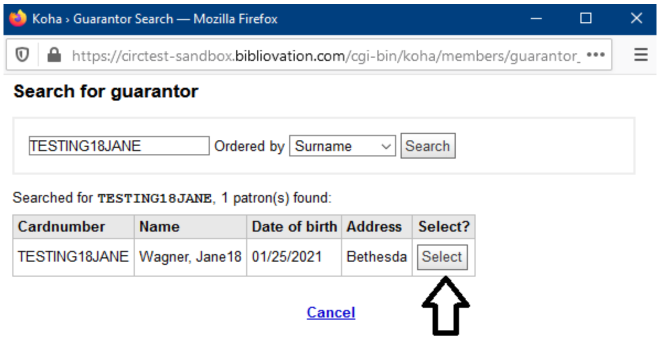
Relationship: Parent

https://circtest-sandbox.bibliovation.com/cgi-bin/koha/members/guarantor_

Search for guarantor

TESTING18JANE Ordered by Surname

Click the Search button. The window brings up a results list:



https://circtest-sandbox.bibliovation.com/cgi-bin/koha/members/guarantor_

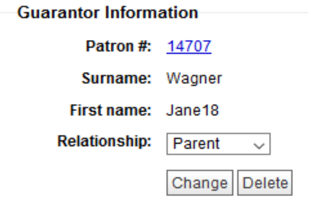
Search for guarantor

TESTING18JANE Ordered by Surname

Searched for `TESTING18JANE`, 1 patron(s) found:

Cardnumber	Name	Date of birth	Address	Select?
TESTING18JANE	Wagner, Jane18	01/25/2021	Bethesda	Select

Click the Select button next to the parent's name. Then close the popup window. That links this child record to the parent record:



Guarantor Information

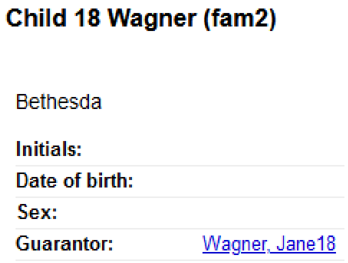
Patron #: 14707

Surname: Wagner

First name: Jane18

Relationship: Parent

Change the Relationship pulldown as needed. You MUST save the child's patron record to retain the change. After saving, the link is visible in the display for both child and parent:



Child 18 Wagner (fam2)

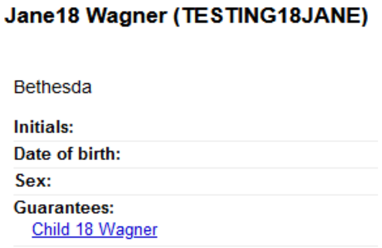
Bethesda

Initials:

Date of birth:

Sex:

Guarantor: Wagner, Jane18



Jane18 Wagner (TESTING18JANE)

Bethesda

Initials:

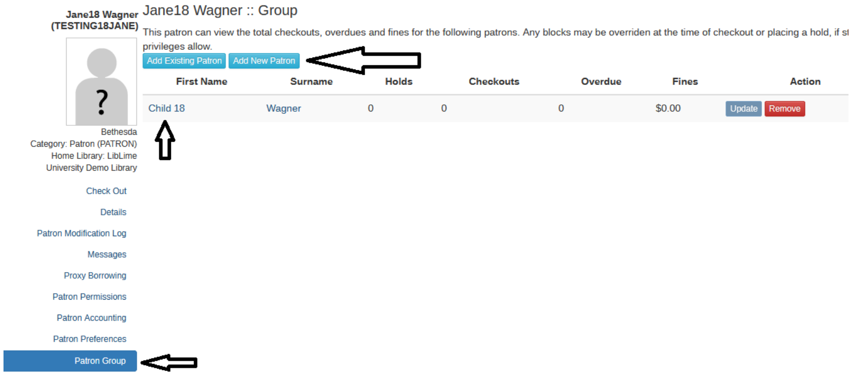
Date of birth:

Sex:

Guarantees:
Child 18 Wagner

5.8.2.2 Creating the Link from the Head of Household

There is now a Patron Group tab in the left sidebar menu on a patron record. For the record designated as the head of household, this will show any existing dependent records, and also has options to add new links.



Jane18 Wagner (TESTING18JANE)

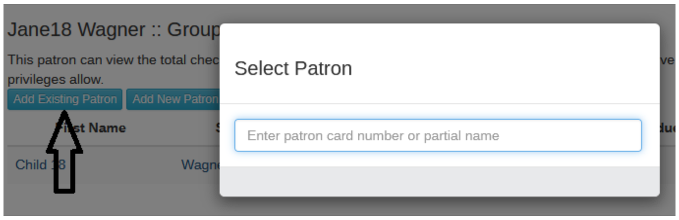
Bethesda
Category: Patron (PATRON)
Home Library: LibLime University Demo Library

Jane18 Wagner :: Group

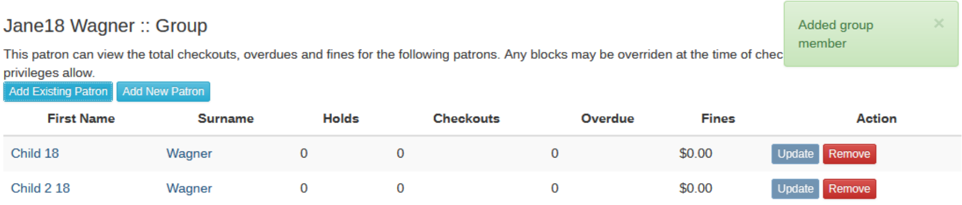
This patron can view the total checkouts, overdues and fines for the following patrons. Any blocks may be overriden at the time of checkout or placing a hold, if st privileges allow.

First Name	Surname	Holds	Checkouts	Overdue	Fines	Action
Child 18	Wagner	0	0	0	$0.00	Update Remove

Click the Add Existing Patron to create a link to another child or adult in the group:



Enter the barcode of the patron to be added, and the system will create the link.

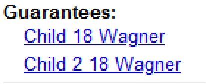


Jane18 Wagner :: Group

This patron can view the total checkouts, overdues and fines for the following patrons. Any blocks may be overriden at the time of chec privileges allow.

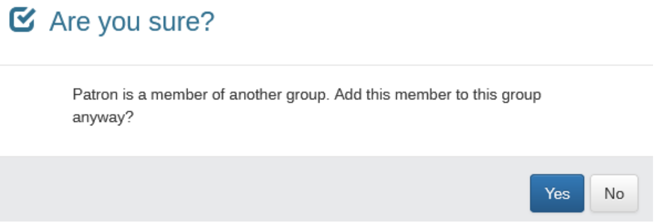
First Name	Surname	Holds	Checkouts	Overdue	Fines	Action
Child 18	Wagner	0	0	0	$0.00	Update Remove
Child 2 18	Wagner	0	0	0	$0.00	Update Remove

Note that the Details tab for the parent record now shows both records linked as part of the family group.



Guarantees:
Child 18 Wagner
Child 2 18 Wagner

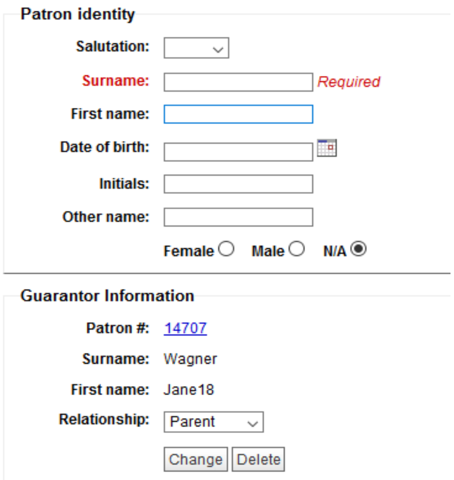
If you try to add a person to the group, and that person is already a member of another group, you will get a screen warning:



Patron is a member of another group. Add this member to this group anyway?

If you click Yes, the person will be removed from the other group and added to this one.

The other option from the Patron Group tab is to add a new patron record. Click the Add New Patron button. This will open a screen for adding a new patron, with the guarantor link already established:



Patron identity

Salutation:

Surname: Required

First name:

Date of birth:

Initials:

Other name:

Female ○ Male ○ N/A ●

Guarantor Information

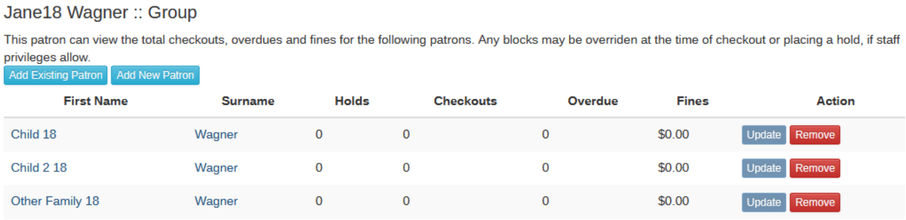
Patron #: 14707

Surname: Wagner

First name: Jane18

Relationship: Parent

Note that by default, this new record will be a Child patron category; edit the category as needed. Also change the Relationship entry in the guarantor section if needed. Fill in address and other details, and save. The new patron record is created, with the guarantor link to the parent/head of household record, and the parent record now shows the new family member:

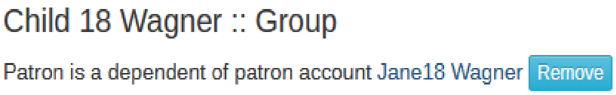


Jane18 Wagner :: Group

This patron can view the total checkouts, overdues and fines for the following patrons. Any blocks may be overriden at the time of checkout or placing a hold, if staff privileges allow.

First Name	Surname	Holds	Checkouts	Overdue	Fines	Action
Child 18	Wagner	0	0	0	$0.00	Update Remove
Child 2 18	Wagner	0	0	0	$0.00	Update Remove
Other Family 18	Wagner	0	0	0	$0.00	Update Remove

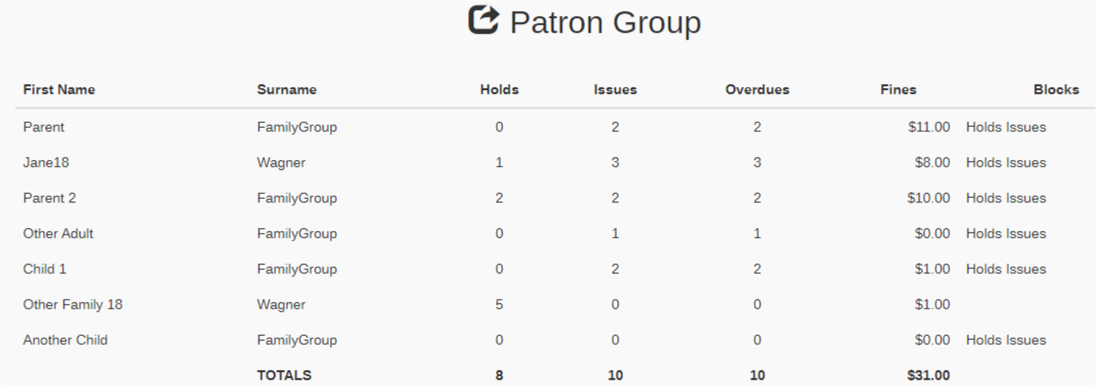
Add as many family members as needed to this parent/head of household record. This record will show all members and their circulation status in the Patron Group tab; the dependent records will only show a link to the parent record in that tab:



Child 18 Wagner :: Group

Patron is a dependent of patron account Jane18 Wagner

There are similar displays available to the patron under a Patron Group section of the Discovery Layer dashboard:



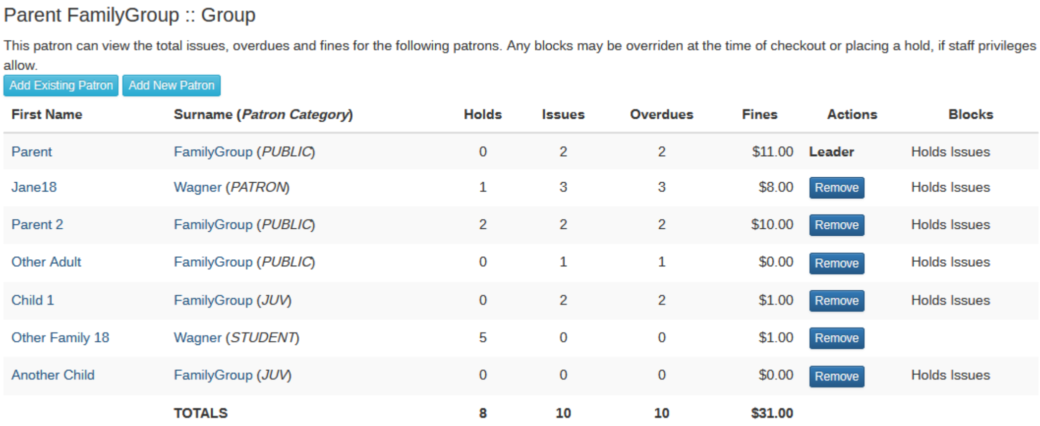
Patron Group

First Name	Surname	Holds	Issues	Overdues	Fines	Blocks
Parent	FamilyGroup	0	2	2	$11.00	Holds Issues
Jane18	Wagner	1	3	3	$8.00	Holds Issues
Parent 2	FamilyGroup	2	2	2	$10.00	Holds Issues
Other Adult	FamilyGroup	0	1	1	$0.00	Holds Issues
Child 1	FamilyGroup	0	2	2	$1.00	Holds Issues
Other Family 18	Wagner	5	0	0	$1.00	
Another Child	FamilyGroup	0	0	0	$0.00	Holds Issues
	TOTALS	8	10	10	$31.00	

The parent/guarantor account will show the totals and blocks for all members, as with the staff display. A child Discovery Layer login will only show the name of the parent account, as above in staff view.

5.8.2.3 Enforcing the Circulation Thresholds

As mentioned above in the configuration section, the thresholds are optional. If they are set, however, the parent account will see current circulation status and any blocks that are currently in effect:



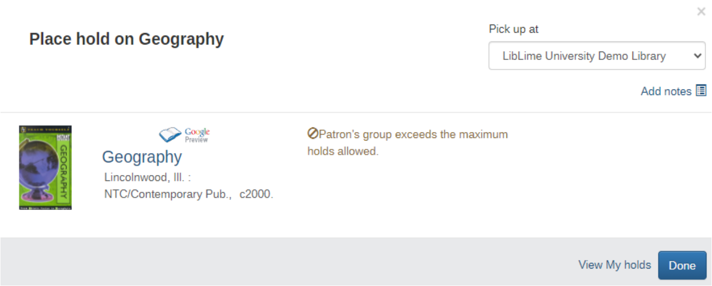
Parent FamilyGroup :: Group

This patron can view the total issues, overdues and fines for the following patrons. Any blocks may be overriden at the time of checkout or placing a hold, if staff privileges allow.

First Name	Surname (*Patron Category*)	Holds	Issues	Overdues	Fines	Actions	Blocks
Parent	FamilyGroup (*PUBLIC*)	0	2	2	$11.00	**Leader**	Holds Issues
Jane18	Wagner (*PATRON*)	1	3	3	$8.00	Remove	Holds Issues
Parent 2	FamilyGroup (*PUBLIC*)	2	2	2	$10.00	Remove	Holds Issues
Other Adult	FamilyGroup (*PUBLIC*)	0	1	1	$0.00	Remove	Holds Issues
Child 1	FamilyGroup (*JUV*)	0	2	2	$1.00	Remove	Holds Issues
Other Family 18	Wagner (*STUDENT*)	5	0	0	$1.00	Remove	
Another Child	FamilyGroup (*JUV*)	0	0	0	$0.00	Remove	Holds Issues
	TOTALS	**8**	**10**	**10**	**$31.00**		

The screen shows all members of the group (including the parent or guarantor account) and a total for each column. The Blocks column shows when any member of the group will be blocked from an action, and for what reason. In the above, both holds and checkouts ("issues") will be blocked for certain group members, based on the group totals and settings in the patron category policy.

When you try to place a hold, either as staff or as patron, it is blocked:



Place hold on Geography

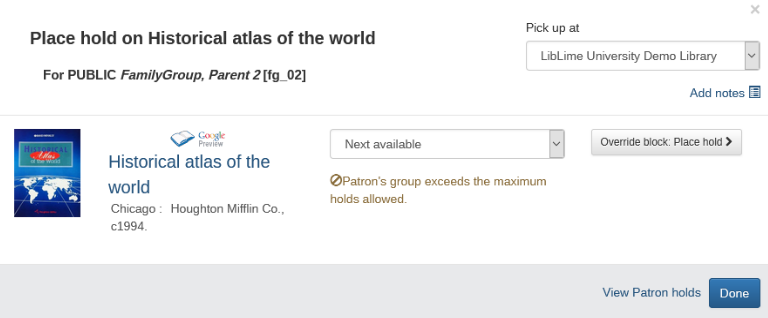
Pick up at: LibLime University Demo Library

Geography
Lincolnwood, Ill. :
NTC/Contemporary Pub., c2000.

⊘Patron's group exceeds the maximum holds allowed.

The blocks can be cleared by getting the various categories down to under the threshold levels: pay fines, check in some items, remove (or trigger/check out) some holds.

Depending on staff permissions, a staff user may be able to override a circulation or a hold block.



Place hold on Historical atlas of the world

For PUBLIC *FamilyGroup, Parent 2* [fg_02]

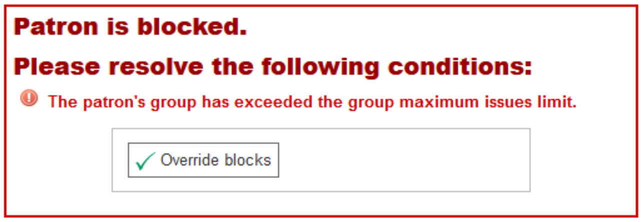
Pick up at: LibLime University Demo Library

Historical atlas of the world
Chicago : Houghton Mifflin Co., c1994.

Next available

Patron's group exceeds the maximum holds allowed.

NOTE: Overriding one condition will override all blocks. In the above example, where group members are blocked for both excess holds and checkouts, you may only see one override alert. However, clearing that block will clear all blocks.



Patron is blocked.

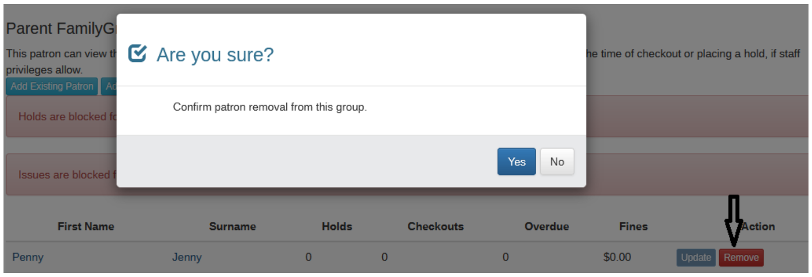
Please resolve the following conditions:

The patron's group has exceeded the group maximum issues limit.

Note that the presence of a block will not prevent either the patron or a staff member from renewing an existing checkout.

5.8.2.4 Removing, Relinking, or Deleting a Group Member

A patron can be removed from the group at any time, regardless of current circ status. This does not delete the patron record; it just removes it from this group. From the parent record, click the Remove button and confirm:

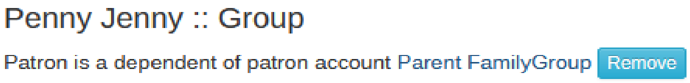


Are you sure?

Confirm patron removal from this group.

First Name	Surname	Holds	Checkouts	Overdue	Fines	Action
Penny	Jenny	0	0	0	$0.00	Update Remove

From a dependent record, on the Patron Group tab, click the Remove button and confirm.



Penny Jenny :: Group

Patron is a dependent of patron account Parent FamilyGroup

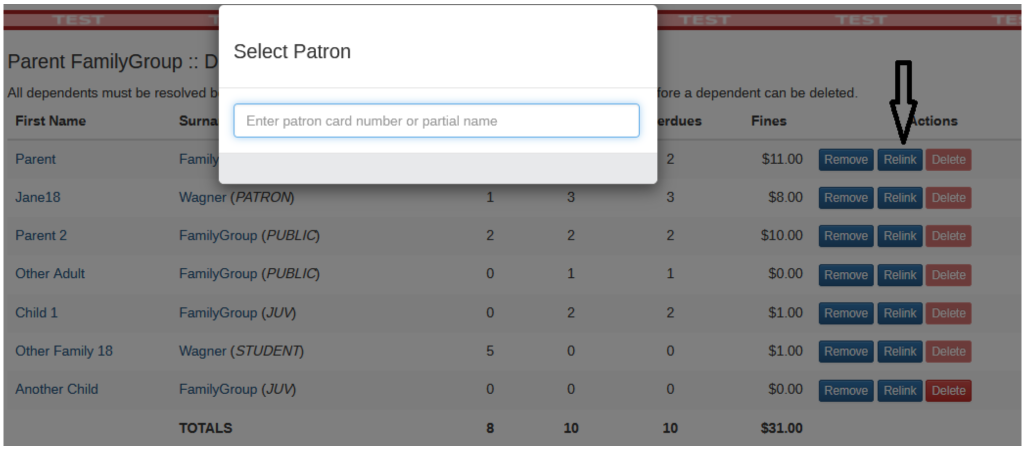
You will then see an option to link this patron to another family group.

Penny Jenny :: Group

Patron is no longer a dependent.

That display link will go away once you navigate away from this patron's record.

A group member can also be linked to another family from the parent's record. This is done from the parent's Delete screen. (Note that the delete option has been moved from one of the top dropdown menus to a separate sidebar tab.) Under the Patron Delete tab, use the Relink button to move a dependent to another parent record:



Parent FamilyGroup :: D

All dependents must be resolved b

Select Patron

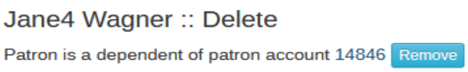
Enter patron card number or partial name

fore a dependent can be deleted.

First Name	Surna			erdues	Fines	Actions
Parent	Family			2	$11.00	Remove Relink Delete
Jane18	Wagner (*PATRON*)	1	3	3	$8.00	Remove Relink Delete
Parent 2	FamilyGroup (*PUBLIC*)	2	2	2	$10.00	Remove Relink Delete
Other Adult	FamilyGroup (*PUBLIC*)	0	1	1	$0.00	Remove Relink Delete
Child 1	FamilyGroup (*JUV*)	0	2	2	$1.00	Remove Relink Delete
Other Family 18	Wagner (*STUDENT*)	5	0	0	$1.00	Remove Relink Delete
Another Child	FamilyGroup (*JUV*)	0	0	0	$0.00	Remove Relink Delete
	TOTALS	**8**	**10**	**10**	**$31.00**	

That dependent is removed from this group and added to the group belonging to the new record.

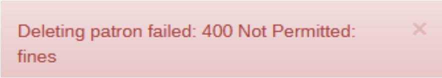
Actually deleting a patron record is a little more complicated. If the patron is a dependent member of a family group, it must be removed from the group first. As above, this can be done either from the parent record, or from the dependent record. The Patron Delete tab for the dependent record will show the link:



Jane4 Wagner :: Delete

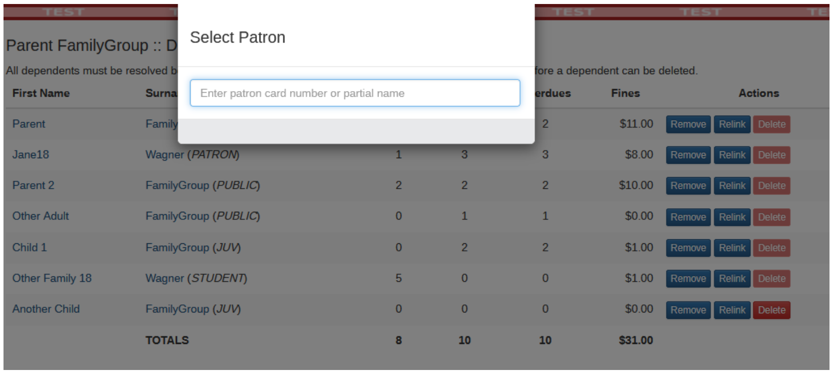
Patron is a dependent of patron account 14846

Remove the patron from the group. A red Delete button will then appear on this screen. However, if the patron has any outstanding checkouts, holds, or fines, you must clear those first. Attempting to delete will give a popup error otherwise:



Deleting patron failed: 400 Not Permitted: fines

If you want to delete the parent record itself, you must first clear all the dependent records. Remove or relink them from the family group (under the Delete tab).



Parent FamilyGroup :: D

All dependents must be resolved b fore a dependent can be deleted.

First Name	Surna			erdues	Fines	Actions
Parent	Family			2	$11.00	Remove Relink Delete
Jane18	Wagner (*PATRON*)	1	3	3	$8.00	Remove Relink Delete
Parent 2	FamilyGroup (*PUBLIC*)	2	2	2	$10.00	Remove Relink Delete
Other Adult	FamilyGroup (*PUBLIC*)	0	1	1	$0.00	Remove Relink Delete
Child 1	FamilyGroup (*JUV*)	0	2	2	$1.00	Remove Relink Delete
Other Family 18	Wagner (*STUDENT*)	5	0	0	$1.00	Remove Relink Delete
Another Child	FamilyGroup (*JUV*)	0	0	0	$0.00	Remove Relink Delete
	TOTALS	**8**	**10**	**10**	**$31.00**	

Then clear any problems (checkouts, holds, fines) from the parent record. After that, you will be able to delete this record.

5.8.2.5 SQL to List all Parent Records

This SQL report will list all parent/guarantor records with their dependent records:

```
select bb.borrowernumber parent, bb.surname parentsurname, bb.firstname
parentfirstname, bb.cardnumber parent, b.borrowernumber child,b.surname
childsurname,b.firstname childfirstnamne,b.cardnumber child from borrowers b join
borrowers bb on ( b.guarantorid is not null and b.guarantorid != "" and
b.guarantorid=bb.borrowernumber) order by bb.surname, bb.firstname
```

5.9 Updating Child to Adult Patron

The Child patron category includes a setting for upper age limit. This would be the age at which the juvenile would be considered an adult. There is presently no automatic way to promote patrons as they age into a new category. You can do so manually in the patron record. If you have entered the birthdate, and if the patron is now old enough to match the patron category setting, you can go into the patron Details screen. Click the More button, then select Update Child to Adult Patron.

John Smith (32929)

100 Main street
Your Town 00123
123-234-4567
No email stored.
Category: Juvenile (JUV)
Home Library: LibLime University Demo Library

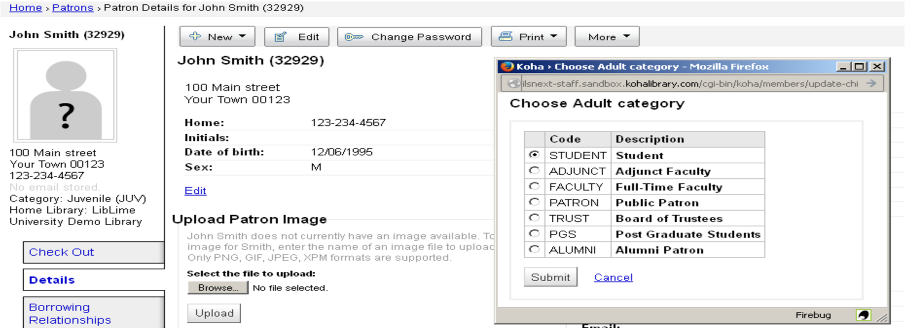
John Smith (32929)

100 Main street
Your Town 00123

Home: 123-234-4567
Initials:
Date of birth: 12/06/1995
Sex: M

Card number: 32929
Borrowernumber: 13759
Category: Juvenile (JUV)
Registration date: 08/27/2010
Expiration date: 12/06/2014
Library: LibLime University Demo Library
OPAC login: john.smith
OPAC password: *******

A popup window will show your Adult patron categories; select the appropriate one.



John Smith (32929)

100 Main street
Your Town 00123
123-234-4567
No email stored.
Category: Juvenile (JUV)
Home Library: LibLime University Demo Library

John Smith (32929)

100 Main street
Your Town 00123

Home: 123-234-4567
Initials:
Date of birth: 12/06/1995
Sex: M

Edit

Upload Patron Image

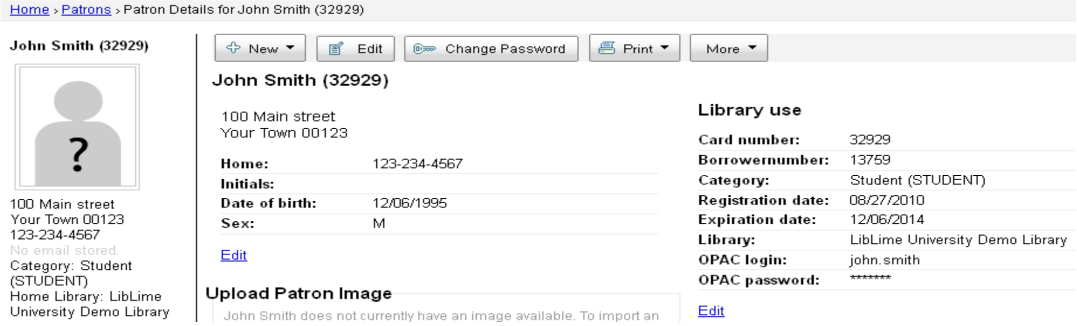
John Smith does not currently have an image available. To image for Smith, enter the name of an image file to upload Only PNG, GIF, JPEG, XPM formats are supported.

Select the file to upload:
No file selected.

Choose Adult category

	Code	Description
●	STUDENT	Student
○	ADJUNCT	Adjunct Faculty
○	FACULTY	Full-Time Faculty
○	PATRON	Public Patron
○	TRUST	Board of Trustees
○	PGS	Post Graduate Students
○	ALUMNI	Alumni Patron

When you click Submit, the patron record will be updated.



John Smith (32929)

100 Main street
Your Town 00123
123-234-4567
No email stored.
Category: Student (STUDENT)
Home Library: LibLime University Demo Library

John Smith (32929)

100 Main street
Your Town 00123

Home: 123-234-4567
Initials:
Date of birth: 12/06/1995
Sex: M

Edit

Upload Patron Image

John Smith does not currently have an image available. To import an

Library use

Card number: 32929
Borrowernumber: 13759
Category: Student (STUDENT)
Registration date: 08/27/2010
Expiration date: 12/06/2014
Library: LibLime University Demo Library
OPAC login: john.smith
OPAC password: *******

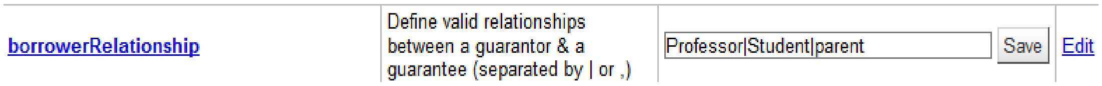
Edit

5.10 Proxy Borrowing

Proxy Borrowing allows one patron to check out items for another patron. Patrons may allow multiple other patrons to borrow on their behalf, and they may borrow on behalf of one or more other patrons.

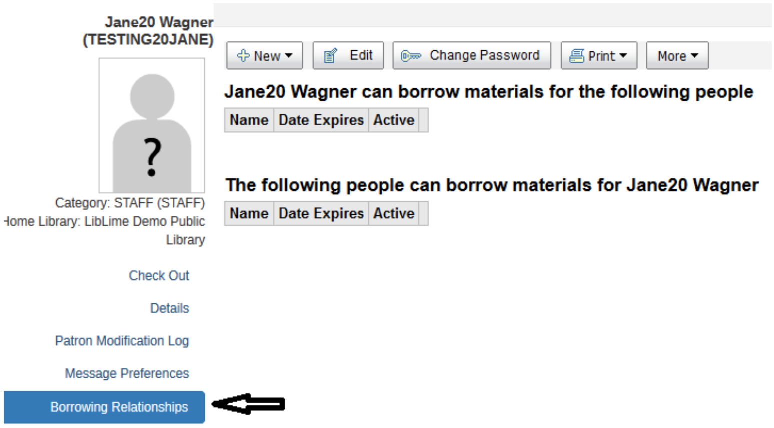
In this feature, the proxy patron (A) is borrowing on behalf of another patron (B). Patron (B) is responsible for the loan and is assessed any fines related to the item. The proxy patron (A) should deliver the materials to the responsible patron (B), not use the responsible patron's privileges to borrow materials for their **own** (A's) use.

The system preference **borrowerRelationship** (also used in family group relationships above) allows libraries to define different proxy relationships:



borrowerRelationship — Define valid relationships between a guarantor & a guarantee (separated by | or ,) — Professor|Student|parent

The Proxy relationship is set from Checkout or from editing the patron record on the **Borrowing Relationships** tab, and can be created from either the Main Patron or the Proxy:



Jane20 Wagner (TESTING20JANE)

Category: STAFF (STAFF)
ome Library: LibLime Demo Public Library

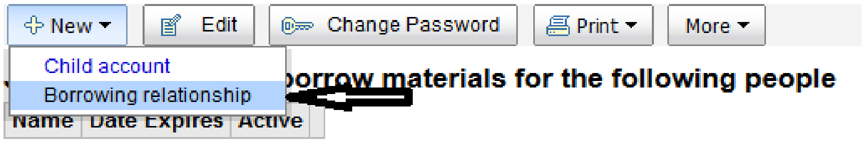
Jane20 Wagner can borrow materials for the following people

Name	Date Expires	Active

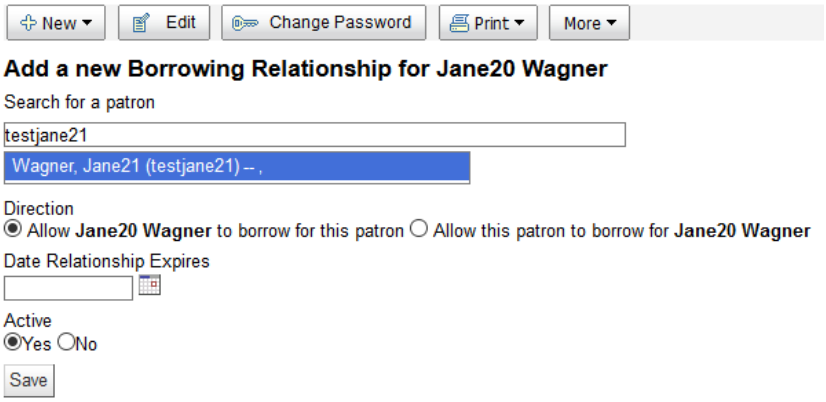
The following people can borrow materials for Jane20 Wagner

Name	Date Expires	Active

Under New, select Borrowing Relationship.



Enter a cardnumber or name for the other patron:



Add a new Borrowing Relationship for Jane20 Wagner

Search for a patron

testjane21

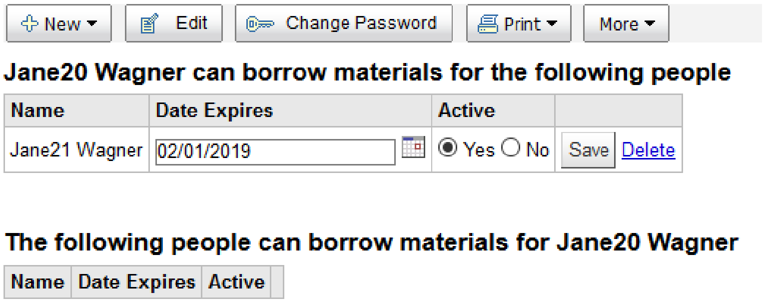
Wagner, Jane21 (testjane21) -- ,

Direction
● Allow **Jane20 Wagner** to borrow for this patron ○ Allow this patron to borrow for **Jane20 Wagner**

Date Relationship Expires

Active
●Yes ○No

Decide which direction the relationship should be (the patron you're editing can borrow for the target, or the target can borrow for this patron). Enter an expiration date – if you don't the relationship will expire today – and Save.



Jane20 Wagner can borrow materials for the following people

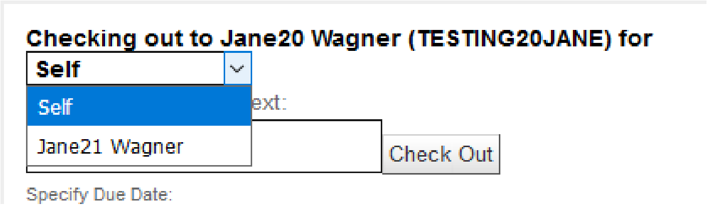
Name	Date Expires	Active	
Jane21 Wagner	02/01/2019	● Yes ○ No	Save Delete

The following people can borrow materials for Jane20 Wagner

Name	Date Expires	Active

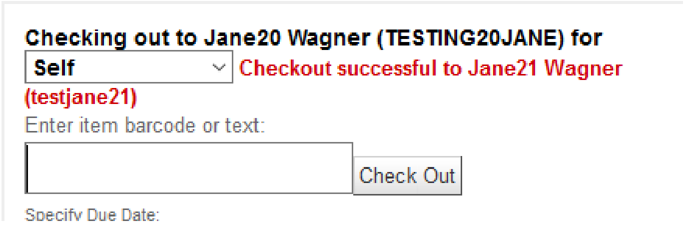
Borrowing relationships are also shown in the patron's Discovery Layer account.

In Circulation, the Proxy is clearly indicated:



Checking out to Jane20 Wagner (TESTING20JANE) for

And the screen shows the user name for whom the checkout was done:

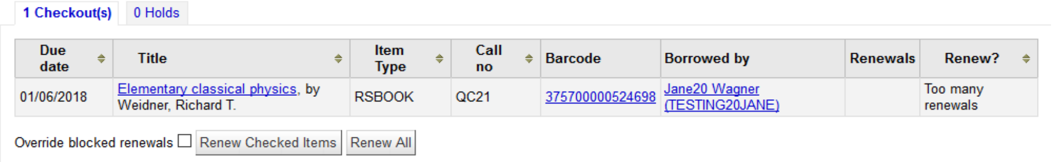


Checking out to Jane20 Wagner (TESTING20JANE) for

Self

Checkout successful to Jane21 Wagner (testjane21)

On the target patron's list of checkouts (Checkout tab), a column shows the proxy borrower's name:

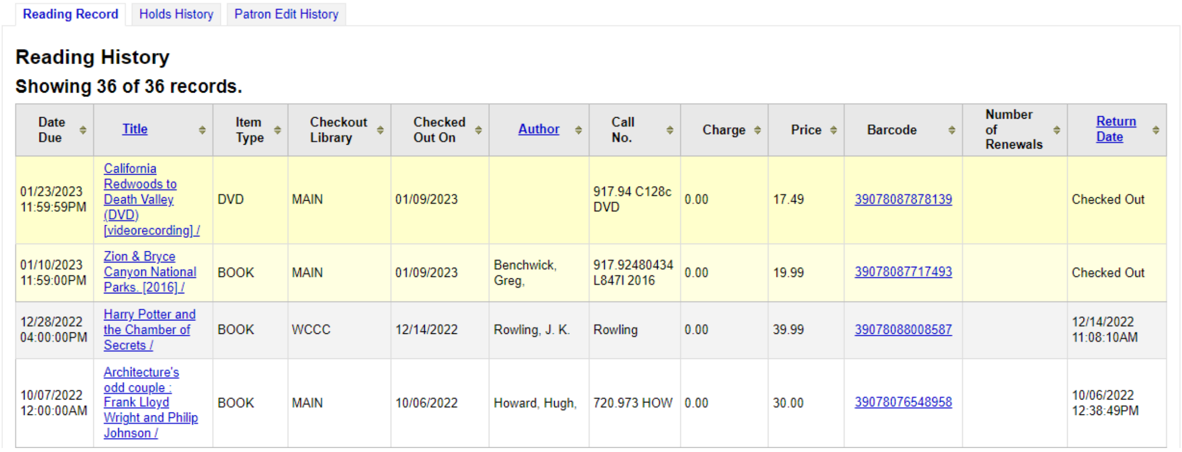


Due date	Title	Item Type	Call no	Barcode	Borrowed by	Renewals	Renew?
01/06/2018	Elementary classical physics, by Weidner, Richard T.	RSBOOK	QC21	375700000524698	Jane20 Wagner (TESTING20JANE)		Too many renewals

Patrons can set messaging options to be notified when a proxy borrower was added, deleted, or changed.

5.11 Patron History Tab

The previously-named Circulation History tab has been renamed to History, and it now contains several sub-tabs. The first tab is the circulation or Reading Record:



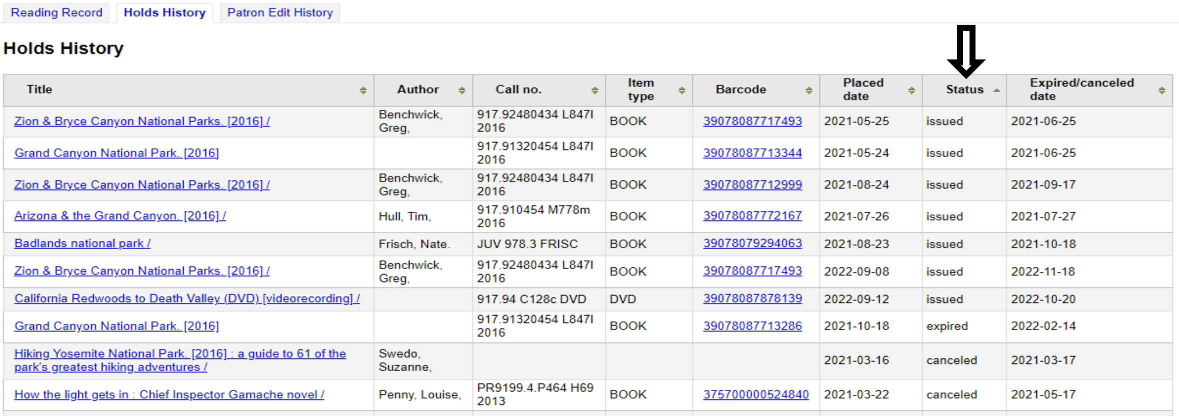
Reading History

Showing 36 of 36 records.

Date Due	Title	Item Type	Checkout Library	Checked Out On	Author	Call No.	Charge	Price	Barcode	Number of Renewals	Return Date
01/23/2023 11:59:59PM	California Redwoods to Death Valley (DVD) [videorecording] /	DVD	MAIN	01/09/2023		917.94 C128c DVD	0.00	17.49	39078087878139		Checked Out
01/10/2023 11:59:00PM	Zion & Bryce Canyon National Parks. [2016] /	BOOK	MAIN	01/09/2023	Benchwick, Greg,	917.92480434 L847I 2016	0.00	19.99	39078087717493		Checked Out
12/28/2022 04:00:00PM	Harry Potter and the Chamber of Secrets /	BOOK	WCCC	12/14/2022	Rowling, J. K.	Rowling	0.00	39.99	39078088008587		12/14/2022 11:08:10AM
10/07/2022 12:00:00AM	Architecture's odd couple : Frank Lloyd Wright and Philip Johnson /	BOOK	MAIN	10/06/2022	Howard, Hugh,	720.973 HOW	0.00	30.00	39078076548958		10/06/2022 12:38:49PM

Unless the data has been anonymized (see Superlibrarian Guide), this tab will show all current and previous checkouts, with datestamps and other information. By default the tab will show all currently issued items if there are 50 or more. If there are fewer than 50 current issues it will show all the current issues, plus however many past issues it takes to make 50 rows. Older issues can be seen by clicking the Show All button.

The Holds History tab shows information about all holds – current (including waiting holds), filled ("issued"), cancelled, and expired. Sort by the Status columns to see all holds of each status together.

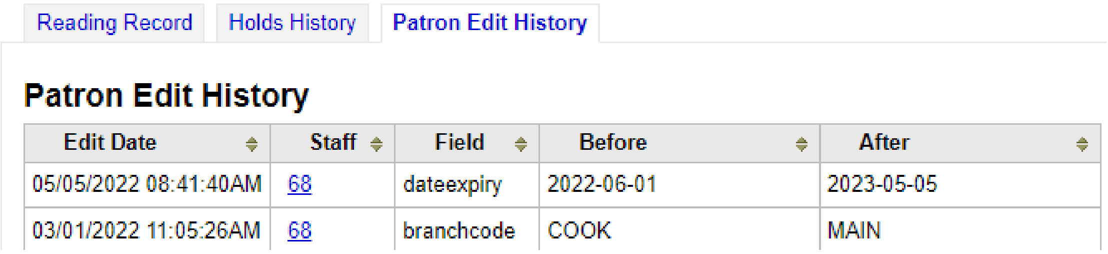


Holds History

Title	Author	Call no.	Item type	Barcode	Placed date	Status	Expired/canceled date
Zion & Bryce Canyon National Parks. [2016] /	Benchwick, Greg,	917.92480434 L847I 2016	BOOK	39078087717493	2021-05-25	issued	2021-06-25
Grand Canyon National Park. [2016]		917.91320454 L847I 2016	BOOK	39078087713344	2021-05-24	issued	2021-06-25
Zion & Bryce Canyon National Parks. [2016] /	Benchwick, Greg,	917.92480434 L847I 2016	BOOK	39078087712999	2021-08-24	issued	2021-09-17
Arizona & the Grand Canyon. [2016] /	Hull, Tim,	917.910454 M778m 2016	BOOK	39078087772167	2021-07-26	issued	2021-07-27
Badlands national park /	Frisch, Nate.	JUV 978.3 FRISC	BOOK	39078079294063	2021-08-23	issued	2021-10-18
Zion & Bryce Canyon National Parks. [2016] /	Benchwick, Greg,	917.92480434 L847I 2016	BOOK	39078087717493	2022-09-08	issued	2022-11-18
California Redwoods to Death Valley (DVD) [videorecording] /		917.94 C128c DVD	DVD	39078087878139	2022-09-12	issued	2022-10-20
Grand Canyon National Park. [2016]		917.91320454 L847I 2016	BOOK	39078087713286	2021-10-18	expired	2022-02-14
Hiking Yosemite National Park. [2016] : a guide to 61 of the park's greatest hiking adventures /	Swedo, Suzanne,				2021-03-16	canceled	2021-03-17
How the light gets in : Chief Inspector Gamache novel /	Penny, Louise,	PR9199.4.P464 H69 2013	BOOK	375700000524840	2021-03-22	canceled	2021-05-17

NOTE: The system preference ShowHoldsRange may be used to limit the date range of hold history visible here and in the patron's Discovery Layer view.

The Patron Edit History tab shows information log data about changes to this record.



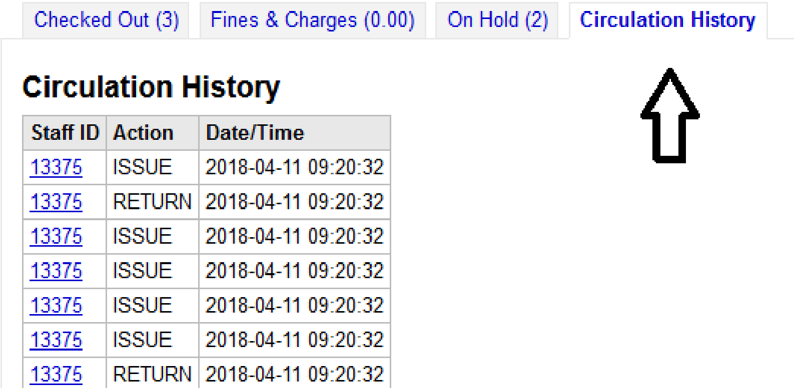
Patron Edit History

Edit Date	Staff	Field	Before	After
05/05/2022 08:41:40AM	68	dateexpiry	2022-06-01	2023-05-05
03/01/2022 11:05:26AM	68	branchcode	COOK	MAIN

There is an option to archive borrower notes, and (if visible) the Patron Block History tab will contain archived borrower notes, if available (primarily used by only one site). This tab and the Archive option are hidden by default but may be enabled with a CSS command; open a Support Center ticket if you need to use this option.

5.11.1 Circulation History

An additional history tab appears at the bottom of the patron details screen, next to the tabs for current checkouts and holds. This tab simply includes log entries for checkouts and checkins, as an additional way for staff to track and troubleshoot problems:



Circulation History

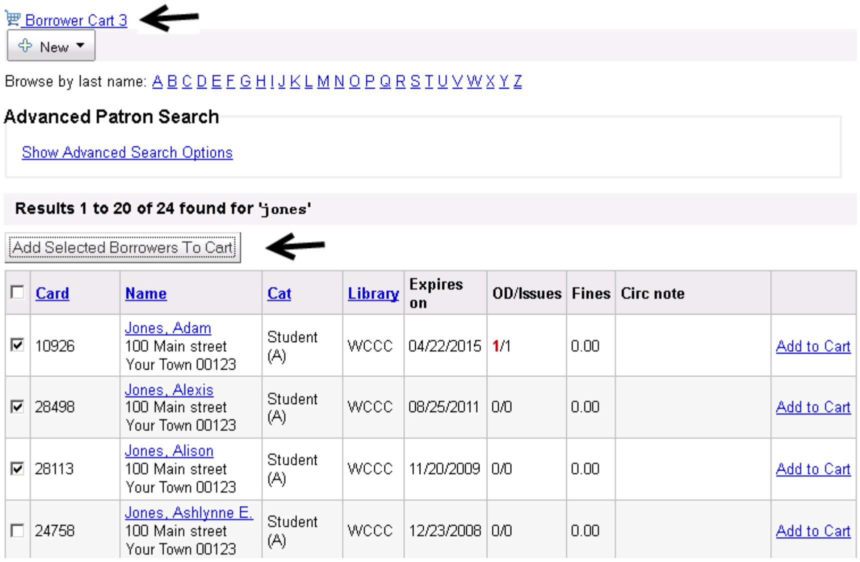
Staff ID	Action	Date/Time
13375	ISSUE	2018-04-11 09:20:32
13375	RETURN	2018-04-11 09:20:32
13375	ISSUE	2018-04-11 09:20:32
13375	ISSUE	2018-04-11 09:20:32
13375	ISSUE	2018-04-11 09:20:32
13375	ISSUE	2018-04-11 09:20:32
13375	RETURN	2018-04-11 09:20:32

The staff ID is a hyperlink to the record of the staff person who performed the transaction.

Note that if a patron has opted to anonymize borrowing data, no data will be available to this screen. Also note that historical data may not show because of a change in table structure when this feature was added.

5.12 Batch Edit/Delete Patrons

You can use the Borrower Cart to batch edit or delete patron records. You can also use the cart to add patrons to a list, for later action. The first step is to search for the records you want. Check them on the results list, then click the Add Selected Borrowers to Cart button. The borrower cart link will change to show how many records are in the cart.

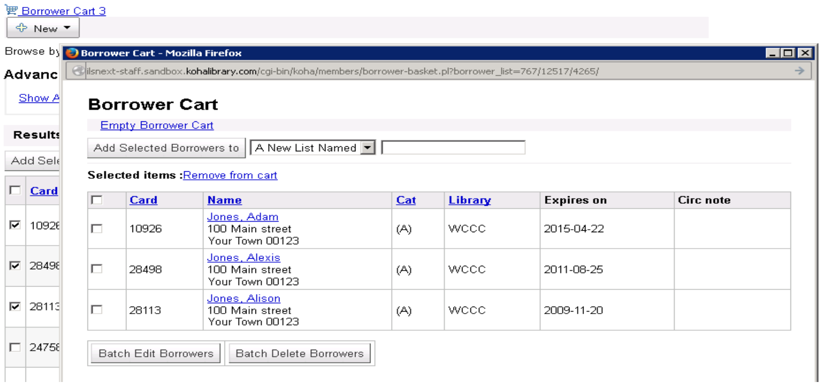


Advanced Patron Search

Results 1 to 20 of 24 found for 'jones'

☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☑	10926	Jones, Adam 100 Main street Your Town 00123	Student (A)	WCCC	04/22/2015	1/1	0.00		Add to Cart
☑	28498	Jones, Alexis 100 Main street Your Town 00123	Student (A)	WCCC	08/25/2011	0/0	0.00		Add to Cart
☑	28113	Jones, Alison 100 Main street Your Town 00123	Student (A)	WCCC	11/20/2009	0/0	0.00		Add to Cart
☐	24758	Jones, Ashlynne E. 100 Main street Your Town 00123	Student (A)	WCCC	12/23/2008	0/0	0.00		Add to Cart

You can do another search and add more records to the cart until you have everyone you need. Then open the cart by clicking on the Borrower Cart link. A popup window shows the contents of the cart.

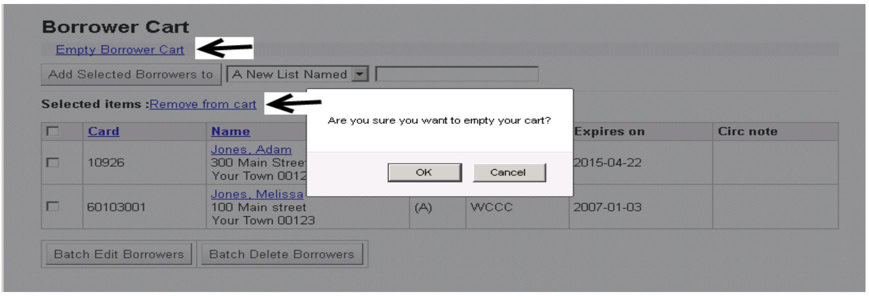


Borrower Cart

Selected items : Remove from cart

☐	Card	Name	Cat	Library	Expires on	Circ note
☐	10926	Jones, Adam 100 Main street Your Town 00123	(A)	WCCC	2015-04-22	
☐	28498	Jones, Alexis 100 Main street Your Town 00123	(A)	WCCC	2011-08-25	
☐	28113	Jones, Alison 100 Main street Your Town 00123	(A)	WCCC	2009-11-20	

If you have added records to the cart, and then decide you don’t want to do anything with them, you can either click the Empty Borrower Cart link, or check off individual records and click Remove from Cart. You’ll be asked to confirm your action.



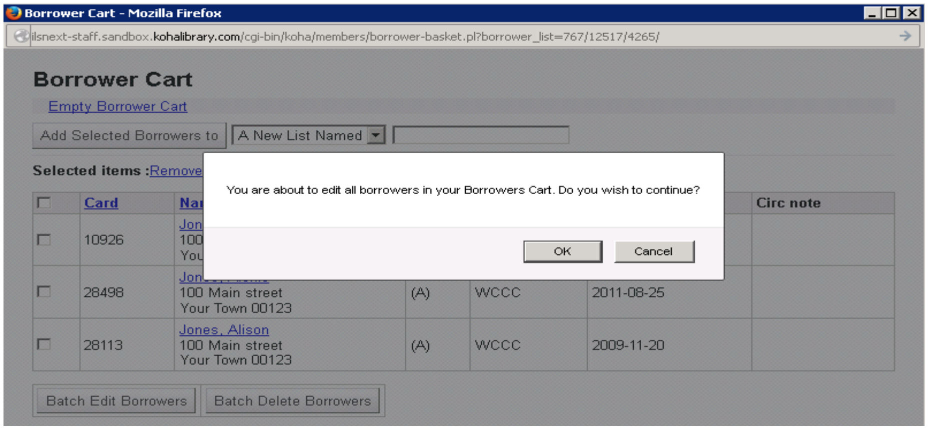
Borrower Cart

Are you sure you want to empty your cart?

☐	Card	Name			Expires on	Circ note
☐	10926	Jones, Adam 300 Main Stree Your Town 0012			2015-04-22	
☐	60103001	Jones, Melissa 100 Main street Your Town 00123	(A)	WCCC	2007-01-03	

5.12.1 Batch Edit

In the borrower cart, you can select individual records or select all. If you don't make any selections, the assumption is that you want to affect all records. At the bottom, you have buttons to batch edit or batch delete. If you click Batch Edit, you'll get a warning message:



Borrower Cart

Empty Borrower Cart

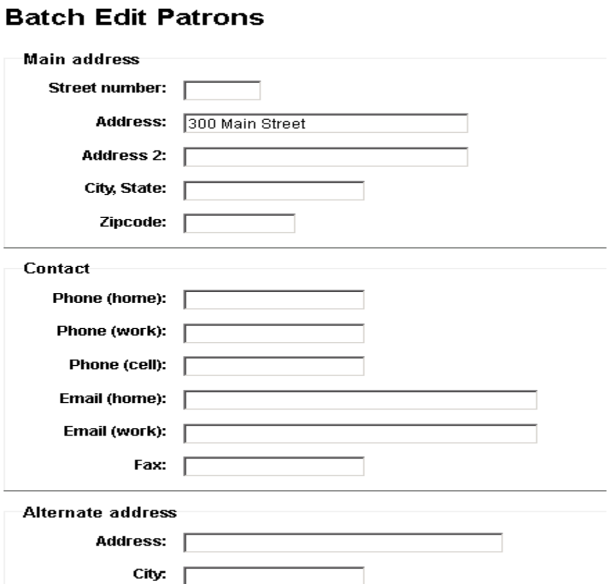
Add Selected Borrowers to | A New List Named

Selected items :Remove

You are about to edit all borrowers in your Borrowers Cart. Do you wish to continue?

☐	Card	Nar				Circ note
☐	10926	Jon 100 You				
☐	28498	Jon 100 Main street Your Town 00123	(A)	WCCC	2011-08-25	
☐	28113	Jones, Alison 100 Main street Your Town 00123	(A)	WCCC	2009-11-20	

To edit, click OK. That will bring up an edit screen that resembles the standard patron edit. Make whatever changes should be done to the group of records.


Batch Edit Patrons

Main address

Street number:

Address: 300 Main Street

Address 2:

City, State:

Zipcode:

Contact

Phone (home):

Phone (work):

Phone (cell):

Email (home):

Email (work):

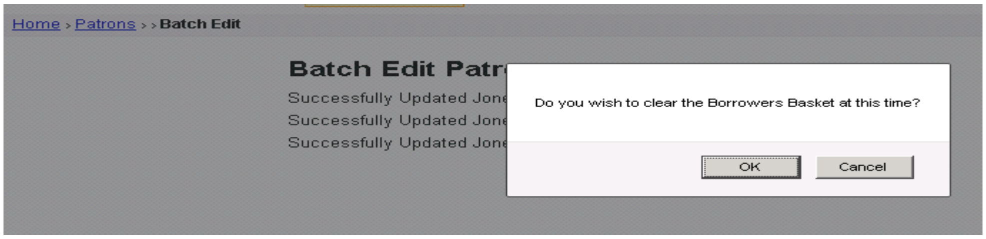
Fax:

Alternate address

Address:

City:

Leave the other fields blank. Then scroll to the bottom and click Save. The records will be edited, and you'll be asked if you want to empty the cart. It's recommended that you do clear it at this point.


Home › Patrons › › Batch Edit

Batch Edit Patr

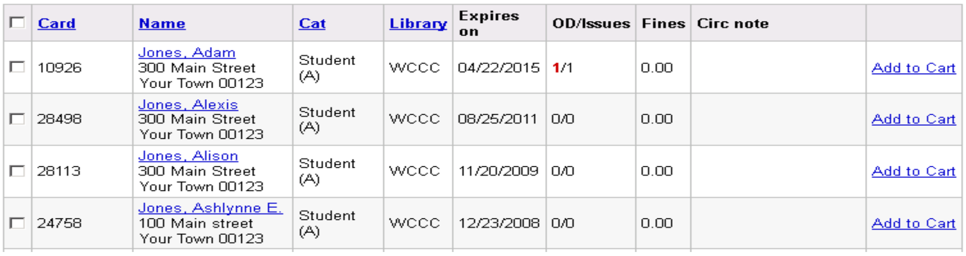
Successfully Updated Jone

Successfully Updated Jone

Successfully Updated Jone

Do you wish to clear the Borrowers Basket at this time?

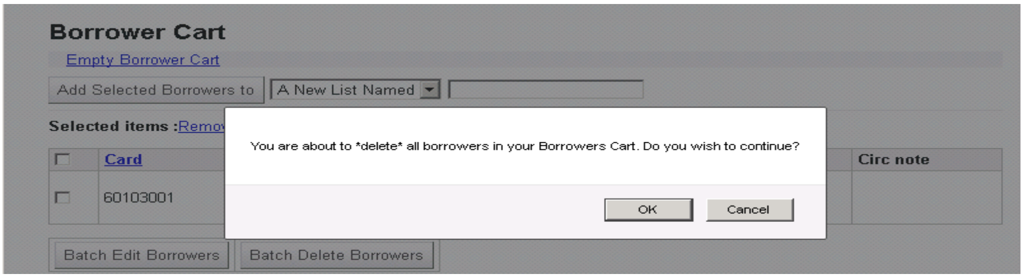
Look at the patron records, and you'll see that the change has been made.



☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	10926	Jones, Adam 300 Main Street Your Town 00123	Student (A)	WCCC	04/22/2015	1/1	0.00		Add to Cart
☐	28498	Jones, Alexis 300 Main Street Your Town 00123	Student (A)	WCCC	08/25/2011	0/0	0.00		Add to Cart
☐	28113	Jones, Alison 300 Main Street Your Town 00123	Student (A)	WCCC	11/20/2009	0/0	0.00		Add to Cart
☐	24758	Jones, Ashlynne E. 100 Main street Your Town 00123	Student (A)	WCCC	12/23/2008	0/0	0.00		Add to Cart

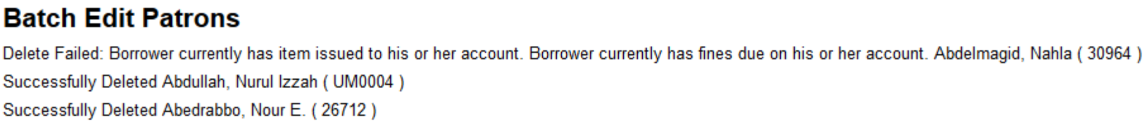
5.12.2 Batch Delete

Batch delete is a similar process. Add your patron records to the cart, then open the cart and click the Batch Delete button. You'll get a warning message.



You are about to *delete* all borrowers in your Borrowers Cart. Do you wish to continue?

If you are sure you want to delete these records, click OK. You'll get a results screen and a message asking if you want to clear your cart. If a delete fails for some reason (material checked out, owes money, etc.), the patron will not be deleted:



Batch Edit Patrons

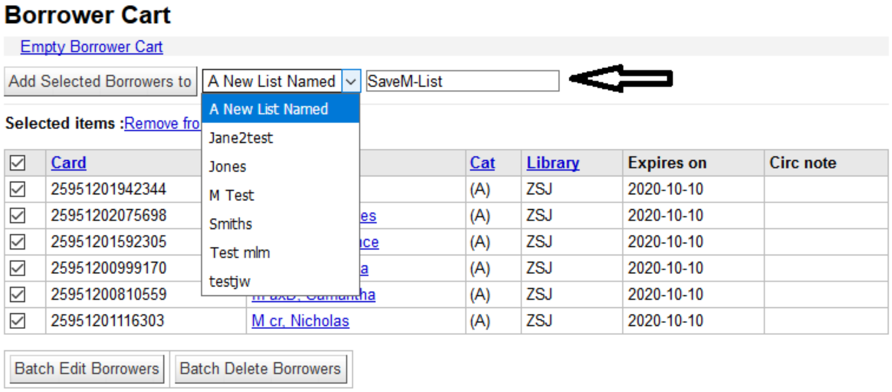
Delete Failed: Borrower currently has item issued to his or her account. Borrower currently has fines due on his or her account. Abdelmagid, Nahla (30964)

Successfully Deleted Abdullah, Nurul Izzah (UM0004)

Successfully Deleted Abedrabbo, Nour E. (26712)

5.12.3 Patron Lists

From the borrower cart (with the granular permission borrowers.lists) you can also add patrons to a list. Unlike the cart, a list lets you keep the selected patrons in a group, so you can use them for multiple actions. In the cart, select the patrons you want to keep, then at the top choose to add them to a new list or an existing list. Click the Add Selected Borrowers To button to add them to your list:

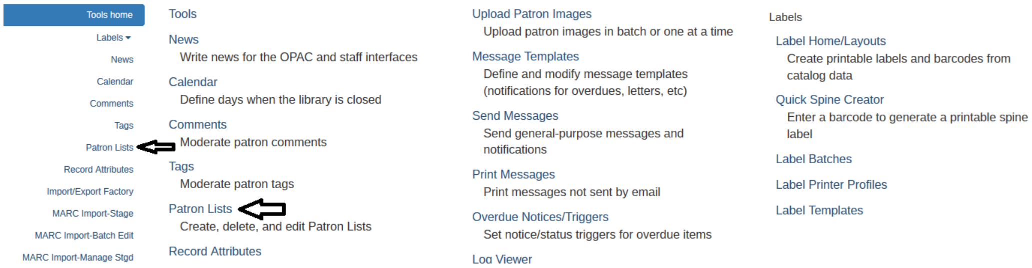


Borrower Cart

SaveM-List

☑	Card		Cat	Library	Expires on	Circ note
☑	25951201942344		(A)	ZSJ	2020-10-10	
☑	25951202075698	es	(A)	ZSJ	2020-10-10	
☑	25951201592305	ce	(A)	ZSJ	2020-10-10	
☑	25951200999170	a	(A)	ZSJ	2020-10-10	
☑	25951200810559	ha	(A)	ZSJ	2020-10-10	
☑	25951201116303	M cr, Nicholas	(A)	ZSJ	2020-10-10	

Then empty the borrower cart to clear it for future use. To use your list, go to Tools, Patron Lists.



Tools

News
Write news for the OPAC and staff interfaces

Calendar
Define days when the library is closed

Comments
Moderate patron comments

Tags
Moderate patron tags

Patron Lists
Create, delete, and edit Patron Lists

Record Attributes

Upload Patron Images
Upload patron images in batch or one at a time

Message Templates
Define and modify message templates (notifications for overdues, letters, etc)

Send Messages
Send general-purpose messages and notifications

Print Messages
Print messages not sent by email

Overdue Notices/Triggers
Set notice/status triggers for overdue items

Log Viewer

Labels

Label Home/Layouts
Create printable labels and barcodes from catalog data

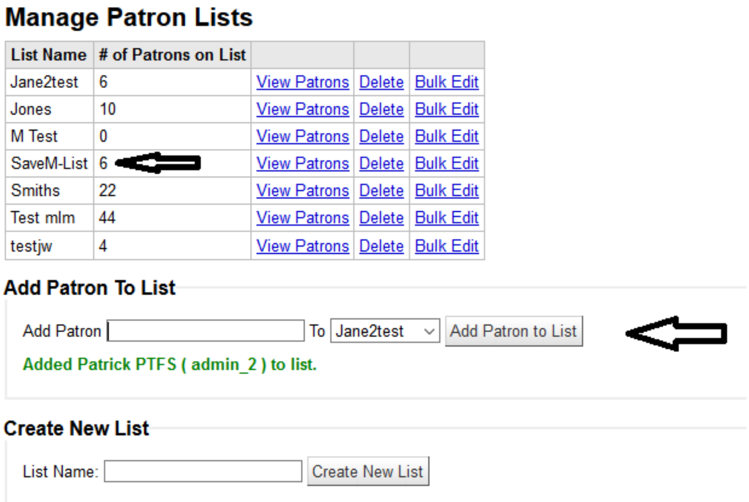
Quick Spine Creator
Enter a barcode to generate a printable spine label

Label Batches

Label Printer Profiles

Label Templates

You will see all the existing lists, including the one you just created. At the bottom you can enter cardnumbers to add patrons to an existing list, or you can create a new empty list for later use.



Manage Patron Lists

List Name	# of Patrons on List			
Jane2test	6	View Patrons	Delete	Bulk Edit
Jones	10	View Patrons	Delete	Bulk Edit
M Test	0	View Patrons	Delete	Bulk Edit
SaveM-List	6	View Patrons	Delete	Bulk Edit
Smiths	22	View Patrons	Delete	Bulk Edit
Test mlm	44	View Patrons	Delete	Bulk Edit
testjw	4	View Patrons	Delete	Bulk Edit

Add Patron To List

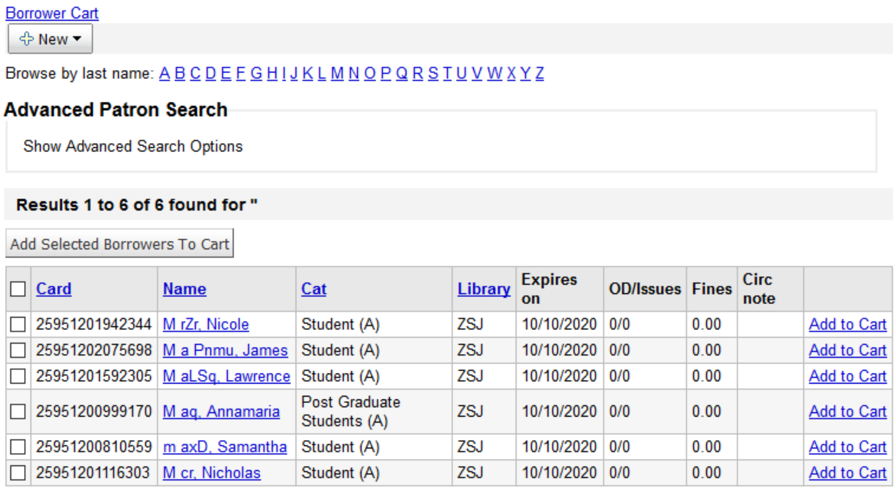
Add Patron To Jane2test

Added Patrick PTFS (admin_2) to list.

Create New List

List Name:

Click View Patrons and you’ll be taken to a patron search results screen, containing just those patrons. You can then add them to the borrowers cart if desired (for a batch delete).



Advanced Patron Search

Show Advanced Search Options

Results 1 to 6 of 6 found for "

☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	25951201942344	M rZr, Nicole	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951202075698	M a Pnmu, James	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951201592305	M aLSq, Lawrence	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951200999170	M aq, Annamaria	Post Graduate Students (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951200810559	m axD, Samantha	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart
☐	25951201116303	M cr, Nicholas	Student (A)	ZSJ	10/10/2020	0/0	0.00		Add to Cart

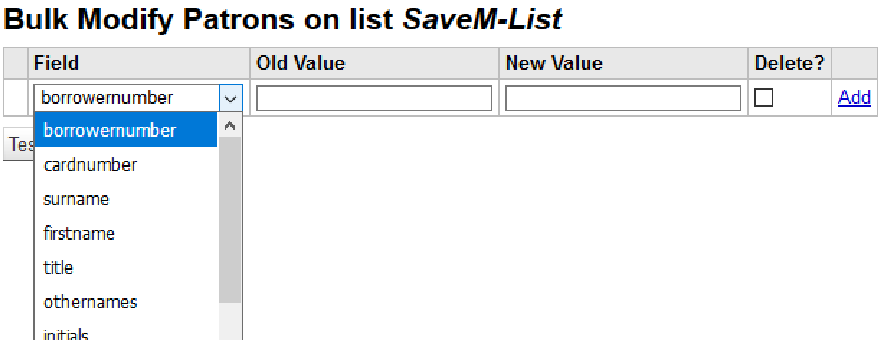
You cannot do a batch delete from the Patron Lists screen – the Delete link here will delete the list itself, not the patrons.

For an existing list, you can do a batch edit – click the Bulk Edit link next to your list:

Manage Patron Lists

List Name	# of Patrons on List			
Jane2test	6	View Patrons	Delete	Bulk Edit
Jones	10	View Patrons	Delete	Bulk Edit
M Test	0	View Patrons	Delete	Bulk Edit
SaveM-List	6	View Patrons	Delete	Bulk Edit
Smiths	22	View Patrons	Delete	Bulk Edit
Test mlm	44	View Patrons	Delete	Bulk Edit
testjw	4	View Patrons	Delete	Bulk Edit

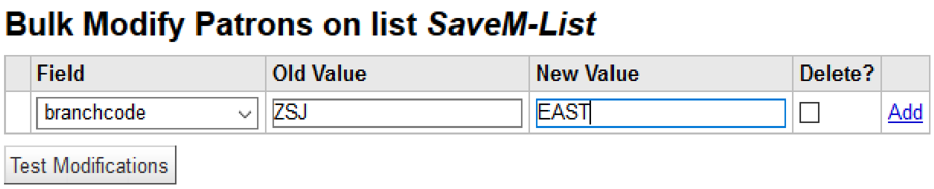
Unlike the batch edit from the cart, this opens a screen with a dropdown list of patron fields.



Bulk Modify Patrons on list *SaveM-List*

	Field	Old Value	New Value	Delete?	
	borrowernumber			☐	Add

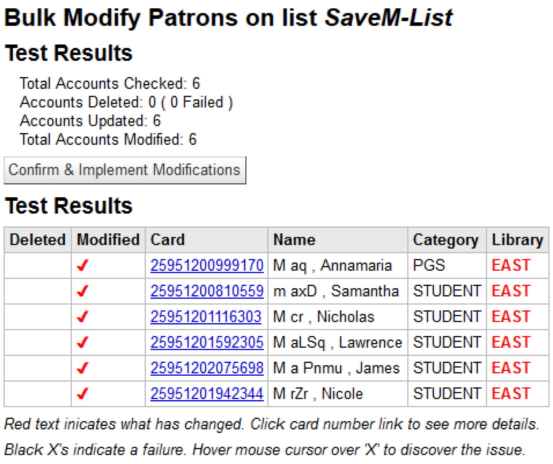
Pick a field and enter both the existing value and the new value. Note that this is more limited than batch editing through the borrower cart – you must match an existing field value. In this example, the patron’s branch will be changed.



Bulk Modify Patrons on list *SaveM-List*

	Field	Old Value	New Value	Delete?	
	branchcode	ZSJ	EAST	☐	Add

Click the Test Modifications button to test the validity of your change:



Bulk Modify Patrons on list *SaveM-List*

Test Results

Total Accounts Checked: 6
Accounts Deleted: 0 (0 Failed)
Accounts Updated: 6
Total Accounts Modified: 6

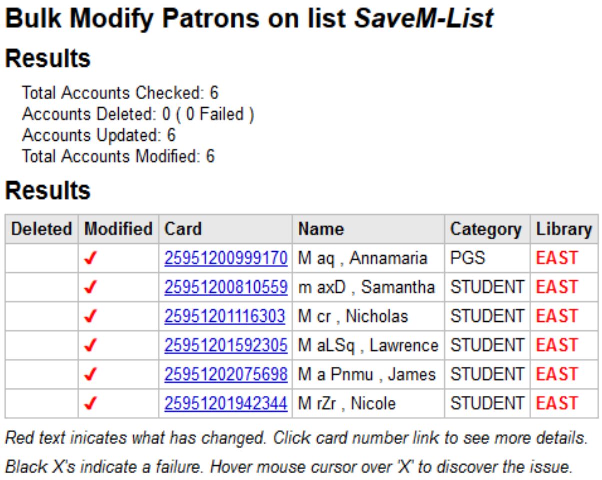
Test Results

Deleted	Modified	Card	Name	Category	Library
	✓	25951200999170	M aq , Annamaria	PGS	EAST
	✓	25951200810559	m axD , Samantha	STUDENT	EAST
	✓	25951201116303	M cr , Nicholas	STUDENT	EAST
	✓	25951201592305	M aLSq , Lawrence	STUDENT	EAST
	✓	25951202075698	M a Pnmu , James	STUDENT	EAST
	✓	25951201942344	M rZr , Nicole	STUDENT	EAST

Red text inicates what has changed. Click card number link to see more details.

Black X's indicate a failure. Hover mouse cursor over 'X' to discover the issue.

If the results are what you want, click the Confirm & Implement Modifications button. The records will be updated:



Bulk Modify Patrons on list *SaveM-List*

Results

Total Accounts Checked: 6
Accounts Deleted: 0 (0 Failed)
Accounts Updated: 6
Total Accounts Modified: 6

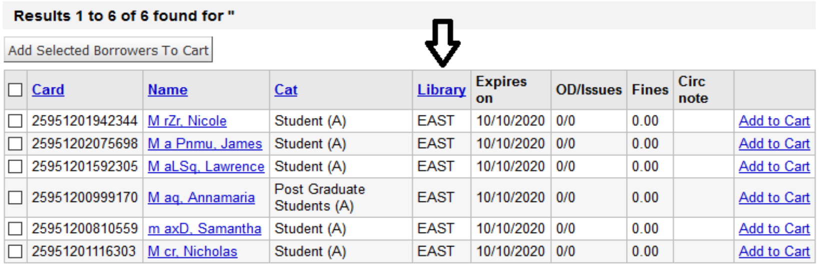
Results

Deleted	Modified	Card	Name	Category	Library
	✓	25951200999170	M aq , Annamaria	PGS	EAST
	✓	25951200810559	m axD , Samantha	STUDENT	EAST
	✓	25951201116303	M cr , Nicholas	STUDENT	EAST
	✓	25951201592305	M aLSq , Lawrence	STUDENT	EAST
	✓	25951202075698	M a Pnmu , James	STUDENT	EAST
	✓	25951201942344	M rZr , Nicole	STUDENT	EAST

Red text inicates what has changed. Click card number link to see more details.

Black X's indicate a failure. Hover mouse cursor over 'X' to discover the issue.

If you go back and view your list, you'll see the change:



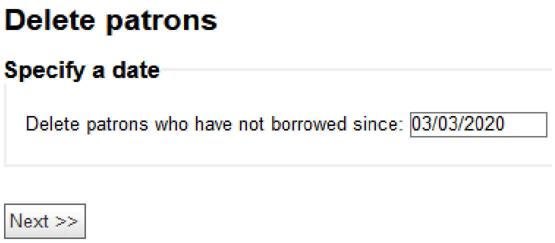
Results 1 to 6 of 6 found for "

☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	25951201942344	M rZr, Nicole	Student (A)	EAST	10/10/2020	0/0	0.00		Add to Cart
☐	25951202075698	M a Pnmu, James	Student (A)	EAST	10/10/2020	0/0	0.00		Add to Cart
☐	25951201592305	M aLSq, Lawrence	Student (A)	EAST	10/10/2020	0/0	0.00		Add to Cart
☐	25951200999170	M aq, Annamaria	Post Graduate Students (A)	EAST	10/10/2020	0/0	0.00		Add to Cart
☐	25951200810559	m axD, Samantha	Student (A)	EAST	10/10/2020	0/0	0.00		Add to Cart
☐	25951201116303	M cr, Nicholas	Student (A)	EAST	10/10/2020	0/0	0.00		Add to Cart

Since edits through this tool depend on matching an existing value, you will probably be better off using the list to define a group of patrons, then adding them to the borrower cart and doing your edits there.

5.12.4 Delete Patrons Tool

Another option for deleting patrons is the Delete Patron tool (on the Tools Menu). This option is very risky. It requires the tools.delete_anonymize_patrons permission, and is not recommended for regular use. The original purpose was to delete patrons who have not borrowed since a specific date. The only option is the date of last activity:

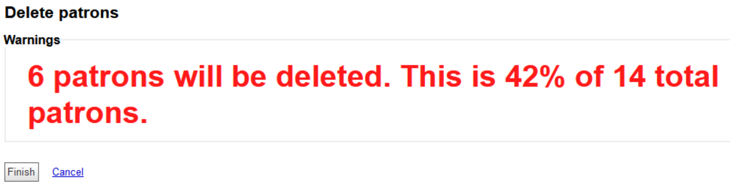


Delete patrons

Specify a date

Delete patrons who have not borrowed since: 03/03/2020

Enter the desired date and click Next. At that screen, you will see a warning about how many records will be removed, and the percentage of your total database. This example is from a very small test system, but the intent is to alert staff that some large percentage of records would be removed. Staff could then abort the process if it seemed wrong.

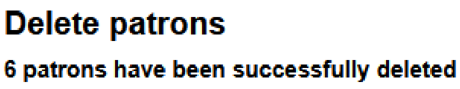


Delete patrons

Warnings

6 patrons will be deleted. This is 42% of 14 total patrons.

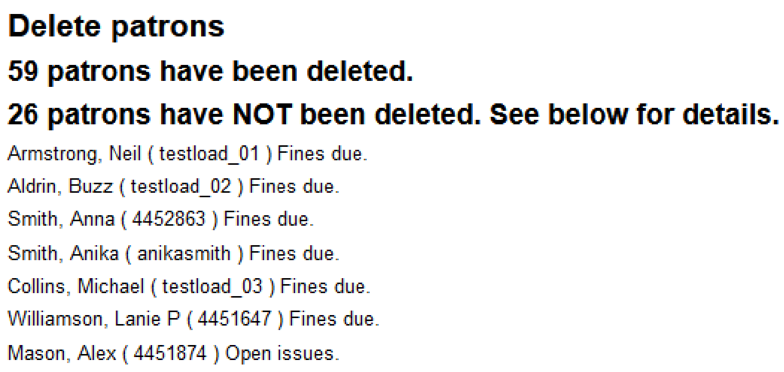
If you click the Finish button, the records will be deleted:



Delete patrons

6 patrons have been successfully deleted

This tool will not delete staff or Role records. It also performs the same checks for current checkouts, fines, etc. as the patron cart delete, and will not remove those records.



Delete patrons

59 patrons have been deleted.

26 patrons have NOT been deleted. See below for details.

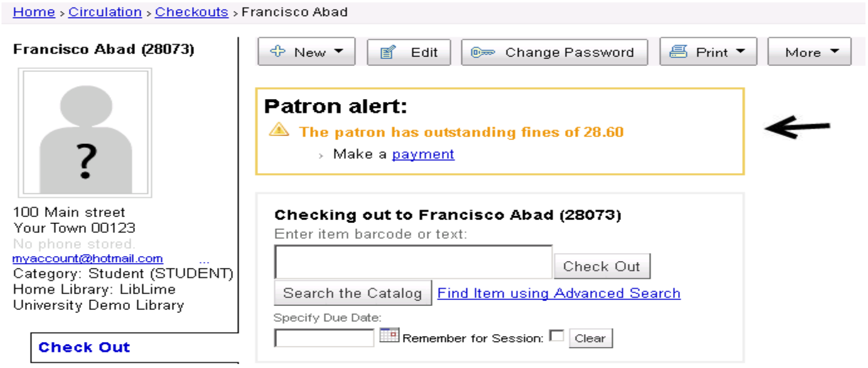
Armstrong, Neil (testload_01) Fines due.
Aldrin, Buzz (testload_02) Fines due.
Smith, Anna (4452863) Fines due.
Smith, Anika (anikasmith) Fines due.
Collins, Michael (testload_03) Fines due.
Williamson, Lanie P (4451647) Fines due.
Mason, Alex (4451874) Open issues.

5.13 Fines

Fines are assessed automatically and manually. Automatic fines are controlled by settings in the Circulation and Fines Policies, and by cron jobs that are run on the server. Manual fines are created by staff for special charges.

5.13.1 Paying Fines

Any charges owed will show on the Checkout tab, and (depending on system configuration) may block the user from checking out until the charges are paid.



Home › Circulation › Checkouts › Francisco Abad

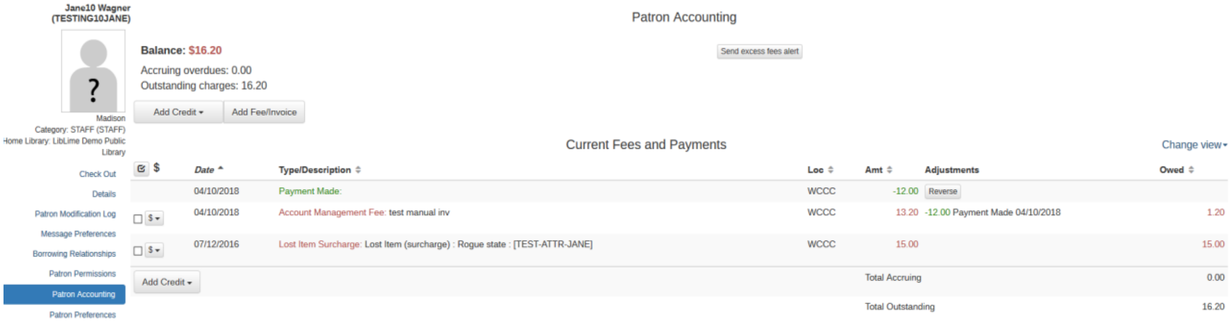
Francisco Abad (28073)

100 Main street
Your Town 00123
No phone stored
myaccount@hotmail.com
Category: Student (STUDENT)
Home Library: LibLime University Demo Library

Patron alert:
The patron has outstanding fines of 28.60
› Make a payment

Checking out to Francisco Abad (28073)
Enter item barcode or text:
Specify Due Date:
Remember for Session: ☐

To accept payment from a patron, click the make a payment link on the checkout screen, or the Patron Accounting tab at the left side of the screen. Both take you into the Accounting tab, to the current Account listing.

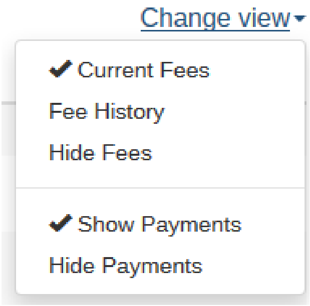


Balance: $16.20
Accruing overdues: 0.00
Outstanding charges: 16.20

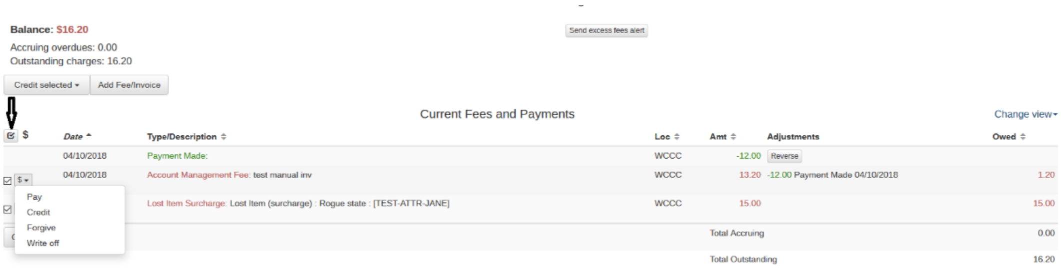
Current Fees and Payments

☑	$	Date	Type/Description	Loc	Amt	Adjustments	Owed
		04/10/2018	Payment Made:	WCCC	-12.00	Reverse	
☐	$	04/10/2018	Account Management Fee: test manual inv	WCCC	13.20	-12.00 Payment Made 04/10/2018	1.20
☐	$	07/12/2016	Lost Item Surcharge: Lost Item (surcharge) : Rogue state : [TEST-ATTR-JANE]	WCCC	15.00		15.00
					Total Accruing		0.00
					Total Outstanding		16.20

By default, this shows current charges and payments. Use the Change View dropdown at upper right to view old entries or hide payments:



Each fine will have an Action drop-down menu, where the staff can choose to Pay, Credit (write off), or Forgive the fine. You can take action on an individual fine. You can also click the top left button to select all (or check several if you don't want all), and apply the action to all/multiple at once.



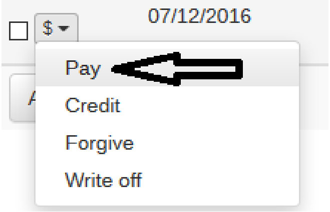
Balance: $16.20
Accruing overdues: 0.00
Outstanding charges: 16.20

Current Fees and Payments

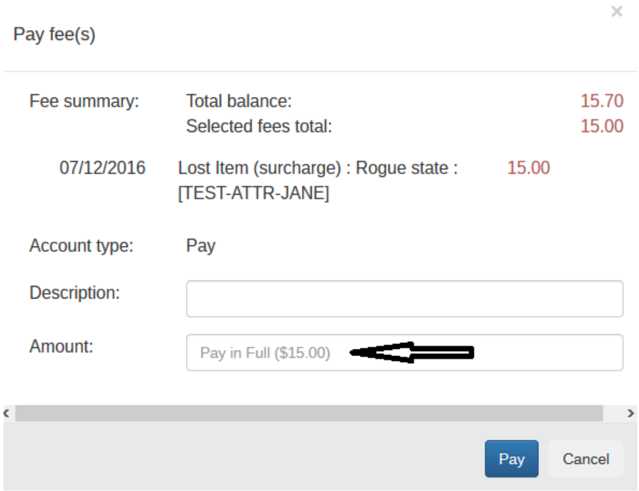
☑	$	Date	Type/Description	Loc	Amt	Adjustments	Owed
		04/10/2018	Payment Made:	WCCC	-12.00	Reverse	
☑	$	04/10/2018	Account Management Fee: test manual inv	WCCC	13.20	-12.00 Payment Made 04/10/2018	1.20
☑			Lost Item Surcharge: Lost Item (surcharge) : Rogue state : [TEST-ATTR-JANE]	WCCC	15.00		15.00
					Total Accruing		0.00
					Total Outstanding		16.20

Granular permissions control what staff members are permitted to do in dealing with fines. A staff person can be given just the fees.accept_payment permission, which will only allow full/partial payment. If the staff person has the fees.waive permission (or the top-level updatecharges) the full options for waiver or forgiveness are allowed.

To make a payment, click the pulldown next to a charge and select Pay.



That will open a popup window for payment. The default is to pay the total amount of this charge; if that's what you want to do, click the Pay button:


Pay fee(s)

Fee summary: Total balance: 15.70
Selected fees total: 15.00

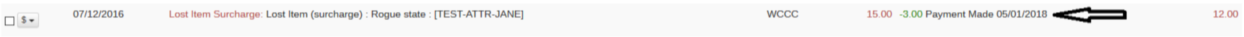
07/12/2016 Lost Item (surcharge) : Rogue state : [TEST-ATTR-JANE] 15.00

Account type: Pay

Description:

Amount: Pay in Full ($15.00)

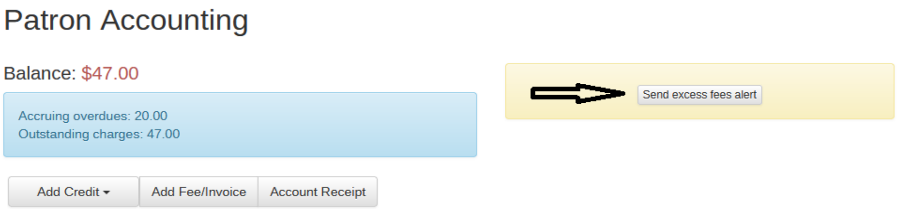
You have other options, however. Note that the top of this window shows the total amount owed; you could enter that amount to pay everything at once. You can enter a note in the Description field. You can also make a partial payment on this particular charge. To do that, type in the amount you want to pay and click the Pay button. This example shows a $3.00 payment against the total $15.00 owed:


☐ $ 07/12/2016 Lost Item Surcharge: Lost Item (surcharge) : Rogue state : [TEST-ATTR-JANE] WCCC 15.00 -3.00 Payment Made 05/01/2018 12.00

If you select multiple fines and do a partial payment, the total amount you enter will be divided among the selected fines.

5.13.1.1 Manual Fines Alert

At this screen, you also have the option to send an alert to the patron. If you click the Send Excess Fees Alert button at the top, the screen will ask you to confirm.


Patron Accounting

Balance: $47.00

Accruing overdues: 20.00
Outstanding charges: 47.00

Then the system will generate an email notice to the patron. The default text is something like this:

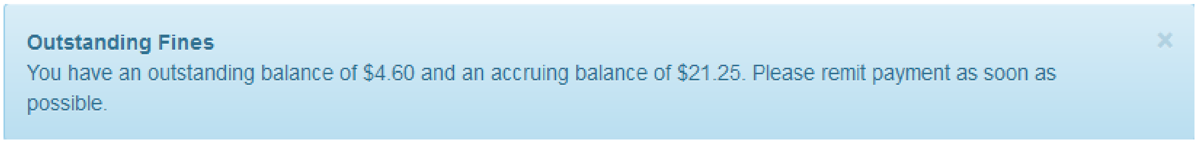
> According to our records, you have an outstanding balance of $36.00 and an accruing balance of $60.00. Please remit payment soon as possible to avoid loss of borrowing privileges.

> Summary of outstanding fines and fees: 06/14/2011 Overdue: MICROPHONE 10.00 04/08/2010 Overdue: Becoming human 26.00 Total due:$36.00

If you have permission, you can alter the text under Tools, Messaging Templates – edit the TOTAL_OWED template.

Note that the message distinguishes between accruing and outstanding balances. The alert can also be run as a cron job, with a triggering balance based on the “Outstanding fines messaging threshold” setting in the patron category policy.

The output can also be a popup message:



Outstanding Fines

You have an outstanding balance of $4.60 and an accruing balance of $21.25. Please remit payment as soon as possible.

The Fines screen then shows that a message has been sent:

Patron Accounting

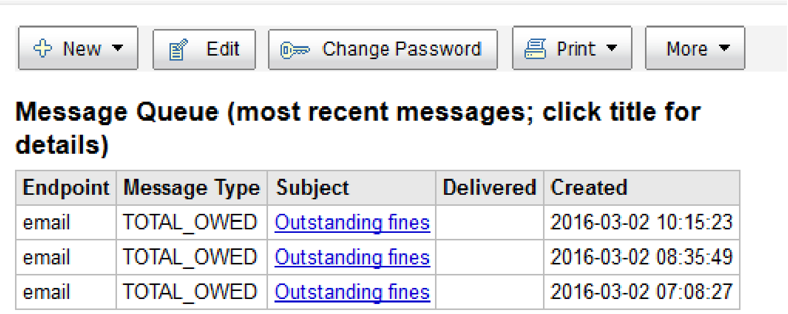
Balance: $16.20

Accruing overdues: 0.00

Outstanding charges: 16.20

⚠ Excess fees alert sent 05/01/2018

A manually-run alert will show in the patron’s Messaging tab (but a cron-generated one won’t):

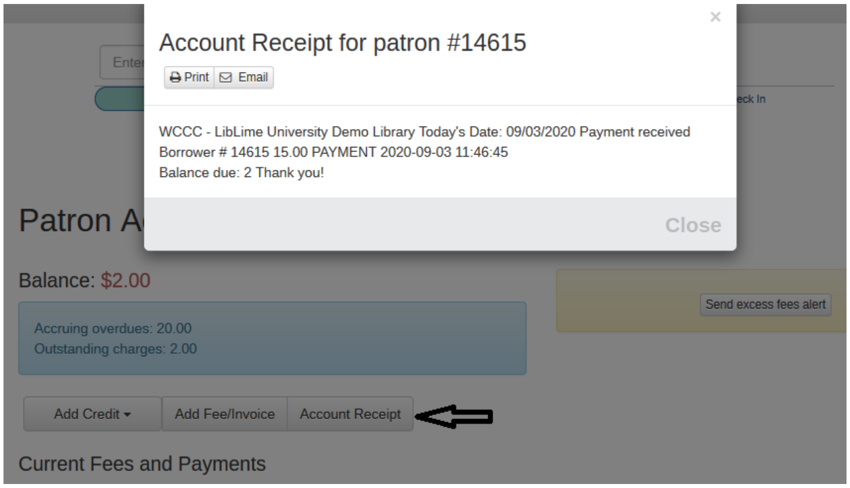


Message Queue (most recent messages; click title for details)

Endpoint	Message Type	Subject	Delivered	Created
email	TOTAL_OWED	Outstanding fines		2016-03-02 10:15:23
email	TOTAL_OWED	Outstanding fines		2016-03-02 08:35:49
email	TOTAL_OWED	Outstanding fines		2016-03-02 07:08:27

5.13.1.2 Account Receipt

You can print or email an account receipt or slip that will show the current day’s payments. (Previous versions’ account slip showed all fines data.) Click the Account Receipt button and a popup will allow you to select which:



Account Receipt for patron #14615

WCCC - LibLime University Demo Library Today's Date: 09/03/2020 Payment received
Borrower # 14615 15.00 PAYMENT 2020-09-03 11:46:45
Balance due: 2 Thank you!

Balance: $2.00

Accruing overdues: 20.00
Outstanding charges: 2.00

5.13.2 Estimated Fines

Patrons with items that are currently overdue and accruing charges will show an estimated fine for those items:

☑ $	Date	Type/Description	Loc	Amt	Adjustments	Owed
	05/01/2018	Accruing Overdue: *Titillating Fast Add* (Due 06/02/2016) dogs	EAST	174.50		174.50
	04/07/2018	Accruing Overdue: *State of fear* : (Due 05/30/2016) TESTJANE177	WCCC	10.00		10.00
☐ $	12/29/2017	Overdue Fine: Overdue: Lure the tiger out of the mountains : the thirty-six stratagems of ancient China / *Lure the tiger out of the mountains : the thirty-six stratagems of ancient China* / 37570000523505	WCCC	10.00		10.00
	04/24/2017	Payment Made: Payment Made	WCCC	-9.00	Reverse	
	04/24/2017	Payment Made: Payment Made	WCCC	-10.00	Reverse	

Those fines cannot be paid until the item is returned. At that point, the system will calculate the full overdue charge, and the patron can then make a payment. The maximum overdue fine to be charged can be set in the circulation policy, if desired.

NOTE: If the syspref ExcludeAccruingInTotal is on, accruing fees will be included in the total displayed on the Accounting tab in the patron record. Those fees will also be included in the total for debt collect, fines notices, and any hold or checkout thresholds set on the system. Most sites will want to leave this syspref off.

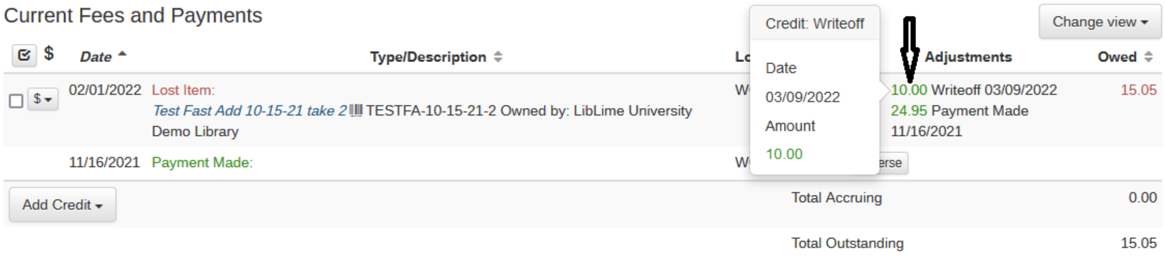
5.13.3 Waiving or Forgiving Fines

Library staff may choose to credit (waive) or forgive certain charges for various reasons. The difference is strictly an accounting one; there is no practical difference in how the system handles these. To either credit or forgive, choose that option from the pull-down next to a charge, and click the Update Fines button.

Current Fees and Payments

☑ $	Date	Type/Description	Loc	Amt	Adjustments	Owed
	05/01/2018	Accruing Overdue: *Titillating Fast Add* (Due 06/02/2016) dogs	EAST	174.50		174.50
	04/07/2018	Accruing Overdue: *State of fear :* (Due 05/30/2016) TESTJANE177	WCCC	10.00		10.00
☐ $	12/29/2017	Overdue Fine: Overdue: Lure the tiger out of the mountains : the thirty-six stratagems of ancient China / *Lure the tiger out of the mountains : the thirty-six stratagems of ancient China* / 37570000523505	WCCC	10.00		10.00
		Payment Made: Payment Made	WCCC	-9.00	Reverse	
		Payment Made: Payment Made	WCCC	-10.00	Reverse	
		Payment Made: Payment Made	WCCC	-8.70	Reverse	

The charges will be removed from the current accounts list after a day or two. Under Account History, the action is shown. If the staff user entered a note for a writeoff or forgiven fine, those notes can be viewed as well. Notes and details about any entry can be see by clicking on the amount:



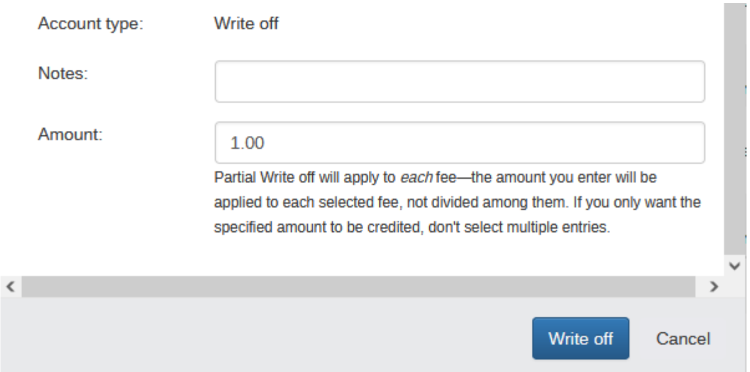
Current Fees and Payments

Credit: Writeoff
Date
03/09/2022
Amount
10.00

☑ $	Date	Type/Description	Lo	Adjustments	Owed
☐ $	02/01/2022	Lost Item: *Test Fast Add 10-15-21 take 2* TESTFA-10-15-21-2 Owned by: LibLime University Demo Library	W	10.00 Writeoff 03/09/2022 24.95 Payment Made 11/16/2021	15.05
	11/16/2021	Payment Made:	W	erse	

Total Accruing	0.00
Total Outstanding	15.05

NOTE: Unlike partial payments, if multiple fines are selected, the amount entered to write off will be applied to EACH selected fine. For example, if you select three fines of $15 each, and enter an amount of $15 in the writeoff popup, all three fines will have $15 applied. To only write off a total of $15, you would need to enter $5 in the popup. That would apply $5 to each fine, for a total of $15. If multiple fines are selected, a note in the popup clarifies this:



Account type: Write off

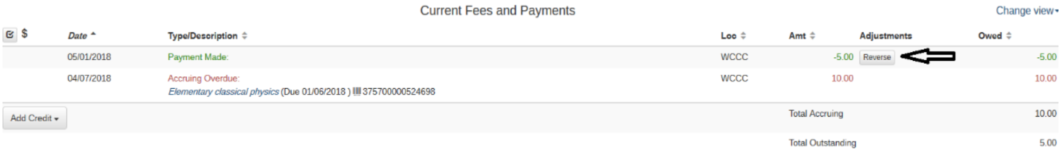
Notes:

Amount: 1.00

Partial Write off will apply to *each* fee—the amount you enter will be applied to each selected fee, not divided among them. If you only want the specified amount to be credited, don't select multiple entries.

5.13.4 Refund/Reverse Payment

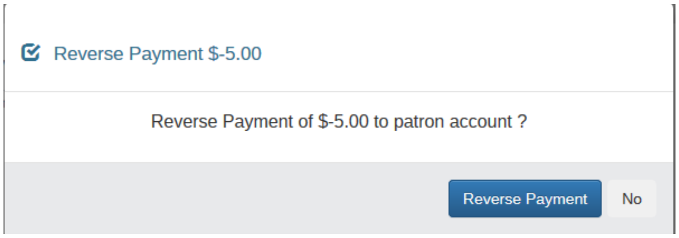
Sites may occasionally need to refund money or reverse a payment. On the Patron Accounting tab, payments which can be reversed will have a Reverse button



Current Fees and Payments

$	Date	Type/Description	Loc	Amt	Adjustments	Owed
	05/01/2018	Payment Made:	WCCC	-5.00	Reverse	-5.00
	04/07/2018	Accruing Overdue: *Elementary classical physics* (Due 01/06/2018) 375700000524698	WCCC	10.00		10.00
				Total Accruing		10.00
				Total Outstanding		5.00

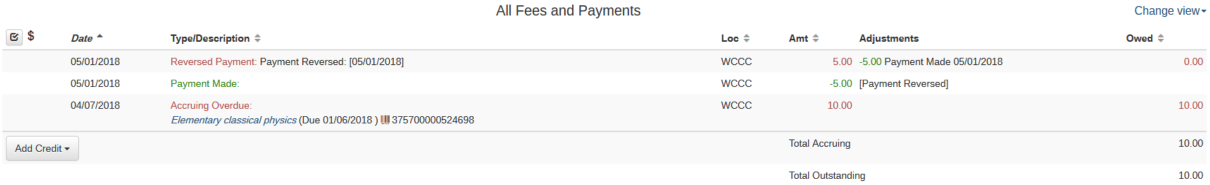
Click that and you will get a popup to confirm:



Reverse Payment $-5.00

Reverse Payment of $-5.00 to patron account ?

If you click Reverse Payment, the payment shows as reversed:

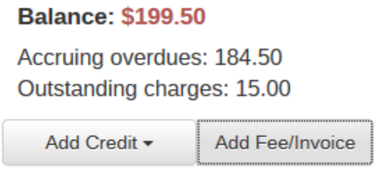


All Fees and Payments

$	Date	Type/Description	Loc	Amt	Adjustments	Owed
	05/01/2018	Reversed Payment: Payment Reversed: [05/01/2018]	WCCC	5.00	-5.00 Payment Made 05/01/2018	0.00
	05/01/2018	Payment Made:	WCCC	-5.00	[Payment Reversed]	
	04/07/2018	Accruing Overdue: *Elementary classical physics* (Due 01/06/2018) 375700000524698	WCCC	10.00		10.00
				Total Accruing		10.00
				Total Outstanding		10.00

5.13.5 Manual Charges

Manual invoices are intended for special charges, which are not part of standard overdue or lost handling. Several types of manual invoices are available, as well as a "Sundry" value for miscellaneous charges. Libraries can create their own fee types under Administration, Invoice Account Types (see Superlibrarian Guide). To create a manual charge, click the Add Fee/Invoice button at the top:

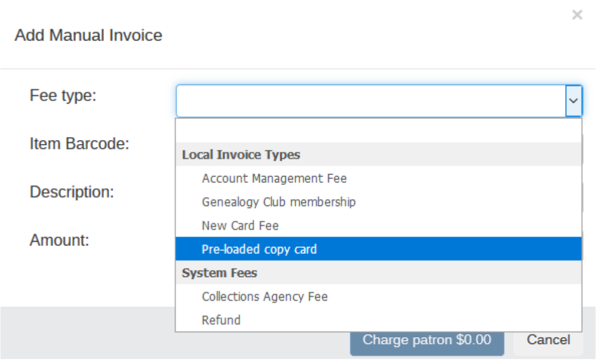


Balance: $199.50

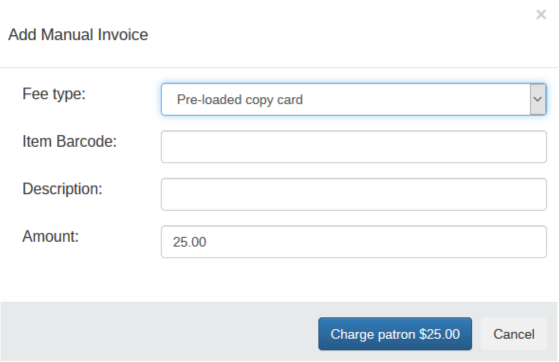
Accruing overdues: 184.50

Outstanding charges: 15.00

In the popup window, use the pulldown to select a fee type. Those under Local Invoice Types are site-created account types. System Fees are native to the system.

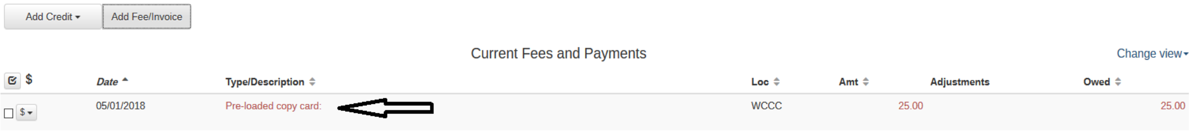


Your choice may or may not have a pre-defined value. If it does, the value will appear in the Amount field. If it doesn't, enter the amount you want to charge. You can enter a descriptive note, or link the fee to a particular item barcode if needed.



Fee type: Pre-loaded copy card
Item Barcode:
Description:
Amount: 25.00

Click the Charge Patron button to record the fee. It then shows on the current list of charges.

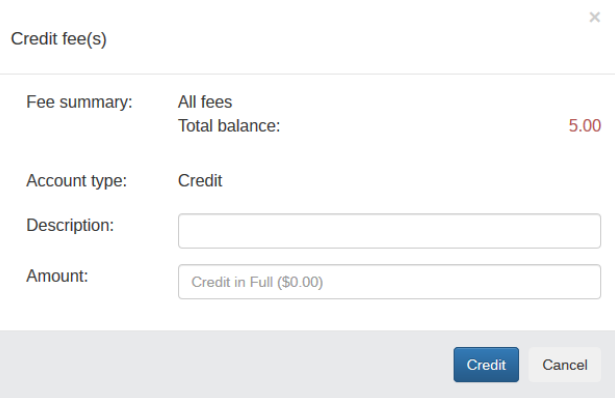


Current Fees and Payments

☑ $	Date	Type/Description	Loc	Amt	Adjustments	Owed
☐ $ ▾	05/01/2018	Pre-loaded copy card:	WCCC	25.00		25.00

5.13.6 Paying Accruing Fines and Adding Credits

Staff are normally prevented from accepting payment for fines that are still accruing (the item is still checked out and overdue). However, there is a way to do it. Click the Add Credit button at the bottom of the list of charges and select Credit. On the popup window, enter an amount into that field.



Credit fee(s)

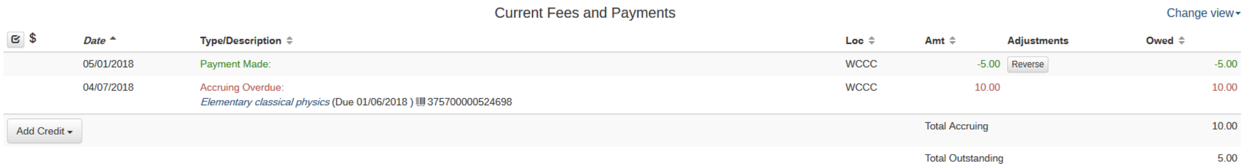
Fee summary: All fees
Total balance: 5.00

Account type: Credit

Description:

Amount: Credit in Full ($0.00)

Entering a $5.00 payment on this popup creates a $5.00 credit on the account. If there are no other outstanding charges, the credit will be applied when the item is checked in.



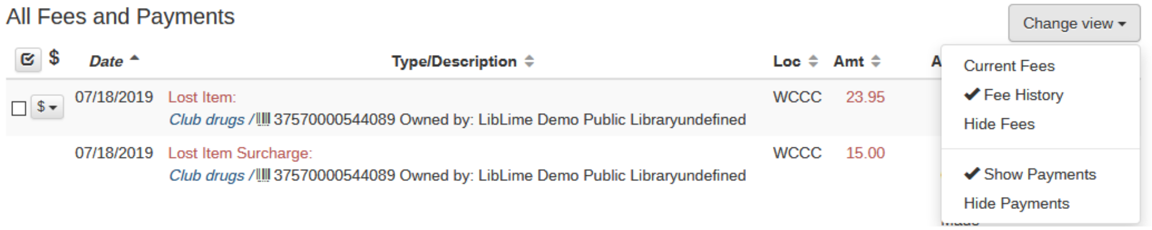
Current Fees and Payments

$	Date	Type/Description	Loc	Amt	Adjustments	Owed
	05/01/2018	Payment Made:	WCCC	-5.00	Reverse	-5.00
	04/07/2018	Accruing Overdue: *Elementary classical physics* (Due 01/06/2018) 375700000524698	WCCC	10.00		10.00
				Total Accruing		10.00
				Total Outstanding		5.00

There are times when a patron wants to make a payment even though there are not any outstanding charges; follow this same procedure to add a credit to the record.

5.13.7 Payment/Credit Details

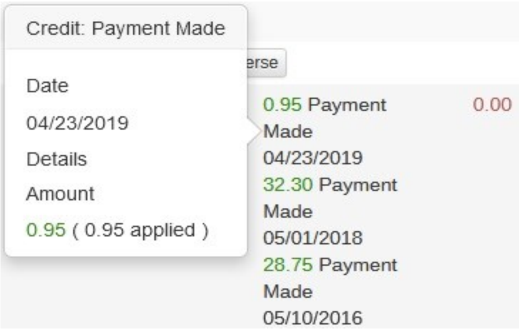
Once a payment has been made, it will move to the History tab. Change view to Fee History.



All Fees and Payments

$	Date	Type/Description	Loc	Amt	A
☐ $	07/18/2019	Lost Item: *Club drugs* / 37570000544089 Owned by: LibLime Demo Public Libraryundefined	WCCC	23.95	
	07/18/2019	Lost Item Surcharge: *Club drugs* / 37570000544089 Owned by: LibLime Demo Public Libraryundefined	WCCC	15.00	

In the Adjustments column, click on any entry and you'll see a popup with additional information:

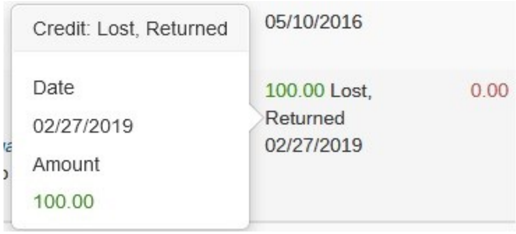


Credit: Payment Made

Date
04/23/2019
Details
Amount
0.95 (0.95 applied)

0.95 Payment Made 04/23/2019
32.30 Payment Made 05/01/2018
28.75 Payment Made 05/10/2016

0.00



Credit: Lost, Returned

Date

02/27/2019

Amount

100.00

05/10/2016

100.00 Lost, Returned 02/27/2019

0.00

Credit: Writeoff

Date

07/25/2019

Amount

1.05

23.95

1.05 Writeoff 07/25/2019

13.95 Payment Made 02/20/2019

0.00

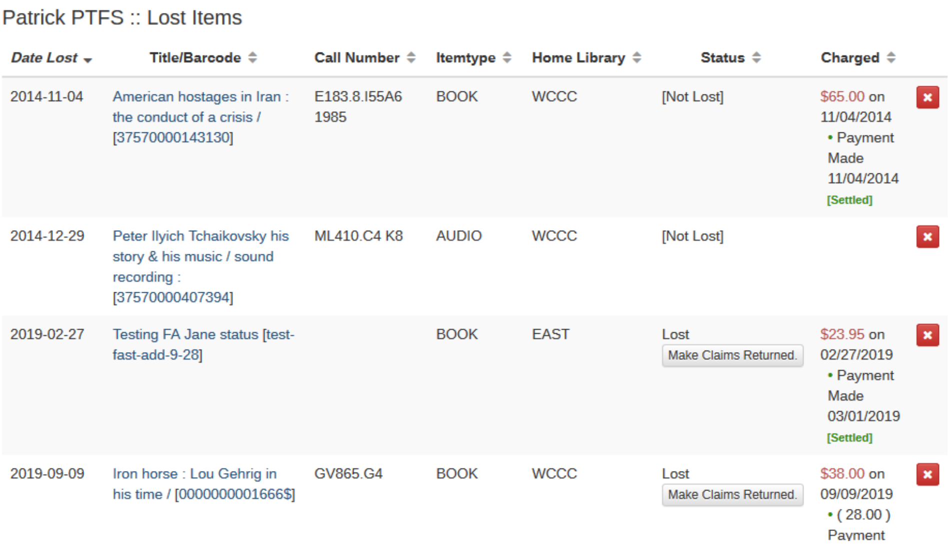
5.13.8 Lost Item Handling

5.13.8.1 Checked Out Items Marked Lost

When a checked-out item is marked lost, the patron is charged a replacement cost; this is either the cost in the item record's replacement price field (subfield v) or a fallback default price specified in the item type policy. Your site may also opt to charge a processing surcharge (configured in the circulation and fines policies). Lost items now get one of four hard-coded statuses (LongOverdue, Lost, Trace, Missing). The various lost categories from older versions have been mapped into custom item statuses (see the Superlibrarian Guide).

The Lost Items tab of the patron account page has a new Claims Returned button. If a lost item is switched to Claims Returned status, the lost item fee and surcharge (if used) will be removed from the patron's account. If a lost item that is marked Claims Returned is checked in, and thus found, the patron will be charged the maximum overdue fine.

When an item is marked lost, it is removed from the patron's list of checkouts. In the patron record, the Lost Items tab will show items marked as lost for that patron:

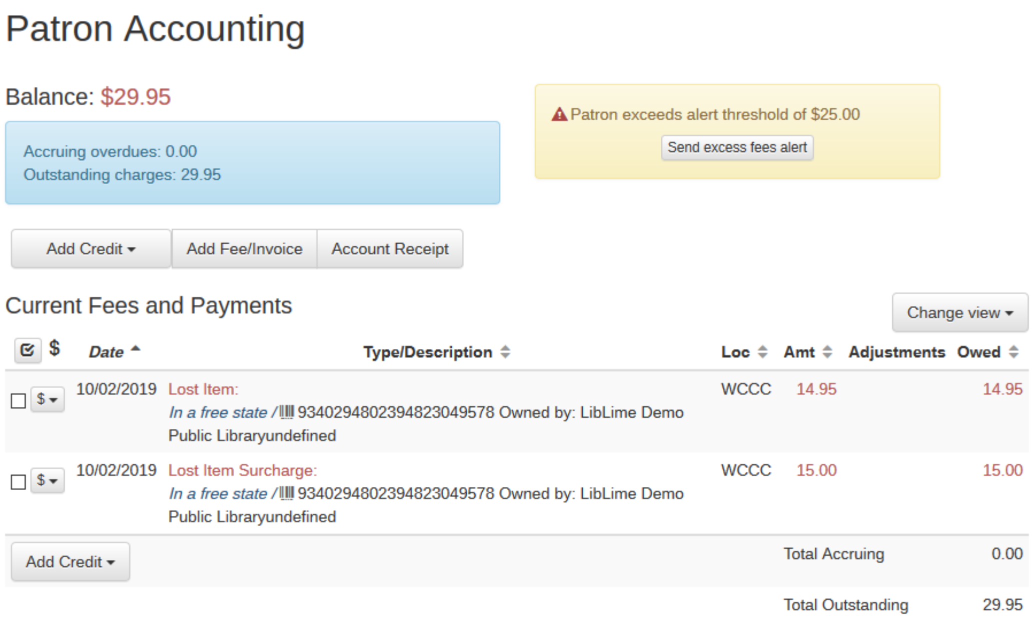


Patrick PTFS :: Lost Items

Date Lost	Title/Barcode	Call Number	Itemtype	Home Library	Status	Charged	
2014-11-04	American hostages in Iran : the conduct of a crisis / [37570000143130]	E183.8.I55A6 1985	BOOK	WCCC	[Not Lost]	$65.00 on 11/04/2014 • Payment Made 11/04/2014 [Settled]	✖
2014-12-29	Peter Ilyich Tchaikovsky his story & his music / sound recording : [37570000407394]	ML410.C4 K8	AUDIO	WCCC	[Not Lost]		✖
2019-02-27	Testing FA Jane status [test-fast-add-9-28]		BOOK	EAST	Lost Make Claims Returned.	$23.95 on 02/27/2019 • Payment Made 03/01/2019 [Settled]	✖
2019-09-09	Iron horse : Lou Gehrig in his time / [0000000001666$]	GV865.G4	BOOK	WCCC	Lost Make Claims Returned.	$38.00 on 09/09/2019 • (28.00) Payment	✖

The "Charged" column will give details about payment status.

The Patron Accounting tab will show an entry for the replacement cost and (if configured) a surcharge:



Patron Accounting

Balance: $29.95

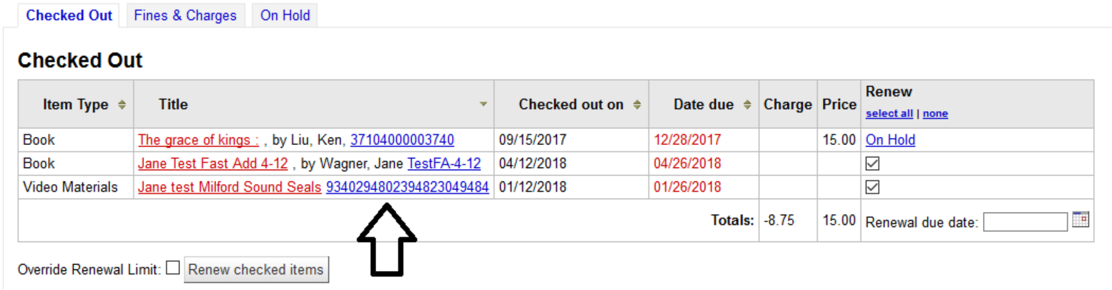
Accruing overdues: 0.00
Outstanding charges: 29.95

⚠ Patron exceeds alert threshold of $25.00

Current Fees and Payments

☑	$	Date	Type/Description	Loc	Amt	Adjustments	Owed
☐	$ ▾	10/02/2019	Lost Item: *In a free state* / 9340294802394823049578 Owned by: LibLime Demo Public Libraryundefined	WCCC	14.95		14.95
☐	$ ▾	10/02/2019	Lost Item Surcharge: *In a free state* / 9340294802394823049578 Owned by: LibLime Demo Public Libraryundefined	WCCC	15.00		15.00
Add Credit ▾					Total Accruing		0.00
					Total Outstanding		29.95

To mark a checked-out item lost manually, go to the Item tab under the title record. You can get there by clicking the barcode from the patron's list of checkouts (the patron record Details or Checkout tab).

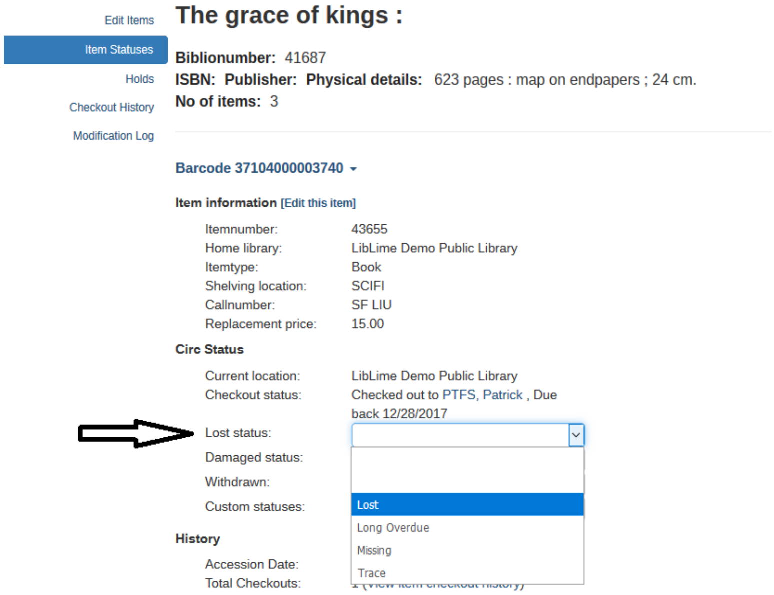


Checked Out

Item Type	Title	Checked out on	Date due	Charge	Price	Renew select all | none
Book	The grace of kings : , by Liu, Ken, 37104000003740	09/15/2017	12/28/2017		15.00	On Hold
Book	Jane Test Fast Add 4-12 , by Wagner, Jane TestFA-4-12	04/12/2018	04/26/2018			☑
Video Materials	Jane test Milford Sound Seals 9340294802394823049484	01/12/2018	01/26/2018			☑
			Totals:	-8.75	15.00	Renewal due date:

Override Renewal Limit: ☐ Renew checked items

On the Item tab, make sure there is a replacement price in the record (edit the item to add one, if necessary). Then use the pull-down to set the Lost status to the Lost status.



The grace of kings :

Biblionumber: 41687
ISBN: **Publisher:** **Physical details:** 623 pages : map on endpapers ; 24 cm.
No of items: 3

Barcode 37104000003740

Item information [Edit this item]

Itemnumber: 43655
Home library: LibLime Demo Public Library
Itemtype: Book
Shelving location: SCIFI
Callnumber: SF LIU
Replacement price: 15.00

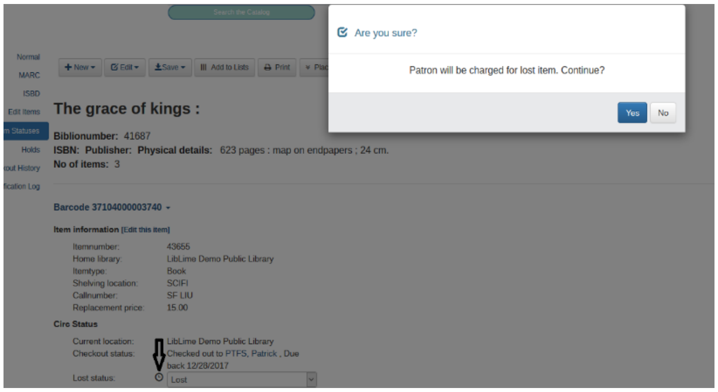
Circ Status

Current location: LibLime Demo Public Library
Checkout status: Checked out to PTFS, Patrick , Due back 12/28/2017
Lost status:
Damaged status:
Withdrawn:
Custom statuses:

History

Accession Date:
Total Checkouts: 1 (View item checkout history)

When you select a value, you'll see a spinning icon and a popup warning you that the patron will be charged.



Are you sure?

Patron will be charged for lost item. Continue?

The grace of kings :

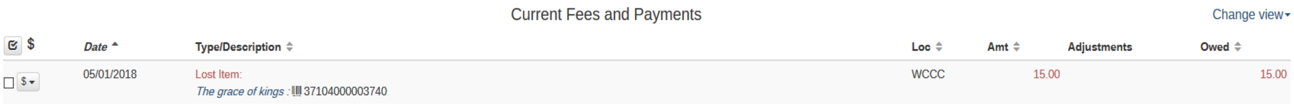
Lost status: Lost

When you click Yes on the popup, the item will be marked lost. It will be moved from the patron's list of checkouts to the patron's Lost Items tab.

Patrick PTFS :: Lost Items

Date Lost	Title/Barcode	Call Number	Itemtype	Home Library	Status	Charged
2014-11-04	American hostages in Iran : [37570000143130]	E183.8.I55A6 1985	BOOK	WCCC	[Not Lost]	$65.00 on 11/04/2014 Settled 11/04/2014
2014-12-29	Peter Ilyich Tchaikovsky [37570000407394]	ML410.C4 K8	AUDIO	WCCC	[Not Lost]	
2016-04-01	Carolyn Heafner, soprano, sings songs by Amy Beach, Jack Beeson, Hugo Weisgall, Lee Hoiby, and Ernst Bacon [BEACH]	BEACH CD	CD	WCCC	Lost Make Claims Returned.	$100.00 on 11/30/-0001 Settled 05/10/2016
2017-03-28	European history / [37570000456037]	D9 .I68 2000	JANE	WCCC	Lost Claimed Returned. [Undo]	$35.00 on 03/28/2017 Settled 04/10/2018
2018-05-01	The grace of kings : [37104000003740]	SF LIU	BOOK	WCCC	Lost Make Claims Returned.	$30.00 on 05/01/2018

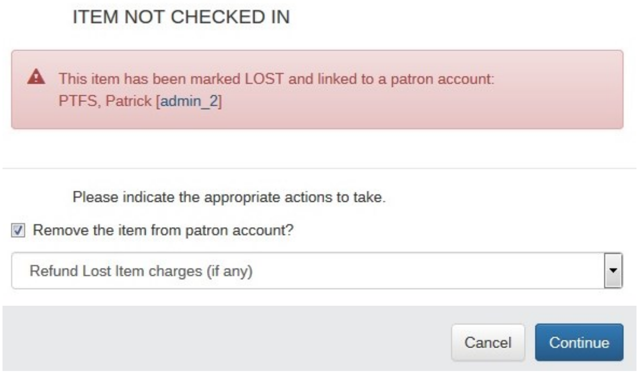
The replacement cost (and surcharge, if configured) will be charged under the Fines tab:



Current Fees and Payments

$	Date	Type/Description	Loc	Amt	Adjustments	Owed
☐ $	05/01/2018	Lost Item: *The grace of kings* : 37104000003740	WCCC	15.00		15.00

If a lost item is found, run it through checkin. Depending on how your system is configured, you may opt to refund any payments for replacement cost and surcharge, and charge an overdue fine.



ITEM NOT CHECKED IN

This item has been marked LOST and linked to a patron account:
PTFS, Patrick [admin_2]

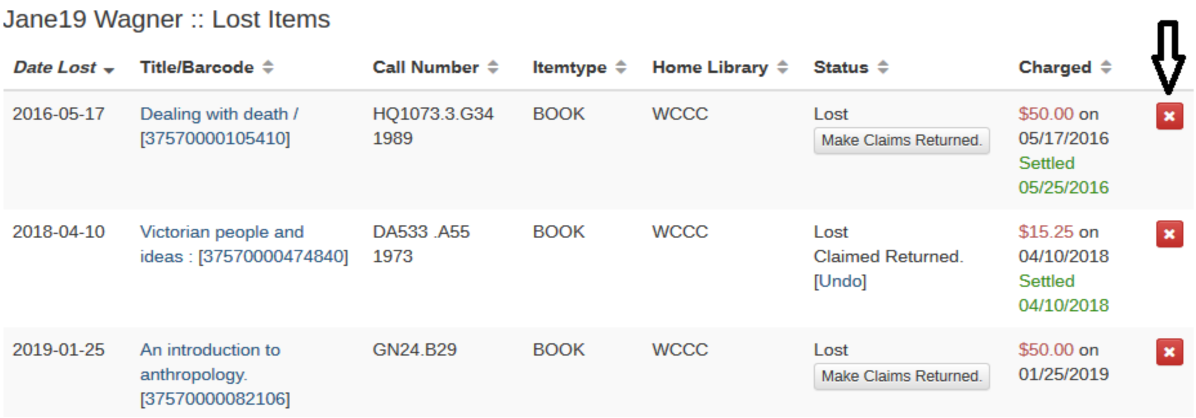
Please indicate the appropriate actions to take.

☑ Remove the item from patron account?

Refund Lost Item charges (if any)

If you select “Remove the item from patron account” during the checkin, the item will be removed from the patron’s Lost Items list. This is usually the desired action.

Depending on payment and item status, staff can hide the entry on this list with the red X delete button. Any paid or unpaid charges will still show on the Patron Accounting tab.



Jane19 Wagner :: Lost Items

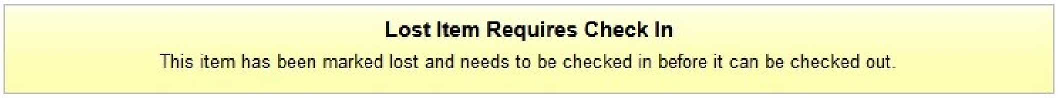
Date Lost	Title/Barcode	Call Number	Itemtype	Home Library	Status	Charged	
2016-05-17	Dealing with death / [37570000105410]	HQ1073.3.G34 1989	BOOK	WCCC	Lost Make Claims Returned.	$50.00 on 05/17/2016 Settled 05/25/2016	✖
2018-04-10	Victorian people and ideas : [37570000474840]	DA533 .A55 1973	BOOK	WCCC	Lost Claimed Returned. [Undo]	$15.25 on 04/10/2018 Settled 04/10/2018	✖
2019-01-25	An introduction to anthropology. [37570000082106]	GN24.B29	BOOK	WCCC	Lost Make Claims Returned.	$50.00 on 01/25/2019	✖

5.13.8.2 Items That Are Not Checked Out Marked Lost

If an item is not checked out, but needs to be marked as lost, staff must use the Missing status (rather than the Lost status). Marking something with the Lost status will try to charge the replacement cost, and that will fail if there is no link to a patron record.

5.13.8.3 *Checking Out Lost Items to Another User*

If an item that was marked as lost is somehow found, and staff attempt to check it out to another user, the system will block the checkout:



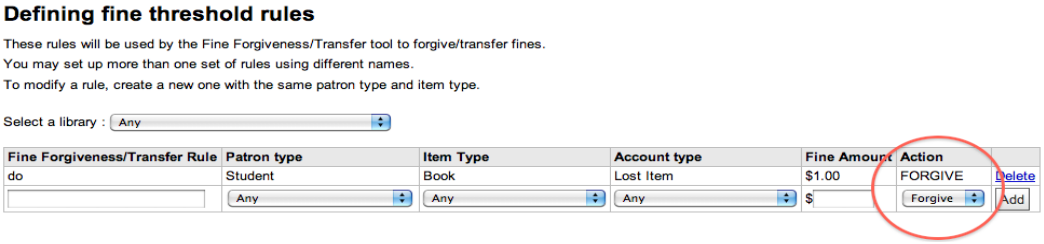
Lost Item Requires Check In

This item has been marked lost and needs to be checked in before it can be checked out.

Staff must first check the item in and deal with any issues of refunding charges and removing the record from the previous user. This only applies to items with “lost” status – “missing” and “trace” statuses will not be blocked.

5.13.9 Fine Threshold Forgiveness and Transfers

System administrators can create Fine Threshold and Transfer Configuration rules (in the Administration section) that can be used to batch-forgive fines. Alternatively, batches of patrons with specified fines can have those fines marked with a “transfer” status; a list of these patrons could be downloaded and sent to a registrar/bursar’s office. (A new granular permission, fees.transfer, controls whether staff can mark individual fines for transfer.)



Defining fine threshold rules

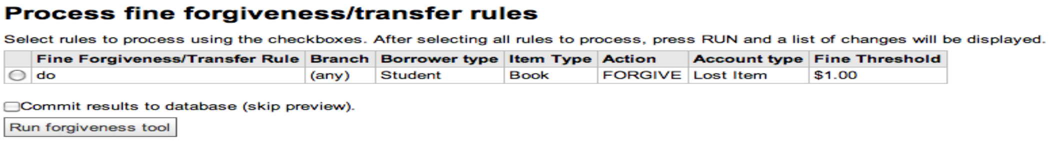
These rules will be used by the Fine Forgiveness/Transfer tool to forgive/transfer fines.
You may set up more than one set of rules using different names.
To modify a rule, create a new one with the same patron type and item type.

Select a library : Any

Fine Forgiveness/Transfer Rule	Patron type	Item Type	Account type	Fine Amount	Action	
do	Student	Book	Lost Item	$1.00	FORGIVE	Delete
	Any	Any	Any	$	Forgive	Add

5.13.9 Forgiven Fines

After rules are defined, fines are batch-forgiven using Tools, Fine Threshold Forgiveness and Transfers.



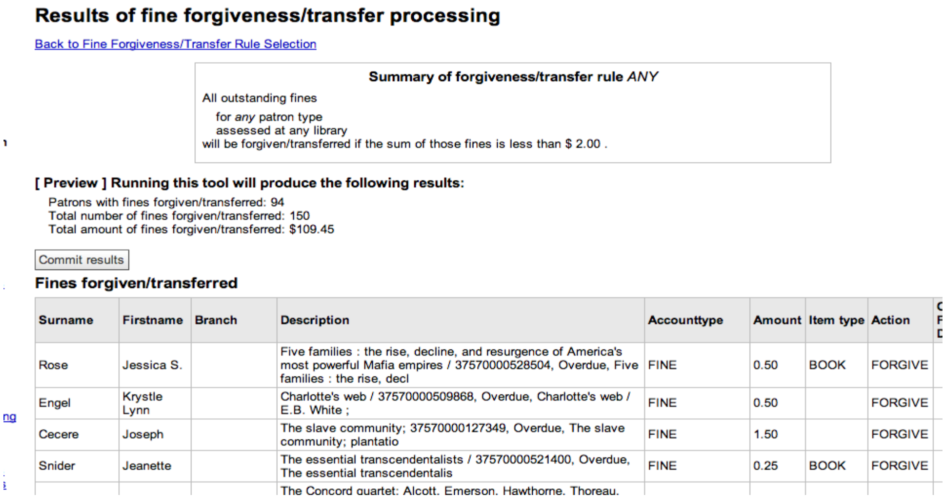
Process fine forgiveness/transfer rules

Select rules to process using the checkboxes. After selecting all rules to process, press RUN and a list of changes will be displayed.

	Fine Forgiveness/Transfer Rule	Branch	Borrower type	Item Type	Action	Account type	Fine Threshold
○	do	(any)	Student	Book	FORGIVE	Lost Item	$1.00

☐Commit results to database (skip preview).

When the forgiveness tool is run, results will display onscreen and the staff can decide whether to commit results to the database.



Results of fine forgiveness/transfer processing

Back to Fine Forgiveness/Transfer Rule Selection

Summary of forgiveness/transfer rule *ANY*

All outstanding fines
for *any* patron type
assessed at any library
will be forgiven/transferred if the sum of those fines is less than $ 2.00 .

[Preview] Running this tool will produce the following results:

Patrons with fines forgiven/transferred: 94
Total number of fines forgiven/transferred: 150
Total amount of fines forgiven/transferred: $109.45

Fines forgiven/transferred

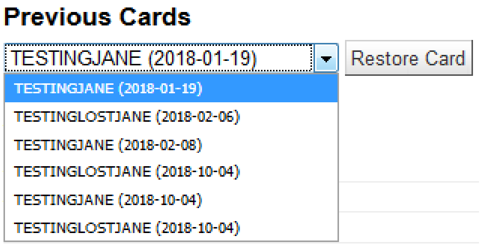
Surname	Firstname	Branch	Description	Accounttype	Amount	Item type	Action
Rose	Jessica S.		Five families : the rise, decline, and resurgence of America's most powerful Mafia empires / 37570000528504, Overdue, Five families : the rise, decl	FINE	0.50	BOOK	FORGIVE
Engel	Krystle Lynn		Charlotte's web / 37570000509868, Overdue, Charlotte's web / E.B. White ;	FINE	0.50		FORGIVE
Cecere	Joseph		The slave community; 37570000127349, Overdue, The slave community; plantatio	FINE	1.50		FORGIVE
Snider	Jeanette		The essential transcendentalists / 37570000521400, Overdue, The essential transcendentalis	FINE	0.25	BOOK	FORGIVE
			The Concord quartet: Alcott, Emerson, Hawthorne, Thoreau,				

The **Forgiven Fines** tool will allow staff to download a list of patron names and fine amounts. This list could be sent to a registrar/bursar's office for processing.

5.14 Lost Card Tracking

A new feature now retains old patron cardnumbers. Staff can restore them if needed. A typical case might be where a patron has misplaced their library card, and the library assigns a new one. The patron later finds the old card and wants to resume using it.

When a patron record is edited and the cardnumber is changed, the old cardnumber is automatically saved into a separate table, linked to the patron record. Old cardnumbers can be seen on the patron record display, with the date the card was marked lost:



Previous Cards

An old cardnumber can be restored by selecting it in the pulldown and clicking the Restore Card button. The current cardnumber will then be moved to this table.

Patrons can be searched using either the current card or a lost cardnumber. If an old number is used, the record will be found but a screen message warns staff:

Results 1 to 1 of 1 found for 'testinglostjane'

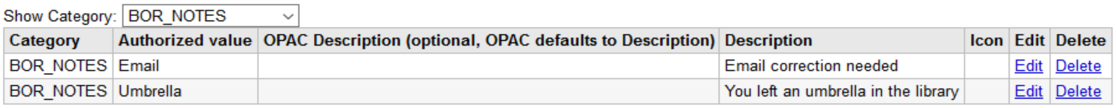
☐	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	TESTINGJANE Warning: Found With Previous Cardnumber	Wagner, Jane Madison	GRC Staff (S)	WCCC	03/29/2019	0/0	0.00		Add to Cart

Any new checkouts are done against the current cardnumber; the old cardnumber is used only for searching.

5.15 Borrower Notes

The patron record has a couple of note fields, for staff and patron display. These are intended for notes which need to be kept. A new feature allows the creation and display of more ephemeral notes. These can be predefined messages or free-text notes, and directed either to the patron or to other staff. The messages can be deleted when no longer needed.

For predefined messages, create an authorized value category (see Superlibrarian Guide) named BOR_NOTES, and enter whatever messages you'd like:



Show Category: BOR_NOTES

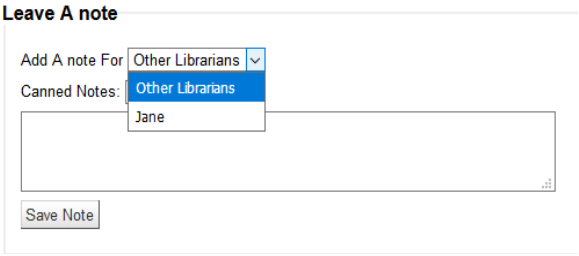
Category	Authorized value	OPAC Description (optional, OPAC defaults to Description)	Description	Icon	Edit	Delete
BOR_NOTES	Email		Email correction needed		Edit	Delete
BOR_NOTES	Umbrella		You left an umbrella in the library		Edit	Delete

To create either a predefined message or a free-text message, go to the patron record's Checkouts tab. At the right you'll see a button for adding a note:

Checking out to Jane Wagner (TESTINGJANE)

Search to place hold for Jane Wagner (TESTINGJANE)

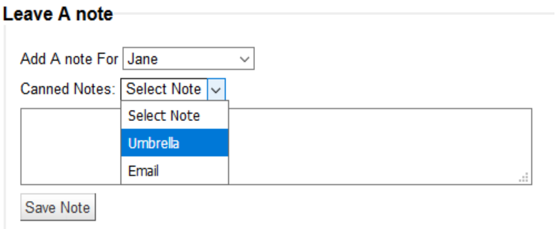
Clicking the button will open an entry screen. The first field is for whether the note should be displayed to other staff or to the patron. All notes will be visible on the Checkout tab, but only those directed to the patron will be visible in the patron's Discovery Layer account:



Leave A note

Add A note For: Other Librarians

The second option is whether you want to use a predefined note, or enter a free-text message. For a predefined note, select one from the pulldown:

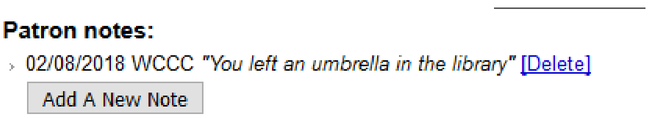


Leave A note

Add A note For: Jane

Canned Notes: Select Note

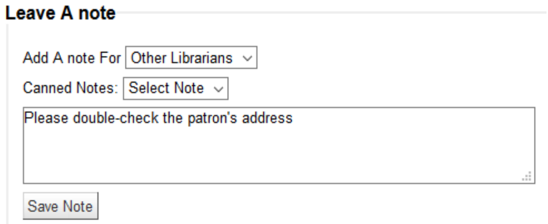
Save, and the message will show on the Checkouts tab:



Patron notes:

- 02/08/2018 WCCC *"You left an umbrella in the library"* [Delete]

For a free-text note, ignore the Canned Notes pulldown and just enter your message:



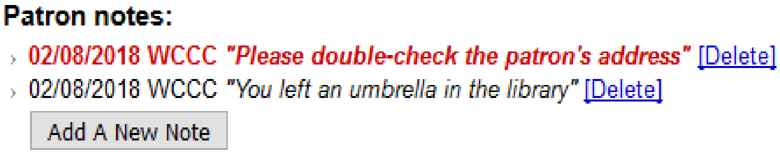
Leave A note

Add A note For: Other Librarians

Canned Notes: Select Note

Please double-check the patron's address

Save, and your message will appear. Note that messages directed to other staff are in red, while messages directed to the patron are displayed normally. This is a visual cue to staff:

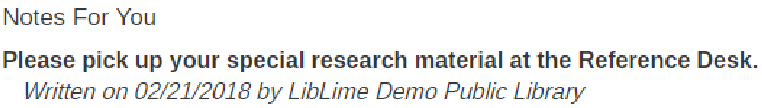


Patron notes:

- 02/08/2018 WCCC *"Please double-check the patron's address"* [Delete]
- 02/08/2018 WCCC *"You left an umbrella in the library"* [Delete]

Library staff can delete notes at any time. In a multi-library system, a system preference (AllowAllNoteDeletion) controls whether staff can delete messages for patrons from other branches, or just from their own branch.

The patron will see notes in the My Account screen:



Notes For You

Please pick up your special research material at the Reference Desk.

Written on 02/21/2018 by LibLime Demo Public Library

5.16 Anonymize Reading History

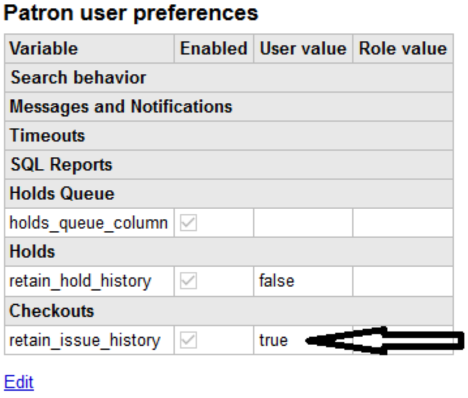
A site may choose to enable anonymization of patron reading history, for privacy reasons. Note that if this is configured, the default is to anonymize history for all patrons (jncluding library staff); **patrons must opt**

in to retain history. In the applicable Role record, under User Preferences, there is a preference named retain_issue_history:

Checkouts				
retain_issue_history	☐	☐		Retain the history of item checkouts

To enable the ability to opt in, click the first check box. Note that this does NOT mean history will be retained – the first check box merely makes the function active and the preference visible in the patron's My General Preferences tab. To choose to retain history, click the second checkbox as well.

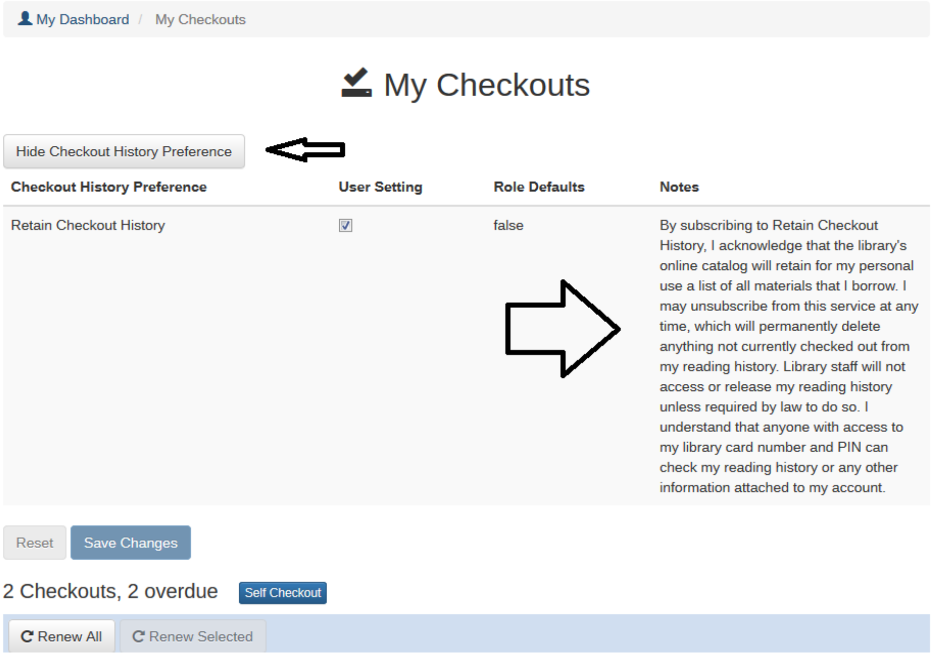
When both are clicked, the preference setting shows as True in the staff display:



Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
Messages and Notifications			
Timeouts			
SQL Reports			
Holds Queue			
holds_queue_column	☑		
Holds			
retain_hold_history	☑	false	
Checkouts			
retain_issue_history	☑	true	

It also shows as available and checked in the Discovery Layer view, by clicking Show Checkout History Preference on the Dashboard, My Checkouts display:



Checkout History Preference	User Setting	Role Defaults	Notes
Retain Checkout History	☑	false	By subscribing to Retain Checkout History, I acknowledge that the library's online catalog will retain for my personal use a list of all materials that I borrow. I may unsubscribe from this service at any time, which will permanently delete anything not currently checked out from my reading history. Library staff will not access or release my reading history unless required by law to do so. I understand that anyone with access to my library card number and PIN can check my reading history or any other information attached to my account.

2 Checkouts, 2 overdue

The patron or Role record must have the granular permission delete_own in addition to the preferences set above, or the option will not show in the Discovery Layer.

WARNING: If the preference was checked, and a user unchecks it, historical DATA IS IMMEDIATELY SCRUBBED. Future transactions are scrubbed nightly when the cron job anonymise_previous_borrowers is run. Because sites need to keep some record of who last had an item (in case it is returned damaged), the MinimumIssueHistoryInterval syspref controls how long newly-checked-in data is retained before it's cleared. Sites will probably want to set this for some brief period, such as five or ten days. Also note that the script will not remove data for lost items linked to patron records.

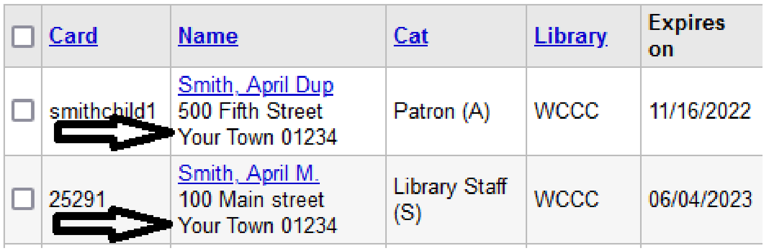
ALSO NOTE that once the cron job runs, it will wipe data for everyone who does not have the second checkbox enabled. This includes patrons where the user pref was never enabled (the first checkbox). All sites need to be absolutely sure that any patrons needing to keep data have the user preference enabled and on BEFORE the first run of the cron job. Scrubbed data can NOT be recovered.

5.17 Merging Two Patron Records

A new feature allows sites to merge duplicate patron records, consolidating current and historical checkouts, holds, and other information onto one record.

NOTE: This feature will transfer all related data to the target record and remove the source record. The action CANNOT be reversed. Sites are urged to use caution with this feature, and to practice on the sandbox first. There is a granular permission for borrowers.merge to govern access to this feature. However, because of the sequence in which steps and checks are performed, staff users will not see the block until attempting to do the merge.

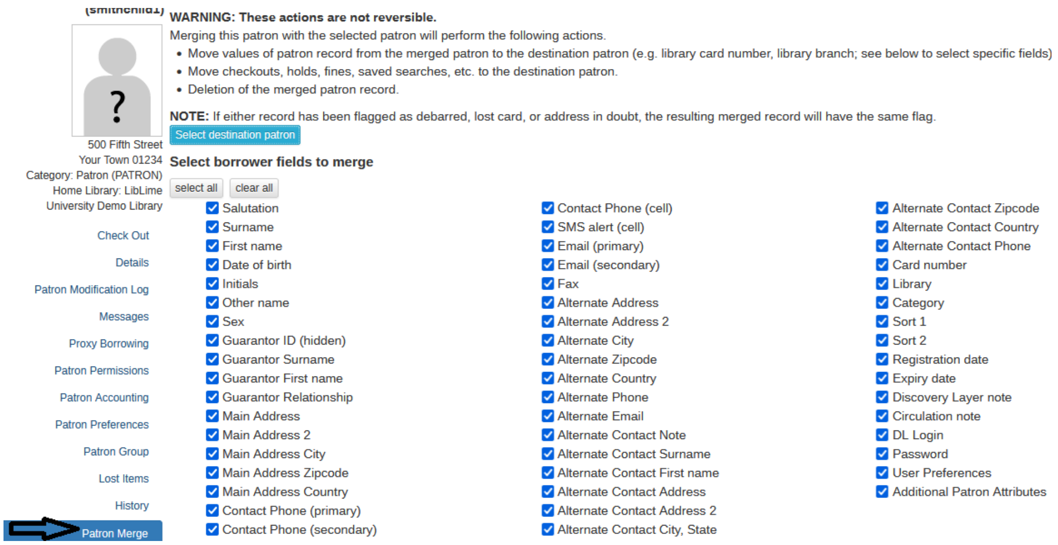
First, identify your source and target records. Specified data will be copied from the source record to the target; the record remaining in the system (the target) will keep its borrowernumber. In this example, my source record is the "April Dup" entry, and the target is the "April" entry:



☐	Card	Name	Cat	Library	Expires on
☐	smithchild1	Smith, April Dup 500 Fifth Street Your Town 01234	Patron (A)	WCCC	11/16/2022
☐	25291	Smith, April M. 100 Main street Your Town 01234	Library Staff (S)	WCCC	06/04/2023

Note that they have different addresses, patron categories, and expiration dates. Copy the target barcode and go to the source record. A new sidebar tab, Patron Merge, allows you to select the target record and choose which fields to overwrite.

Read the notes at the top of this screen, and carefully consider what patron record data you want to merge.



500 Fifth Street
Your Town 01234
Category: Patron (PATRON)
Home Library: LibLime
University Demo Library

WARNING: These actions are not reversible.

Merging this patron with the selected patron will perform the following actions.

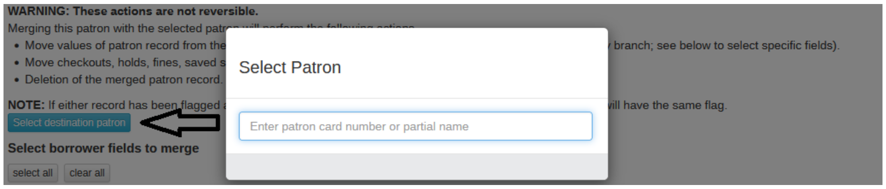
- Move values of patron record from the merged patron to the destination patron (e.g. library card number, library branch; see below to select specific fields)
- Move checkouts, holds, fines, saved searches, etc. to the destination patron.
- Deletion of the merged patron record.

NOTE: If either record has been flagged as debarred, lost card, or address in doubt, the resulting merged record will have the same flag.

Select borrower fields to merge

- ☑ Salutation
- ☑ Surname
- ☑ First name
- ☑ Date of birth
- ☑ Initials
- ☑ Other name
- ☑ Sex
- ☑ Guarantor ID (hidden)
- ☑ Guarantor Surname
- ☑ Guarantor First name
- ☑ Guarantor Relationship
- ☑ Main Address
- ☑ Main Address 2
- ☑ Main Address City
- ☑ Main Address Zipcode
- ☑ Main Address Country
- ☑ Contact Phone (primary)
- ☑ Contact Phone (secondary)
- ☑ Contact Phone (cell)
- ☑ SMS alert (cell)
- ☑ Email (primary)
- ☑ Email (secondary)
- ☑ Fax
- ☑ Alternate Address
- ☑ Alternate Address 2
- ☑ Alternate City
- ☑ Alternate Zipcode
- ☑ Alternate Country
- ☑ Alternate Phone
- ☑ Alternate Email
- ☑ Alternate Contact Note
- ☑ Alternate Contact Surname
- ☑ Alternate Contact First name
- ☑ Alternate Contact Address
- ☑ Alternate Contact Address 2
- ☑ Alternate Contact City, State
- ☑ Alternate Contact Zipcode
- ☑ Alternate Contact Country
- ☑ Alternate Contact Phone
- ☑ Card number
- ☑ Library
- ☑ Category
- ☑ Sort 1
- ☑ Sort 2
- ☑ Registration date
- ☑ Expiry date
- ☑ Discovery Layer note
- ☑ Circulation note
- ☑ DL Login
- ☑ Password
- ☑ User Preferences
- ☑ Additional Patron Attributes

Click the Select Destination Patron button, then enter your target record's cardnumber (or search by name if needed).



WARNING: These actions are not reversible.

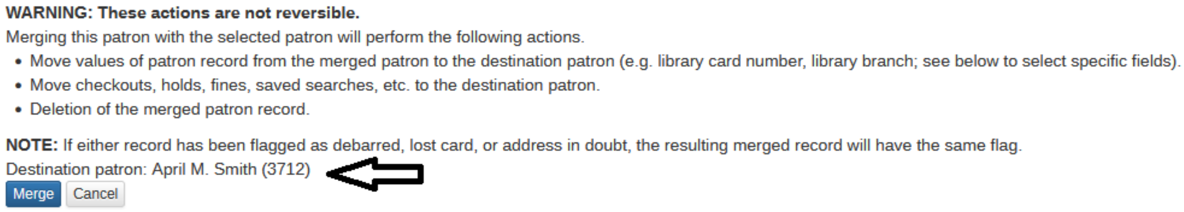
Merging this patron with the selected patr

- Move values of patron record from the … branch; see below to select specific fields).
- Move checkouts, holds, fines, saved s
- Deletion of the merged patron record.

NOTE: If either record has been flagged … will have the same flag.

Select borrower fields to merge

The screen will change to show the selected target record.



WARNING: These actions are not reversible.

Merging this patron with the selected patron will perform the following actions.

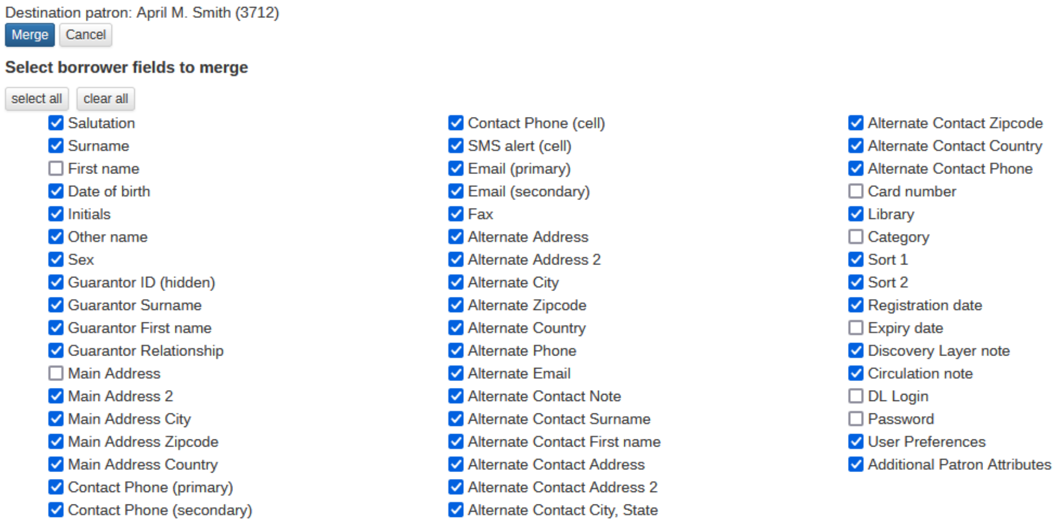
- Move values of patron record from the merged patron to the destination patron (e.g. library card number, library branch; see below to select specific fields).
- Move checkouts, holds, fines, saved searches, etc. to the destination patron.
- Deletion of the merged patron record.

NOTE: If either record has been flagged as debarred, lost card, or address in doubt, the resulting merged record will have the same flag.

Destination patron: April M. Smith (3712)

Next, look at the field selections in the main body of the screen. By default, all fields are checked, meaning that data in the target record will be overwritten with data from the source record. You can use the Clear All button to uncheck every field, or uncheck only certain fields to keep the specified data in the target record. **If a field is checked, the target record's data will be overwritten with whatever is in the source record's field (including overwriting fields containing content with empty entries).**

In this example, the target record's first name, main address, card number, patron category, expiration date, and Discovery Layer login ID/password will NOT be overwritten.



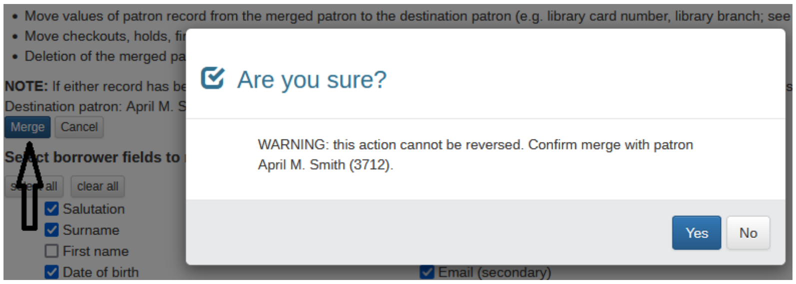
Destination patron: April M. Smith (3712)

Select borrower fields to merge

- ☑ Salutation
- ☑ Surname
- ☐ First name
- ☑ Date of birth
- ☑ Initials
- ☑ Other name
- ☑ Sex
- ☑ Guarantor ID (hidden)
- ☑ Guarantor Surname
- ☑ Guarantor First name
- ☑ Guarantor Relationship
- ☐ Main Address
- ☑ Main Address 2
- ☑ Main Address City
- ☑ Main Address Zipcode
- ☑ Main Address Country
- ☑ Contact Phone (primary)
- ☑ Contact Phone (secondary)
- ☑ Contact Phone (cell)
- ☑ SMS alert (cell)
- ☑ Email (primary)
- ☑ Email (secondary)
- ☑ Fax
- ☑ Alternate Address
- ☑ Alternate Address 2
- ☑ Alternate City
- ☑ Alternate Zipcode
- ☑ Alternate Country
- ☑ Alternate Phone
- ☑ Alternate Email
- ☑ Alternate Contact Note
- ☑ Alternate Contact Surname
- ☑ Alternate Contact First name
- ☑ Alternate Contact Address
- ☑ Alternate Contact Address 2
- ☑ Alternate Contact City, State
- ☑ Alternate Contact Zipcode
- ☑ Alternate Contact Country
- ☑ Alternate Contact Phone
- ☐ Card number
- ☑ Library
- ☐ Category
- ☑ Sort 1
- ☑ Sort 2
- ☑ Registration date
- ☐ Expiry date
- ☑ Discovery Layer note
- ☑ Circulation note
- ☐ DL Login
- ☐ Password
- ☑ User Preferences
- ☑ Additional Patron Attributes

Note that this screen only shows fields in the patron table itself. Data in related fields, including current and historical checkouts, holds, lost items, messages, statistical and modification log entries, permissions, guarantor or family group settings, etc. will automatically be merged into the target record. **NOTE: If your site uses patron images, that link is based on the cardnumber, so an image will be kept or dropped depending on which cardnumber is kept.**

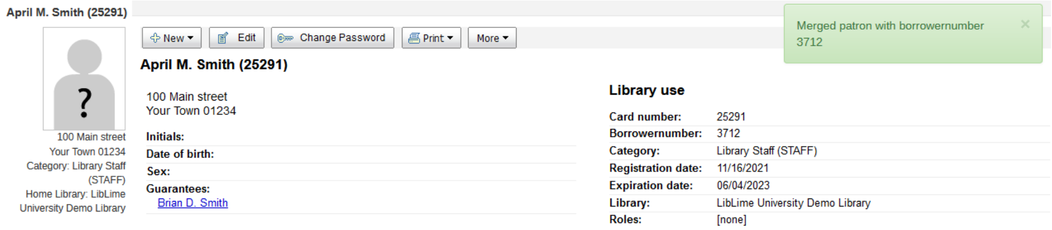
When you have made your field selections, click the Merge button at the top. You'll get an "are you sure" popup.



Are you sure?

WARNING: this action cannot be reversed. Confirm merge with patron April M. Smith (3712).

Click Yes to proceed. The system will merge the data and give you a success popup. You'll be taken into the patron Details tab for the merged record.



April M. Smith (25291)

Merged patron with borrowernumber 3712

April M. Smith (25291)

100 Main street
Your Town 01234

Initials:
Date of birth:
Sex:
Guarantees:
Brian D. Smith

100 Main street
Your Town 01234
Category: Library Staff (STAFF)
Home Library: LibLime University Demo Library

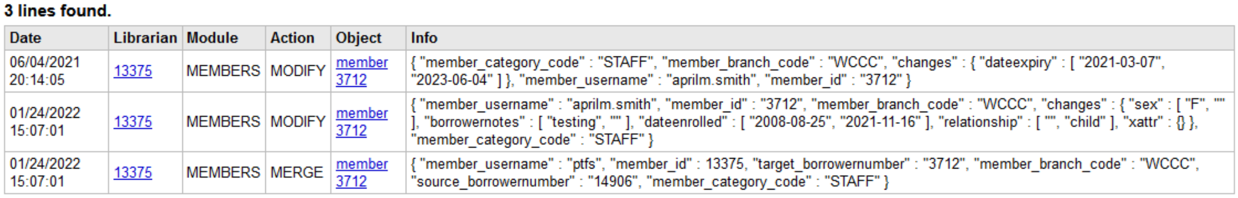
Library use

Card number:	25291
Borrowernumber:	3712
Category:	Library Staff (STAFF)
Registration date:	11/16/2021
Expiration date:	06/04/2023
Library:	LibLime University Demo Library
Roles:	[none]

Note that this record has retained the cardnumber, expiration date, and patron category of the target record. It also retained the link to a child record (guarantee). All checkouts, holds, fines, etc. have been combined onto this record. If you had chosen to overwrite the cardnumber, this record's original cardnumber would have shown as a "previous cardnumber" entry. A patron search shows only one April Smith record now.

☐	Card	Name	Cat	Library	Expires on
☐	25291	Smith, April M. 100 Main street Your Town 01234	Library Staff (S)	WCCC	06/04/2023
☐	20306003	Smith, Brian D. 100 Main street Your Town 00123	Patron (A)	WCCC	05/25/2022

The record's Modification Log tab shows the merge action.



3 lines found.

Date	Librarian	Module	Action	Object	Info
06/04/2021 20:14:05	13375	MEMBERS	MODIFY	member 3712	{ "member_category_code" : "STAFF", "member_branch_code" : "WCCC", "changes" : { "dateexpiry" : ["2021-03-07", "2023-06-04"] }, "member_username" : "aprilm.smith", "member_id" : "3712" }
01/24/2022 15:07:01	13375	MEMBERS	MODIFY	member 3712	{ "member_username" : "aprilm.smith", "member_id" : "3712", "member_branch_code" : "WCCC", "changes" : { "sex" : ["F", ""], "borrowernotes" : ["testing", ""], "dateenrolled" : ["2008-08-25", "2021-11-16"], "relationship" : ["", "child"], "xattr" : {} }, "member_category_code" : "STAFF" }
01/24/2022 15:07:01	13375	MEMBERS	MERGE	member 3712	{ "member_username" : "ptfs", "member_id" : 13375, "target_borrowernumber" : "3712", "member_branch_code" : "WCCC", "source_borrowernumber" : "14906", "member_category_code" : "STAFF" }

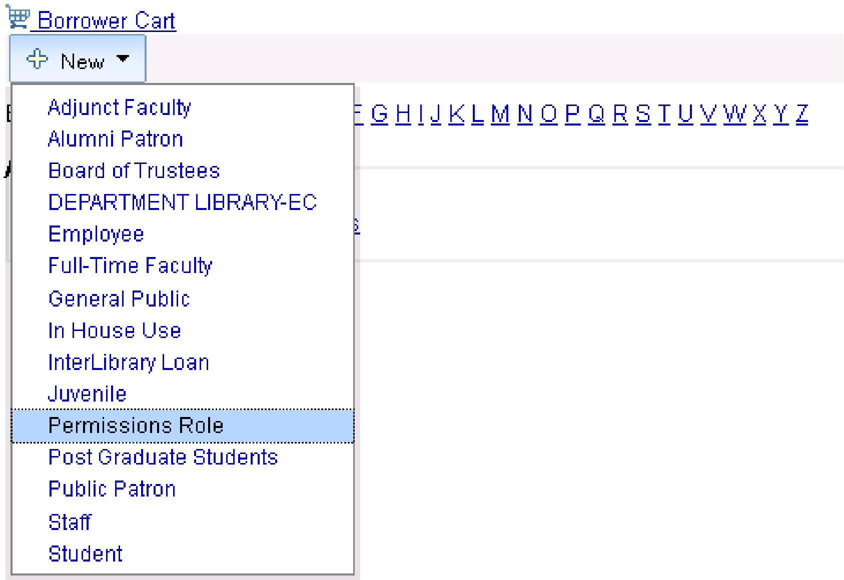
The source record's circulation and statistical data will now be linked to this record, and reports will reflect the additional data.

6. Role Patrons and Default Permissions

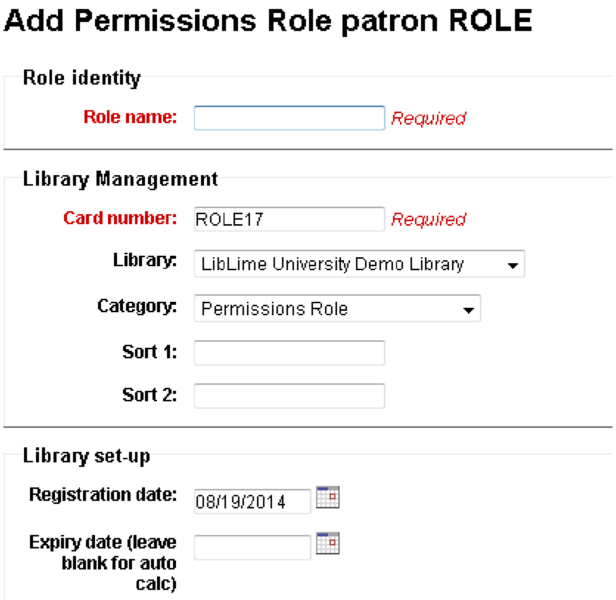
A Role patron is a record which can be used to assign default permissions and messaging options for both staff and patrons. Staff and patron records can then be linked to the role (or roles) and the role's defaults are inherited by the user. This linking can be done either individually in the user record, or by linking a Role to a patron category. Role patrons are set up and managed the same way as a standard patron account; however, **the staff person must have the staffaccess granular permission**. They should all be created with a standard naming convention (such as SR CATALOGING ROLE) to help with searching and identification. This section will cover creating and assigning Roles and the granular permissions that can be enabled. The next section will cover messaging and messaging options as a separate topic, although messaging defaults can also be set in the Role patron.

6.1 Creating a Role Patron

To set up a staff role, go under Patron and click New. From the pull-down, select Permission Role.



This will bring up an abbreviated patron entry screen, tailored to the Role patron; give the record a name appropriate for its intent.



Add Permissions Role patron ROLE

Role identity

Role name: Required

Library Management

Card number: ROLE17 Required

Library: LibLime University Demo Library

Category: Permissions Role

Sort 1:

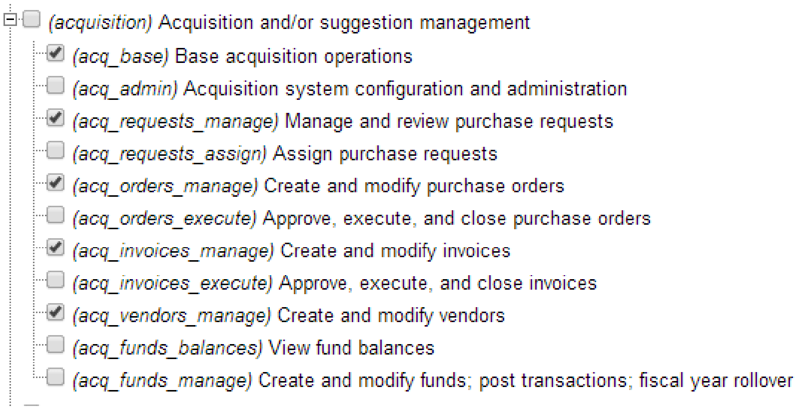
Sort 2:

Library set-up

Registration date: 08/19/2014

Expiry date (leave blank for auto calc):

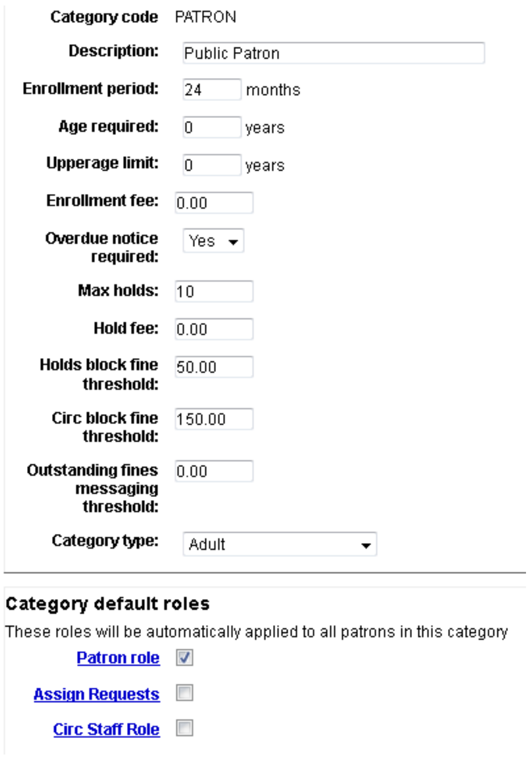
After saving, from the patron record display click More, Set Permissions. For example, a Junior Acquisitions role may get permissions allowing them to create and modify purchase orders, but not be given permission to approve or execute them. Set the needed permissions and save (click Set Flags button) – see the section on Available Granular Permissions below.



- ☐ *(acquisition)* Acquisition and/or suggestion management
  - ☑ *(acq_base)* Base acquisition operations
  - ☐ *(acq_admin)* Acquisition system configuration and administration
  - ☑ *(acq_requests_manage)* Manage and review purchase requests
  - ☐ *(acq_requests_assign)* Assign purchase requests
  - ☑ *(acq_orders_manage)* Create and modify purchase orders
  - ☐ *(acq_orders_execute)* Approve, execute, and close purchase orders
  - ☑ *(acq_invoices_manage)* Create and modify invoices
  - ☐ *(acq_invoices_execute)* Approve, execute, and close invoices
  - ☑ *(acq_vendors_manage)* Create and modify vendors
  - ☐ *(acq_funds_balances)* View fund balances
  - ☐ *(acq_funds_manage)* Create and modify funds; post transactions; fiscal year rollover

6.2 Assigning Roles to User Records in the Patron Category

All users assigned to a particular patron category can be linked to a Role through the patron category policy setup. In Administration, Patron Categories, edit the applicable category and check the role(s) desired:



Category code PATRON
Description: Public Patron
Enrollment period: 24 months
Age required: 0 years
Upperage limit: 0 years
Enrollment fee: 0.00
Overdue notice required: Yes
Max holds: 10
Hold fee: 0.00
Holds block fine threshold: 50.00
Circ block fine threshold: 150.00
Outstanding fines messaging threshold: 0.00
Category type: Adult

Category default roles

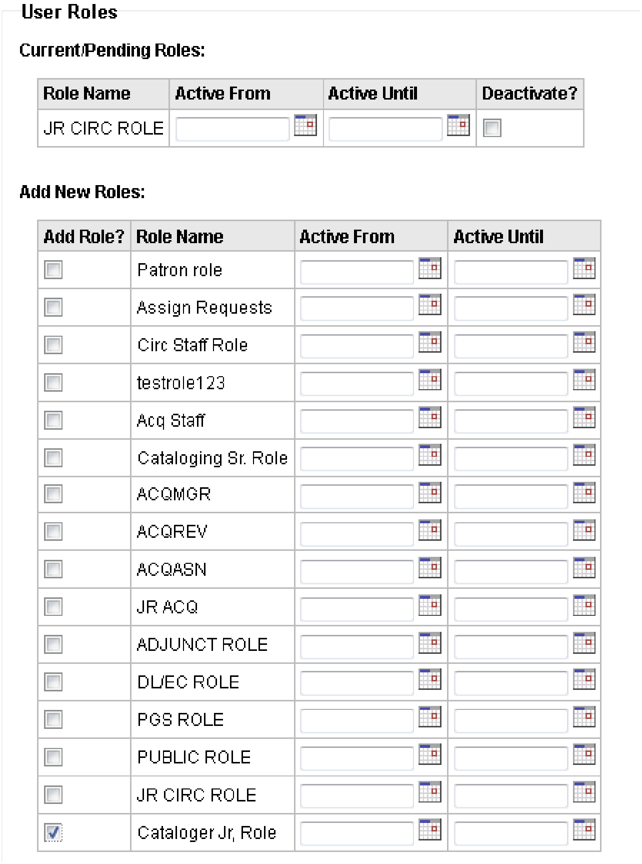
These roles will be automatically applied to all patrons in this category

Patron role ☑
Assign Requests ☐
Circ Staff Role ☐

Note that general patrons as well as staff can be linked to a Role. For public users, the Role will be used primarily to define default messaging options (see that section). If a site is running the full Bibliovation software, certain patrons can also be given default permissions to upload digital options. There are also permissions to allow patrons to use Self Checkout and see/add ratings to title records.

6.3 Assigning Roles in the Individual Patron Record

You can also assign a Role to an individual patron record. This is not generally recommended, but can be used when a staff person needs extra rights beyond the general staff Role. Edit the patron record and scroll down to the User Roles section. Then check one or more Roles you want to assign to this particular person:



User Roles

Current/Pending Roles:

Role Name	Active From	Active Until	Deactivate?
JR CIRC ROLE			☐

Add New Roles:

Add Role?	Role Name	Active From	Active Until
☐	Patron role		
☐	Assign Requests		
☐	Circ Staff Role		
☐	testrole123		
☐	Acq Staff		
☐	Cataloging Sr. Role		
☐	ACQMGR		
☐	ACQREV		
☐	ACQASN		
☐	JR ACQ		
☐	ADJUNCT ROLE		
☐	DL/EC ROLE		
☐	PGS ROLE		
☐	PUBLIC ROLE		
☐	JR CIRC ROLE		
☑	Cataloger Jr, Role		

Any existing Role assignments will show at the top; add new ones as desired by checking their boxes. For existing Roles, note that you can assign an expiration date. This can be useful for temporary or visiting staff – you can assign a person certain expanded permissions with an expiration date. After that date, the assignment will automatically end. You can also cancel a Role assignment by clicking the Deactivate box.

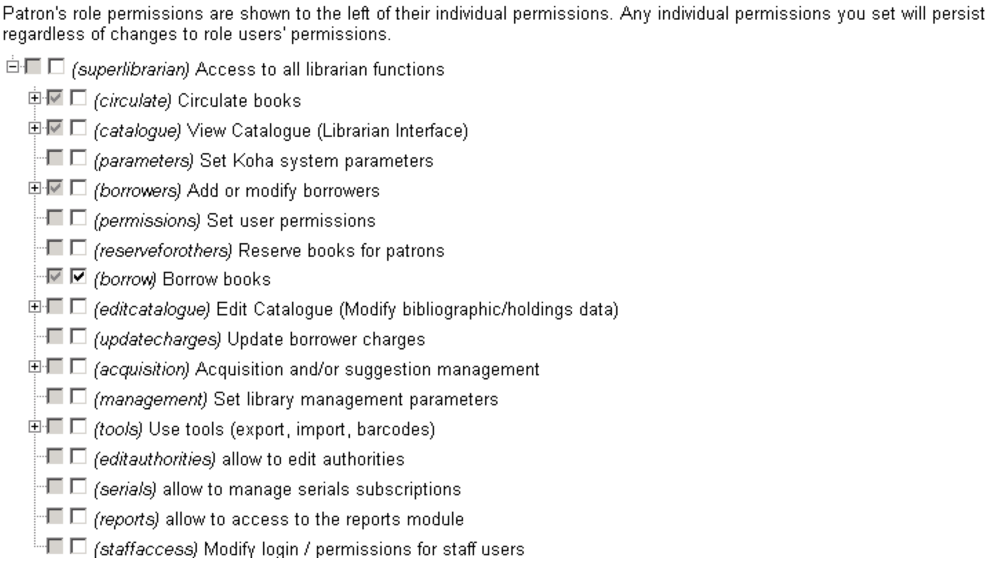
When you save the record, the updated Role assignments are visible on the Details screen. This screen will also show the Role linked through the patron category – see the difference between Roles (linked directly) and Category Roles (from the patron category setting):

Library: LibLime University Demo Library

Roles:
JR ACQ

Category Roles:
GENERAL STAFF

NOTE: Linking a patron and a role will change the display of the person who is linked to the role. If a staff person is set up with basic permission to borrow books as their only permission, and then assigned to/ linked with a Role which has further permissions, that staff person's account, after the Role is linked, will show ALL the permissions within that role. In the display, the left-hand (greyed) column are the settings coming from the Role record.



Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of changes to role users' permissions.

- ⊟ ☐ ☐ *(superlibrarian)* Access to all librarian functions
  - ⊞ ☑ ☐ *(circulate)* Circulate books
  - ⊞ ☑ ☐ *(catalogue)* View Catalogue (Librarian Interface)
  - ☐ ☐ *(parameters)* Set Koha system parameters
  - ⊞ ☑ ☐ *(borrowers)* Add or modify borrowers
  - ☐ ☐ *(permissions)* Set user permissions
  - ☐ ☐ *(reserveforothers)* Reserve books for patrons
  - ☑ ☑ *(borrow)* Borrow books
  - ⊞ ☐ ☐ *(editcatalogue)* Edit Catalogue (Modify bibliographic/holdings data)
  - ☐ ☐ *(updatecharges)* Update borrower charges
  - ⊞ ☐ ☐ *(acquisition)* Acquisition and/or suggestion management
  - ☐ ☐ *(management)* Set library management parameters
  - ⊞ ☐ ☐ *(tools)* Use tools (export, import, barcodes)
  - ☐ ☐ *(editauthorities)* allow to edit authorities
  - ☐ ☐ *(serials)* allow to manage serials subscriptions
  - ☐ ☐ *(reports)* allow to access to the reports module
  - ☐ ☐ *(staffaccess)* Modify login / permissions for staff users

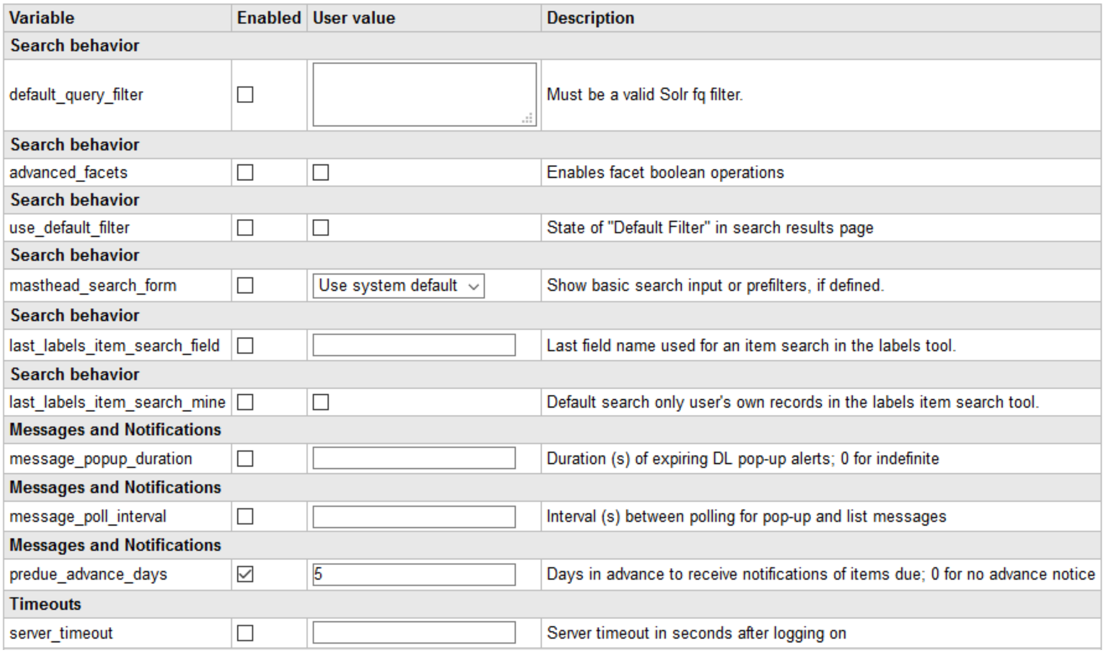
6.4 User Preferences

User preferences can also be set in the Role record as well as in individual patron records. Most of the preferences are relevant to staff logins; a few should be set or checked for patrons. Some preferences are set by the system, or are only used in specific cases.

The most important patron setting is predue_advance_days which is used by the advance notice script to determine when to send the advance notice.

If a site requires timeouts after inactivity, both staff and patron Role records will have settings in server_timeout and application_timeout (see Superlibrarian Guide). Some sites may want to turn on advanced_facets (see Superlibrarian Guide) for either/both staff and patron use. Sites may opt to display or hide hold history by default using retain_hold_history. Sites using the anonymization scripts will need to set the retain_issue_history preference for any patron or patron category where data should be retained.

Staff-specific preferences include sqlreports_numresults and holds_queue_column.



Variable	Enabled	User value	Description
Search behavior			
default_query_filter	☐		Must be a valid Solr fq filter.
Search behavior			
advanced_facets	☐	☐	Enables facet boolean operations
Search behavior			
use_default_filter	☐	☐	State of "Default Filter" in search results page
Search behavior			
masthead_search_form	☐	Use system default	Show basic search input or prefilters, if defined.
Search behavior			
last_labels_item_search_field	☐		Last field name used for an item search in the labels tool.
Search behavior			
last_labels_item_search_mine	☐	☐	Default search only user's own records in the labels item search tool.
Messages and Notifications			
message_popup_duration	☐		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
Messages and Notifications			
message_poll_interval	☐		Interval (s) between polling for pop-up and list messages
Messages and Notifications			
predue_advance_days	☑	5	Days in advance to receive notifications of items due; 0 for no advance notice
Timeouts			
server_timeout	☐		Server timeout in seconds after logging on

It is important to note that, as with messaging options below, some problems may appear if a specific user record overrides the Role setting, and then that record removes that setting. If the patron is 1) allowed to make a choice (i.e. the pref is enabled), and 2) at some point has applied a setting that is not the default, and 3) later changes it back to the default, that patron is no longer actually inheriting the defaults from the Role. If a different Role record is applied or if the permissions for an existing Role are changed, it will not affect that user's preferences.

A somewhat awkward workaround is to uncheck the enable box (the first column for most preferences) in the Role's preference settings, then edit the patron's account preferences. That will remove that particular pref from the patron's list of set prefs. Then you can go back and re-check the enable box in the role pref.

6.5 Updating Permission Settings

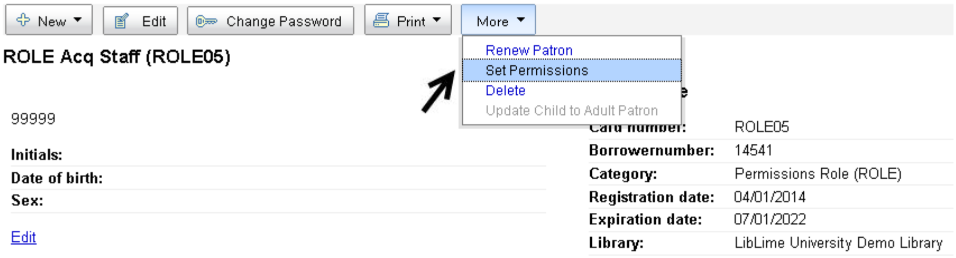
If you edit a Role patron and change default settings for permissions or messaging, those changes will immediately be reflected in every patron record linked to that Role. If permissions were individually assigned, you will need to edit each patron record to change them. It is recommended that you set default permissions through a Role record whenever possible. Note that users may need to refresh the browser to see the changes immediately.

6.6 Available Granular Permissions

See the Superlibrarian Guide for the current list of permissions; it is subject to change and too cumbersome to fully list both here and in that guide.

6.7 Assigning Permissions in a Role Patron

After the Role record is created and saved, click More, Set Permissions or use the sidebar link for Patron Permissions.



ROLE Acq Staff (ROLE05)

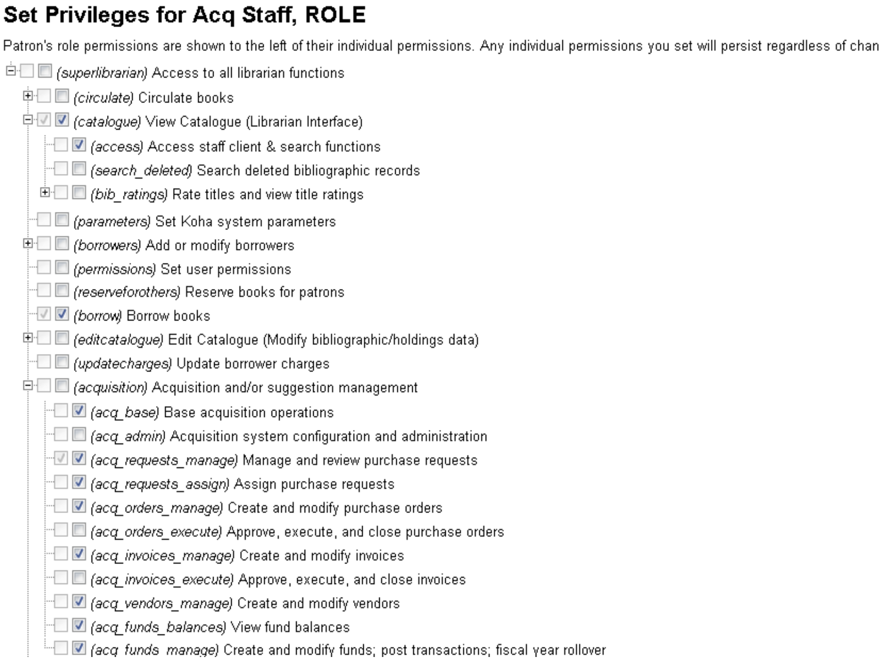
99999

Initials:
Date of birth:
Sex:

Edit

Card number: ROLE05
Borrowernumber: 14541
Category: Permissions Role (ROLE)
Registration date: 04/01/2014
Expiration date: 07/01/2022
Library: LibLime University Demo Library

This opens up a screen with check boxes for various actions. For staff roles, you must assign the *catalogue / access* permission or else the user will not be able to log into the staff client at all. Decide what permissions this Role should have and assign them in the right-hand checkbox column:



Set Privileges for Acq Staff, ROLE

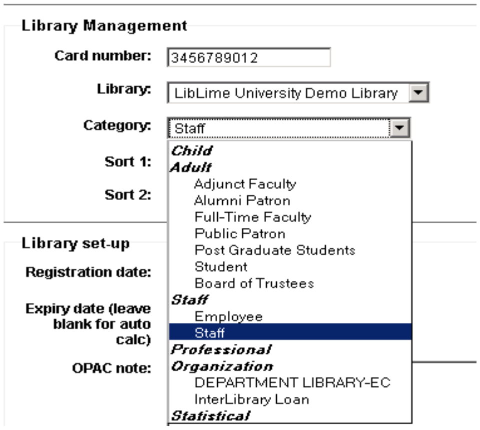
Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of chan

- ⊟ ☐ ☐ *(superlibrarian)* Access to all librarian functions
  - ⊞ ☐ ☐ *(circulate)* Circulate books
  - ⊟ ☑ ☑ *(catalogue)* View Catalogue (Librarian Interface)
    - ☐ ☑ *(access)* Access staff client & search functions
    - ☐ ☐ *(search_deleted)* Search deleted bibliographic records
    - ⊞ ☐ ☐ *(bib_ratings)* Rate titles and view title ratings
  - ☐ ☐ *(parameters)* Set Koha system parameters
  - ⊞ ☐ ☐ *(borrowers)* Add or modify borrowers
  - ☐ ☐ *(permissions)* Set user permissions
  - ☐ ☐ *(reserveforothers)* Reserve books for patrons
  - ☑ ☑ *(borrow)* Borrow books
  - ⊞ ☐ ☐ *(editcatalogue)* Edit Catalogue (Modify bibliographic/holdings data)
  - ☐ ☐ *(updatecharges)* Update borrower charges
  - ⊟ ☐ ☐ *(acquisition)* Acquisition and/or suggestion management
    - ☐ ☑ *(acq_base)* Base acquisition operations
    - ☐ ☐ *(acq_admin)* Acquisition system configuration and administration
    - ☑ ☑ *(acq_requests_manage)* Manage and review purchase requests
    - ☐ ☑ *(acq_requests_assign)* Assign purchase requests
    - ☐ ☑ *(acq_orders_manage)* Create and modify purchase orders
    - ☐ ☐ *(acq_orders_execute)* Approve, execute, and close purchase orders
    - ☐ ☑ *(acq_invoices_manage)* Create and modify invoices
    - ☐ ☐ *(acq_invoices_execute)* Approve, execute, and close invoices
    - ☐ ☑ *(acq_vendors_manage)* Create and modify vendors
    - ☐ ☑ *(acq_funds_balances)* View fund balances
    - ☐ ☑ *(acq_funds_manage)* Create and modify funds; post transactions; fiscal year rollover

Scroll to the bottom and click the Set Flags button. Those permissions will be assigned to any staff record linked to that Role.

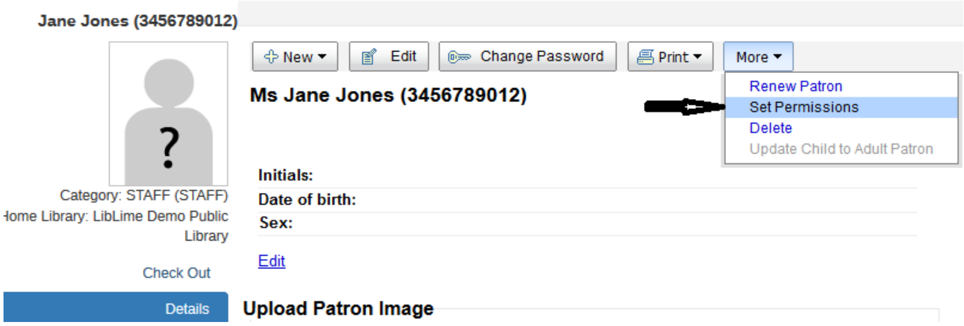
6.8 Assigning Permissions in an Individual Patron Record

A library staff user is created in the same way as a regular patron, except that you must select a patron category that has been designated as library staff. (Patron categories can be classified as Adult, Child, Staff, or some other special designations – Staff tells the system the user is a library staff person and is allowed to do certain actions.)



Card number: 3456789012
Library: LibLime University Demo Library
Category: Staff

See the previous section for assigning permissions via User Roles. Permissions can also be configured individually. After the record is created and saved, click More, Set Permissions.



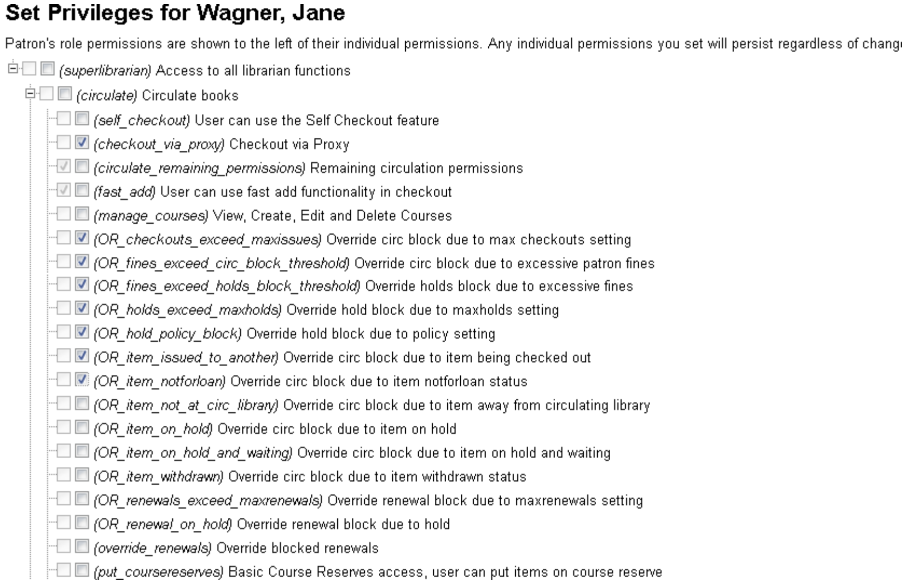
Ms Jane Jones (3456789012)

Category: STAFF (STAFF)
Home Library: LibLime Demo Public Library

Initials:
Date of birth:
Sex:

Edit

Remember, you must assign the *catalogue / access* permission or else the user will not be able to log into the staff client at all. The left-hand checkbox column will show what permissions are assigned in any linked Role (a user record can be linked to multiple roles). These cannot be removed in the individual record. Decide what additional permissions this user should have and assign them in the right-hand checkbox column. If a staff user is given a Role permission, but also individual permissions, the individual permissions will have priority. For example, the Role may not permit editing items, but if the staff person's individual record has that permission, the staff person will be allowed to edit items.



Set Privileges for Wagner, Jane

Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of chang

- ☐ ☐ *(superlibrarian)* Access to all librarian functions
  - ☐ ☐ *(circulate)* Circulate books
    - ☐ ☐ *(self_checkout)* User can use the Self Checkout feature
    - ☐ ☑ *(checkout_via_proxy)* Checkout via Proxy
    - ☑ ☐ *(circulate_remaining_permissions)* Remaining circulation permissions
    - ☑ ☐ *(fast_add)* User can use fast add functionality in checkout
    - ☐ ☐ *(manage_courses)* View, Create, Edit and Delete Courses
    - ☐ ☑ *(OR_checkouts_exceed_maxissues)* Override circ block due to max checkouts setting
    - ☐ ☑ *(OR_fines_exceed_circ_block_threshold)* Override circ block due to excessive patron fines
    - ☐ ☑ *(OR_fines_exceed_holds_block_threshold)* Override holds block due to excessive fines
    - ☐ ☑ *(OR_holds_exceed_maxholds)* Override hold block due to maxholds setting
    - ☐ ☑ *(OR_hold_policy_block)* Override hold block due to policy setting
    - ☐ ☑ *(OR_item_issued_to_another)* Override circ block due to item being checked out
    - ☐ ☑ *(OR_item_notforloan)* Override circ block due to item notforloan status
    - ☐ ☐ *(OR_item_not_at_circ_library)* Override circ block due to item away from circulating library
    - ☐ ☐ *(OR_item_on_hold)* Override circ block due to item on hold
    - ☐ ☐ *(OR_item_on_hold_and_waiting)* Override circ block due to item on hold and waiting
    - ☐ ☐ *(OR_item_withdrawn)* Override circ block due to item withdrawn status
    - ☐ ☐ *(OR_renewals_exceed_maxrenewals)* Override renewal block due to maxrenewals setting
    - ☐ ☐ *(OR_renewal_on_hold)* Override renewal block due to hold
    - ☐ ☐ *(override_renewals)* Override blocked renewals
    - ☐ ☐ *(put_coursereserves)* Basic Course Reserves access, user can put items on course reserve

The permissions assigned depend on the person's work needs. Superlibrarian is the system administrator permission; you should not assign it to logins intended for daily library work. Instead, review what that person will need to do, and assign permissions accordingly. For example, a person who works at the Circulation Desk will need most of the permissions in the circulate group, but you may not want that person to be able to override certain checkout blocks such as "Override circ block due to excessive patron fines." Leave those permissions unchecked.

Someone working at the Circulation Desk will probably also need at least the "Remaining Borrowers Permissions" setting (to be able to search and display patron records), but you may not want to allow other patron actions such as batch edit/delete. The library staff person may also need "Update borrower charges" to be able to take payment for fines. However, this person would not be given permissions in other areas such as Acquisitions, Tools, or Cataloging.

Set the permissions you think this staff role will need, then click the Set Flags button to save them. Then log in as that user and test it. Make sure the login can do all the actions needed, but cannot do anything that should be blocked. When that person logs in, the initial menu will be much more limited than that of someone with full administrator permissions.

6.9 Permissions for Anonymous Users

Some limited permissions can be granted even to users who are not logged in. The system preference AnonymousRole can be tied to a patron Role record. Any features which don't require a link to an individual patron record can be granted to anonymous users. An example would be the bib ratings feature. See Superlibrarian Guide, Role Patrons and Default Permissions, Permissions for Anonymous Users.

7. Messaging and Message Preference Defaults

The system now has a common infrastructure which is used for all messages and notifications. This replaces three previous mutually incompatible subsystems for managing messages. The messaging infrastructure supports two different classes of messages: **unicast** and **multicast**. A unicast message is sent to a specific patron or recipient address; examples include fines alerts, account details/welcome emails, and approval or rejections notifications sent to patrons who submit purchase requests. A multicast message occurs in response to a particular event, and is received by patrons who are subscribed to that message type through their message receipt preferences.

Each message has a specific **message type**, associated with a unique code such as *ODUE* ("overdue"), *PR.approved* ("purchase request approved"), or *gen.letter* (general purpose letter). Message types are grouped into categories such as *Acquisition* or *Announcements*. Some message types exist in both unicast and multicast flavors; others only occur in one variant or the other.

Messages can be delivered to one or more **message endpoint types**. Currently defined endpoint types include:

- Popup – these appear as info or alert boxes in staff mode or the Discovery Layer.
- List – these appear in the "My Messages" tab of the Discovery Layer
- RSS – these are available once a user subscribes to their messages RSS feed using their browser or RSS reader
- Email – these are sent to the user's email address

There are some specialized endpoints used by sites running the Talking Tech phone notification service; these will only show if enabled. More endpoint types may be added in the future.

The delivery of messages is governed by patrons' **message receipt preferences**, which can be set either through the Discovery Layer ("My Messaging Preferences" tab) or through the staff patron editor. A patron must *subscribe* to a particular message via a particular endpoint to receive messages (exception: delivery can be forced using the staff message send tool, see below). Subscription can happen directly, through the patron's own preferences, or indirectly, through their roles or their category roles. For example, if the "STUDENT" category were assigned a "ROLESTUDENT" category default role, and ROLESTUDENT were subscribed to advance notices by popup and email, then any student who did not override these preferences would receive advance popups and emails.

7.1 Staff Management of Patron Messaging Preferences

7.1.1 Role Settings

Library staff can set defaults in the assigned Role patron, and those will be picked up when a new record is created, but staff can also change settings at any time for an individual patron. Role patron settings are edited the same way as individual patron settings (see below).

Changes to a role's messaging settings take effect immediately to all patrons who are linked to this role. However, users may need to refresh the browser to see new settings.

Remember that patrons can be assigned roles directly through the patron edit screen (where you can assign roles and decide when they expire), or through their patron category, via the *category default roles* which are set up in *Administration -> Patron categories*.

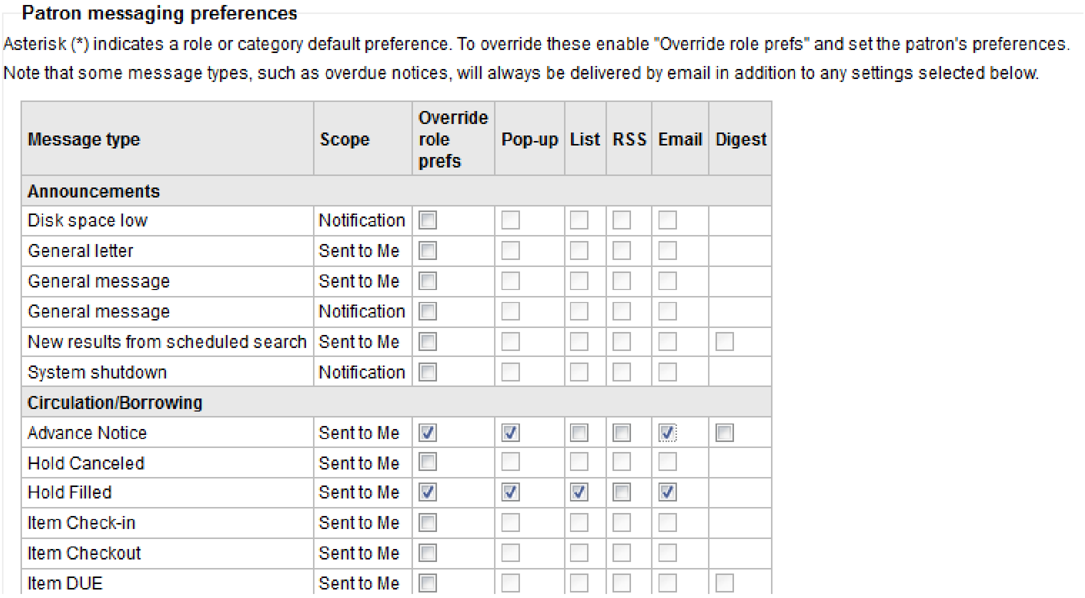
Patron Category Administration

Code	Category name	Type	Enrollment period	Age required	Upper age limit	Enrollment fee	Overdue	Hold fee	Roles		
ADJUNCT	Adjunct Faculty	Adult	24 months	0 years	0 years	0.00	Yes	0.00	ADJUNCT ROLE	Edit	Delete
AGSTAFF	Agency Staff	Adult	12 months	0 years	0 years	0.00	Yes	0.00		Edit	Delete
ALUMNI	Alumni Patron	Adult	24 months	0 years	0 years	0.00	No	0.00		Edit	Delete
TRUST	Board of Trustees	Adult	24 months	0 years	0 years	0.00	No	0.00		Edit	Delete
FACULTY	Full-Time Faculty	Adult	24 months	0 years	0 years	0.00	No	0.00		Edit	Delete
PUBLIC	General Public	Adult	12 months	0 years	0 years	0.00	Yes	0.00	PUBLIC ROLE	Edit	Delete
PGS	Post Graduate Students	Adult	36 months	0 years	0 years	500.00	Yes	0.00	PGS ROLE	Edit	Delete
PATRON	Public Patron	Adult	24 months	0 years	0 years	0.00	Yes	0.00	Patron role	Edit	Delete
STUDENT	Student	Adult	24 months	0 years	0 years	0.00	Yes	0.00		Edit	Delete
TESTUSER	Test Patron	Adult	60 months	0 years	0 years	0.00	Yes	0.00		Edit	Delete
JUV	Juvenile	Child	12 months	0 years	18 years	0.00	Yes	0.00		Edit	Delete
DL/EC	DEPARTMENT LIBRARY-EC	Org.	36 months	20 years	40 years	0.00	No	0.00	DL/EC ROLE	Edit	Delete
ILL	InterLibrary Loan	Org.	24 months	0 years	0 years	0.00	No	0.00		Edit	Delete
STAFF	Staff	Staff	24 months	0 years	999 years	0.00	Yes	0.00		Edit	Delete
EMPLOYEE	Employee	Staff	36 months	0 years	0 years	0.00	No	0.00		Edit	Delete
ROLE	Permissions Role	Staff	99 months	18 years	999 years	0.00	No	0.00		Edit	Delete
INHOUSE	In House Use	Statistical	0 months	0 years	0 years	0.00	No	0.00		Edit	Delete

Message preferences obtained through roles are additive. For example, if role X is set to get overdue notices by email, and role Y is set to get overdue notices by RSS, then a patron with both roles will receive overdue notices both by email and RSS.

7.1.2 Role or Individual Patron Settings

To change messaging options for either a Role patron or a particular patron, you can either edit the full patron record (scroll to the bottom) or click the Edit link under the messaging options part of the patron detail display screen. That link takes you into an edit page for just the messaging options.



Patron messaging preferences

Asterisk (*) indicates a role or category default preference. To override these enable "Override role prefs" and set the patron's preferences.

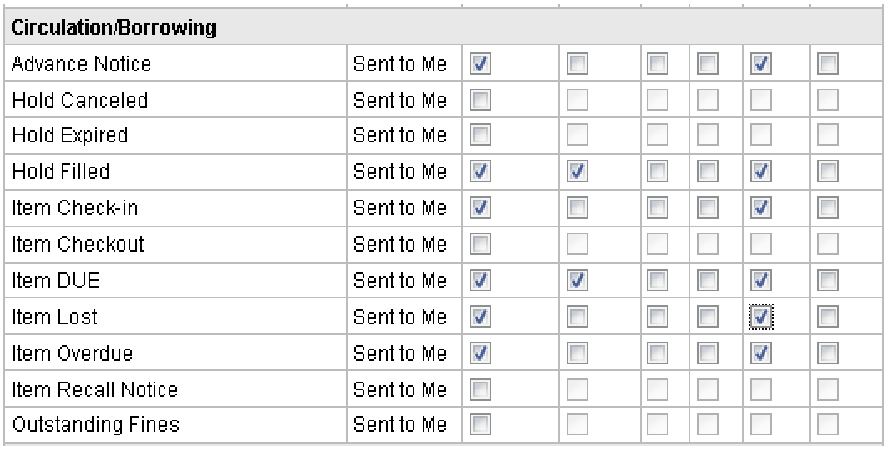
Note that some message types, such as overdue notices, will always be delivered by email in addition to any settings selected below.

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	Digest
Announcements							
Disk space low	Notification	☐	☐	☐	☐	☐	
General letter	Sent to Me	☐	☐	☐	☐	☐	
General message	Sent to Me	☐	☐	☐	☐	☐	
General message	Notification	☐	☐	☐	☐	☐	
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐
System shutdown	Notification	☐	☐	☐	☐	☐	
Circulation/Borrowing							
Advance Notice	Sent to Me	☑	☑	☐	☐	☑	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	
Hold Filled	Sent to Me	☑	☑	☑	☐	☑	
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐

In previous versions, with the old messaging setup, patrons were not given a choice about opting out of overdue notices. **It's important to note now that if the Overdue messaging preference isn't enabled, patrons won't get overdue notices. You should set that preference in all the Role records.**

Role preference settings are indicated by asterisks and a grayed-out check on a patron display page. For example, if a user is subscribed by their roles to receive Advance notice messages by popup and list, then an asterisk (*) will appear next to the corresponding checkboxes for this message (see screenshot above).

The user's own preferences are governed by the checkboxes; the *Override role prefs* box must be checked to assign the user preferences that differ from their role preferences. No asterisk will appear next to the check marks for these message settings.



Circulation/Borrowing							
Advance Notice	Sent to Me	☑	☐	☐	☐	☑	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☑	☐	☐	☑	☐
Item Check-in	Sent to Me	☑	☐	☐	☐	☑	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☑	☑	☐	☐	☑	☐
Item Lost	Sent to Me	☑	☐	☐	☐	☑	☐
Item Overdue	Sent to Me	☑	☐	☐	☐	☑	☐
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☐	☐

IMPORTANT: there is a subtle but important semantic difference between user and role preferences. For example, suppose Alice and Bob are both assigned the *AdultPatronRole* role, and that role is subscribed to receive overdue messages by list alone. Alice's preferences are overridden (by the staff member checking the *Override role preferences* box) and changed to RSS alone (RSS checked, but all others are unchecked). Later, a staff member decides to change the *AdultPatronRole* role to receive overdue notices by email.

Now, Bob will receive these by email, because he has not overridden his role preferences. **Alice, however, will still get overdue notices only by RSS, because she has overridden her role preferences.** If she (or a staff member) unchecks *Override role preferences*, she will automatically go back to the current role defaults (email).

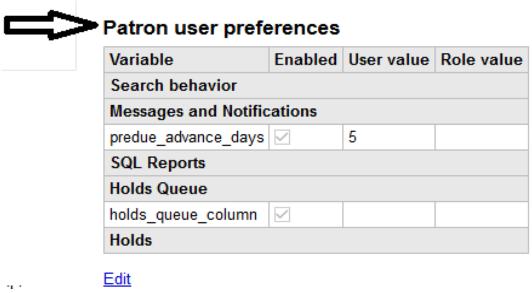
Patrons may only be subscribed to message types appropriate to their permissions set. For example, patrons cannot subscribe to catalog multicast messages sent when bibliographic record batches are staged or committed unless they have the *cataloguing.bib* permission. If a staff member does not have Reports permissions, the messages related to reports will not be available on that record.

IMPORTANT: if a patron is granted permissions, subscribed to a privileged message type, and then the permissions are removed, the patron will still be subscribed to that message type, even though it will not appear in their messaging preferences (either in the Discovery Layer or staff side). This should be corrected in a future release.

7.1.3 Most Common Types of Messages

Most messages are generated by being set up in two places: the relevant cron job and by being selected in the relevant role record's message preferences. The two exceptions to this are 1) overdue notices also must be set up in the Overdue Notices / Triggers section in Tools and 2) Advance Notices must also be set in the User Preferences section.

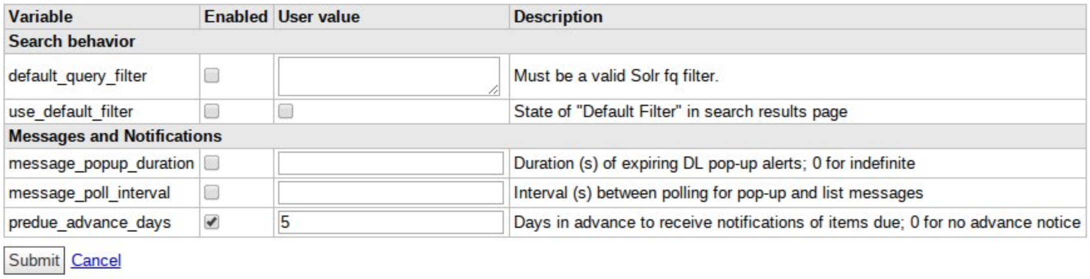
From the patron's point of view, holds, overdues, and advance notices are the most important messages; others are more specialized. Item DUE and Advance Notice are controlled by the Advance Notice cron job. The advance notice message sends an email the specified number of days before an item is due, alerting the patron to renew or return the item. The item due notice is sent on the morning something is due. Note that the number of days in advance the Advance Notice is sent is controlled under the User Preferences section of the record:



Patron user preferences

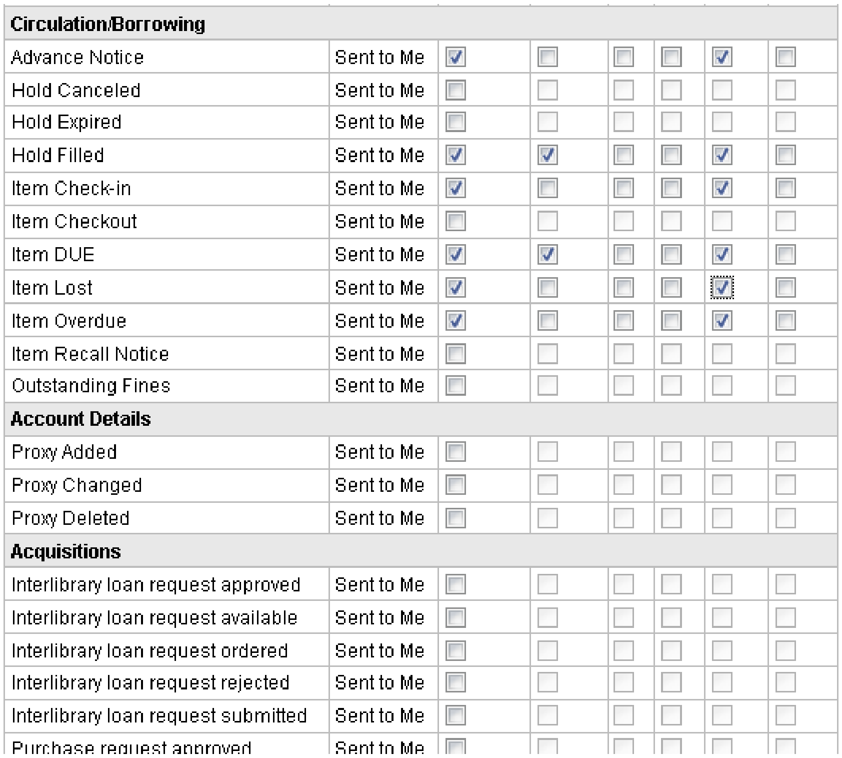
Variable	Enabled	User value	Role value
Search behavior			
Messages and Notifications			
predue_advance_days	☑	5	
SQL Reports			
Holds Queue			
holds_queue_column	☑		
Holds			

You must also set a value here, or advance notices will not be sent:



Variable	Enabled	User value	Description
Search behavior			
default_query_filter	☐		Must be a valid Solr fq filter.
use_default_filter	☐	☐	State of "Default Filter" in search results page
Messages and Notifications			
message_popup_duration	☐		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
message_poll_interval	☐		Interval (s) between polling for pop-up and list messages
predue_advance_days	☑	5	Days in advance to receive notifications of items due; 0 for no advance notice

See the earlier discussion of this section under Search Filters.



Circulation/Borrowing							
Advance Notice	Sent to Me	☑	☐	☐	☐	☑	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☑	☑	☐	☐	☑	☐
Item Check-in	Sent to Me	☑	☐	☐	☐	☑	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	☐
Item DUE	Sent to Me	☑	☑	☐	☐	☑	☐
Item Lost	Sent to Me	☑	☐	☐	☐	☑	☐
Item Overdue	Sent to Me	☑	☐	☐	☐	☑	☐
Item Recall Notice	Sent to Me	☐	☐	☐	☐	☐	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☐	☐
Account Details							
Proxy Added	Sent to Me	☐	☐	☐	☐	☐	☐
Proxy Changed	Sent to Me	☐	☐	☐	☐	☐	☐
Proxy Deleted	Sent to Me	☐	☐	☐	☐	☐	☐
Acquisitions							
Interlibrary loan request approved	Sent to Me	☐	☐	☐	☐	☐	☐
Interlibrary loan request available	Sent to Me	☐	☐	☐	☐	☐	☐
Interlibrary loan request ordered	Sent to Me	☐	☐	☐	☐	☐	☐
Interlibrary loan request rejected	Sent to Me	☐	☐	☐	☐	☐	☐
Interlibrary loan request submitted	Sent to Me	☐	☐	☐	☐	☐	☐
Purchase request approved	Sent to Me	☐	☐	☐	☐	☐	☐

Hold Filled is the message that is sent to the patron when a hold is triggered. Item Checkout and Item Check-In are generated at checkout or checkin – a message saying what items were checked out or returned. It could be used instead of a printed slip. Item Lost will notify a patron if an item checked out to that patron is marked as lost (which may result in charges to the patron).

The Interlibrary Loan group of messages will notify patrons about the status of those requests. If your site allows patrons to make purchase suggestions, those messages may be used.

Digest mode, where available, does not give details. A regular advance notice or item due notice would list the titles and item details. The digest version would only say something like "you have 3 items due." No item details are available. Digest mode is available for Advanced Due and Items Due notices. It combines multiple notices that would be sent out at the same time into one notice that lists all titles.

The most common (and strongly recommended) settings for patrons are Item Overdue, Hold Filled, and Advance Notice.

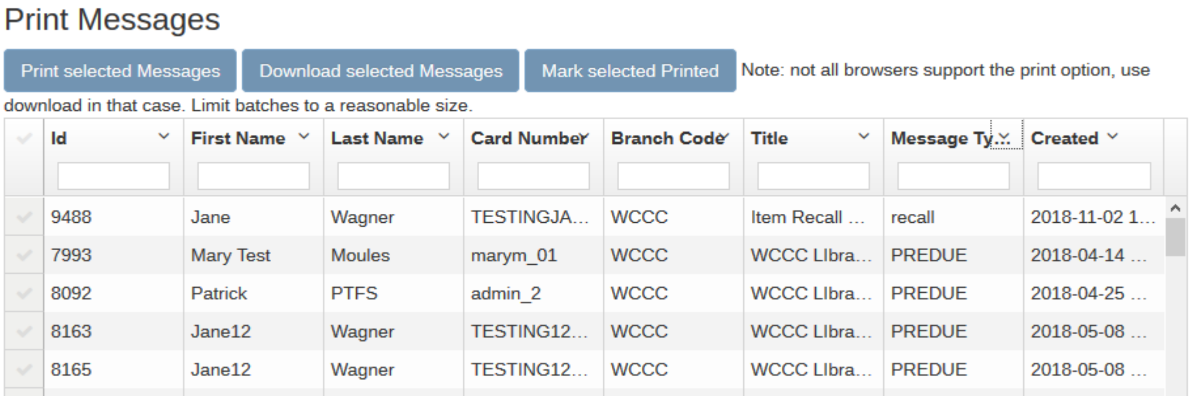
Other messaging options may be added by future development. The text for these messages is found under Tools, Message Templates and may be modified (see the Superlibrarian Guide), but should be kept fairly generic. Since people can use different day-in-advance settings for advance notices, the notice should not specify a time period. Use wording such as “due soon” rather than “due in three days” so that it applies to all users.

7.1.4 Patron Management of Messaging Preferences

Patrons can manage their own messaging preferences; see the Discovery Layer section later in this manual.

7.1.5 Print Notices

The Print Messages feature allows printing notices that were generated for patrons without email addresses. A granular permission (tools.print_messages) allows staff access to Tools, Print Messages. This checks the message table for any messages with a status of “failed” and makes them available to print. NOTE: Messages do not get that status until after the process_message_queue cron job runs and the email message fails.

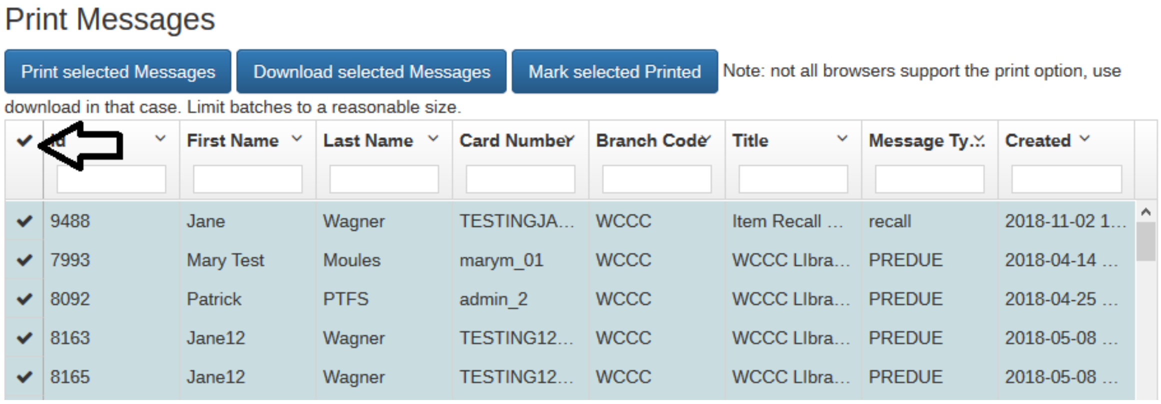


Print Messages

Note: not all browsers support the print option, use download in that case. Limit batches to a reasonable size.

	Id	First Name	Last Name	Card Number	Branch Code	Title	Message Ty...	Created
	9488	Jane	Wagner	TESTINGJA...	WCCC	Item Recall ...	recall	2018-11-02 1...
	7993	Mary Test	Moules	marym_01	WCCC	WCCC LIbra...	PREDUE	2018-04-14 ...
	8092	Patrick	PTFS	admin_2	WCCC	WCCC LIbra...	PREDUE	2018-04-25 ...
	8163	Jane12	Wagner	TESTING12...	WCCC	WCCC LIbra...	PREDUE	2018-05-08 ...
	8165	Jane12	Wagner	TESTING12...	WCCC	WCCC LIbra...	PREDUE	2018-05-08 ...

You can select all messages at once by clicking the arrow next to the ID field in the header:

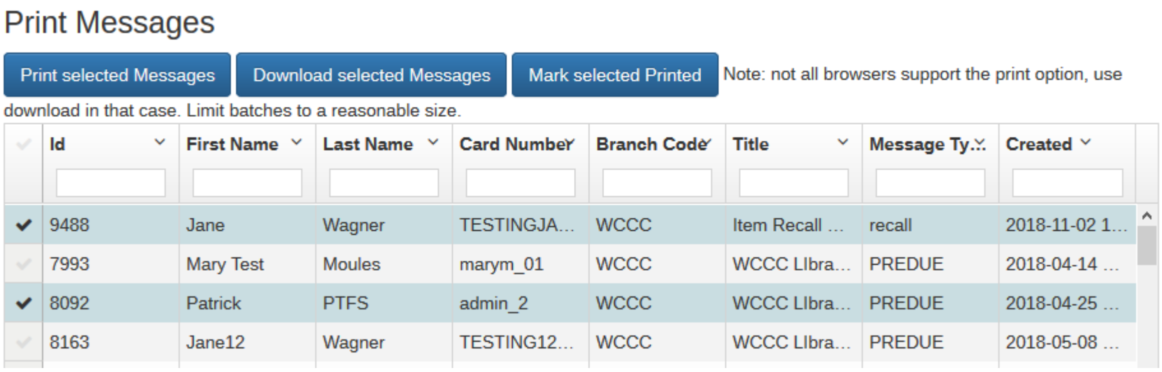


Print Messages

Note: not all browsers support the print option, use download in that case. Limit batches to a reasonable size.

✓	Id	First Name	Last Name	Card Number	Branch Code	Title	Message Ty...	Created
✓	9488	Jane	Wagner	TESTINGJA...	WCCC	Item Recall ...	recall	2018-11-02 1...
✓	7993	Mary Test	Moules	marym_01	WCCC	WCCC LIbra...	PREDUE	2018-04-14 ...
✓	8092	Patrick	PTFS	admin_2	WCCC	WCCC LIbra...	PREDUE	2018-04-25 ...
✓	8163	Jane12	Wagner	TESTING12...	WCCC	WCCC LIbra...	PREDUE	2018-05-08 ...
✓	8165	Jane12	Wagner	TESTING12...	WCCC	WCCC LIbra...	PREDUE	2018-05-08 ...

or you can click on lines individually to select them:

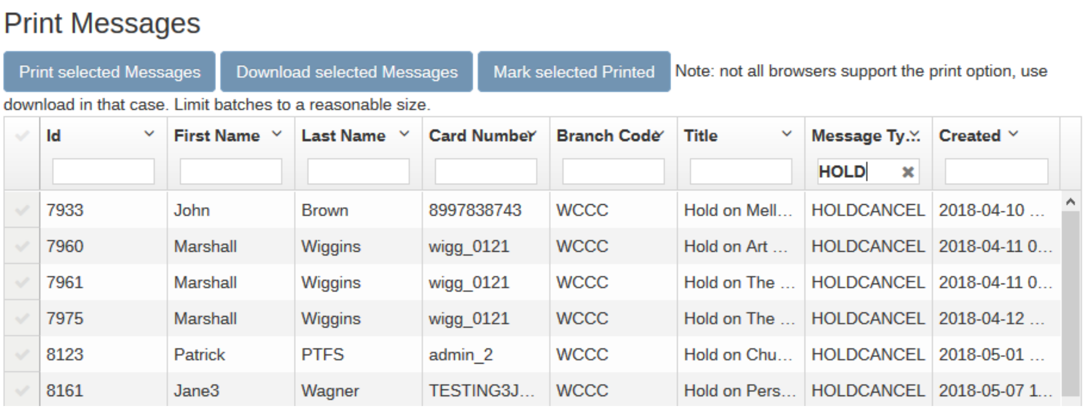


Note: not all browsers support the print option, use download in that case. Limit batches to a reasonable size.

	Id	First Name	Last Name	Card Number	Branch Code	Title	Message Ty...	Created
✓	9488	Jane	Wagner	TESTINGJA...	WCCC	Item Recall ...	recall	2018-11-02 1...
	7993	Mary Test	Moules	marym_01	WCCC	WCCC LIbra...	PREDUE	2018-04-14 ...
✓	8092	Patrick	PTFS	admin_2	WCCC	WCCC LIbra...	PREDUE	2018-04-25 ...
	8163	Jane12	Wagner	TESTING12...	WCCC	WCCC LIbra...	PREDUE	2018-05-08 ...

Note that the buttons change color whenever messages are selected.

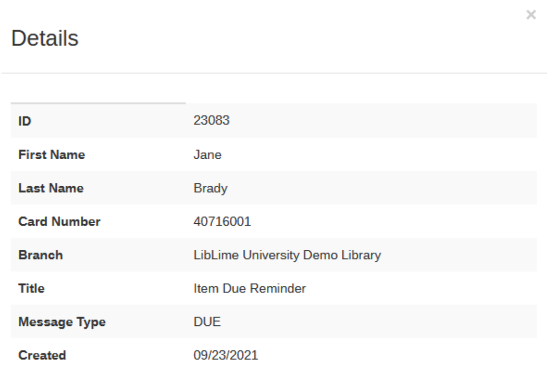
The tool has options for sorting or filtering by column – enter a value in one of the header boxes and the display will limit to that. This is useful if a site only wants to print and mail certain types of messages. This will be especially needed in a multi-library setup where each branch only wants to print its own notices. Note that you only have to start typing an entry (like EA for EAST) and the system will filter to match what you have typed so far. You could then apply another limiter, such as last name or title of message, to filter results further. Then select the entries you want.



Note: not all browsers support the print option, use download in that case. Limit batches to a reasonable size.

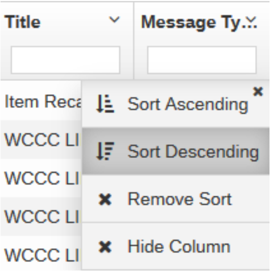
	Id	First Name	Last Name	Card Number	Branch Code	Title	Message Ty...	Created
							HOLD	
	7933	John	Brown	8997838743	WCCC	Hold on Mell...	HOLDCANCEL	2018-04-10 ...
	7960	Marshall	Wiggins	wigg_0121	WCCC	Hold on Art ...	HOLDCANCEL	2018-04-11 0...
	7961	Marshall	Wiggins	wigg_0121	WCCC	Hold on The ...	HOLDCANCEL	2018-04-11 0...
	7975	Marshall	Wiggins	wigg_0121	WCCC	Hold on The ...	HOLDCANCEL	2018-04-12 ...
	8123	Patrick	PTFS	admin_2	WCCC	Hold on Chu...	HOLDCANCEL	2018-05-01 ...
	8161	Jane3	Wagner	TESTING3J...	WCCC	Hold on Pers...	HOLDCANCEL	2018-05-07 1...

You can view an individual message by doubleclicking on it. That produces a popup window:



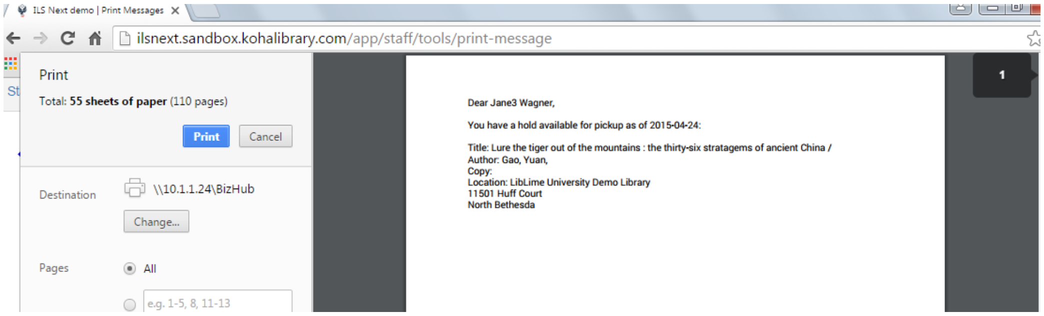
ID	23083
First Name	Jane
Last Name	Brady
Card Number	40716001
Branch	LibLime University Demo Library
Title	Item Due Reminder
Message Type	DUE
Created	09/23/2021

To sort, click on the column heading. Three dots displaying in the header indicates which sort is active. Clicking the header by itself should do an automatic sort; clicking the down-arrow icon next to the label will open an options menu:



The selected messages are combined into a .pdf file for viewing and printing – use the Print Selected Messages or Download Selected Messages buttons. Most browsers will have trouble processing a large number of messages; you should limit your batch to perhaps 50 messages (see filtering options below) or use the download option.

Not all browsers support previewing this file. If needed, download the file and then inspect it and print it.



Total: 55 sheets of paper (110 pages)

Destination: \\10.1.1.24\BizHub

Dear Jane3 Wagner,

You have a hold available for pickup as of 2015-04-24:

Title: Lure the tiger out of the mountains : the thirty-six stratagems of ancient China /
Author: Gao, Yuan,
Copy:
Location: LibLime University Demo Library
11501 Huff Court
North Bethesda

Each notice is on a separate page. You will want to be sure all your message templates have full address fields (both branchcode and patron) so that print messages can be sent out.

After printing or downloading the messages, be sure to select all of them and click the Mark Selected Printed button. This changes the message status to “printed”, so that they don’t show up the next time you use the tool. If necessary, refresh the browser so that the list shows as empty.

7.1.5.1 Change to Overdue Notice Handling

Previously, if a patron record had no email address, separate overdue notices would not be generated. Instead, the missed notice would be rolled up into a "These messages were not sent directly to the patron" email sent to the library's email address. However, with the new print notice feature, these messages were not available for printout. By default, now, overdue notices for patrons with no email address will be created and marked as failed; they will then be available for printing. If a site would prefer the earlier behavior (the combined email to library staff), using the -noempty parameter on the overdue notice cron job will do that (but the messages will not be available for printing). If needed, open a Support Center ticket and ask to have the -noempty parameter configured on your cron job.

This only applies to overdue notices, not to any other kind of notice. Other notices will automatically go into the Print Notice tool if there is no email address.

8. Reports

The reports module has messaging options and granular permissions associated with it – check the Role settings for staff patrons and update as needed. Report messaging options are Reports initiated, completed, failed. Permissions are Reports, create/update/delete reports, run existing reports, retrieve reports, and Tools, async_jobs, view and modify. Any user with report permissions can see all saved or completed reports. Any user with these report permissions can see all saved or completed reports, create/edit/delete them, or run them. Staff users can be assigned more limited permissions, to allow them to run and view existing reports but not to modify them or create new ones.

All reports run in the background now; the server job for asynchronous processing is required. This eliminates earlier browser timeout problems for lengthy or complex reports. Make sure you have assigned the “report completed” messaging option to staff records so that you will get the promised notice (preferably a popup) when a report finishes. If a report starts but never completes (“pending”), contact Support Center – the report process may need to be restarted on the server.

All item, patron, and transactional data is stored in various tables, which can be queried using MySQL commands through the Reports interface. There are some wizards and canned reports, but the best results will come through more precise queries designed to get at the particular data needed. Sites will need someone with some SQL query expertise, and will also need to understand the basic table structure. This SQL query will list all the table and fieldnames in the current database:

```
select TABLE_NAME, COLUMN_NAME from information_schema.columns where
table_schema != 'information_schema' order by TABLE_NAME asc
```

The most important tables are biblio, biblioitems, items, borrowers, issues (checkouts), reserves (holds), and statistics. Links between tables are on the internal system unique identifier – biblionumber, itemnumber, borrowernumber. For example, to check what items a patron has on hold, one could query the reserves table for that patron’s borrowernumber. Other parameters would probably need to be set, and additional information pulled from other tables (such as the patron’s name, item barcode, and title) to get the results in a usable format.

The Reports menu has several options:

SQL/Guided Reports

SQL Reports
Manage or run guided and SQL reports

Create from SQL
Create a new SQL report

Guided Reports Wizard
Build a new guided report

Reports Dictionary

Dictionary
Use the dictionary to define custom criteria for reporting

Statistics Wizard

Patron Stats
Generate statistics about patrons

Catalog Stats
Generate statistics about catalog records

Circulation Stats
Generate statistics about item circulation

Average Loan Time
Generate statistics about average checkout periods

Inactive

Inactive Patrons
Find patrons with no checkouts

Inactive Items

Top Lists

Most Active Patrons
Find patrons with the most checkouts

Most Circulated Items
Find the most circulated items

Other

Items Lost
Find items marked as lost

Catalog by Item Type
View catalog group by item types

Resources

LibLime Reports Library

MySQL Documentation

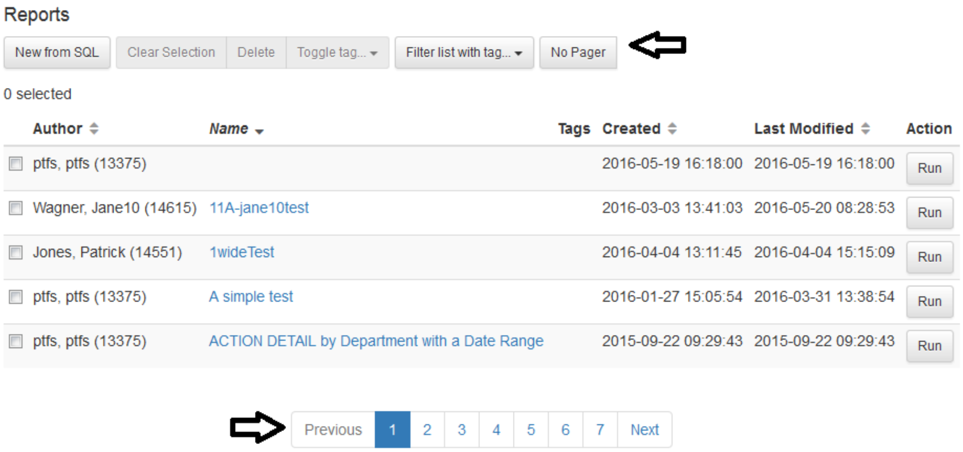
8.1 SQL Reports

If you have some SQL expertise and learn the basic table structure, you can write your own queries from scratch. You will only be able to use the SELECT query and associated modifiers – you are not allowed to save reports that attempt to modify table data or do anything potentially harmful. The reports interface is for querying only.

From the main reports menu, click SQL Reports. The SQL reports interface allows several options. We'll first look at running existing reports, then at creating new ones.

8.1.1 Running an Existing Report and Viewing Output

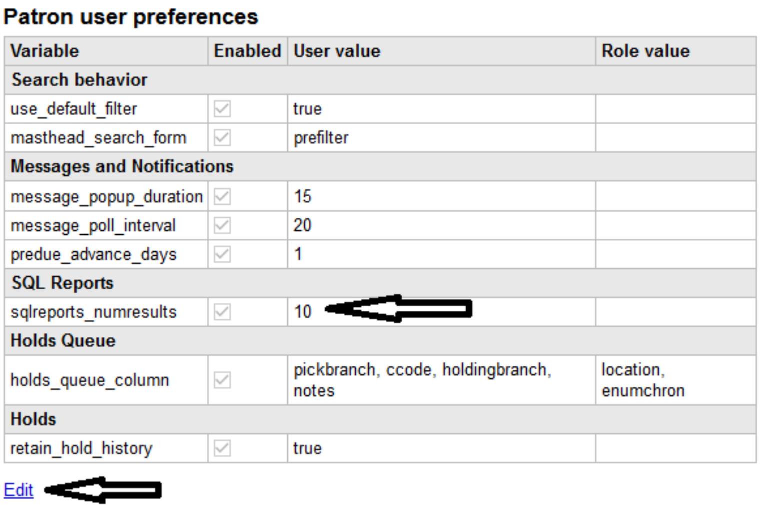
The list of saved reports is paginated (the default is 10 per page). Use the page numbers at the bottom to move through the list. You can use the No Pager button at the top to show all reports on one screen.



0 selected

	Author	Name	Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)			2016-05-19 16:18:00	2016-05-19 16:18:00	Run
☐	Wagner, Jane10 (14615)	11A-jane10test		2016-03-03 13:41:03	2016-05-20 08:28:53	Run
☐	Jones, Patrick (14551)	1wideTest		2016-04-04 13:11:45	2016-04-04 15:15:09	Run
☐	ptfs, ptfs (13375)	A simple test		2016-01-27 15:05:54	2016-03-31 13:38:54	Run
☐	ptfs, ptfs (13375)	ACTION DETAIL by Department with a Date Range		2015-09-22 09:29:43	2015-09-22 09:29:43	Run

The default number of entries per page can be set in staff mode for any patron or Role. In the patron record, edit the User Preferences section:

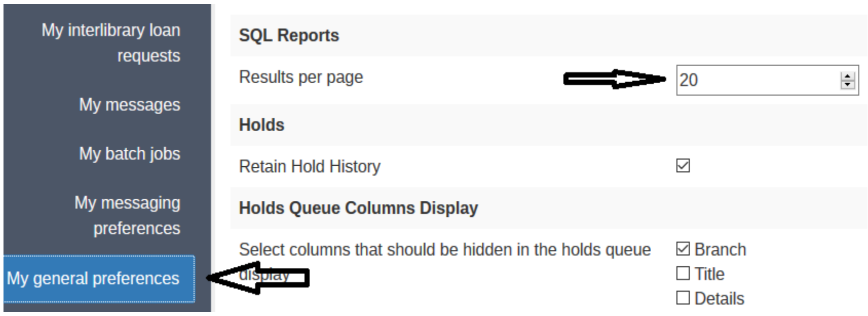


Patron user preferences

Variable	Enabled	User value	Role value
Search behavior			
use_default_filter	☑	true	
masthead_search_form	☑	prefilter	
Messages and Notifications			
message_popup_duration	☑	15	
message_poll_interval	☑	20	
predue_advance_days	☑	1	
SQL Reports			
sqlreports_numresults	☑	10	
Holds Queue			
holds_queue_column	☑	pickbranch, ccode, holdingbranch, notes	location, enumchron
Holds			
retain_hold_history	☑	true	

Then change the sqlreports_numresults entry to the number you want.

Individual users can also set this in the patron account (My Account, My General Preferences, Results per page):



SQL Reports

Results per page: 20

Holds

Retain Hold History ☑

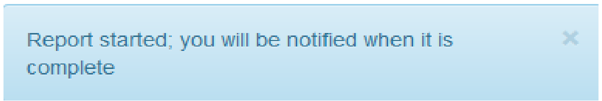
Holds Queue Columns Display

Select columns that should be hidden in the holds queue display: ☑ Branch ☐ Title ☐ Details

The preference is only visible for staff users, not general patrons.

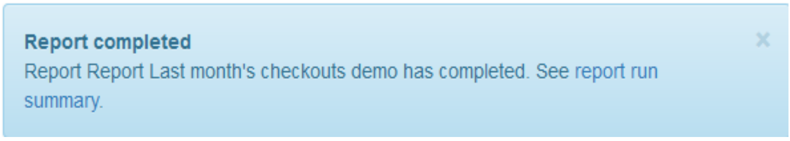
The default sort in the list of reports is report title; you can use the column headers to change the sort by author, date created, or date modified. The Filter Text with Tag button allows you to filter based on report tags (see that section below).

From the list, you can click the Run button to run an existing report. If you have the messaging options set, you'll get a popup alert.



Report started; you will be notified when it is complete

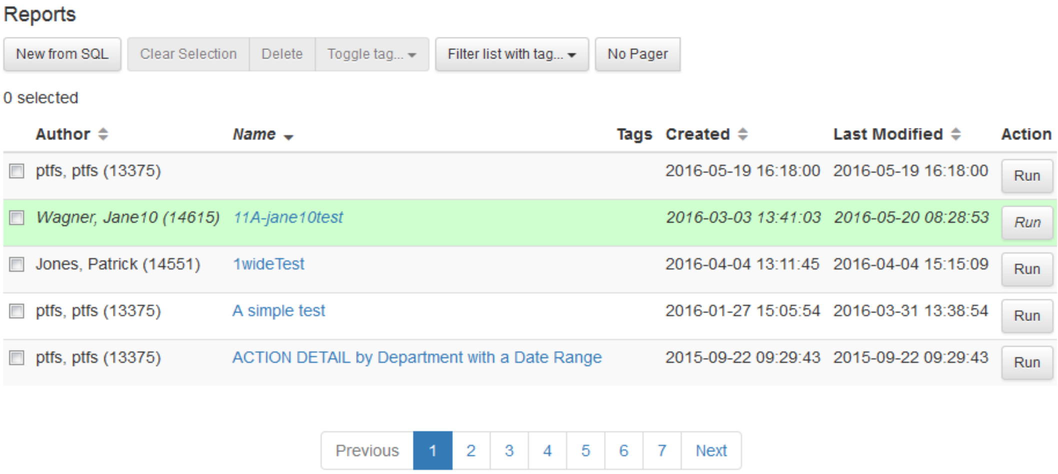
When the report finishes, if you have the messaging option set, you'll get a popup alerting you to that:



Report completed

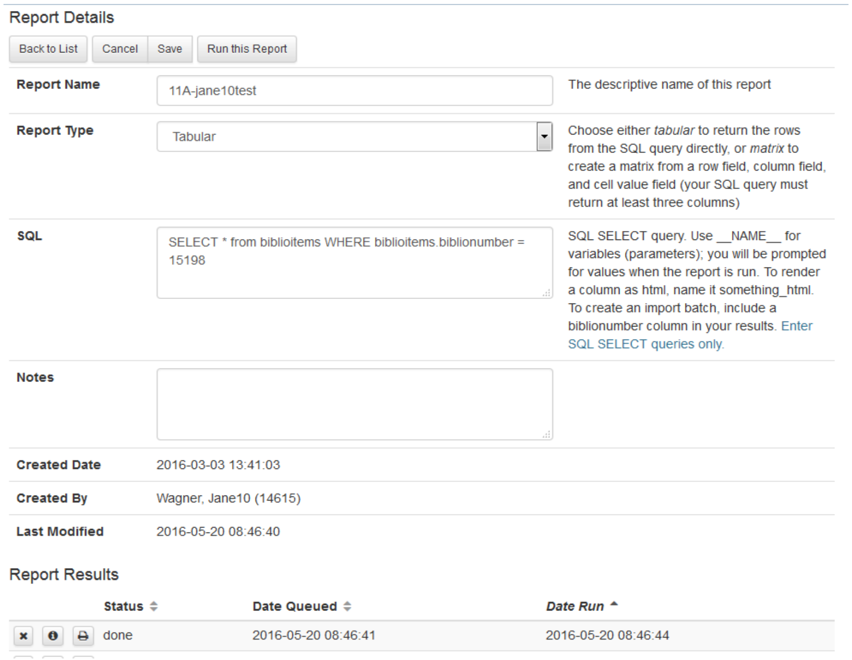
Report Report Last month's checkouts demo has completed. See report run summary.

You can click the "report run summary" link in the popup, or click on the report name in the list of saved reports. When a report has finished, the background color and font change in the list of saved reports to alert you that it is ready:



	Author	Name	Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)			2016-05-19 16:18:00	2016-05-19 16:18:00	Run
☐	*Wagner, Jane10 (14615)*	*11A-jane10test*		*2016-03-03 13:41:03*	*2016-05-20 08:28:53*	*Run*
☐	Jones, Patrick (14551)	1wideTest		2016-04-04 13:11:45	2016-04-04 15:15:09	Run
☐	ptfs, ptfs (13375)	A simple test		2016-01-27 15:05:54	2016-03-31 13:38:54	Run
☐	ptfs, ptfs (13375)	ACTION DETAIL by Department with a Date Range		2015-09-22 09:29:43	2015-09-22 09:29:43	Run

Click the name of the report from the list. This takes you into the report setup page; finished reports are at the bottom.



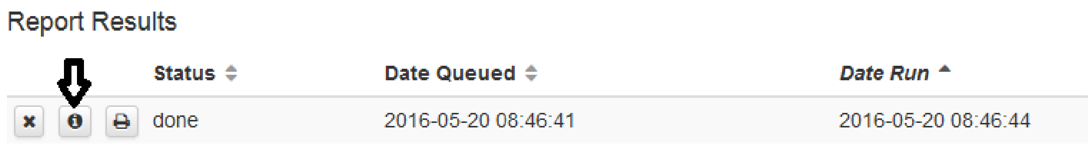
Report Name	11A-jane10test	The descriptive name of this report
Report Type	Tabular	Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)
SQL	SELECT * from biblioitems WHERE biblioitems.biblionumber = 15198	SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results. Enter SQL SELECT queries only.
Notes		
Created Date	2016-03-03 13:41:03	
Created By	Wagner, Jane10 (14615)	
Last Modified	2016-05-20 08:46:40	

Report Results

	Status	Date Queued	Date Run
✖ ℹ 🖶	done	2016-05-20 08:46:41	2016-05-20 08:46:44

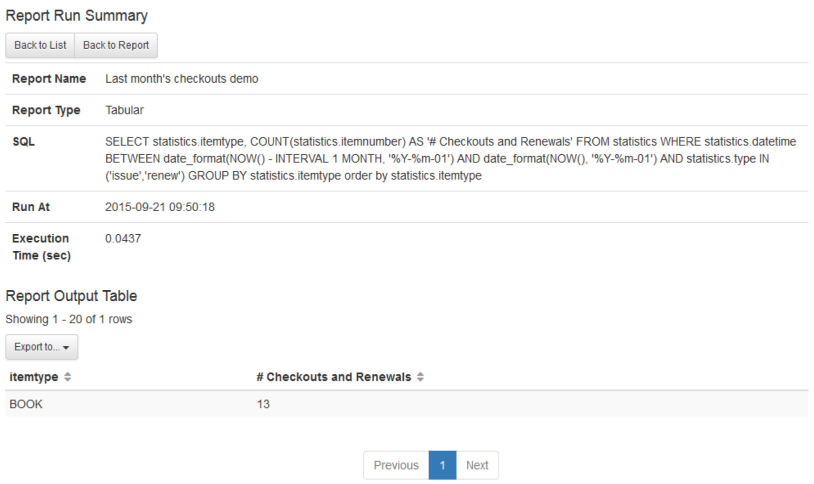
Staff should regularly delete unneeded copies (server space can become an issue), but a weekly cleanup script will delete all copies older than 30 days. If you need to save the contents of a report, download it to your local PC.

To view the report output, click the "i" button:


Report Results

	Status	Date Queued	Date Run
✖ ℹ 🖶	done	2016-05-20 08:46:41	2016-05-20 08:46:44

This shows a summary of the report setup and the report output:


Report Run Summary

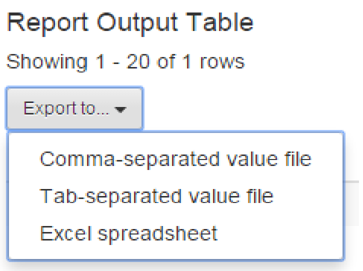
Report Name	Last month's checkouts demo
Report Type	Tabular
SQL	SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(), '%Y-%m-01') AND statistics.type IN ('issue','renew') GROUP BY statistics.itemtype order by statistics.itemtype
Run At	2015-09-21 09:50:18
Execution Time (sec)	0.0437

Report Output Table

Showing 1 - 20 of 1 rows

itemtype	# Checkouts and Renewals
BOOK	13

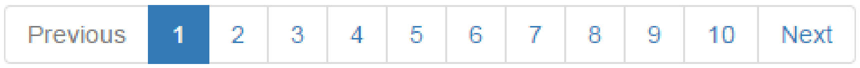
The Export button gives you the option to export as comma or tab-delimited or as an Excel spreadsheet.


Report Output Table

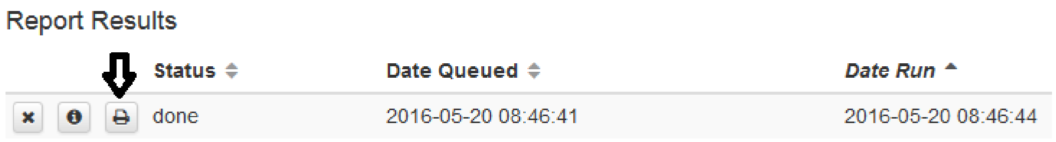
Showing 1 - 20 of 1 rows

IMPORTANT NOTE: When exporting as Excel, the system must first build the spreadsheet in memory, which takes time and system resources. Very large reports are likely to time out; it is strongly recommended to export large reports as comma-separated (.csv) and then open the file in Excel externally.

If a report's output is lengthy, there will be pagination tabs at the bottom:

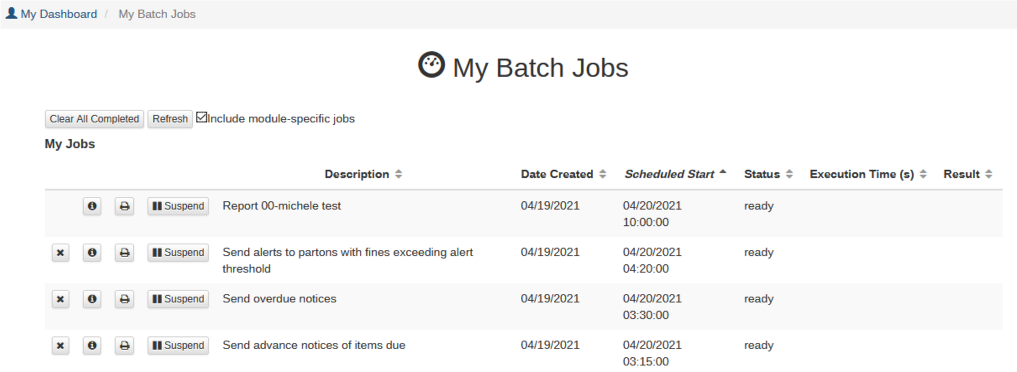


The printer icon button will open a separate browser window with just the report output, formatted for printing:


Report Results

	Status	Date Queued	Date Run
✖ ℹ 🖶	done	2016-05-20 08:46:41	2016-05-20 08:46:44

You can also check the status of any report by going to your Discovery Layer account and then going to the My Batch Jobs tab:



My Batch Jobs

My Jobs

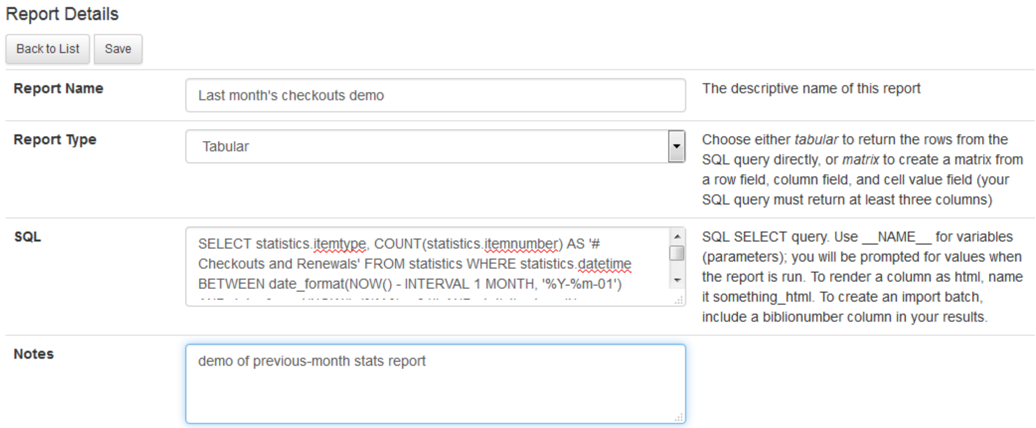
Description	Date Created	Scheduled Start	Status	Execution Time (s)	Result
Report 00-michele test	04/19/2021	04/20/2021 10:00:00	ready		
Send alerts to partons with fines exceeding alert threshold	04/19/2021	04/20/2021 04:20:00	ready		
Send overdue notices	04/19/2021	04/20/2021 03:30:00	ready		
Send advance notices of items due	04/19/2021	04/20/2021 03:15:00	ready		

Note that you may need to check the “Include Module-Specific Jobs” box to see reports. You’ll see the status on all reports you’ve run. As above, you can use the X icon to delete a report, the i icon to view a report, or the printer icon to send one to the printer. You can clear this list with the Clear All Completed button at the top.

8.1.2 Creating and Running a SQL Report

From the reports main page, click on the Create From SQL link in the sidebar or main menu. That opens an edit screen where you can give your report a name and enter your SQL commands. For example, here is a report to count checkouts and renewals for the previous month, broken down by item type. Note the sliding date parameter. Rather than hardcoding a date, this setting will always run for the month previous to today’s date.

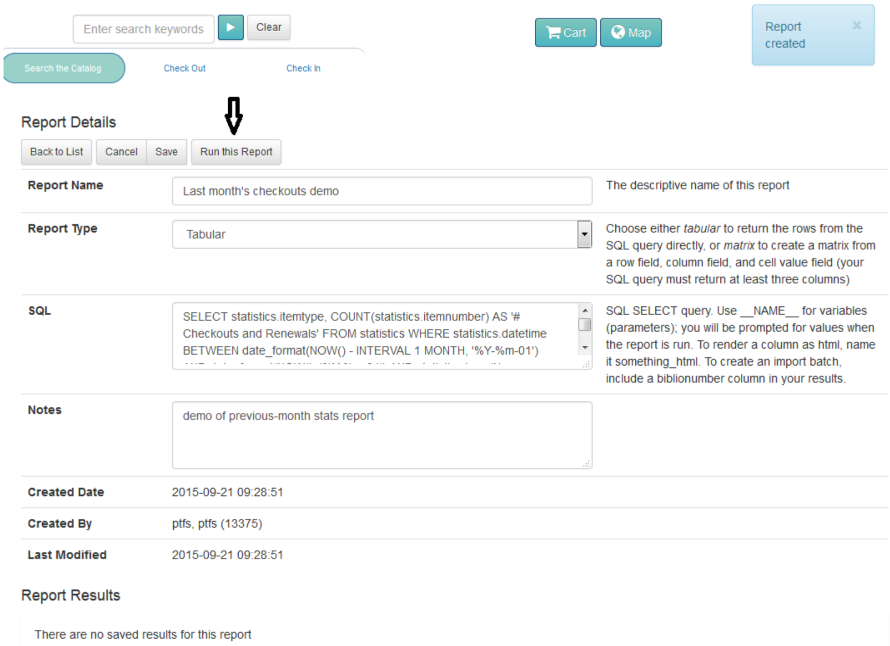
> SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(), '%Y-%m-01') AND statistics.type IN ('issue','renew') GROUP BY statistics.itemtype order by statistics.itemtype



Report Details

Report Name	Last month's checkouts demo	The descriptive name of this report
Report Type	Tabular	Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)
SQL	SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01')	SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results.
Notes	demo of previous-month stats report	

Click the Save button to save the report. Once it is saved (note the screen popup), you have the option to run it immediately, or return to the list of saved reports.



Report created

Report Details

Report Name: Last month's checkouts demo — The descriptive name of this report

Report Type: Tabular — Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)

SQL:

```
SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01')
```

SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results.

Notes: demo of previous-month stats report

Created Date: 2015-09-21 09:28:51

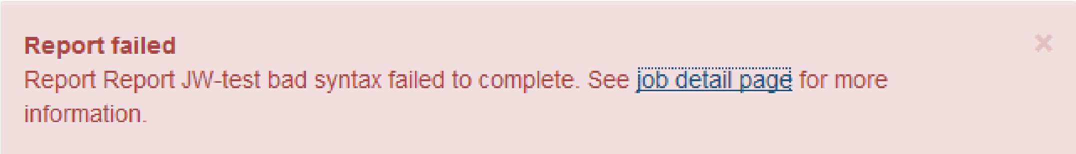
Created By: ptfs, ptfs (13375)

Last Modified: 2015-09-21 09:28:51

Report Results

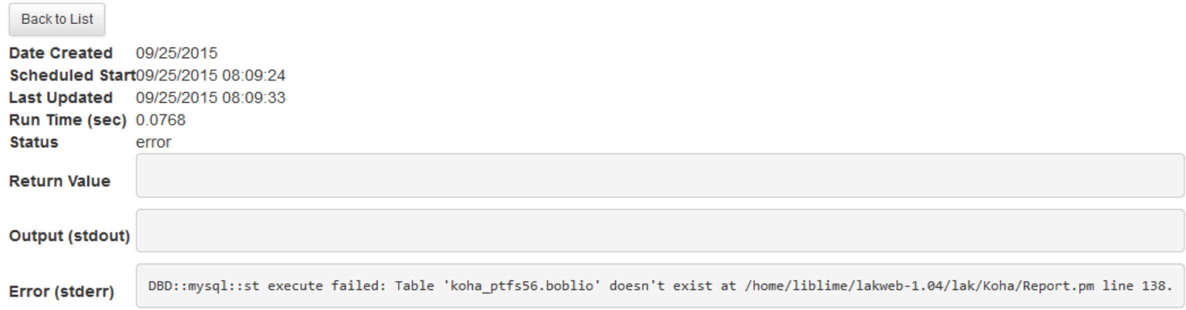
There are no saved results for this report

Run it now to check your output; it can take a few tries to get your syntax right. When you click the Run This Report button, if you have the messaging options set, you'll get a popup alert that the report has started. If you have a syntax error, you'll get a different-colored popup:



Report failed
Report Report JW-test bad syntax failed to complete. See job detail page for more information.

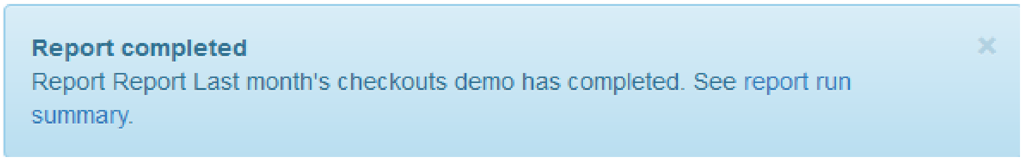
Click the link for "job detail page" (or the question mark icon on the reports page) for details. Only limited information is available about the cause of the error; you may have to troubleshoot your syntax. In this case, the report tried to use a table that doesn't exist:



Date Created 09/25/2015
Scheduled Start 09/25/2015 08:09:24
Last Updated 09/25/2015 08:09:33
Run Time (sec) 0.0768
Status error
Return Value
Output (stdout)
Error (stderr)

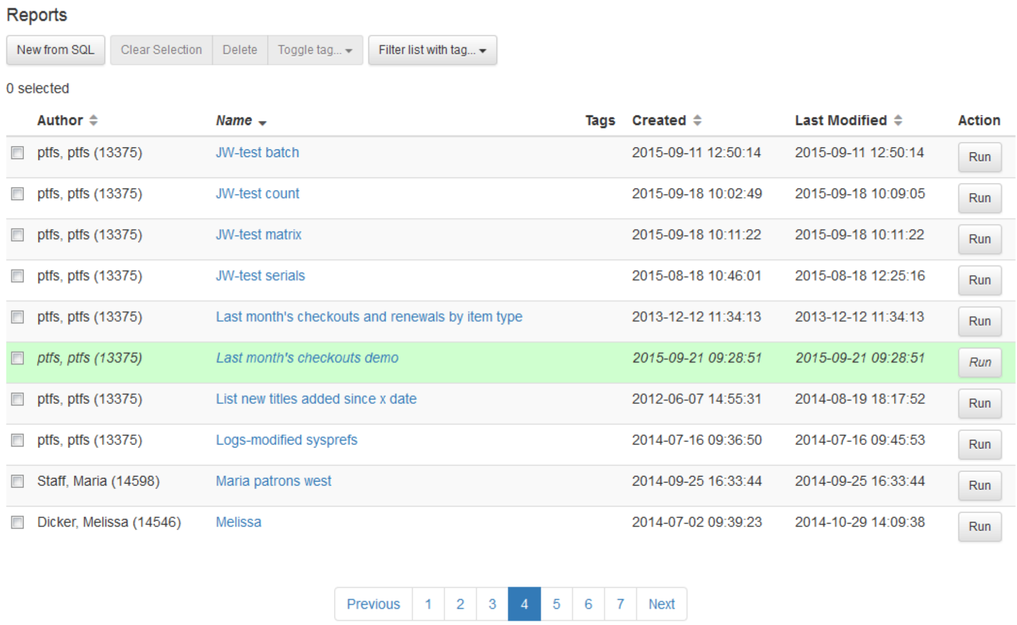
```
DBD::mysql::st execute failed: Table 'koha_ptfs56.boblio' doesn't exist at /home/liblime/lakweb-1.04/lak/Koha/Report.pm line 138.
```

When the report finishes without error, if you have the messaging option set, you'll get a popup alerting you to that:



Report completed
Report Report Last month's checkouts demo has completed. See report run summary.

If you have left the report screen, you can click the "report run summary" link in the popup, or click on the report name in the list of saved reports. When a report has finished, the background color and font change in the list of saved reports to alert you that it is ready:

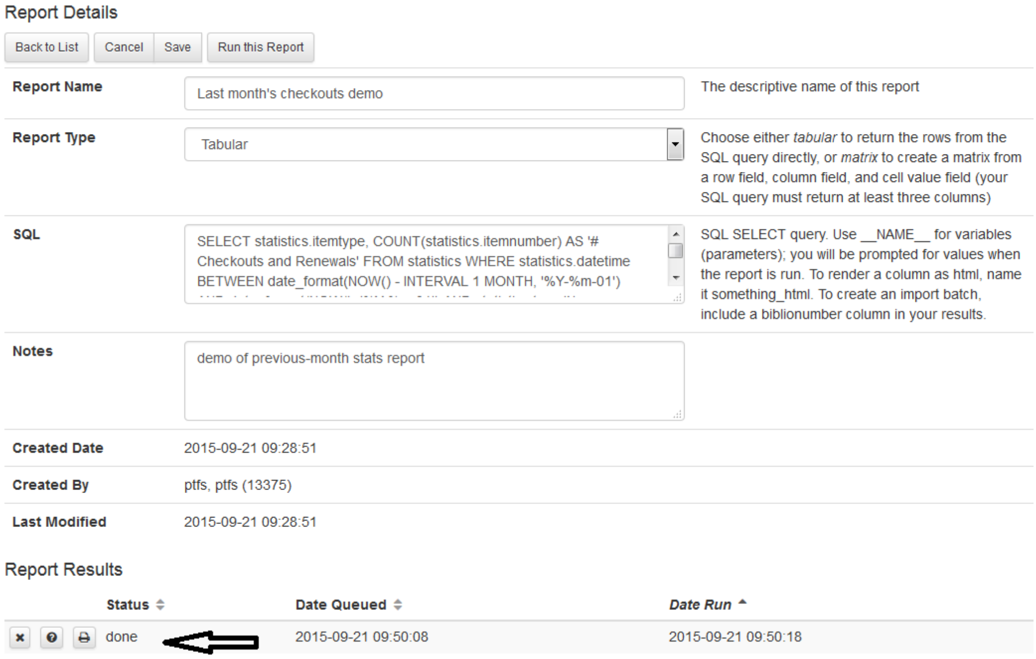


Reports

0 selected

	Author	Name	Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)	JW-test batch		2015-09-11 12:50:14	2015-09-11 12:50:14	Run
☐	ptfs, ptfs (13375)	JW-test count		2015-09-18 10:02:49	2015-09-18 10:09:05	Run
☐	ptfs, ptfs (13375)	JW-test matrix		2015-09-18 10:11:22	2015-09-18 10:11:22	Run
☐	ptfs, ptfs (13375)	JW-test serials		2015-08-18 10:46:01	2015-08-18 12:25:16	Run
☐	ptfs, ptfs (13375)	Last month's checkouts and renewals by item type		2013-12-12 11:34:13	2013-12-12 11:34:13	Run
☐	*ptfs, ptfs (13375)*	*Last month's checkouts demo*		*2015-09-21 09:28:51*	*2015-09-21 09:28:51*	*Run*
☐	ptfs, ptfs (13375)	List new titles added since x date		2012-06-07 14:55:31	2014-08-19 18:17:52	Run
☐	ptfs, ptfs (13375)	Logs-modified sysprefs		2014-07-16 09:36:50	2014-07-16 09:45:53	Run
☐	Staff, Maria (14598)	Maria patrons west		2014-09-25 16:33:44	2014-09-25 16:33:44	Run
☐	Dicker, Melissa (14546)	Melissa		2014-07-02 09:39:23	2014-10-29 14:09:38	Run

If you are still on the report setup screen, the page refreshes when the "report completed" popup appears. If you aren't on that screen, click the name of the report from the list. This takes you back into the report setup page; finished reports are at the bottom.



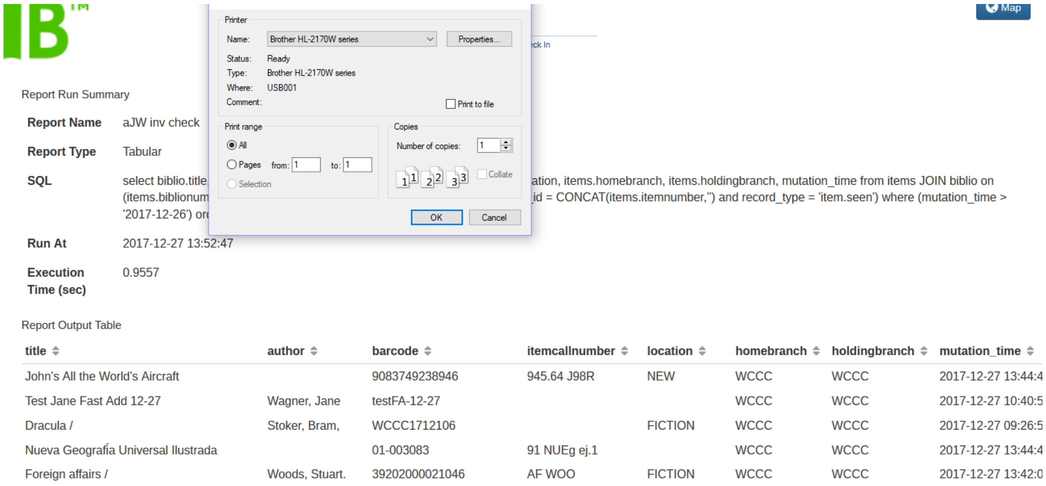
Report Details

Report Name	Last month's checkouts demo	The descriptive name of this report
Report Type	Tabular	Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)
SQL	SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01')	SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results.
Notes	demo of previous-month stats report	
Created Date	2015-09-21 09:28:51	
Created By	ptfs, ptfs (13375)	
Last Modified	2015-09-21 09:28:51	

Report Results

	Status	Date Queued	Date Run
✖ ❓ 🖶	done	2015-09-21 09:50:08	2015-09-21 09:50:18

As discussed above, to view the report output, click the question mark button; this shows a summary of the report setup and the report output. The Export button gives you the option to export as comma, tab-delimited, or Excel spreadsheet. The printer icon button will open a separate browser window with just the report output, formatted for printing:



Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series
Where: USB001
Comment:
☐ Print to file
● All
○ Pages from: 1 to: 1
○ Selection
Number of copies: 1
☐ Collate

Report Run Summary

Report Name	aJW inv check
Report Type	Tabular
SQL	select biblio.title ... ation, items.homebranch, items.holdingbranch, mutation_time from items JOIN biblio on (items.biblionum ... id = CONCAT(items.itemnumber,'') and record_type = 'item.seen') where (mutation_time > '2017-12-26') or
Run At	2017-12-27 13:52:47
Execution Time (sec)	0.9557

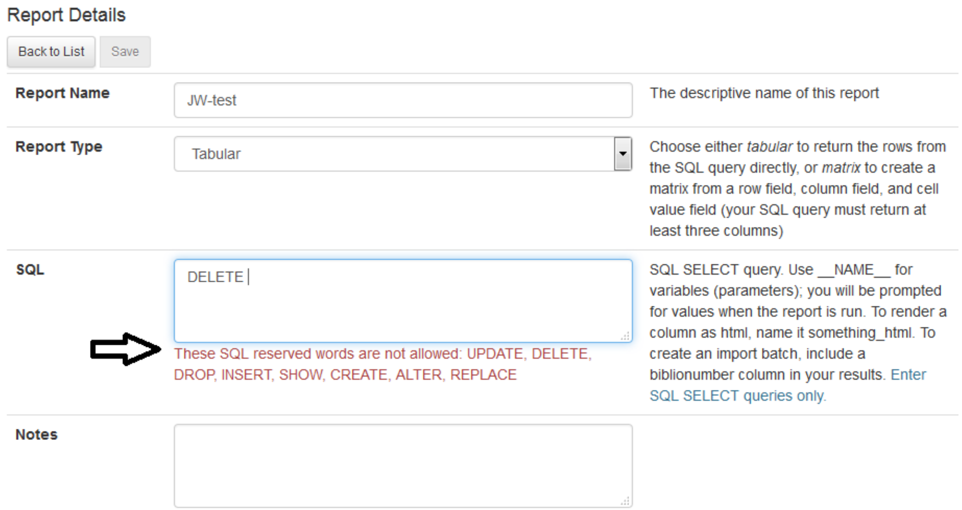
Report Output Table

title	author	barcode	itemcallnumber	location	homebranch	holdingbranch	mutation_time
John's All the World's Aircraft		9083749238946	945.64 J98R	NEW	WCCC	WCCC	2017-12-27 13:44:4
Test Jane Fast Add 12-27	Wagner, Jane	testFA-12-27			WCCC	WCCC	2017-12-27 10:40:5
Dracula /	Stoker, Bram,	WCCC1712106		FICTION	WCCC	WCCC	2017-12-27 09:26:5
Nueva Geografía Universal Ilustrada		01-003083	91 NUEg ej.1		WCCC	WCCC	2017-12-27 13:44:4
Foreign affairs /	Woods, Stuart.	39202000021046	AF WOO	FICTION	WCCC	WCCC	2017-12-27 13:42:0

Be sure to close this window when you have sent it to the printer, so you can resume work in your original window. **Note that large reports may have browser timeout issues in rendering the print page; Chrome seems to be more forgiving in this regard that Firefox and is recommended for these issues. Both browsers should eventually render the page but it may take a minute or two.**

8.1.2.1 Forbidden SQL Commands

The system has always blocked saving any report with SQL commands that would modify a database; reports are only allowed to select data. A screen warning has been added about those terms. If a forbidden term is entered in the SQL field, a red screen warning appears immediately, and the Save button is disabled until the offending term is removed:



Report Name JW-test — The descriptive name of this report

Report Type Tabular — Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)

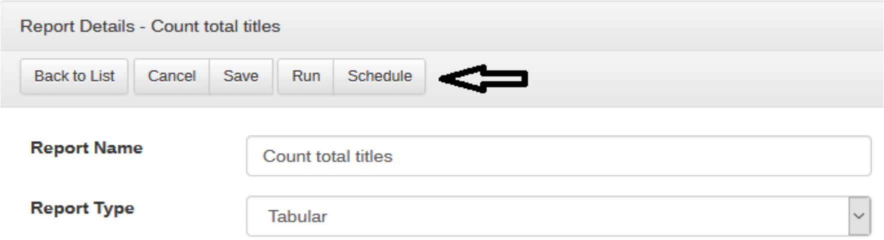
SQL DELETE — SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results. Enter SQL SELECT queries only.

These SQL reserved words are not allowed: UPDATE, DELETE, DROP, INSERT, SHOW, CREATE, ALTER, REPLACE

Notes

8.1.3 Scheduling a Report

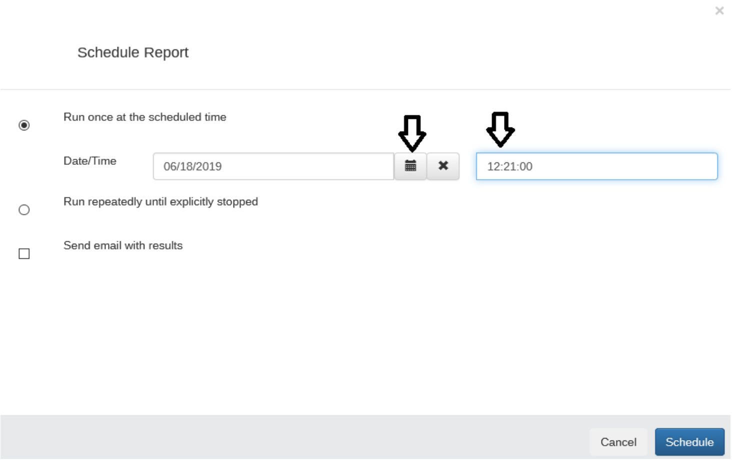
A Schedule option within the report create/edit screen allows staff to schedule a report for later. It can be run either once at a specified time, or repeatedly on a defined schedule. Output can be emailed if desired. At the top of the create/edit screen, click the Schedule button:



Report Name Count total titles

Report Type Tabular

The default action is to run the report once. You can use the calendar widget to specify the date, but you must fill in the time as a full HH:MM:SS (hours, minutes, seconds) entry:



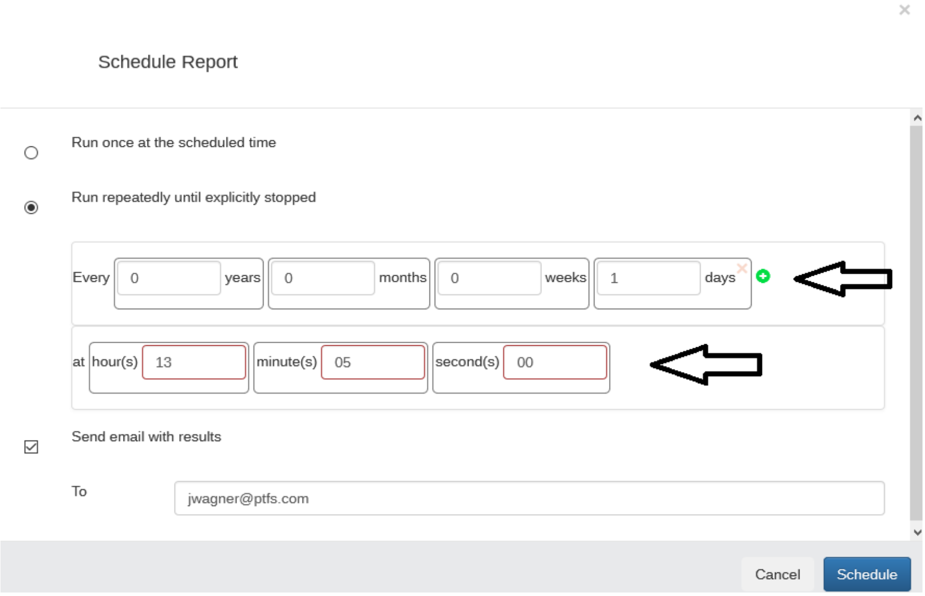
● Run once at the scheduled time

Date/Time 06/18/2019 12:21:00

○ Run repeatedly until explicitly stopped

☐ Send email with results

You can also run the report on a regular schedule. Click the radio button for "run repeatedly" and fill in the schedule fields:



○ Run once at the scheduled time

● Run repeatedly until explicitly stopped

Every 0 years 0 months 0 weeks 1 days

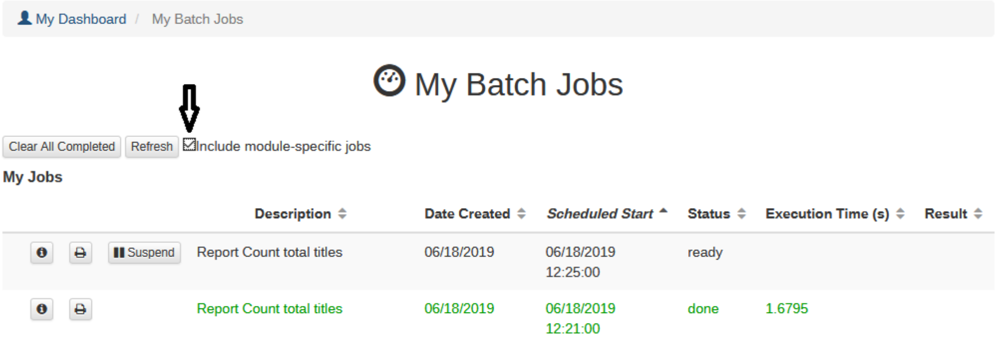
at hour(s) 13 minute(s) 05 second(s) 00

☑ Send email with results

To jwagner@ptfs.com

For either option, you can choose to have the results emailed to yourself or another user.

You can see the status of your scheduled reports in the dashboard, under My Batch Jobs. You'll need to check the "include module-specific jobs" to see the reports:

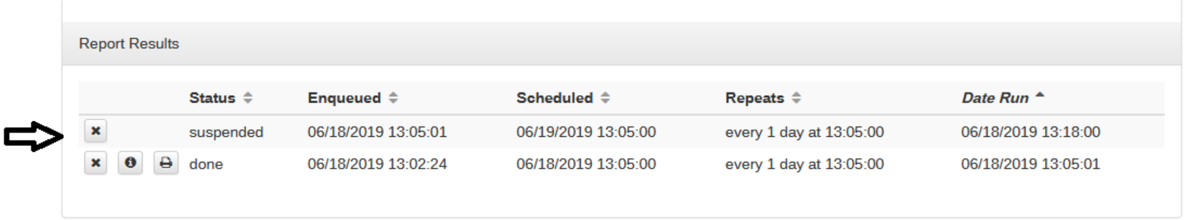


☑ Include module-specific jobs

My Jobs

Description	Date Created	Scheduled Start	Status	Execution Time (s)	Result
Report Count total titles	06/18/2019	06/18/2019 12:25:00	ready		
Report Count total titles	06/18/2019	06/18/2019 12:21:00	done	1.6795	

Scheduled reports can be suspended from this screen. A scheduled report can only be permanently deleted from the report create/edit screen, though:

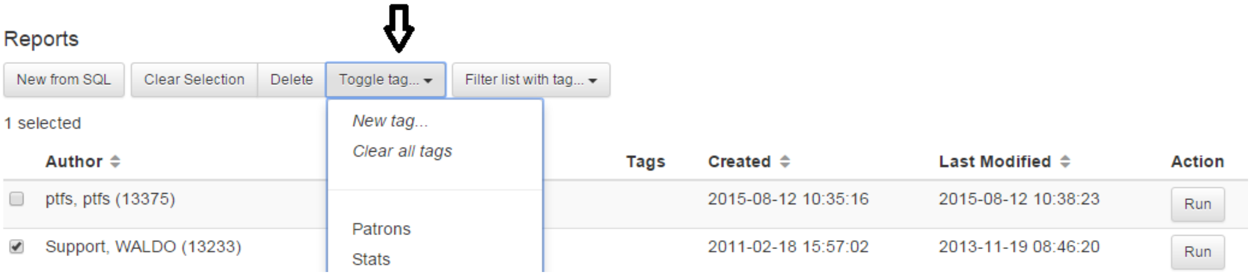


	Status	Enqueued	Scheduled	Repeats	Date Run
✖	suspended	06/18/2019 13:05:01	06/19/2019 13:05:00	every 1 day at 13:05:00	06/18/2019 13:18:00
✖	done	06/18/2019 13:02:24	06/18/2019 13:05:00	every 1 day at 13:05:00	06/18/2019 13:05:01

8.1.4 Tags

You can also create tags and apply them to reports; this will help you organize and locate reports. It's especially useful on large, multi-library sites. For example, you could create a tag for each branch, then filter the report list to your branch's tag. Or you could organize reports by topic.

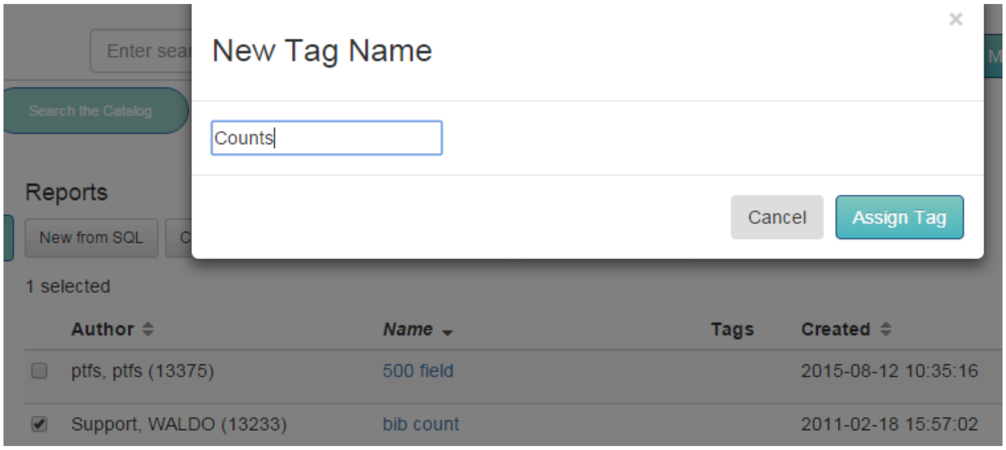
To create a new tag, select at least one report from the list of saved reports, then click the Toggle Tag button at the top.



1 selected

	Author	Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)		2015-08-12 10:35:16	2015-08-12 10:38:23	Run
☑	Support, WALDO (13233)		2011-02-18 15:57:02	2013-11-19 08:46:20	Run

Select New tag. In the popup window, enter a name for your tag and click Assign Tag:

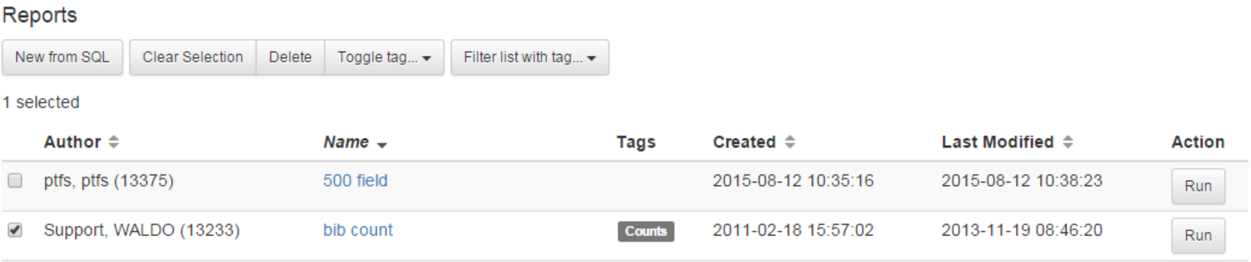


Counts

1 selected

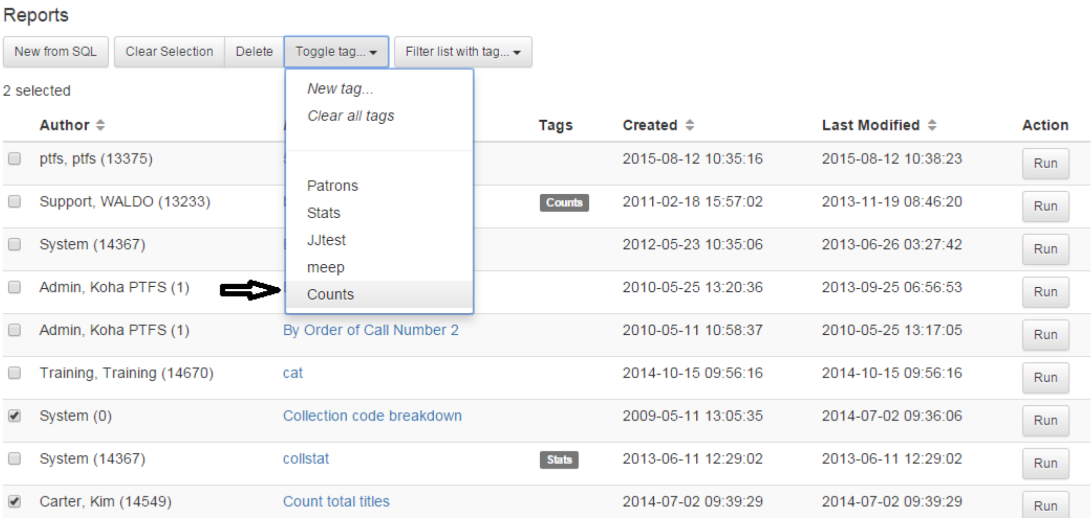
	Author	Name	Tags	Created
☐	ptfs, ptfs (13375)	500 field		2015-08-12 10:35:16
☑	Support, WALDO (13233)	bib count		2011-02-18 15:57:02

The tag is created and assigned to the report(s) you selected.



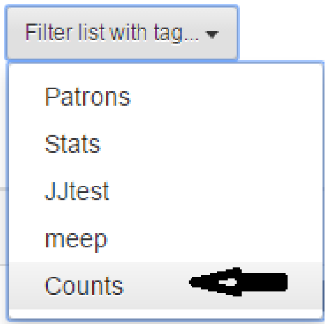
	Author	Name	Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)	500 field		2015-08-12 10:35:16	2015-08-12 10:38:23	Run
☑	Support, WALDO (13233)	bib count	Counts	2011-02-18 15:57:02	2013-11-19 08:46:20	Run

You can now select other reports and apply the tag to them as well; click the checkbox for all the reports you want, then go under Toggle Tag and select the tag name:

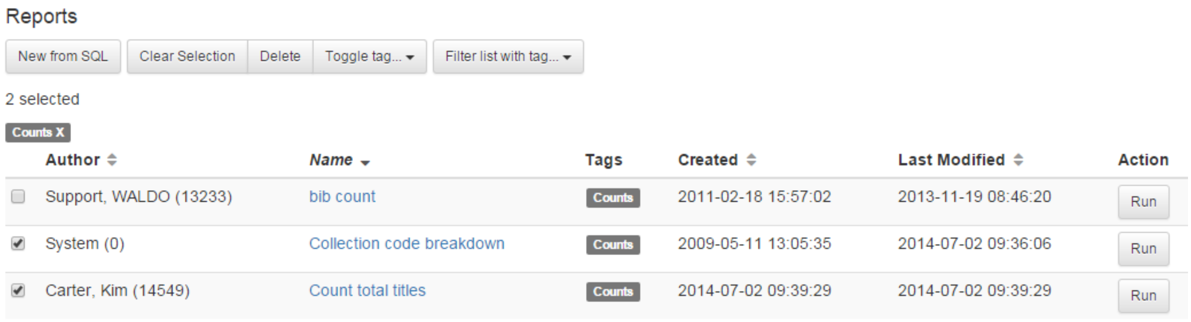


	Author		Tags	Created	Last Modified	Action
☐	ptfs, ptfs (13375)			2015-08-12 10:35:16	2015-08-12 10:38:23	Run
☐	Support, WALDO (13233)		Counts	2011-02-18 15:57:02	2013-11-19 08:46:20	Run
☐	System (14367)			2012-05-23 10:35:06	2013-06-26 03:27:42	Run
☐	Admin, Koha PTFS (1)			2010-05-25 13:20:36	2013-09-25 06:56:53	Run
☐	Admin, Koha PTFS (1)	By Order of Call Number 2		2010-05-11 10:58:37	2010-05-25 13:17:05	Run
☐	Training, Training (14670)	cat		2014-10-15 09:56:16	2014-10-15 09:56:16	Run
☑	System (0)	Collection code breakdown		2009-05-11 13:05:35	2014-07-02 09:36:06	Run
☐	System (14367)	collstat	Stats	2013-06-11 12:29:02	2013-06-11 12:29:02	Run
☑	Carter, Kim (14549)	Count total titles		2014-07-02 09:39:29	2014-07-02 09:39:29	Run

Once tags are applied, you can use them to filter the list of saved reports. Click the Filter List With Tag button and select your tag:

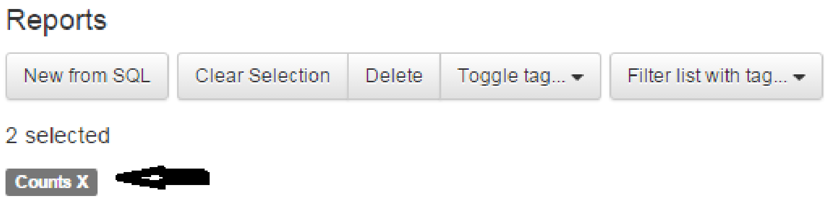


Only the reports with that tag applied will show in the list:



	Author	Name	Tags	Created	Last Modified	Action
☐	Support, WALDO (13233)	bib count	Counts	2011-02-18 15:57:02	2013-11-19 08:46:20	Run
☑	System (0)	Collection code breakdown	Counts	2009-05-11 13:05:35	2014-07-02 09:36:06	Run
☑	Carter, Kim (14549)	Count total titles	Counts	2014-07-02 09:39:29	2014-07-02 09:39:29	Run

To return to the full report list, take off the tag filter by clicking the tag name with the X at the top of the list:



You can apply more than one tag to a particular report.

You can remove the tag from a report the same way it was added, by clicking the checkbox, then using the Toggle Tag button. (NOTE: There is presently no way to delete a tag once it has been created; this is planned for a future release.)

8.2 SQL Syntax

As mentioned above, writing your own reports requires some expertise with SQL syntax. Here are a few tips.

8.2.1 Truncation

You can use the percent sign as a truncate for one or more characters. For example, if you have several item types beginning with BOOK (BOOK, BOOKREF, BOOKSPEC), and you want to select them all, instead of a statement equals something, use a LIKE command:

WHERE itemtype LIKE ‘BOOK%’

Putting a percent sign at the end picks up any item type starting with BOOK. If you also put it at the beginning:

WHERE itemtype LIKE ‘%BOOK%’

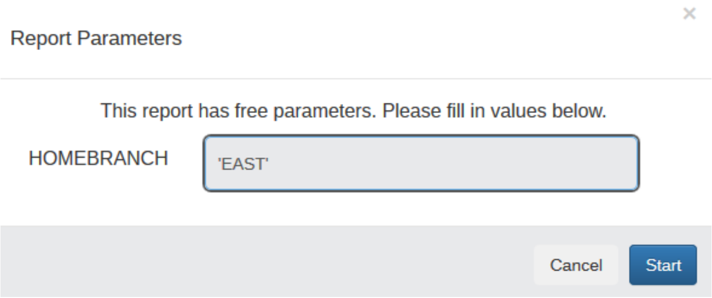
it would pick up any item type with BOOK somewhere in the name (such as EBOOK or REFBOOK).

8.2.2 Runtime Parameters

You will frequently want to change parameters for a report – perhaps run a count by different item types, or statistics by different patron categories. You can embed a runtime parameter in your saved SQL statement, so that the report asks for input when you run it. The syntax is the fieldname (in all caps) preceded and followed by two underscores, such as __HOMEBRANCH__. Here’s a sample query to count items added (grouped by call number) for a particular branch in the previous month:

```
SELECT items.homebranch, count(items.itemcallnumber) AS 'Count',
items.itemcallnumber FROM items WHERE items.dateaccessioned BETWEEN
date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND last_day(NOW() -
INTERVAL 1 MONTH) AND items.homebranch = __HOMEBRANCH__ GROUP BY
items.itemcallnumber ORDER BY items.itemcallnumber asc
```

Create and save it as a saved SQL report. When you run the report, it brings up a screen asking for input. Enter the branch code (not description), surrounded by single quote marks:



Report Parameters

This report has free parameters. Please fill in values below.

HOMEBRANCH 'EAST'

Surround text and date entries with single quotes; the report may not work correctly otherwise. Numeric entries should not need the quotes. Remember that you must use the policy code, not the description, for fields such as item type, branch, etc.

Then click Run and the report will execute the query with that parameter added into the other selections.

8.2.3 Selecting on MARC Data

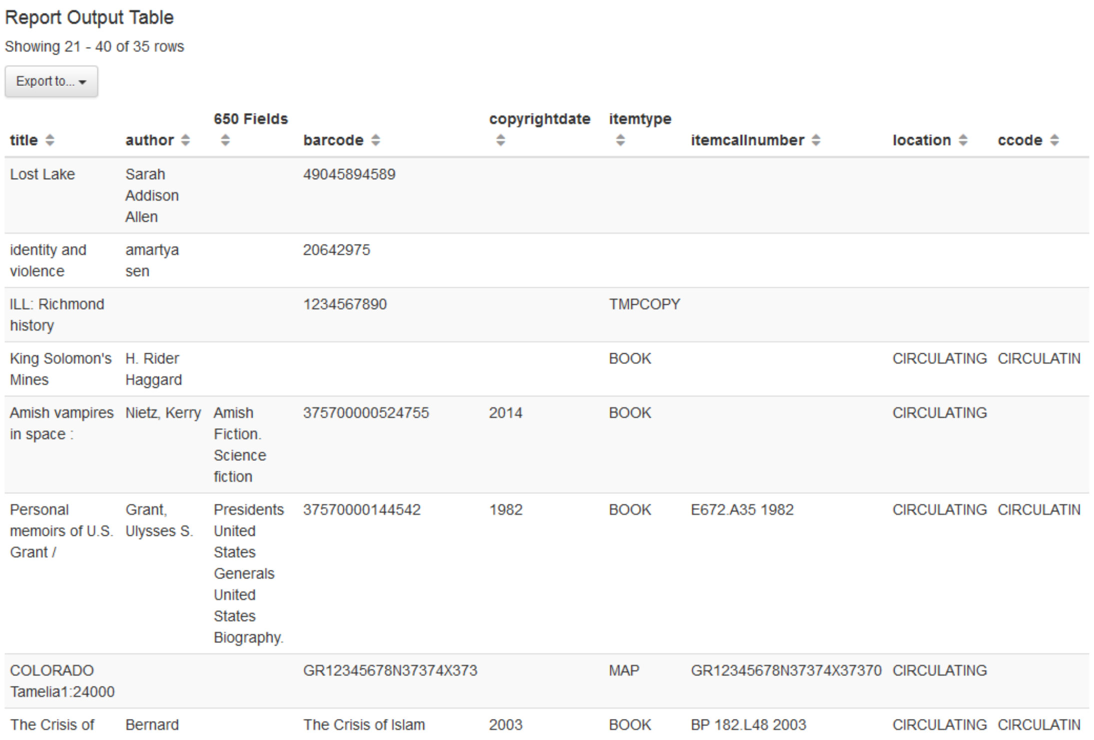
Most item fields and some from the title record are stored in separate tables and fields, such as items.itemcallnumber or biblio.title. However, the MARC record as a whole is stored in two fields; as a MARC-formatted blob in biblioitems.marc, and in XML format in biblioitems.marcxml. This means that it can be difficult to isolate and report particular MARC fields. You’ll need to work with the ExtractValue() command. Here’s a sample which pulls the 020a and the 245a:

```
SELECT ExtractValue(marcxml, '//datafield[@tag="020"]/subfield[@code>="a"]') AS
'020-ISBN', ExtractValue(marcxml, '//datafield[@tag="245"]/subfield[@code>="a"]')
AS 'TITLE' FROM biblioitems WHERE ExtractValue(marcxml,
'//datafield[@tag="020"]/subfield[@code>="a"]') order by TITLE
```

Here's another sample, which pulls all the 650a entries and concatenates them. It has a runtime parameter for the item's home branch:

```
SELECT biblio.title, biblio.author, ExtractValue(biblioitems.marcxml, '//datafield[@tag="650"]/subfield[@code>="a"]') AS '650 Fields', items.barcode, biblio.copyrightdate, items.itemtype, items.itemcallnumber, items.location, items.ccode FROM items JOIN biblioitems on (items.biblioitemnumber = biblioitems.biblioitemnumber) JOIN biblio on (items.biblionumber = biblio.biblionumber) where items.homebranch = __HOMEBRANCHCODE__ ORDER BY items.cn_sort asc
```

That report output looks like this:



Report Output Table

Showing 21 - 40 of 35 rows

title	author	650 Fields	barcode	copyrightdate	itemtype	itemcallnumber	location	ccode
Lost Lake	Sarah Addison Allen		49045894589					
identity and violence	amartya sen		20642975					
ILL: Richmond history			1234567890		TMPCOPY			
King Solomon's Mines	H. Rider Haggard				BOOK		CIRCULATING	CIRCULATIN
Amish vampires in space :	Nietz, Kerry	Amish Fiction. Science fiction	375700000524755	2014	BOOK		CIRCULATING	
Personal memoirs of U.S. Grant /	Grant, Ulysses S.	Presidents United States Generals United States Biography.	37570000144542	1982	BOOK	E672.A35 1982	CIRCULATING	CIRCULATIN
COLORADO Tamelia1:24000			GR12345678N37374X373		MAP	GR12345678N37374X37370	CIRCULATING	
The Crisis of	Bernard		The Crisis of Islam	2003	BOOK	BP 182.L48 2003	CIRCULATING	CIRCULATIN

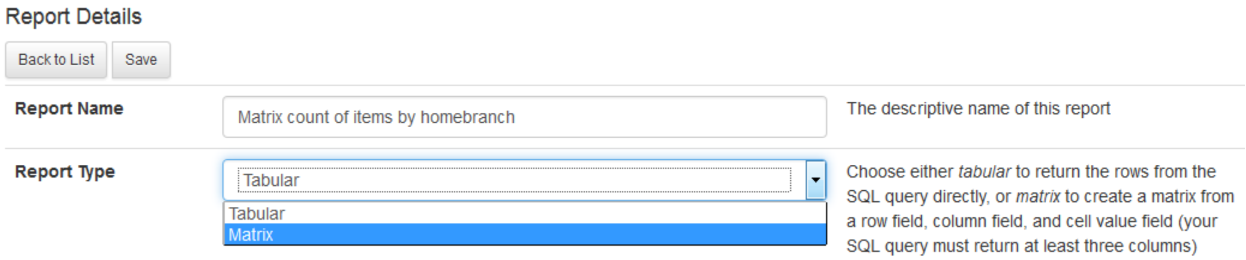
When a title record is first created, the 245a is placed in the biblio.title field, and the first author is placed in the biblio.author field. For most queries, it's easier to use those fields rather than extracting the MARC fields. The above query uses biblio.title and biblio.author, but then extracts the 650 from the MARC data.

This syntax can be tricky to use – do some research on it.

8.2.4 Matrix Reports

All the report examples so far have been tabular – a list of fields is specified in report setup and is output in the finished report. There is also an option for matrix reports. These are reports that produce twodimensional output – they take two parameters (vertical and horizontal axis) and provide a count for the combination.

To create one, select Matrix rather than Tabular in the report setup:

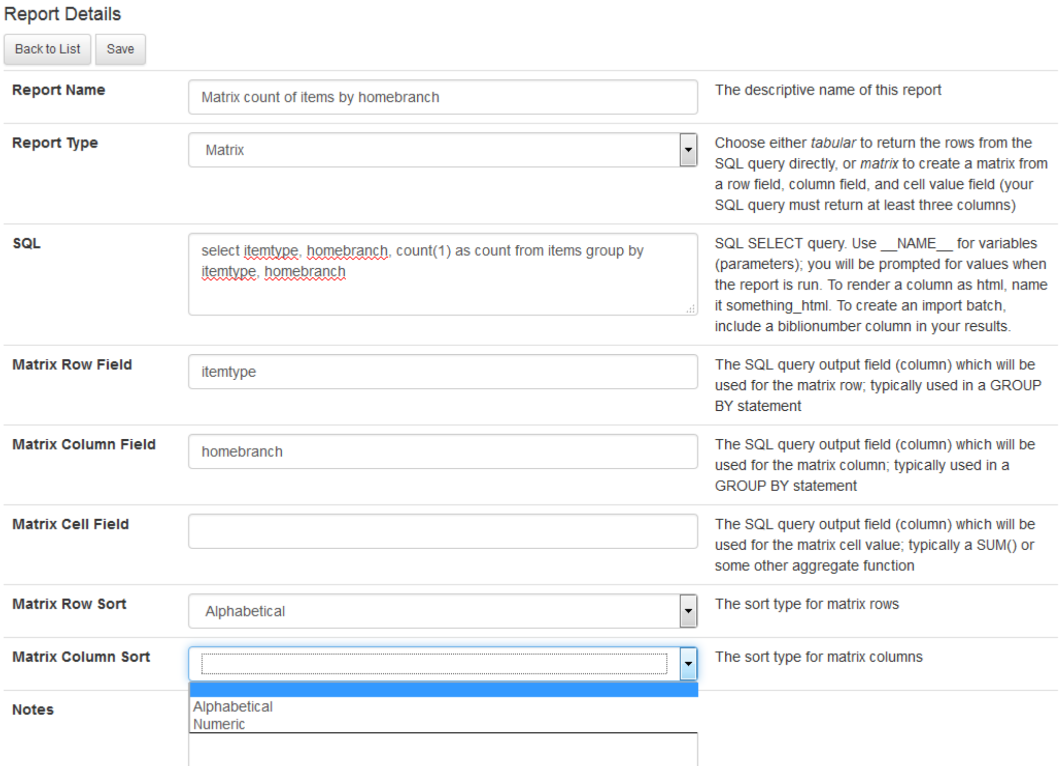


Report Name	Matrix count of items by homebranch	The descriptive name of this report
Report Type	Tabular Tabular Matrix	Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)

The report setup screen changes to allow for row and column entries. For example, a matrix report to count item type by homebranch would look like this. The SQL itself would be

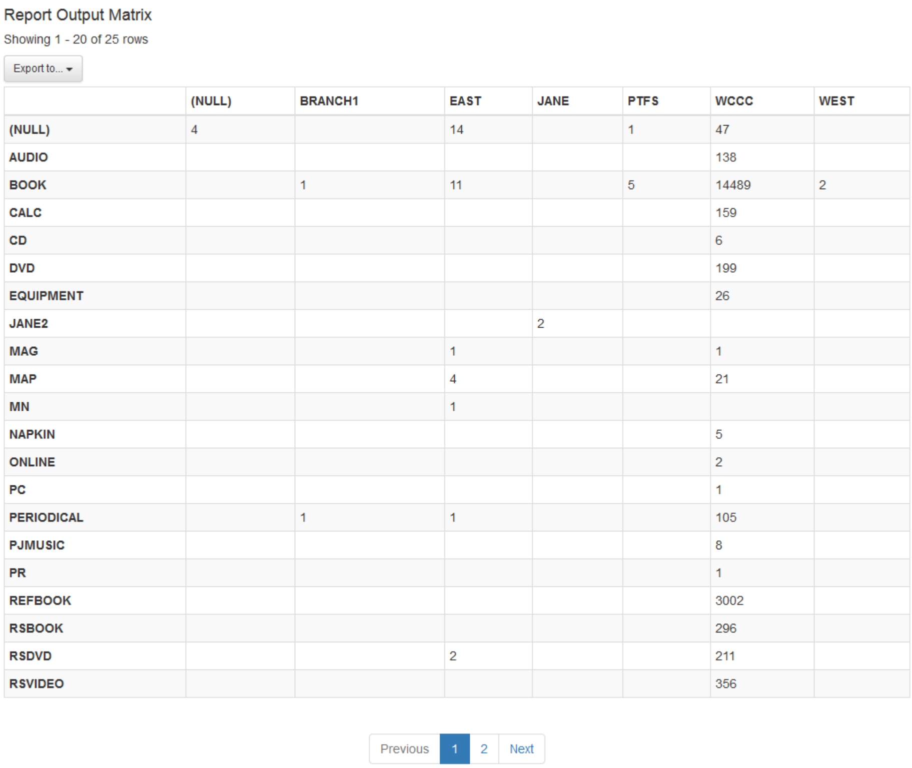
select itemtype, homebranch, count(1) as count from items group by itemtype, homebranch

Enter item type and homebranch as the row and column. Note that you can chose to sort both either alphabetically or numerically. The count(1) parameter means that you want a count of the combined data.



Report Name	Matrix count of items by homebranch	The descriptive name of this report
Report Type	Matrix	Choose either *tabular* to return the rows from the SQL query directly, or *matrix* to create a matrix from a row field, column field, and cell value field (your SQL query must return at least three columns)
SQL	select itemtype, homebranch, count(1) as count from items group by itemtype, homebranch	SQL SELECT query. Use __NAME__ for variables (parameters); you will be prompted for values when the report is run. To render a column as html, name it something_html. To create an import batch, include a biblionumber column in your results.
Matrix Row Field	itemtype	The SQL query output field (column) which will be used for the matrix row; typically used in a GROUP BY statement
Matrix Column Field	homebranch	The SQL query output field (column) which will be used for the matrix column; typically used in a GROUP BY statement
Matrix Cell Field		The SQL query output field (column) which will be used for the matrix cell value; typically a SUM() or some other aggregate function
Matrix Row Sort	Alphabetical	The sort type for matrix rows
Matrix Column Sort	 Alphabetical Numeric	The sort type for matrix columns
Notes		

Save and run the report; you will see that the output is a matrix which produces the count of each item type by homebranch. In this example, there are 11 Books belonging to the East Branch:



Report Output Matrix

Showing 1 - 20 of 25 rows

	(NULL)	BRANCH1	EAST	JANE	PTFS	WCCC	WEST
(NULL)	4		14		1	47	
AUDIO						138	
BOOK		1	11		5	14489	2
CALC						159	
CD						6	
DVD						199	
EQUIPMENT						26	
JANE2				2			
MAG			1			1	
MAP			4			21	
MN			1				
NAPKIN						5	
ONLINE						2	
PC						1	
PERIODICAL		1	1			105	
PJMUSIC						8	
PR						1	
REFBOOK						3002	
RSBOOK						296	
RSDVD			2			211	
RSVIDEO						356	

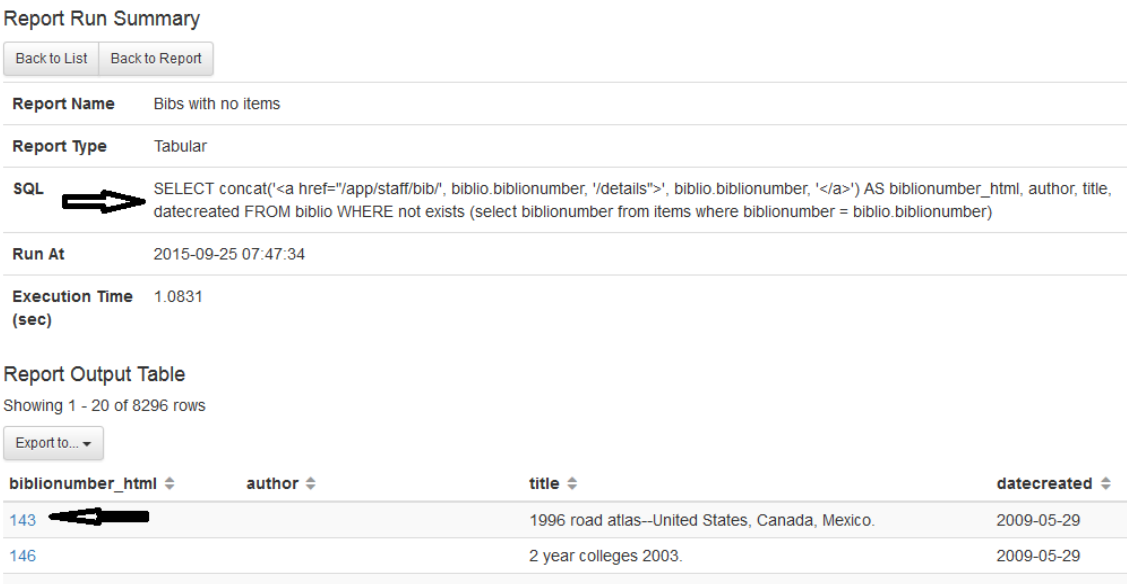
This output looks similar to some of the old canned reports and wizards (see below), but the setup can be more detailed and the report can be saved for future use. For example, you could add a date parameter and SQL to count circulation by item type for the previous month.

8.2.5 HTML Formatting

HTML formatting should not be used in standard field output. However, if you specifically name an output column similarly to something_html, you can use formatting in that column. An example would be to create a clickable link for a title in a bib output report. This syntax

SELECT concat('', biblio.biblionumber, '') AS biblionumber_html

would create a link to the staff view of a title in a report with other fields. For example:



Report Run Summary

Report Name	Bibs with no items
Report Type	Tabular
SQL	SELECT concat('', biblio.biblionumber, '') AS biblionumber_html, author, title, datecreated FROM biblio WHERE not exists (select biblionumber from items where biblionumber = biblio.biblionumber)
Run At	2015-09-25 07:47:34
Execution Time (sec)	1.0831

Report Output Table

Showing 1 - 20 of 8296 rows

biblionumber_html	author	title	datecreated
143		1996 road atlas--United States, Canada, Mexico.	2009-05-29
146		2 year colleges 2003.	2009-05-29

Clicking the link in the report display takes you directly to the record (and away from the report output). You might instead want to right-click and open the link in a new tab or window, or add a target= "_blank" to the setup. Here's a simple list of titles with a clickable biblionumber link:

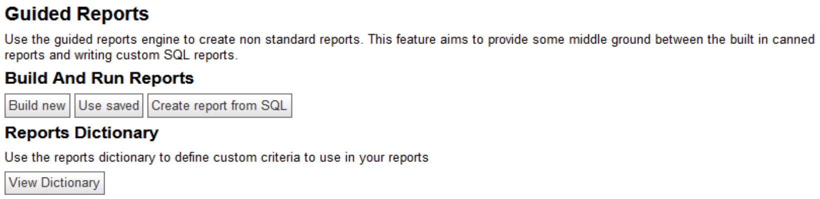
SELECT concat('', biblio.biblionumber, '') AS biblionumber_html, biblio.title FROM biblio ORDER BY biblio.title

That link opens the title in staff view. To open in the Discovery Layer view, change href="/app/staff/bib/' to href="/app/work/'.

8.3 Guided Report Wizard

The guided report wizard is a limited but useful way to create reports if you don't know SQL or the table structure. It is legacy code and may not work against newer tables such as fines and fees. The wizard will walk you through various selection phases, with choices appropriate to each phase. At the end, you will save your report and then can run it at any time.

Under Reports, select Guided Report Wizard. Choose Build New:



Guided Reports

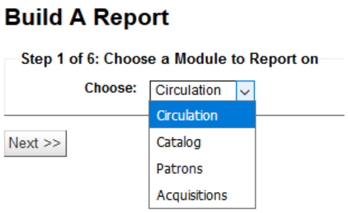
Use the guided reports engine to create non standard reports. This feature aims to provide some middle ground between the built in canned reports and writing custom SQL reports.

Build And Run Reports

Reports Dictionary

Use the reports dictionary to define custom criteria to use in your reports

The first step is to select a module for reporting:

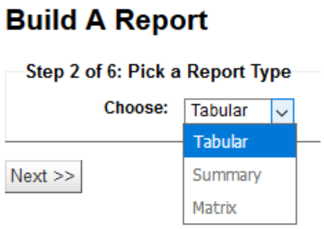


Build A Report

Step 1 of 6: Choose a Module to Report on

Choose: Circulation

Click Next. Almost always you will be reporting tabular data. The other options aren't available for most reports in this wizard.

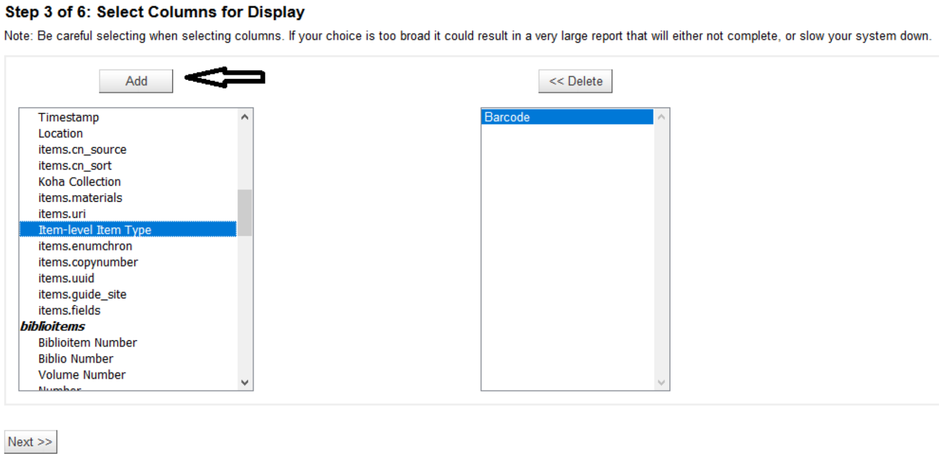


Build A Report

Step 2 of 6: Pick a Report Type

Choose: Tabular

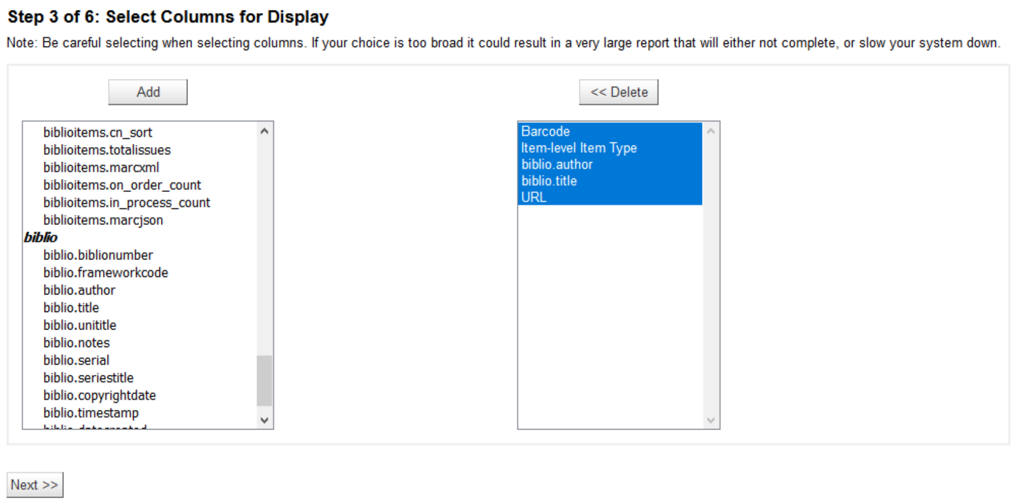
Click Next, and the third step shows tables and fields appropriate for the module you selected:



Step 3 of 6: Select Columns for Display

Note: Be careful selecting when selecting columns. If your choice is too broad it could result in a very large report that will either not complete, or slow your system down.

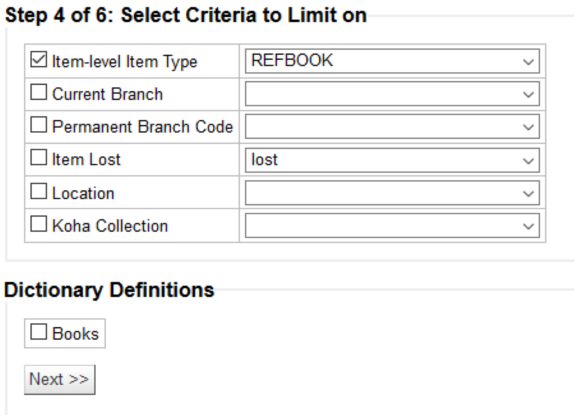
Find the fields you want in the left-hand box, select them (holding down CTRL will allow you to select multiple fields), then click Add to move them to the right-hand box. These are the fields that will be included in your report – they will display in the order you add them to the right-hand column. Be sure to scroll down. In this example, the first set of fields are relevant to the item record, but further down are some fields for the title record.



Step 3 of 6: Select Columns for Display

Note: Be careful selecting when selecting columns. If your choice is too broad it could result in a very large report that will either not complete, or slow your system down.

The next screen will give you some options to limit your report – by item type, branch, lost value, shelving location, or collection code. You must click the checkbox next to the option for it to be applied.



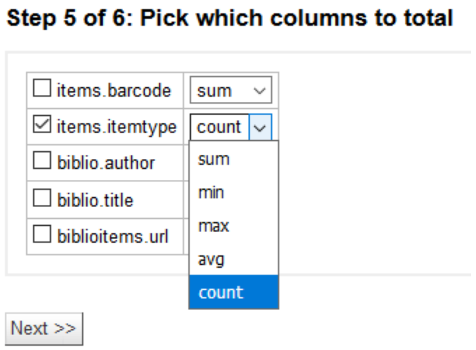
Step 4 of 6: Select Criteria to Limit on

☑ Item-level Item Type	REFBOOK
☐ Current Branch	
☐ Permanent Branch Code	
☐ Item Lost	lost
☐ Location	
☐ Koha Collection	

Dictionary Definitions

☐ Books

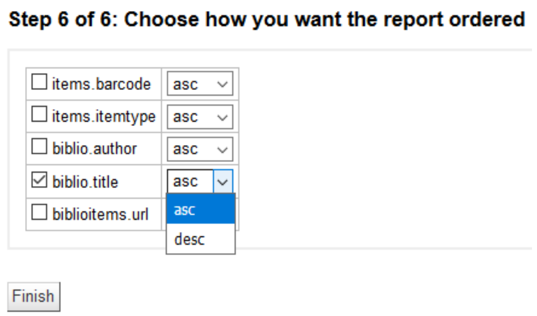
This sample report will be limited to item type of REFBOOK. The next screen is useful if you are running a report with fields that can be added up, or you want to know how many occurrences of each selection there are. For example, you might want to count how many checkouts there have been, or how many items of each item type. Check the fieldname you want to count (required if you want this type of selection). You have different options, or you can ignore the selections entirely.



Step 5 of 6: Pick which columns to total

☐ items.barcode	sum
☑ items.itemtype	count
☐ biblio.author	
☐ biblio.title	
☐ biblioitems.url	

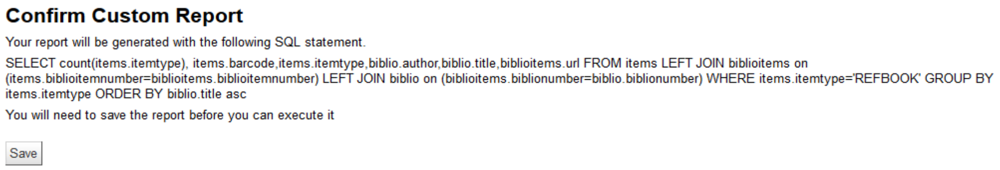
The last step lets you determine how the report output should be sorted. You can select a particular field, or leave everything unchecked.



Step 6 of 6: Choose how you want the report ordered

☐ items.barcode	asc
☐ items.itemtype	asc
☐ biblio.author	asc
☑ biblio.title	asc
☐ biblioitems.url	

Your sort choices are ascending or descending (such as A-Z or Z-A). The final screen shows you the SQL statement that will produce the report you want.



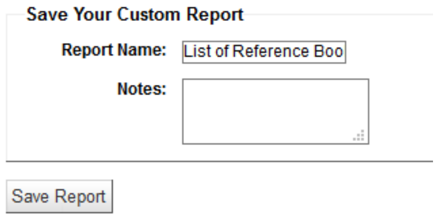
Confirm Custom Report

Your report will be generated with the following SQL statement.

```
SELECT count(items.itemtype), items.barcode,items.itemtype,biblio.author,biblio.title,biblioitems.url FROM items LEFT JOIN biblioitems on
(items.biblioitemnumber=biblioitems.biblioitemnumber) LEFT JOIN biblio on (biblioitems.biblionumber=biblio.biblionumber) WHERE items.itemtype='REFBOOK' GROUP BY
items.itemtype ORDER BY biblio.title asc
```

You will need to save the report before you can execute it

You'll have to save it and give it a name:

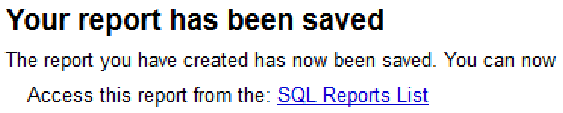


Save Your Custom Report

Report Name: List of Reference Boo

Notes:

Your report is then saved – you can run it by going to the Saved Reports list.

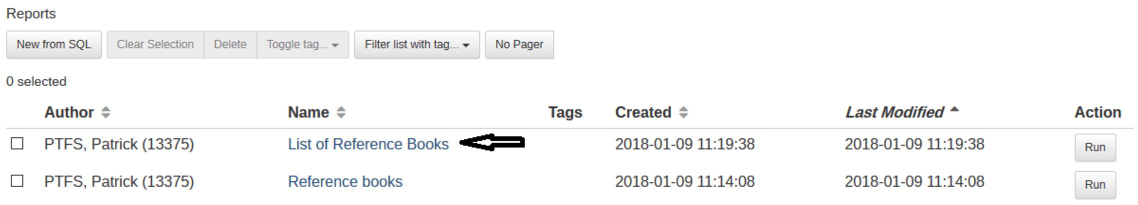


Your report has been saved

The report you have created has now been saved. You can now

Access this report from the: SQL Reports List

Navigate through the pages of saved reports until you find yours. From the Saved Reports list, click the Run link at the end of the line to run the report.



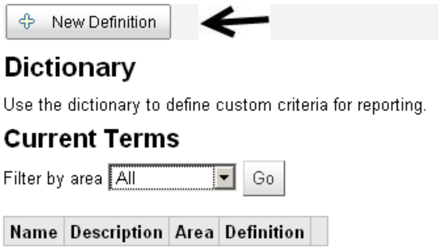
0 selected

	Author	Name	Tags	Created	Last Modified	Action
☐	PTFS, Patrick (13375)	List of Reference Books		2018-01-09 11:19:38	2018-01-09 11:19:38	Run
☐	PTFS, Patrick (13375)	Reference books		2018-01-09 11:14:08	2018-01-09 11:14:08	Run

As with any SQL report (see above), the report runs in the background. When it has finished, you will be notified with a popup window (assuming messaging options are set for that) and the display in the finished reports list will change. Click on the name of the report and scroll to the bottom. Select your finished report and click the question mark button to see the results. You may need to adjust the wizard’s SQL to get the exact results you want.

8.3.1 Reports Dictionary

The Reports Dictionary lets you pre-define certain settings that you might use frequently. For example, in a university setting, you might need to report on all faculty. From the Reports menu, select View Dictionary, then create a new definition.



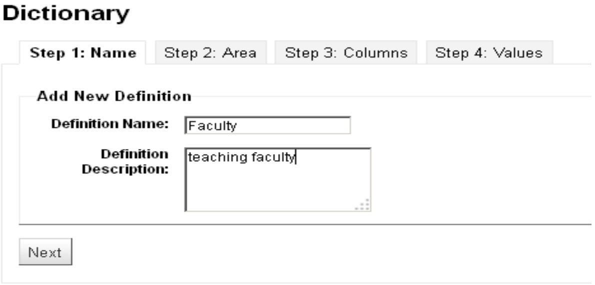
Dictionary

Use the dictionary to define custom criteria for reporting.

Current Terms

Filter by area: All

The first step is to give it a name and description:



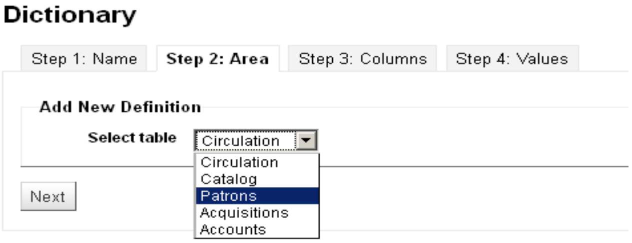
Dictionary

Add New Definition

Definition Name: Faculty

Definition Description: teaching faculty

Click Next and Step 2 allows you to select the module:

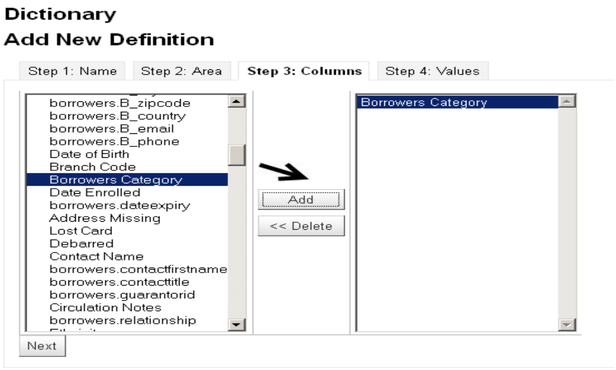


Dictionary

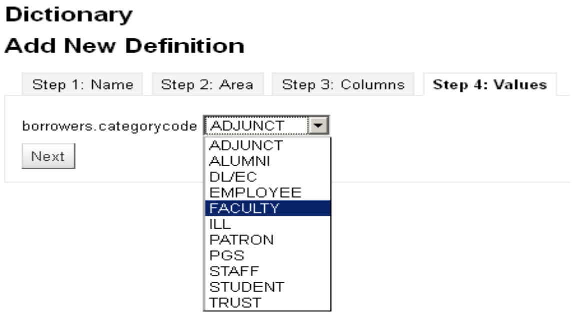
Add New Definition

Select table: Circulation

In the third step, select the field that contains the values you want to select. Click Add to move it to the right-hand column.



In the fourth step, select the value you want for that field, and click Next.

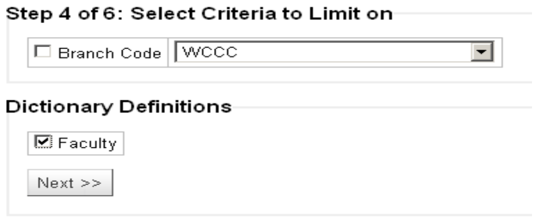


Confirm your settings and save the definition.

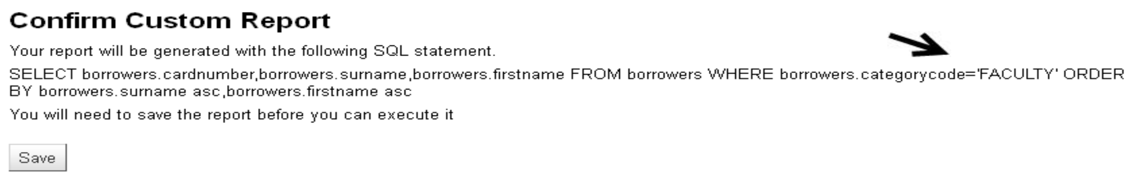
Name: Faculty
Description: teaching faculty
Area: Patrons

Columns	Values
borrowers.categorycode	FACULTY

Now, if you use the guided report wizard to build a patron report, the definition will be available as a limiting option:



The limiter will be added into the SQL statement created by the wizard.



Confirm Custom Report

Your report will be generated with the following SQL statement.

SELECT borrowers.cardnumber,borrowers.surname,borrowers.firstname FROM borrowers WHERE borrowers.categorycode='FACULTY' ORDER BY borrowers.surname asc,borrowers.firstname asc

You will need to save the report before you can execute it

8.4 Statistical Data Logging

The sample report library gives some examples of statistical reports. Data gets logged in different places, depending on the action. Checkouts, renewals, returns, fine payments, and fine writeoffs are recorded in the statistics table.

Depending on the logs that are activated (Administration, System Preferences, Logs) other actions are recorded in the action_logs table. This now includes catalog searching, title displays, and (on full Bibliovation systems), viewing of digital objects. Here is a sample report which will give counts for searching and viewing in the previous calendar month if the OpacLog syspref is enabled. Note that for full DLS systems there is now a distinction between GET DLSO (downloading a digital object) and VIEW DLSO (viewing a digital object) in the log entries. There is also a log entry for deleting a DLSO.

```
SELECT action_logs.action,object_type, COUNT(action_logs.action) AS
'Search Type' FROM action_logs WHERE action_logs.timestamp BETWEEN
date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(),
'%Y-%m-01') AND action_logs.module in ( 'CATALOG',"CATALOGUING") and
(action like "%DLSO%" or object_type like "%DLSO%" or action in ("NEW
SEARCH","VIEW BIB")) GROUP BY action_logs.action,object_type order by
action_logs.action
```

It is possible for the system to record what terms are being searched (and by whom) but most sites will not want to enable this because of privacy concerns. If the syspref OpacLog is turned on (it's delivered off by default), any catalog search, view/download of a digital object, or other general catalog action in either staff or Discovery Layer mode will be logged in the action_logs table. An entry might look like this:

```
111686      2015-09-02 08:30:44     0     CATALOG     NEW SEARCH  3890
      {"q":"state","fq":["lost:[* TO 0]","suppress:0"]}
```

This would be counted as a search in the SQL above.

The cataloging log is usually turned off by default because it can become very resource intensive. If it is enabled, this sample report will give counts for catalog actions (add, delete, modify) in the previous month:

```
SELECT action_logs.action,object_type, COUNT(action_logs.action) AS
'Search Type'  FROM action_logs WHERE action_logs.timestamp BETWEEN
date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(),
'%Y-%m-01') AND action_logs.module = 'CATALOGUING' GROUP BY
action_logs.action order by action_logs.action,object_type
```

Similarly, this report will give counts for patron actions (create, delete, modify) in the previous month:

```
SELECT action_logs.action, COUNT(action_logs.action) AS 'Search Type'  FROM action_logs
WHERE action_logs.timestamp BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(), '%Y-%m-01') AND action_logs.module = 'MEMBERS'
GROUP BY action_logs.action order by action_logs.action
```

Batch record stage, commit, and revert actions are now also logged; entries are recorded as module "CATALOGUING" and action of "BATCH CREATE", "BATCH COMMIT", and "BATCH REVERT". The batch_id value is stored in the object column of the log entry. Note that records added or removed are also entered in the log as individual title entries; make sure that you don't count them twice.

You can look at the structure of the statistics and action_logs tables to find other ways of using them (links to the borrowers, biblio, items tables, for example).

8.4.1.1 Additional User Data Logging

An additional table (action_details) has been added. For sites which need more detail about users performing certain actions, a new syspref (ActionDetails) and cron job can populate this table with specified information. This feature captures the user information at the moment of the action, rather than the current values in the patron record. **Most sites will not want to use this feature because of privacy concerns.**

The syspref has to be structured to identify the action for which more information is desired, and the additional fields to capture. Up to seven fields are available in action_details, named detail_1 through detail_7. Here is an example syspref entry:

```
CATALOG;NEW SEARCH; SELECT country AS country from borrowers where
borrowernumber=$object;select attribute AS agency from  borrower_attributes where code =
"SCHOOL" and  borrowernumber = $user ; select attribute AS department  from
borrower_attributes where code = "GRADE" and borrowernumber = $user;
```

This assumes that the OpacLog syspref is on; when the cron job is run, it will populate detail_1 through detail_3 (in that order) with the city and patron attributes of School and Grade for any patron who does a catalog search. The above is only populating the table for searches; other actions such as views, catalog edits, checkouts, etc. could also be captured.

The new table can then be queried; this SQL will list all entries with a value. If not all seven fields are being populated, you don't have to include them in a query.

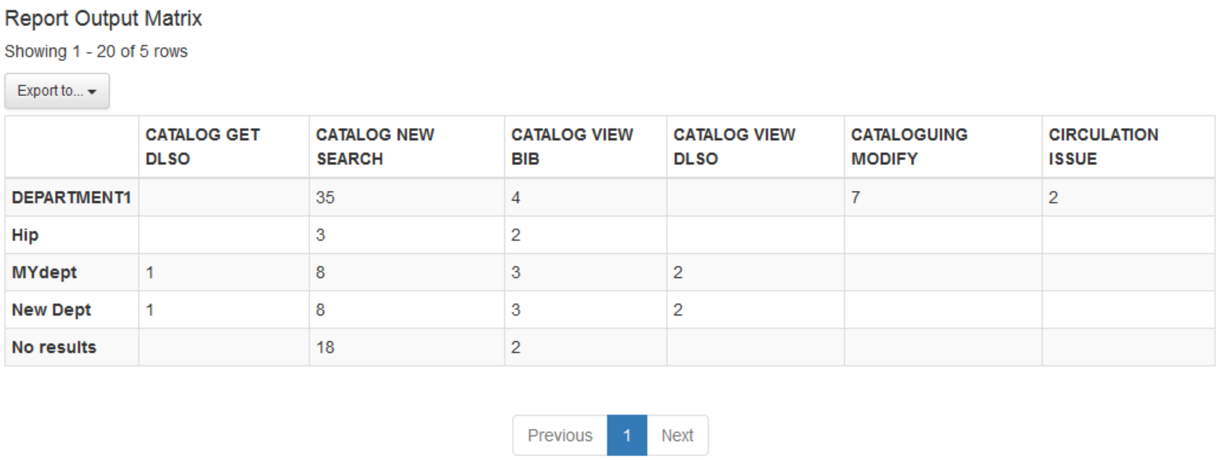
```
select action_logs.user, action_logs.action, action_logs.info, action_details.detail_1,
action_details.detail_2, action_details.detail_3, action_details.detail_4, action_details.detail_5,
action_details.detail_6, action_details.detail_7 from action_logs JOIN action_details on
(action_logs.action_id = action_details.action_id) where action_logs.user > 0 and
action_logs.module = 'CATALOG' and action_logs.action = 'NEW SEARCH'
```

A SQL report could also count by the captured information. Here are examples using Department as the captured detail_3 field, for a regular query and a matrix query (see Reports section):

```
select action_details.detail_3 as "Department", action_logs.module, action_logs.action, count(*)
from action_logs join action_details on ( action_logs.action_id = action_details.action_id) group
by detail_3,module,action
```

```
select detail_3, concat(module," ",action), count(1) from action_logs join action_details on (
action_logs.action_id = action_details.action_id) group by detail_3,concat(module," ",action)
```

The matrix output looks like this (multiple actions are being logged in this example):



Report Output Matrix

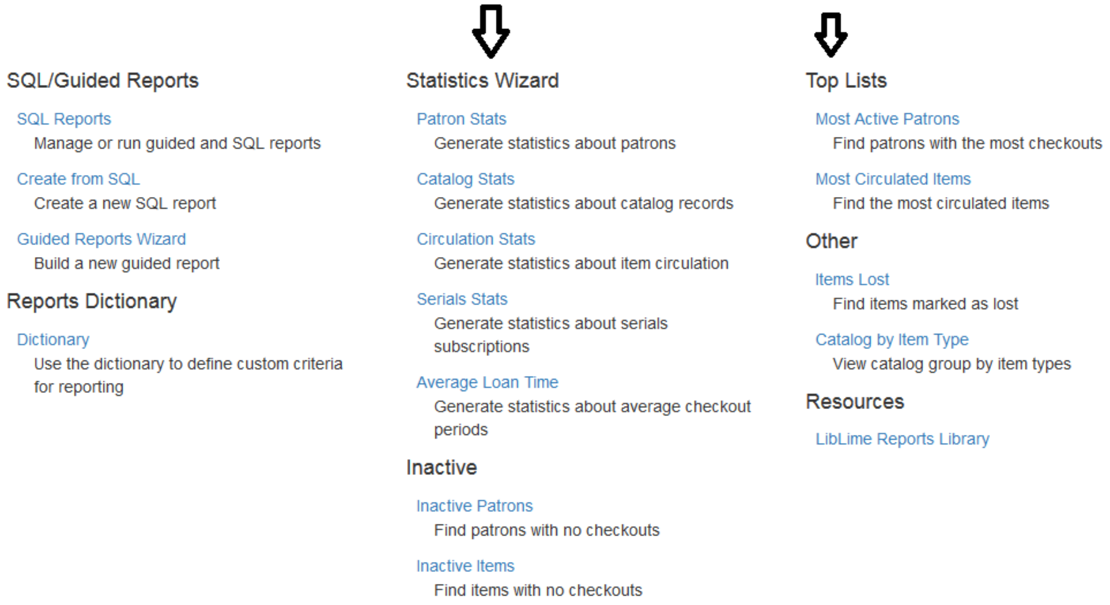
Showing 1 - 20 of 5 rows

	CATALOG GET DLSO	CATALOG NEW SEARCH	CATALOG VIEW BIB	CATALOG VIEW DLSO	CATALOGUING MODIFY	CIRCULATION ISSUE
DEPARTMENT1		35	4		7	2
Hip		3	2			
MYdept	1	8	3	2		
New Dept	1	8	3	2		
No results		18	2			

This feature is complex to set up and use; ask for help with it. Again, most sites will not want to use this option because of patron privacy concerns.

8.5 Canned and Statistical Reports

There are several generic reports available from the main reports menu, and several statistical wizards. These can provide general information but cannot be altered beyond the setup options included. In some cases, a more targeted SQL query might be better. Some of these reports are obsolete and will be removed in a future version.



SQL/Guided Reports

- SQL Reports
  - Manage or run guided and SQL reports
- Create from SQL
  - Create a new SQL report
- Guided Reports Wizard
  - Build a new guided report

Reports Dictionary

- Dictionary
  - Use the dictionary to define custom criteria for reporting

Statistics Wizard

- Patron Stats
  - Generate statistics about patrons
- Catalog Stats
  - Generate statistics about catalog records
- Circulation Stats
  - Generate statistics about item circulation
- Serials Stats
  - Generate statistics about serials subscriptions
- Average Loan Time
  - Generate statistics about average checkout periods

Inactive

- Inactive Patrons
  - Find patrons with no checkouts
- Inactive Items
  - Find items with no checkouts

Top Lists

- Most Active Patrons
  - Find patrons with the most checkouts
- Most Circulated Items
  - Find the most circulated items

Other

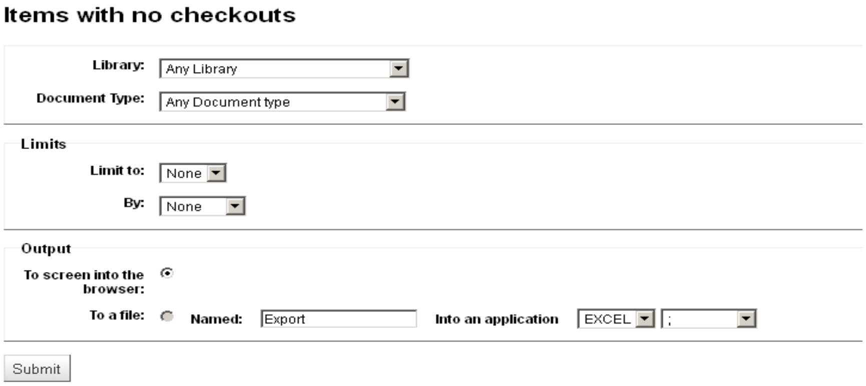
- Items Lost
  - Find items marked as lost
- Catalog by Item Type
  - View catalog group by item types

Resources

- LibLime Reports Library

8.5.1 Inactive Items

This report can identify items that have never been checked out. The initial setup screen gives options for selecting by branch and item type:



Items with no checkouts

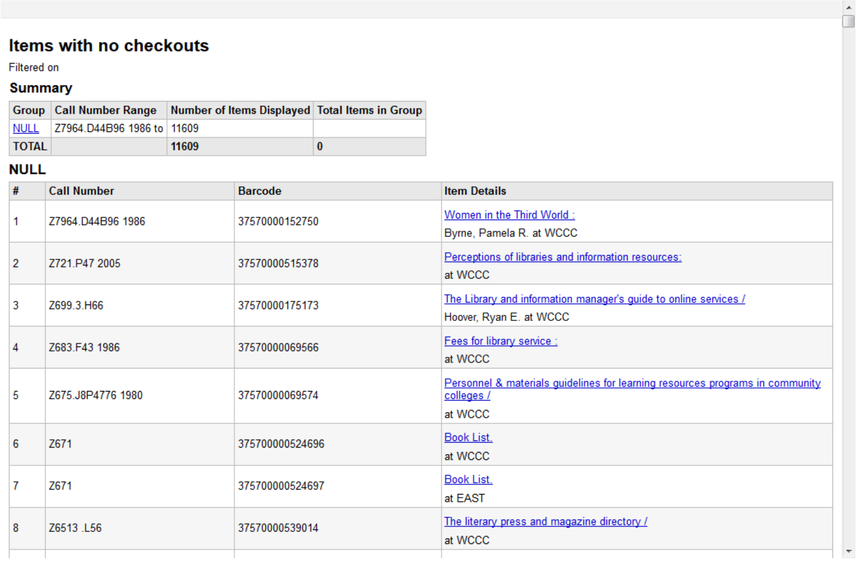
Library: Any Library
Document Type: Any Document type

Limits
Limit to: None
By: None

Output
To screen into the browser: ●
To a file: ○ Named: Export Into an application EXCEL ;

Submit

The report output lists materials with no recorded checkouts. If you leave the default “none” as the limit option, it will list everything. Otherwise, you can set a value from 5 to 1,000 for number of items on the list.



Items with no checkouts

Filtered on

Summary

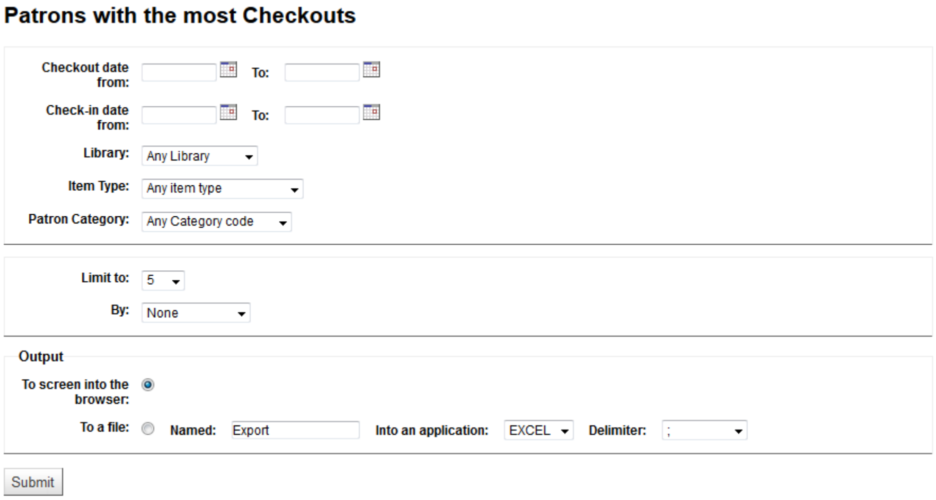
Group	Call Number Range	Number of Items Displayed	Total Items in Group
NULL	Z7964.D44B96 1986 to	11609	
TOTAL		11609	0

NULL

#	Call Number	Barcode	Item Details
1	Z7964.D44B96 1986	37570000152750	Women in the Third World : Byrne, Pamela R. at WCCC
2	Z721.P47 2005	37570000515378	Perceptions of libraries and information resources: at WCCC
3	Z699.3.H66	37570000175173	The Library and information manager's guide to online services / Hoover, Ryan E. at WCCC
4	Z683.F43 1986	37570000069566	Fees for library service : at WCCC
5	Z675.J8P4776 1980	37570000069574	Personnel & materials guidelines for learning resources programs in community colleges / at WCCC
6	Z671	375700000524696	Book List. at WCCC
7	Z671	375700000524697	Book List. at EAST
8	Z6513 .L56	37570000539014	The literary press and magazine directory / at WCCC

8.5.2 Most Active Patrons

This report will list patrons who have been the most active in the specified time period. The setup screen gives options for date ranges, branch, item type, and patron category:



Patrons with the most Checkouts

Checkout date from: To:

Check-in date from: To:

Library: Any Library

Item Type: Any item type

Patron Category: Any Category code

Limit to: 5

By: None

Output

To screen into the browser: ●

To a file: ○ Named: Export Into an application: EXCEL Delimiter: ;

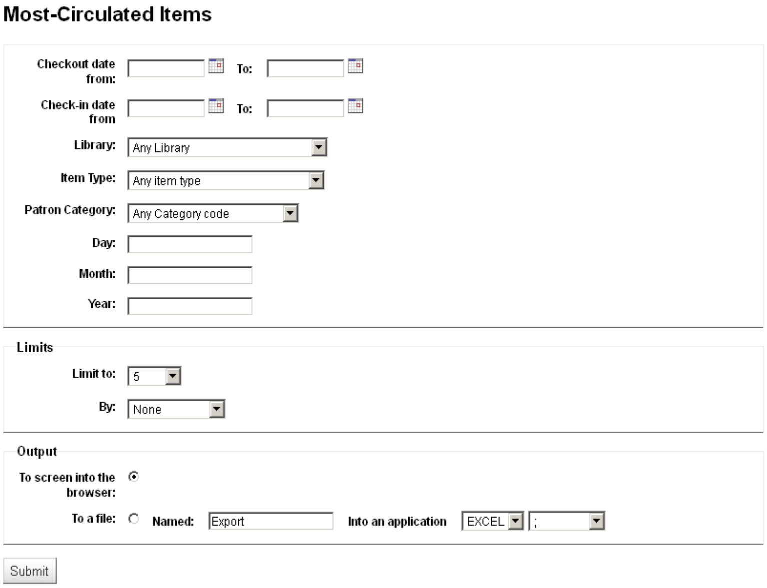
The output lists the patrons and their counts:

Top 5 List patrons for Checkouts

Rank	Patron	Issues count
1		1585
2	Roan, Linda B.	314
3	Macklin, Cindy	285
4	Hafner, Zondra	270
5	Robinson, Cindy	240
6	Wheeler, Scott	239
7	Holland,Valerie,	231
8	Stoll, Lisa	218
9	Degnan, Paul F.	193
10	Victorin, Stephanie	193

8.5.3 Most Circulated Items

This report is similar to the patrons with the most checkouts, except it is by item. The setup is the same (select by date range, branch, item type, patron category).



Most-Circulated Items

Checkout date from: To:

Check-in date from To:

Library: Any Library

Item Type: Any item type

Patron Category: Any Category code

Day:

Month:

Year:

Limits

Limit to: 5

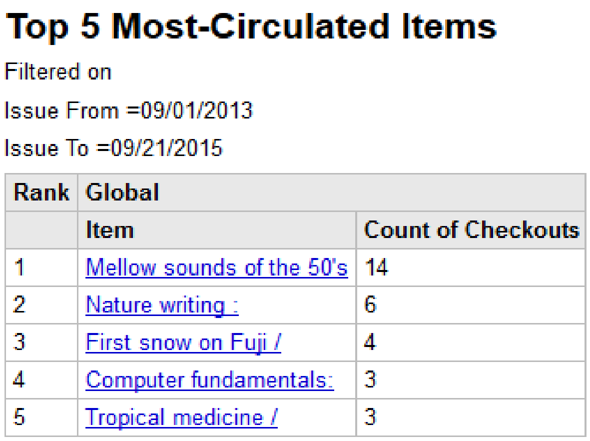
By: None

Output

To screen into the browser: ●

To a file: ○ Named: Export Into an application EXCEL ;

The report output lists the items and the number of checkouts:



Top 5 Most-Circulated Items

Filtered on

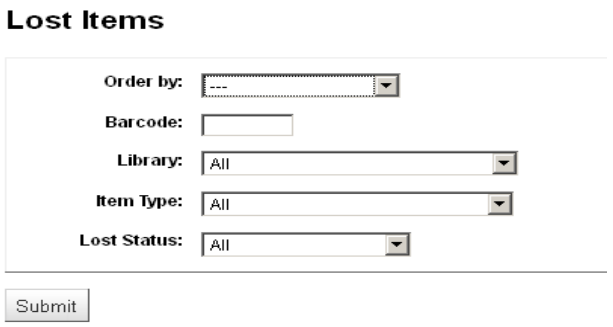
Issue From =09/01/2013

Issue To =09/21/2015

Rank	Global	
	Item	Count of Checkouts
1	Mellow sounds of the 50's	14
2	Nature writing :	6
3	First snow on Fuji /	4
4	Computer fundamentals:	3
5	Tropical medicine /	3

8.5.4 Items Lost

This report lists items that have been marked lost. The setup menu has options to limit by library, item type, or particular lost status, and an option to sort.



Lost Items

Order by: ---

Barcode:

Library: All

Item Type: All

Lost Status: All

The report output gives details about the title and item.

Lost Items

360 lost items found

Title	Author	Lost Code	Barcode	Date last seen	Price	Rep.Price	Library	Itemtype	Holdingbranch	Location	Notes
10,000 ideas for term papers, projects, and reports /	Lamm, Kathryn.		37570000156041	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
101 tips for scoring high on the LSAT /	Martinson, Thomas H.		37570000154806	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
1984 :	Orwell, George,		37570000051713	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
21st century earth :			37570000304856	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A basic guide for valuing a company /	Yegge, Wilbur M.		37570000487545	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A book of scripts,	Fairbank, Alfred J.		37570000195973	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A brief guide to biology /	Krogh, David,		37570000537778	2009-12-07			WCCC	RSBOOK	WCCC	RESERVE	
A celebration or											

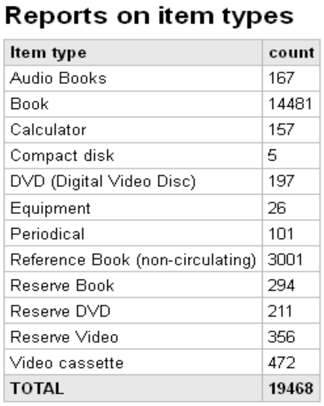
8.5.5 Catalog by Itemtype

This report gives a count of items by item type. You can either limit to a particular branch, or run for the entire database.

View catalog group by item types

Select a branch Select none to see all branches

The output is a breakdown with counts.



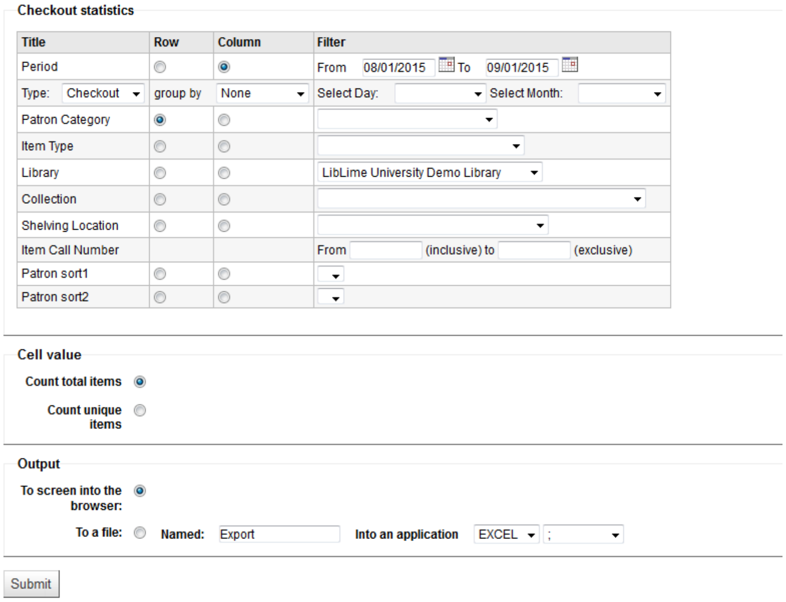
Reports on item types

Item type	count
Audio Books	167
Book	14481
Calculator	157
Compact disk	5
DVD (Digital Video Disc)	197
Equipment	26
Periodical	101
Reference Book (non-circulating)	3001
Reserve Book	294
Reserve DVD	211
Reserve Video	356
Video cassette	472
TOTAL	**19468**

8.5.6 Statistics Wizards

The statistics wizards (Patrons, Catalog, Circulation) are for doing counts on various combinations of data. They have different setup screens, with options appropriate to the module, but you must always select a row and column for the reports to work.

To use one of the wizards, decide what data you need. For example, the circulation statistics wizard is most commonly used for checkout statistics. Set a date range – note that you should use from the first day of the month to the first day of the next month, not the last day of the month, because of the way the script is calculating dates. Then decide what other selections you need, such as a breakdown of checkouts by patron category. You can set other limiters such as branchcode or item type.



Checkout statistics

Title	Row	Column	Filter
Period	○	●	From 08/01/2015 To 09/01/2015
Type: Checkout	group by	None	Select Day: Select Month:
Patron Category	●	○	
Item Type	○	○	
Library	○	○	LibLime University Demo Library
Collection	○	○	
Shelving Location	○	○	
Item Call Number			From (inclusive) to (exclusive)
Patron sort1	○	○	
Patron sort2	○	○	

Cell value

Count total items ●

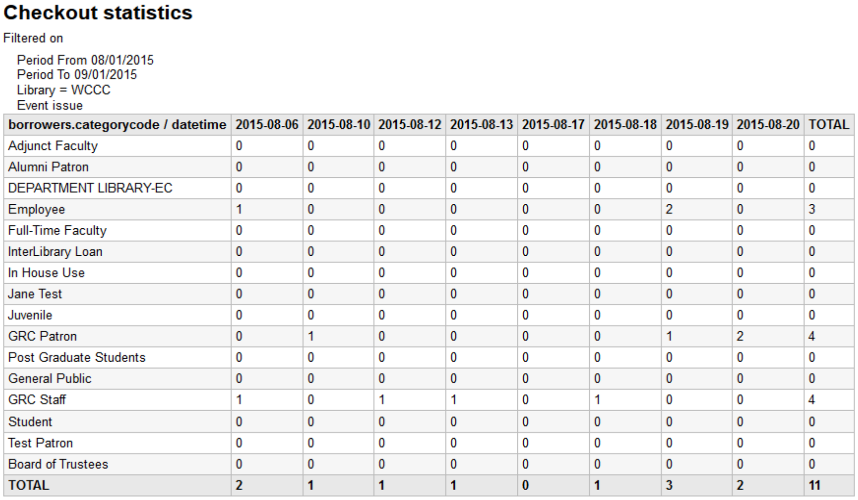
Count unique items ○

Output

To screen into the browser: ●

To a file: ○ **Named:** Export **Into an application** EXCEL ;

Remember that you MUST set both a row and column. The results show the breakdown you specified:



Checkout statistics

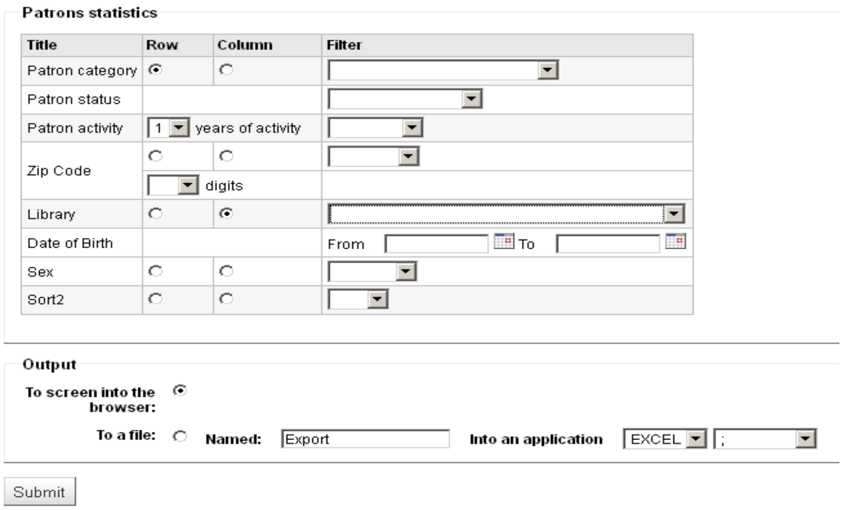
Filtered on

Period From 08/01/2015
Period To 09/01/2015
Library = WCCC
Event issue

borrowers.categorycode / datetime	2015-08-06	2015-08-10	2015-08-12	2015-08-13	2015-08-17	2015-08-18	2015-08-19	2015-08-20	TOTAL
Adjunct Faculty	0	0	0	0	0	0	0	0	0
Alumni Patron	0	0	0	0	0	0	0	0	0
DEPARTMENT LIBRARY-EC	0	0	0	0	0	0	0	0	0
Employee	1	0	0	0	0	0	2	0	3
Full-Time Faculty	0	0	0	0	0	0	0	0	0
InterLibrary Loan	0	0	0	0	0	0	0	0	0
In House Use	0	0	0	0	0	0	0	0	0
Jane Test	0	0	0	0	0	0	0	0	0
Juvenile	0	0	0	0	0	0	0	0	0
GRC Patron	0	1	0	0	0	0	1	2	4
Post Graduate Students	0	0	0	0	0	0	0	0	0
General Public	0	0	0	0	0	0	0	0	0
GRC Staff	1	0	1	1	0	1	0	0	4
Student	0	0	0	0	0	0	0	0	0
Test Patron	0	0	0	0	0	0	0	0	0
Board of Trustees	0	0	0	0	0	0	0	0	0
TOTAL	**2**	**1**	**1**	**1**	**0**	**1**	**3**	**2**	**11**

Since you cannot save settings, you must recreate your report each time you run it. You may be better off creating a saved SQL report, so that you can reuse it without recreating each time.

The patron statistics wizard can give you breakdowns by patron options. For example, how many patrons are in the various patron categories by branch:



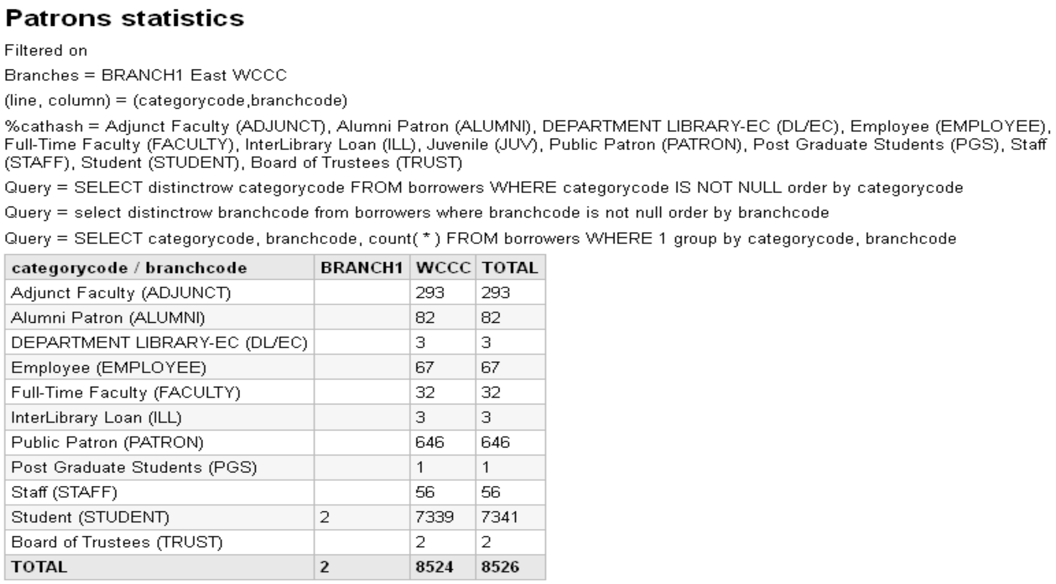
Patrons statistics

Title	Row	Column	Filter
Patron category	●	○	
Patron status			
Patron activity	1 years of activity		
Zip Code	○	○	
	digits		
Library	○	●	
Date of Birth			From To
Sex	○	○	
Sort2	○	○	

Output

To screen into the browser: ●

To a file: ○ **Named:** Export **Into an application** EXCEL ;



Patrons statistics

Filtered on

Branches = BRANCH1 East WCCC

(line, column) = (categorycode,branchcode)

%cathash = Adjunct Faculty (ADJUNCT), Alumni Patron (ALUMNI), DEPARTMENT LIBRARY-EC (DL/EC), Employee (EMPLOYEE), Full-Time Faculty (FACULTY), InterLibrary Loan (ILL), Juvenile (JUV), Public Patron (PATRON), Post Graduate Students (PGS), Staff (STAFF), Student (STUDENT), Board of Trustees (TRUST)

Query = SELECT distinctrow categorycode FROM borrowers WHERE categorycode IS NOT NULL order by categorycode

Query = select distinctrow branchcode from borrowers where branchcode is not null order by branchcode

Query = SELECT categorycode, branchcode, count(*) FROM borrowers WHERE 1 group by categorycode, branchcode

categorycode / branchcode	BRANCH1	WCCC	TOTAL
Adjunct Faculty (ADJUNCT)		293	293
Alumni Patron (ALUMNI)		82	82
DEPARTMENT LIBRARY-EC (DL/EC)		3	3
Employee (EMPLOYEE)		67	67
Full-Time Faculty (FACULTY)		32	32
InterLibrary Loan (ILL)		3	3
Public Patron (PATRON)		646	646
Post Graduate Students (PGS)		1	1
Staff (STAFF)		56	56
Student (STUDENT)	2	7339	7341
Board of Trustees (TRUST)		2	2
TOTAL	**2**	**8524**	**8526**

8.6 Sample Report Library

LibLime maintains a library of sample SQL reports at:

https://cdn.bibliovation.com/c/Docs/LibLimeSampleReports.htm

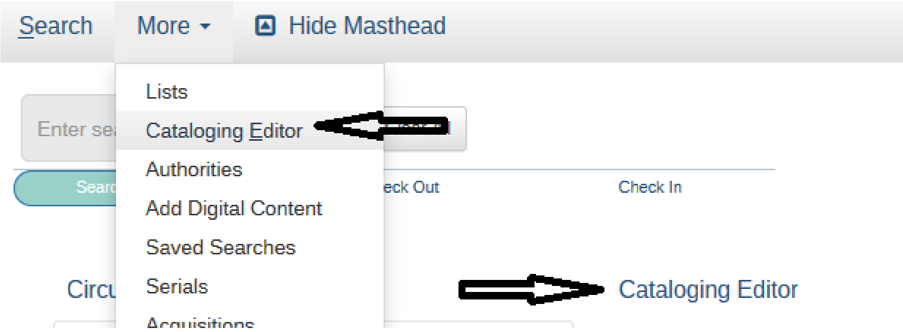
This document is updated as new reports are requested or table schema changed; there's a link to it on the Reports main menu page.

9. Cataloging

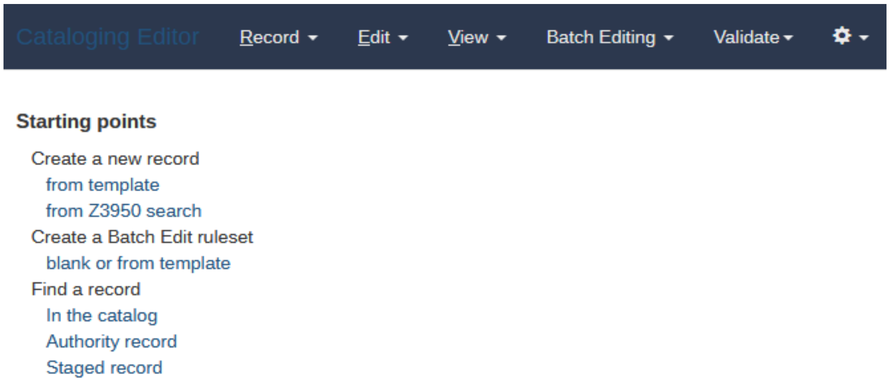
The Cataloging Editor is a single screen editor used for the creation/edit/deletion of bibliographic records, holdings records, and authority records, all following the MARC21 cataloging rules.

9.1 Opening the Cataloging Editor

To open the Cataloging editor, you can either click on Open Cataloging Editor from the Home page of the staff client or go under the More menu and select Cataloging Editor.

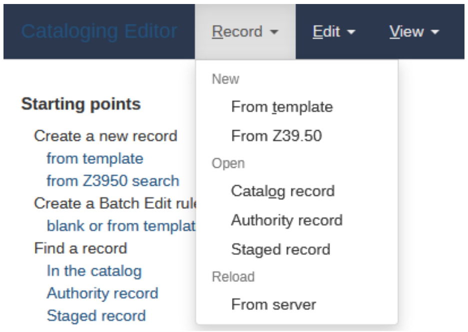


When the Cataloging Editor is launched, it gives you options for creating or searching for records:



Depending on your permissions, you may see other options.

You can create a record or launch a search either from the Starting Points links, or from the pulldown under Record. Note that the links available will change depending on the current environment in the editor.

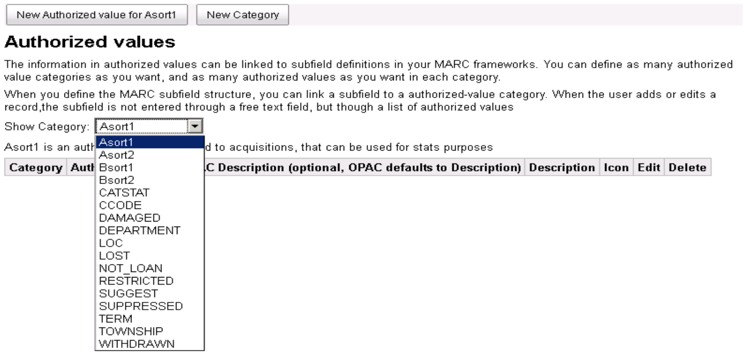


Two options on this menu are applicable throughout the Editor. Reload from Server will refresh an edited record and return it to the version stored in the database. (The system will warn you if you have unsaved changes if you use the Reload option.) This can be useful to refresh one record without saving/closing records open in other tabs.

Print allows you to print a MARC record.

9.1.1 Authorized Values

Authorized values are a collection of policies with defined values. They have very different uses (shelving locations, cataloging attributes, etc.) but are created in the same way. Under Administration, Authorized Values staff with permission to access that area can click the pull-down to see the categories that have been established already, and can create new ones:

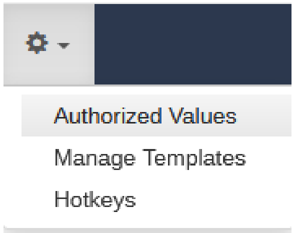


The information in authorized values can be linked to subfield definitions in your MARC frameworks. You can define as many authorized value categories as you want, and as many authorized values as you want in each category.

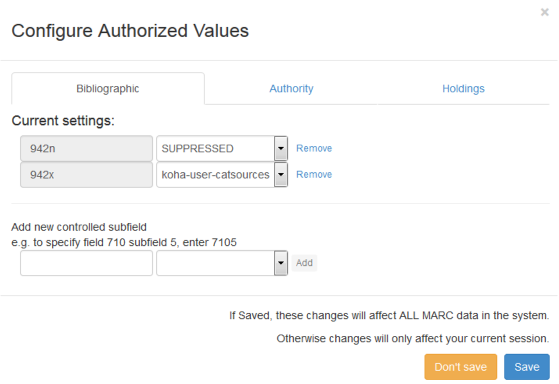
When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user adds or edits a record,the subfield is not entered through a free text field, but though a list of authorized values

Show Category: Asort1

Using the Cataloging Editor, authorized values can be linked to a MARC field and subfield. Click the gearbox (Settings) menu and choose Authorized Values:



In this screen shot two authorized values have been established – linking bib fields / subfields to an authorized list:


Configure Authorized Values

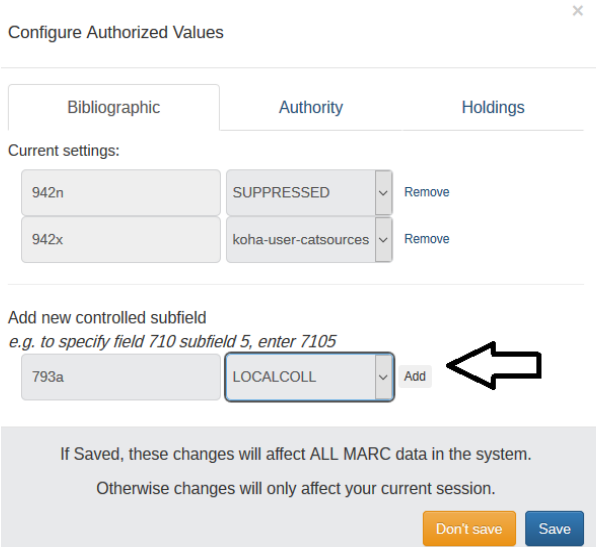
Current settings:

942n SUPPRESSED Remove
942x koha-user-catsources Remove

Add new controlled subfield
e.g. to specify field 710 subfield 5, enter 7105

If Saved, these changes will affect ALL MARC data in the system.
Otherwise changes will only affect your current session.

To set up more, a staff member can type the MARC field and subfield in the blank box and then choose the desired authorized value list from those provided. Don’t forget to click the Add button, or your new entry won’t be saved.


Configure Authorized Values

Current settings:

942n SUPPRESSED Remove
942x koha-user-catsources Remove

Add new controlled subfield
e.g. to specify field 710 subfield 5, enter 7105

793a LOCALCOLL

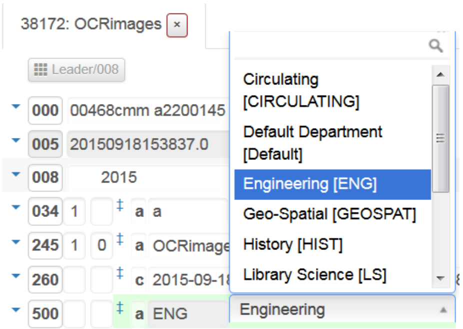
If Saved, these changes will affect ALL MARC data in the system.
Otherwise changes will only affect your current session.

With the 942$n setting, when a bib is edited or created, the 942$n will show the authorized list for suppressed records:


946 ‡ a moclc
999 ‡ c 144286 ‡ d 144287
942 ‡ n 0 Visible

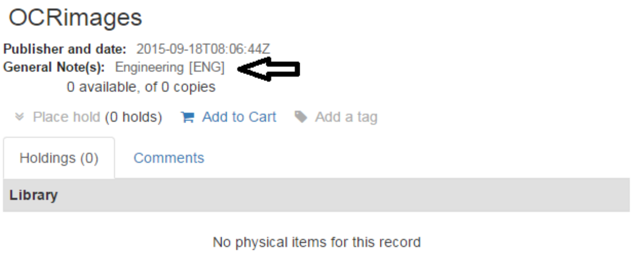
Authorized value links can be set (saved) for the entire system, or just for the current record/sessions.

Note that what is stored in the catalog record is the actual code from the authorized value, not the description. For example, with a setting linking the 500$a to the Department authval, the selection box may show Engineering, but the record stores the code of ENG:



000 00468cmm a2200145
005 20150918153837.0
008 2015
034 1 ‡ a a
245 1 0 ‡ a OCRimage
260 ‡ c 2015-09-1
500 ‡ a ENG Engineering

If an authorized value is linked in the cataloging editor, by default, the Discovery Layer view of the record shows both the authval code and the description for that entry (the General Note):

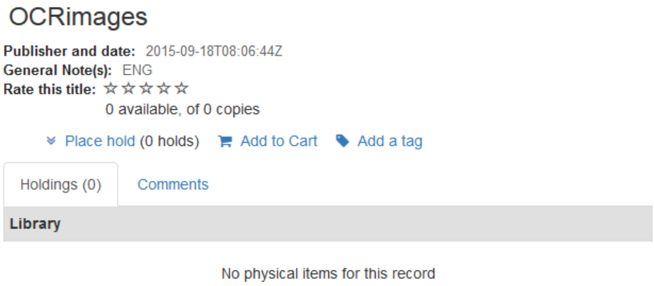

OCRimages

Publisher and date: 2015-09-18T08:06:44Z
General Note(s): Engineering [ENG]
0 available, of 0 copies

No physical items for this record

Sites will probably want to hide the code (ENG in the above example). Either the code or the description can be hidden with a style command – see the Discovery Layer guide for details.

IMPORTANT NOTE: This translation of the code to the authorized value description in the Discovery Layer will only work as long as the authorized value is configured in the Cataloging Editor. If that setup is removed, the system does not know about the link and cannot identify the proper description to use. In that case, if the field is set to display, only the code will show:


OCRimages

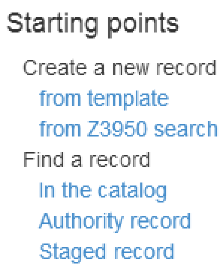
Publisher and date: 2015-09-18T08:06:44Z
General Note(s): ENG
Rate this title: ☆☆☆☆☆
0 available, of 0 copies

No physical items for this record

9.2 Creating or Editing Bibliographic Records

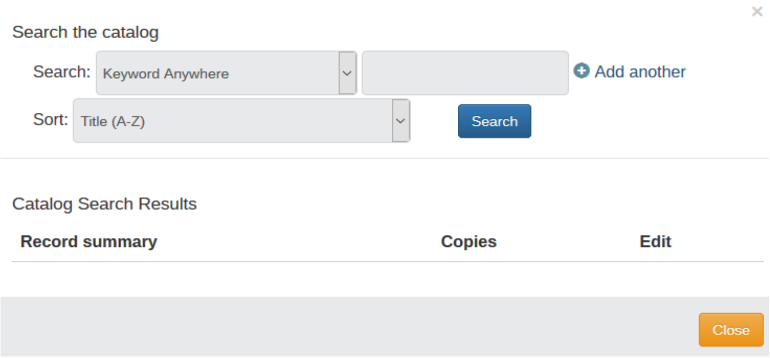
9.2.1 Searching for Existing Bibliographic Records

From Starting Points choose “Find a record in catalog”

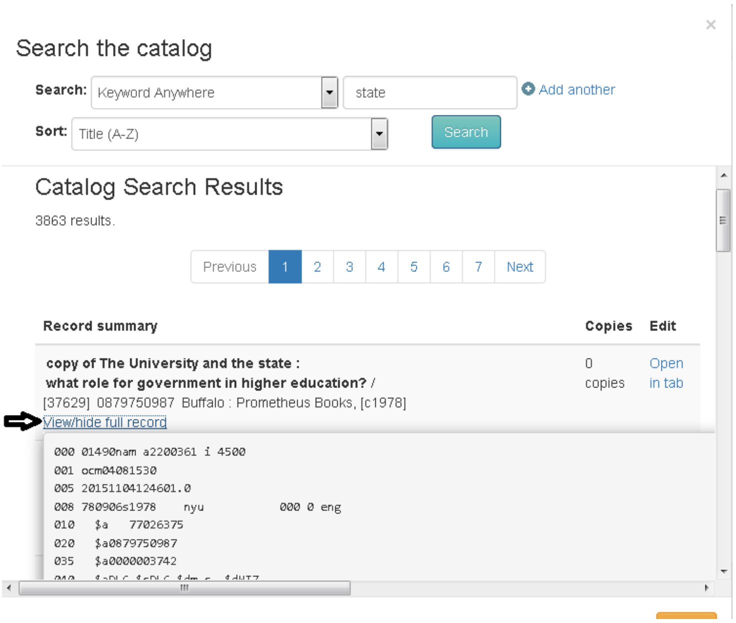


OR use the Record dropdown at the top of the Cataloging Editor and choose Open, Catalog Record.

Enter desired search term(s) in search box provided; click enter to submit search. Note that you can select the search index and the sort order. (Sites with knowledge of JSON encoding and search indexes can customize the indexes available in the pulldown in the MarcEditorConfig syspref.)



Search results will display within the popup box; each record has a View/Hide Record link which will pop out a display of the full MARC:



Search: Keyword Anywhere state

Sort: Title (A-Z)

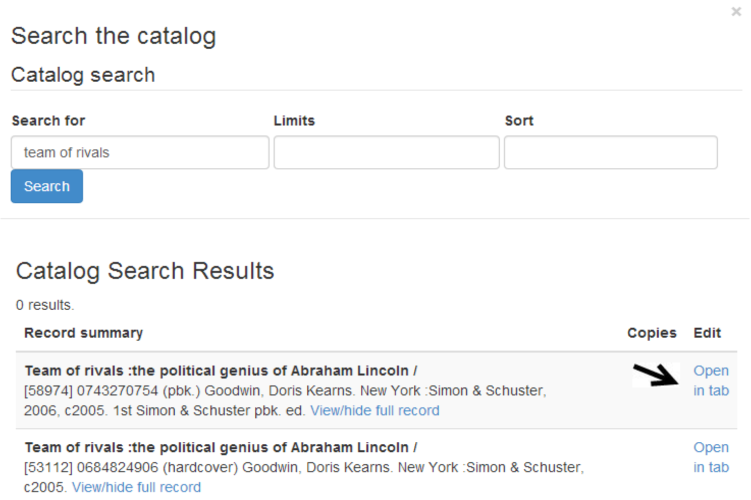
Catalog Search Results

3863 results.

Record summary	Copies	Edit
copy of The University and the state : what role for government in higher education? / [37629] 0879750987 Buffalo : Prometheus Books, [c1978]	0 copies	Open in tab

```
000 01490nam a2200361 i 4500
001 ocm04081530
005 20151104124601.0
008 780906s1978    nyu           000 0 eng
010   $a   77026375
020   $a0879750987
035   $a0000003742
```

You can scroll down/across to see the full record. Choose the record you want and click the Open in Tab link:



Search the catalog

Catalog search

Search for	Limits	Sort
team of rivals		

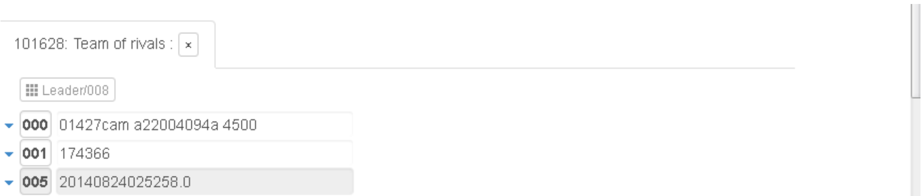
Search

Catalog Search Results

0 results.

Record summary	Copies	Edit
Team of rivals :the political genius of Abraham Lincoln / [58974] 0743270754 (pbk.) Goodwin, Doris Kearns. New York :Simon & Schuster, 2006, c2005. 1st Simon & Schuster pbk. ed. View/hide full record		Open in tab
Team of rivals :the political genius of Abraham Lincoln / [53112] 0684824906 (hardcover) Goodwin, Doris Kearns. New York :Simon & Schuster, c2005. View/hide full record		Open in tab

The record will open in the Cataloging Editor screen:

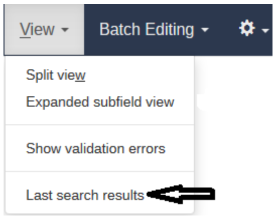


101628: Team of rivals : ×

Leader/008

```
000 01427cam a22004094a 4500
001 174366
005 20140824025258.0
```

You can return to your search results later by clicking View, Last Search Results; this will open the last search window.



If you have already searched for and are displaying the record you want outside the editor, clicking Edit and then selecting Edit Record will open the title in the Cataloging Editor:

Red stat **state, poor state :** why Americans vote the way they do

by Gelman, ,

Format: Boo

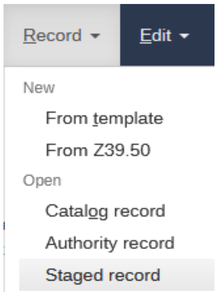
Related Subj | Political parties > United States | Politics, Practical > United States. | Presidents > Election

Publisher and date: Princeton : Princeton University Press, c2008.

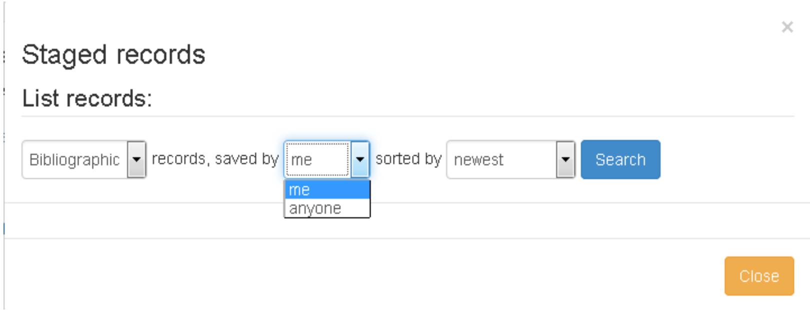
ISBN: 9780691139272 (acid-free paper).

9.2.2 Searching for a Record in the Reservoir

If a staff person has previously created or imported a record, but saved it to the reservoir rather than to the catalog, you can search and retrieve those records. From the Starting Points menu, click Record, Open, Staged Record:



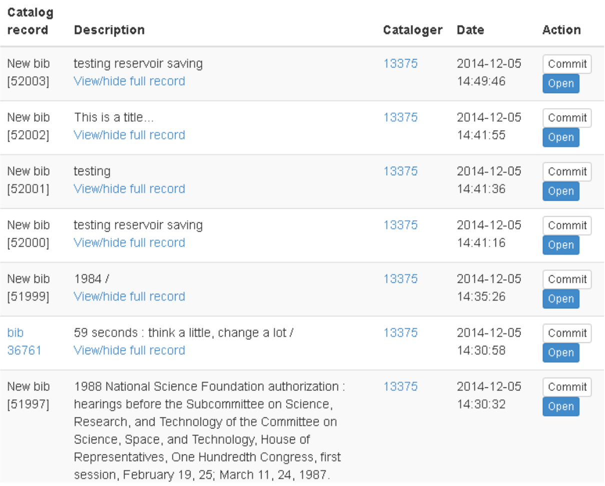
This brings up a search box. You can use the pulldowns to specify either bibliographic, authority, or holdings record, and a record that was staged by you or by anyone:


Staged records

List records:

Bibliographic records, saved by me sorted by newest

The results list shows titles with a link to the creator's staff patron record, and links to view the record, open it in the editor, or commit the record directly to the catalog:

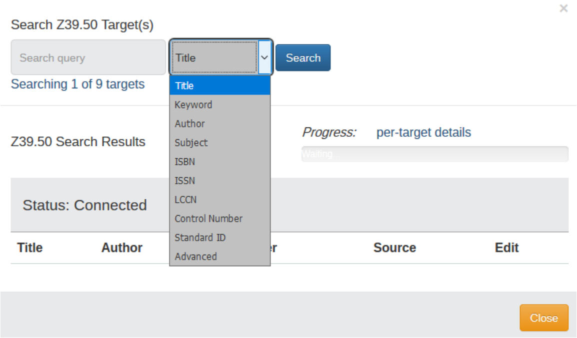


Catalog record	Description	Cataloger	Date	Action
New bib [52003]	testing reservoir saving View/hide full record	13375	2014-12-05 14:49:46	Commit Open
New bib [52002]	This is a title... View/hide full record	13375	2014-12-05 14:41:55	Commit Open
New bib [52001]	testing View/hide full record	13375	2014-12-05 14:41:36	Commit Open
New bib [52000]	testing reservoir saving View/hide full record	13375	2014-12-05 14:41:16	Commit Open
New bib [51999]	1984 / View/hide full record	13375	2014-12-05 14:35:26	Commit Open
bib 36761	59 seconds : think a little, change a lot / View/hide full record	13375	2014-12-05 14:30:58	Commit Open
New bib [51997]	1988 National Science Foundation authorization : hearings before the Subcommittee on Science, Research, and Technology of the Committee on Science, Space, and Technology, House of Representatives, One Hundredth Congress, first session, February 19, 25; March 11, 24, 1987.	13375	2014-12-05 14:30:32	Commit Open

The planned workflow is that a junior cataloger might create a record and save it to the reservoir. Then a senior cataloger will open the record, check it for accuracy, and commit it to the catalog. See the sections on reviewing, saving, and abandoning staged records below.

9.2.3 Creating a Bibliographic Record using Z39.50

You can use z39.50 to import a bib record from another catalog. From the Record or Starting Points menu, click From z3950. A popup box will appear which you can use to search z39.50 targets. (Targets are configured in your system's administration menu; see the Superlibrarian Guide for details.)



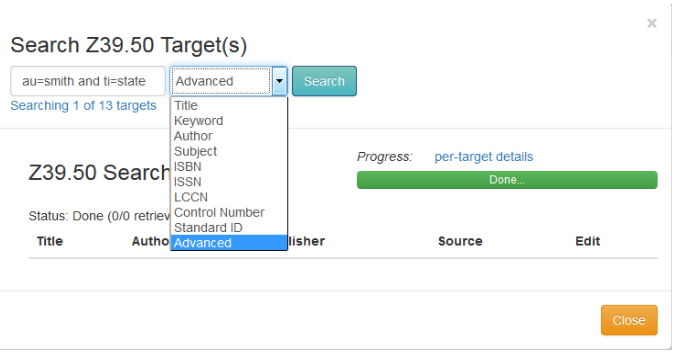
You can use the dropdown menu to select your desired search index. Note that placing your search terms in quotes will increase the exactness of the search. The Advanced option allows using CCL language (z39.50 syntax) to specify exact indexes and to combine entries. Those index names are

au, date, isbn, issn, lccn, cn, stdid, kw, pub, su, ti

So you could have a search entry of

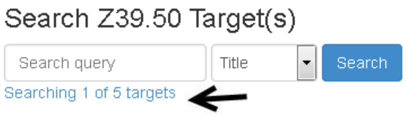
au=smith and ti=state

to do a search against both author and title. Be aware that your success will depend on how the search target has indexed its records.

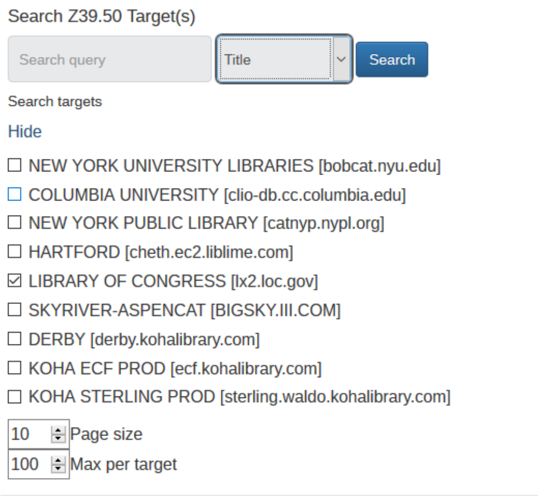


This option is for advanced users who need that level of precision; most users will be fine with the pulldown settings for title, author, ISBN, etc.

By default, the search will run against all targets specified as "checked" (searched by default) in the z39.50 administrative setup. You can adjust this by clicking the link that reads "Searching x of x targets":



That expands the display to show all available targets. Click or unclick the ones you want to search. You can specify how many results to retrieve from each target. NOTE: the more targets you select, the slower the search will be. You are better off just using one primary target. If that doesn't find the record you want, you can redo the search against other targets.



☐ NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
☐ COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
☐ NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]
☐ HARTFORD [cheth.ec2.liblime.com]
☑ LIBRARY OF CONGRESS [lx2.loc.gov]
☐ SKYRIVER-ASPENCAT [BIGSKY.III.COM]
☐ DERBY [derby.kohalibrary.com]
☐ KOHA ECF PROD [ecf.kohalibrary.com]
☐ KOHA STERLING PROD [sterling.waldo.kohalibrary.com]

10 Page size
100 Max per target

After entering your search term and selecting your target(s), click the Search button. The search will run against the target(s) and show you a list of results. For multi-target searches, if one target doesn't respond, the search will continue against the other targets. A progress meter will update you as the search takes place. Clicking the "per target details" link will show you any problems as well as number of hits per target:

Searching 1 of 8 targets

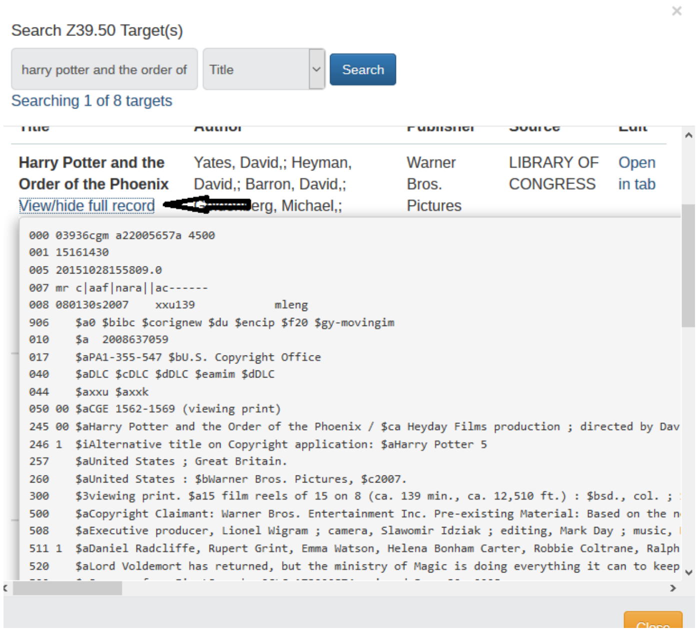
Z39.50 Search Results

lx2.loc.gov:210/LCDB: *17 / 17* Client_Idle

Status: Done (17/17 retrieved) Showing page 1

Title	Author	Publisher	Source	Edit
Harry Potter and the Order of the Phoenix View/hide full record	Yates, David,; Heyman, David,; Barron, David,; Goldenberg, Michael,; Radcliffe, Daniel,; Grint, Rupert,; Watson, Emma,; Rowling, J. K.; Heyday Films.; Warner Bros. Pictures (1969-); Copyright Collection (Library of Congress)	Warner Bros. Pictures	LIBRARY OF CONGRESS	Open in tab
Harry Potter and the Order of the	Hooper, Nicholas.; King, Alastair ; Chamber Orchestra	Warner Bros	LIBRARY OF CONGRESS	Open in tab

From this screen, clicking the View Full link will expand the display to show a record, so you can decide if it's the one you want:

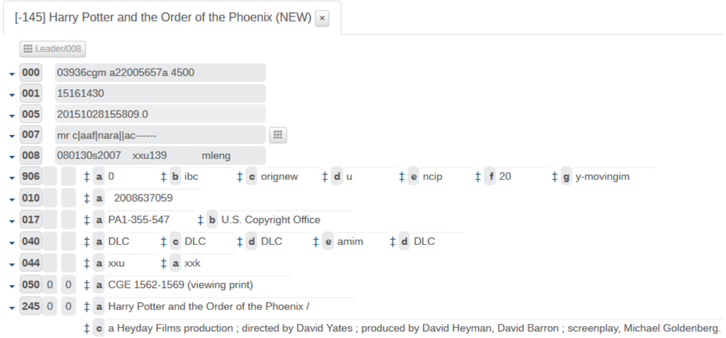


Harry Potter and the Order of the Phoenix | Yates, David,; Heyman, David,; Barron, David,; erg, Michael,; | Warner Bros. Pictures | LIBRARY OF CONGRESS | Open in tab

View/hide full record

```
000 03936cgm a22005657a 4500
001 15161430
005 20151028155809.0
007 mr c|aaf|nara||ac------
008 080130s2007    xxu139           mleng
906    $a0 $bibc $corignew $du $encip $f20 $gy-movingim
010    $a  2008637059
017    $aPA1-355-547 $bU.S. Copyright Office
040    $aDLC $cDLC $dDLC $eamim $dDLC
044    $axxu $axxk
050 00 $aCGE 1562-1569 (viewing print)
245 00 $aHarry Potter and the Order of the Phoenix / $ca Heyday Films production ; directed by Dav
246 1  $iAlternative title on Copyright application: $aHarry Potter 5
257    $aUnited States ; Great Britain.
260    $aUnited States : $bWarner Bros. Pictures, $c2007.
300    $3viewing print. $a15 film reels of 15 on 8 (ca. 139 min., ca. 12,510 ft.) : $bsd., col. ;
500    $aCopyright Claimant: Warner Bros. Entertainment Inc. Pre-existing Material: Based on the n
508    $aExecutive producer, Lionel Wigram ; camera, Slawomir Idziak ; editing, Mark Day ; music,
511 1  $aDaniel Radcliffe, Rupert Grint, Emma Watson, Helena Bonham Carter, Robbie Coltrane, Ralph
520    $aLord Voldemort has returned, but the ministry of Magic is doing everything it can to keep
```

Click the Open in Tab link to open the record in the Cataloging Editor. The z39.50 popup will stay open; if you don't want any other records from this search, close it.

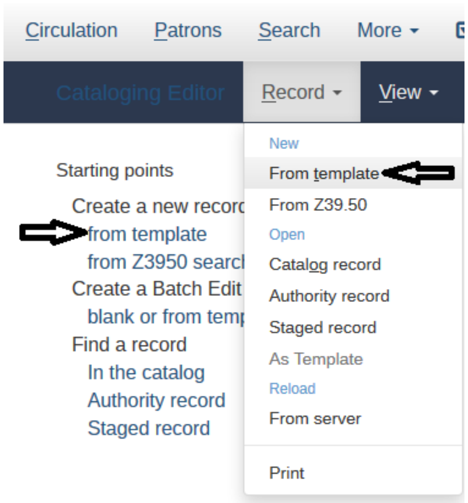


```
000        03936cgm a22005657a 4500
001        15161430
005        20151028155809.0
007        mr c|aaf|nara||ac------
008        080130s2007   xxu139        mleng
906        ‡ a 0   ‡ b ibc   ‡ c orignew   ‡ d u   ‡ e ncip   ‡ f 20   ‡ g y-movingim
010        ‡ a  2008637059
017        ‡ a PA1-355-547   ‡ b U.S. Copyright Office
040        ‡ a DLC   ‡ c DLC   ‡ d DLC   ‡ e amim   ‡ d DLC
044        ‡ a xxu   ‡ a xxk
050  0  0  ‡ a CGE 1562-1569 (viewing print)
245  0  0  ‡ a Harry Potter and the Order of the Phoenix /
           ‡ c a Heyday Films production ; directed by David Yates ; produced by David Heyman, David Barron ; screenplay, Michael Goldenberg.
```

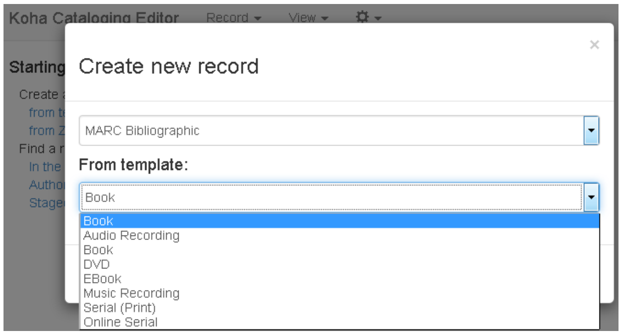
Note that the record has not yet been saved into your catalog – you **must** save it from this screen after you make any changes desired.

9.2.4 Creating a Bibliographic Record From a Template

Templates are defined structures including standard MARC fields for different kinds of records. They can also be used to set default values for large collections. The system is delivered with standard templates for bibliographic, holdings, and authority records; sites can add their own as desired. To open a new record with a template, choose From Template either from the Starting Points menu or under Record, From Template:



This opens a menu window. Use the top pulldown to select which type of record (bibliographic, MARC holdings, authority), then use the bottom pulldown to select the template you want:


Create new record

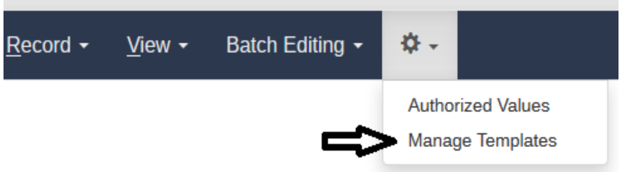
MARC Bibliographic

From template: Book

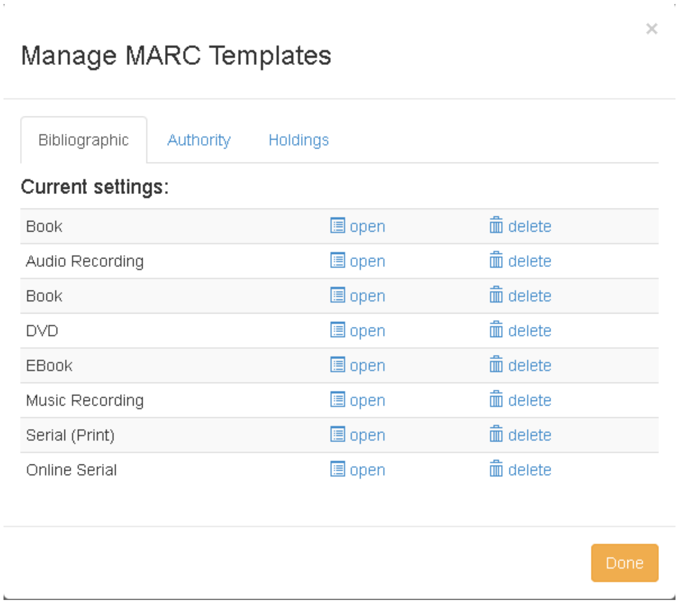
Then click the Create New button to open a record in the Cataloging Editor using that template.

9.2.5 Managing Templates

You can manage existing templates by clicking the gear icon (Settings) and choosing Manage Templates:



This menu will let you create an empty record from a template, or delete a template:

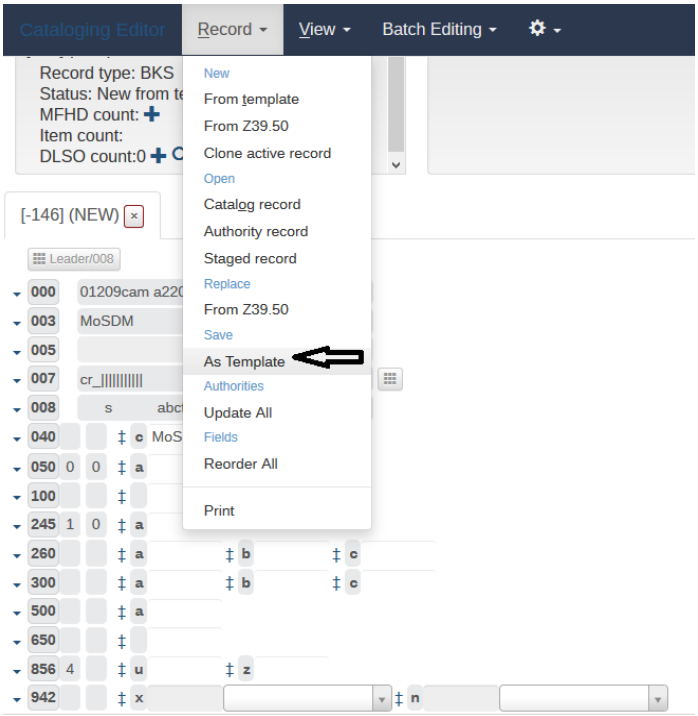


Manage MARC Templates

Current settings:

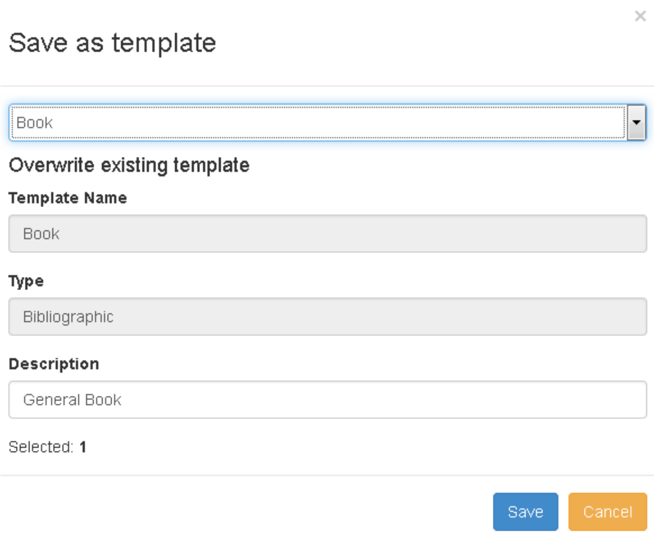
Book	open	delete
Audio Recording	open	delete
Book	open	delete
DVD	open	delete
EBook	open	delete
Music Recording	open	delete
Serial (Print)	open	delete
Online Serial	open	delete

To modify an existing template, or create a new one, open an empty record from an existing template. Add or remove fields and subfields as desired, and make any custom entries (defaults, etc.) you want. Then, under the Record menu, choose Save as Template – give it a name and description.



Record type: BKS
Status: New from te
MFHD count:
Item count:
DLSO count:0

The default is to overwrite the existing template – you can do that if desired.


Save as template

Book

Overwrite existing template

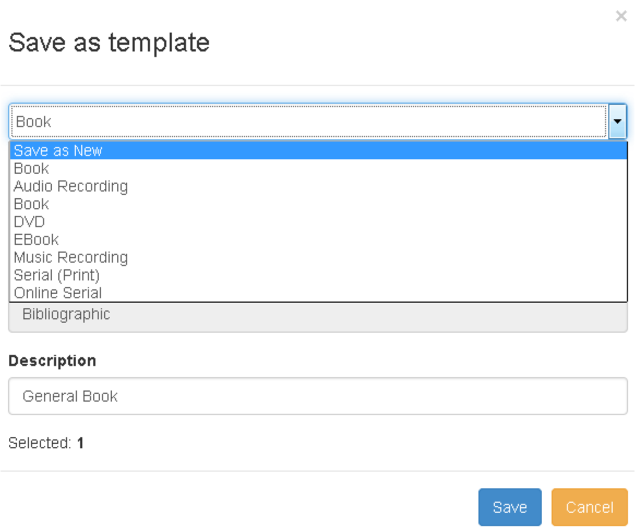
Template Name: Book

Type: Bibliographic

Description: General Book

Selected: 1

Otherwise, click the top pulldown and choose Save as New. Give it a name and a description.


Save as template

Book

Bibliographic

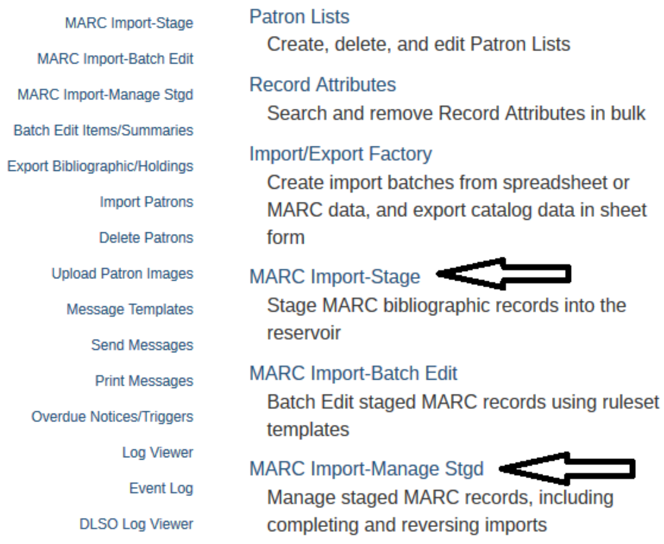
Description: General Book

Selected: 1

9.2.6 Importing a Batch of Records

MARC-format bibliographic records can be batch-imported into the catalog outside the cataloging editor. Note that bibliographic/holdings records must be imported separately from authority records – the two types cannot be merged in the same file.

There are two steps, staging for import and managing staged records. Both functions are found under the Tools menu:



Patron Lists
Create, delete, and edit Patron Lists

Record Attributes
Search and remove Record Attributes in bulk

Import/Export Factory
Create import batches from spreadsheet or MARC data, and export catalog data in sheet form

MARC Import-Stage
Stage MARC bibliographic records into the reservoir

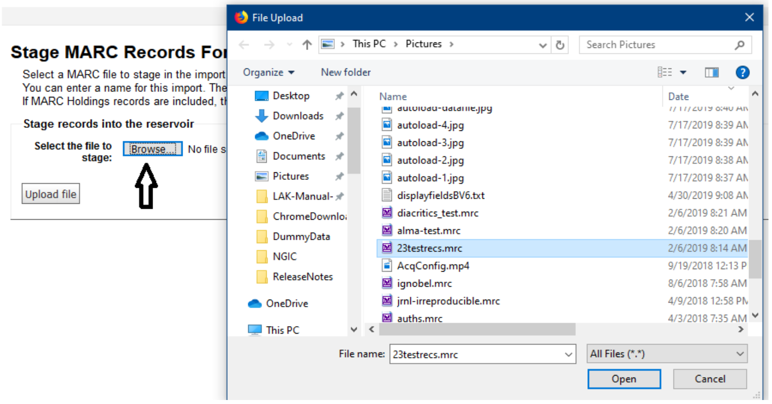
MARC Import-Batch Edit
Batch Edit staged MARC records using ruleset templates

MARC Import-Manage Stgd
Manage staged MARC records, including completing and reversing imports

9.2.6.1 Stage Bibliographic MARC Records for Import

From Tools, choose MARC Import - Stage. The Stage Marc Records for Import page will display. Click the Browse button and navigate to the location (on your local PC or your network) of the file to be imported.

Once found, click once on the file name and it will appear in the File Name area of the popup.



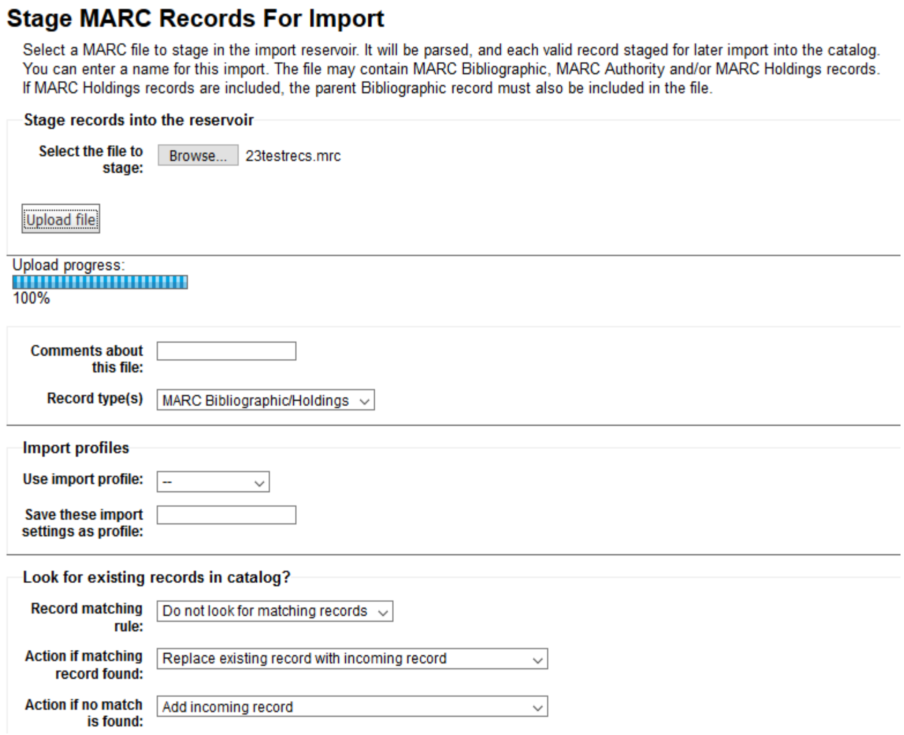
Select a MARC file to stage in the import
You can enter a name for this import. The
If MARC Holdings records are included, t

Name	Date
autoload-4.jpg	7/17/2019 8:39 AM
autoload-3.jpg	7/17/2019 8:39 AM
autoload-2.jpg	7/17/2019 8:38 AM
autoload-1.jpg	7/17/2019 8:37 AM
displayfieldsBV6.txt	4/30/2019 9:08 AM
diacritics_test.mrc	2/6/2019 8:21 AM
alma-test.mrc	2/6/2019 8:20 AM
23testrecs.mrc	2/6/2019 8:14 AM
AcqConfig.mp4	9/19/2018 12:13 P
ignobel.mrc	8/6/2018 7:58 AM
jrnl-irreproducible.mrc	4/9/2018 12:58 PM
auths.mrc	4/3/2018 7:35 AM

File name: 23testrecs.mrc

Then click Open and the Stage March Biblio Records for Import page will reappear with the file chosen displayed.

Then click the Upload File button. An upload progress bar will display. When the import is done, both the color of the bar will change and a 100% progress will appear.



Stage MARC Records For Import

Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog. You can enter a name for this import. The file may contain MARC Bibliographic, MARC Authority and/or MARC Holdings records. If MARC Holdings records are included, the parent Bibliographic record must also be included in the file.

Stage records into the reservoir

Select the file to stage: 23testrecs.mrc

Upload progress: 100%

Comments about this file:

Record type(s): MARC Bibliographic/Holdings

Import profiles

Use import profile: --

Save these import settings as profile:

Look for existing records in catalog?

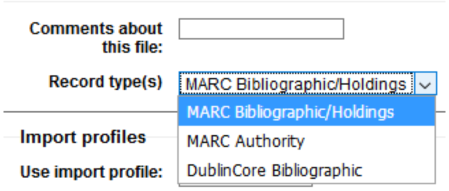
Record matching rule: Do not look for matching records

Action if matching record found: Replace existing record with incoming record

Action if no match is found: Add incoming record

On the remainder of the screen, you must first select whether you are uploading bibliographic records or authority records. The available options will change. (See the section on importing authority records for how to import authorities.)

For MARC records, select MARC Bibliographic/Holdings for the Record Type(s) field.



Comments about this file:

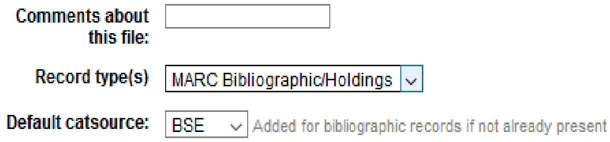
Record type(s): MARC Bibliographic/Holdings

Support has been added for Dublin Core bib import; select that if needed instead. The import will convert a file of Dublin Core records to MARC for loading into the catalog.

You have the option to enter Comments, which can be helpful later for notes about the file's origin or contents.

If you select bibliographic, you will then have the remaining options described below. See the section on importing authority records for those options.

If your site is using cataloging access control, you must specify a default catsource from the options available to you in the pulldown. Which options you see depend on what cataloging permissions your login has (see the permissions section). If your site does not use cataloging access control, this entry will not appear.



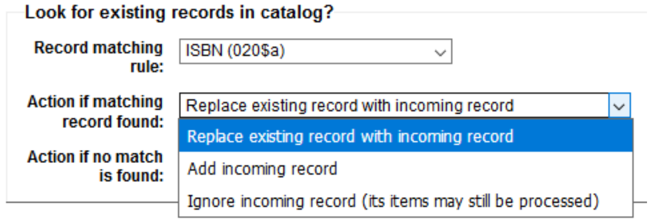
Comments about this file:

Record type(s): MARC Bibliographic/Holdings

Default catsource: BSE Added for bibliographic records if not already present

You can also choose to check for duplicates when importing by applying a match rule. Depending on what rules are configured on your system (Administration, Record Matching Rules), you could check for matches on fields such as ISBN, 001, 035, or 010. **IMPORTANT**: If you choose to look for a match, the system will only compare the first occurrence of each subfield. Thus, if you choose to match on the 020a then it will only compare the first 020a in both records. If you have multiple 020a subfields, you need to be aware of their order.

Next, you need to specify what should happen if a duplicate record is found in your system.



Look for existing records in catalog?

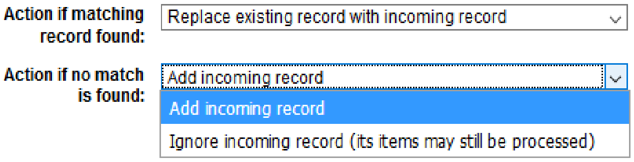
Record matching rule: ISBN (020$a)

Action if matching record found: Replace existing record with incoming record

Action if no match is found:

The first (default) option, Replace Existing Record with Incoming Record, will overlay any existing records with new ones from this import. Add Incoming Record will ignore the match and create a new duplicate record. Ignore Incoming Record will leave the existing records intact, adding new item data if that is included in the file.

If no match is found, you will almost always want to choose the default option to import the new record:

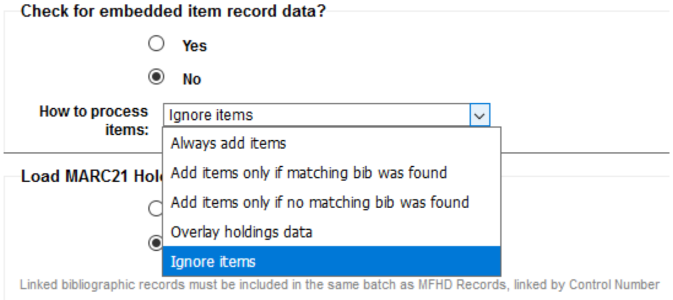


Action if matching record found: Replace existing record with incoming record

Action if no match is found: Add incoming record

There are two more field entries in this section for leader 05 delete handling; see the next subsection for details on those options. **For normal bib loading, leave these fields set to the default values.**

The final setup options allow you to choose whether or not to import item records and/or MARC Holdings records. See the section below on 952 Item Formatting for the syntax to use in item record creation. If your incoming data does not have an item (952) field, click the No radio button and/or select Ignore Items from the pulldown:



Check for embedded item record data?

○ Yes

● No

How to process items: Ignore items

Load MARC21 Hol

○

●

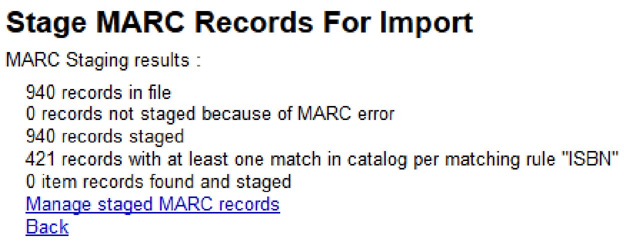
Linked bibliographic records must be included in the same batch as MFHD Records, linked by Control Number

If your data does have item records (952 fields), you will usually want the “Always Add Items” entry, but may use one of the others if needed.

If your incoming data includes serial holdings records, you can opt to load those as well.

When you have made your selections, click Click the Stage for Import button. Your MARC file will be parsed, and each valid record staged for later import into the catalog. All staged records go into the reservoir, the holding place for records before they are added to the catalog. Records will remain in the reservoir even after the import is complete.

After the file loads, you’ll be taken to a summary screen detailing how many were reviewed and how many records were successfully imported.



Stage MARC Records For Import

MARC Staging results :

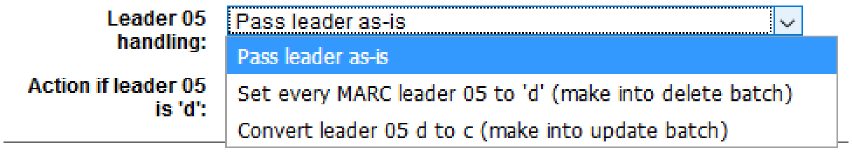
940 records in file
0 records not staged because of MARC error
940 records staged
421 records with at least one match in catalog per matching rule "ISBN"
0 item records found and staged
Manage staged MARC records
Back

From this page, users can either return to the staging area to stage more files for import or begin managing the staged records for import (click the Manage Staged Records link in the summary and you’ll go directly into the batch).

9.2.6.2 Leader 05 Delete Handling

This feature will allow using an import batch to delete existing records, or to change the leader 05 flag. An example where this would be used is a batch of ebook records. If your library no longer subscribes to that ebook service, you need to remove the bib records from your system, but that can be difficult. You can either get a file of records from your vendor, or export those bibs from your current system and then re-import with the delete settings.

There are two options for processing the batch with changes to the leader 05 delete setting.

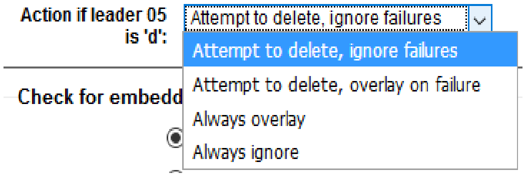


Leader 05 handling: Pass leader as-is

Action if leader 05 is 'd':

For the first field (Leader 05 Handling), you can pass it as-is (the setting for most normal import batches), set it as 'd' (make this into a delete batch), or change 'd' to 'c' (make this into an update batch).

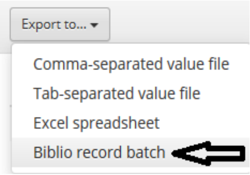
The action setting is only used if you are trying to change the leader 05 to delete records.



Action if leader 05 is 'd': Attempt to delete, ignore failures

The options are to attempt to delete any matching records (ignoring failures), attempt to delete (but overlay on failures), always overlay, or always ignore. These are only meaningful if there's a match of some kind.

Here is a sample process to delete a batch of existing records from your system:

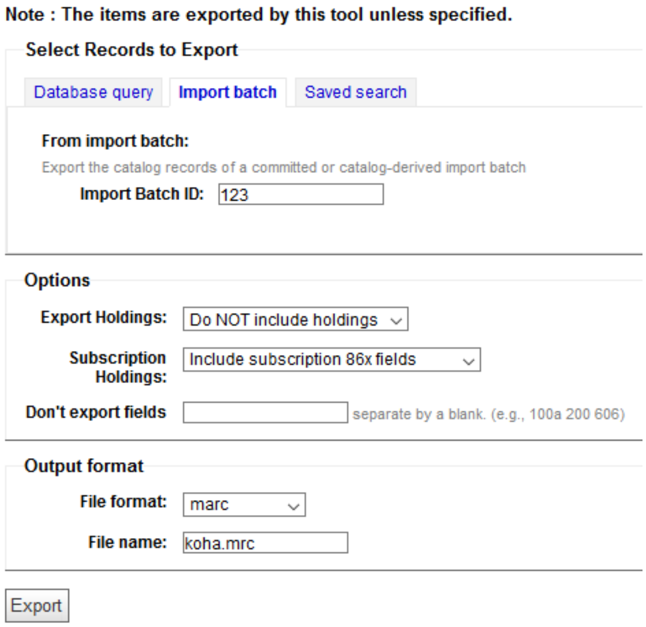
1. Create a batch via SQL report – structure a report query to identify your records. Make the first field in the output be biblionumber. Then, from the finished report, choose Biblio Record Batch under the export options.
2. 

3. This creates a staged batch in the system.
4. Get the batch number from the popup message from the above, or look under Tools, MARC Import-Manage Staged:

Manage Staged MARC Biblio Records

#	File name	Creator	Comments	Status	Staged	# Records	# Items	Action
2347	From active catalog	PTFSadmin, Jane	Report aJW	staged	2021-04-19 14:03:20	1	0	Clean

5. Under Tools, Export Bibliographic, select that batch number to export:



Note : The items are exported by this tool unless specified.

Select Records to Export

From import batch:

Export the catalog records of a committed or catalog-derived import batch

Import Batch ID: 123

Options

Export Holdings: Do NOT include holdings

Subscription Holdings: Include subscription 86x fields

Don't export fields separate by a blank. (e.g., 100a 200 606)

Output format

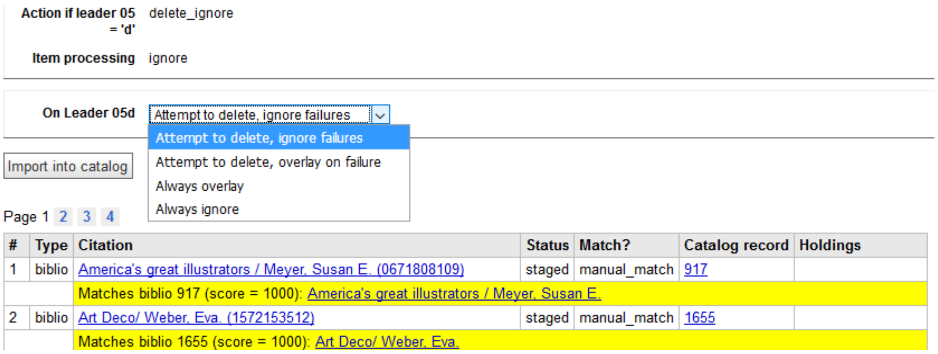
File format: marc

File name: koha.mrc

6. Then, stage that exported batch of bibs with the Leader 05 handling as Set every MARC leader 05 to d.

7. When you commit this batch (Manage Staged Records section below), those records will be deleted from your system.

Note that nothing happens to the existing records at this stage – you MUST go into Manage Staged Records. In that import batch, verify your Leader 05 settings, and then click Import Into Catalog:



Action if leader 05 = 'd' delete_ignore

Item processing ignore

On Leader 05d Attempt to delete, ignore failures

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	biblio	America's great illustrators / Meyer, Susan E. (0671808109)	staged	manual_match	917	
		Matches biblio 917 (score = 1000): America's great illustrators / Meyer, Susan E.				
2	biblio	Art Deco/ Weber, Eva. (1572153512)	staged	manual_match	1655	
		Matches biblio 1655 (score = 1000): Art Deco/ Weber, Eva.				

When that action completes, the records are removed. Note that the system also deletes all of the items and MFHD records as well. Delete fails if the bib has a serial subscription attached, or if any physical items are checked out.

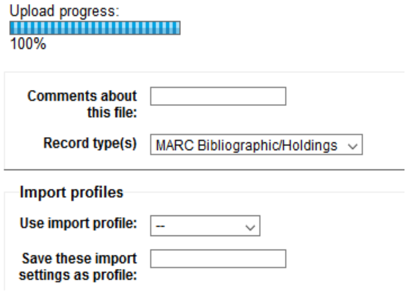
Note that the option to set the leader to ‘c’ (Change) would be rarely used. That setting says to process this as an update. Two possible scenarios are:

- If you are importing a MARC batch from another source of dubious integrity where the leaders might be incorrect and have 'd' flags in the 05, and you want to change that to 'c' in your system.

- If you want to move a batch of bibs from one site to another. You would process it as a delete batch ('d' setting) on site 1, and then process it as an update batch ('c' setting) on site 2.

9.2.6.3 Add Item Profiles

A new feature allows sites to create profiles and add items during import. After the file uploads, a new section for Import Profiles will appear:



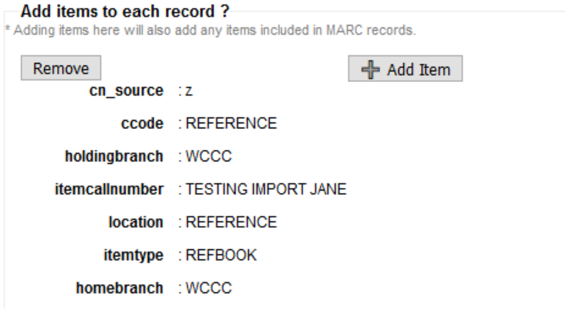
Upload progress:
100%

Comments about this file:
Record type(s) MARC Bibliographic/Holdings

Import profiles
Use import profile: --
Save these import settings as profile:

If your site has already saved profiles, you can use the pulldown to select an existing one. Otherwise, if desired, you can name and save the settings you create for this batch (below).

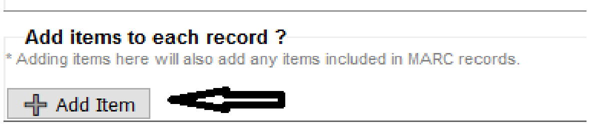
Further down on the screen is an option to add items. If you selected a profile, those settings will automatically show; you can click the Add Item button to add more item entries.



Add items to each record ?
* Adding items here will also add any items included in MARC records.

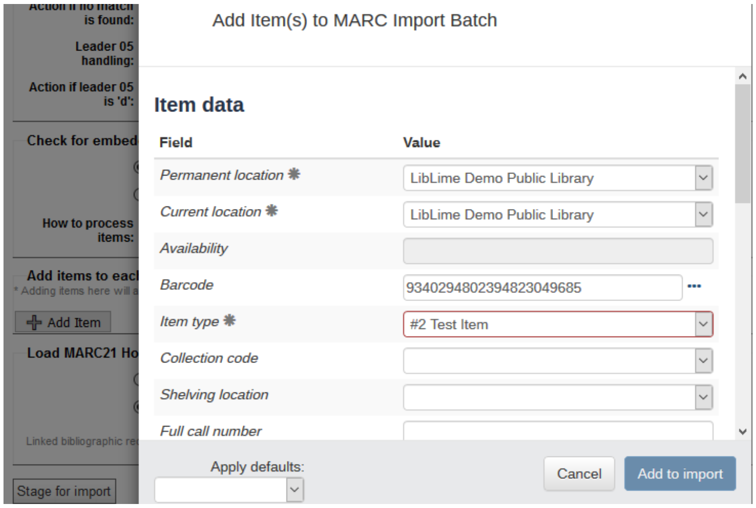
cn_source : z
ccode : REFERENCE
holdingbranch : WCCC
itemcallnumber : TESTING IMPORT JANE
location : REFERENCE
itemtype : REFBOOK
homebranch : WCCC

Otherwise, you’ll see an Add Item button; click it to begin the setup.



Add items to each record ?
* Adding items here will also add any items included in MARC records.

That opens an item create popup:



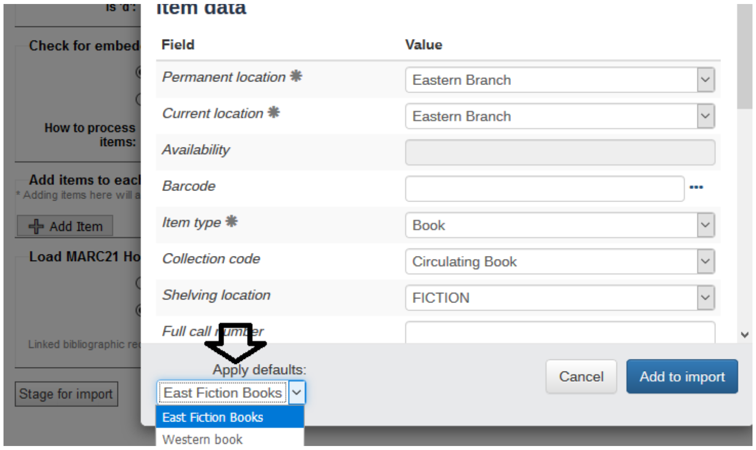
Add Item(s) to MARC Import Batch

Item data

Field	Value
Permanent location ✱	LibLime Demo Public Library
Current location ✱	LibLime Demo Public Library
Availability	
Barcode	9340294802394823049685
Item type ✱	#2 Test Item
Collection code	
Shelving location	
Full call number	

Use this screen to set basic defaults, such as branchcode, item type, shelving location, etc. **IMPORTANT**: If your site has auto-barcoding turned on, a barcode will appear in this popup – be sure to delete it before saving. Items created during import will be barcoded automatically. Also, as with item creation (see below), if a field is required, it will be outlined in red. A required field tied to a pulldown, such as Item Type in the screenshot above, will display the first entry in the pulldown, but you MUST select the appropriate entry before the setting is recorded. You won't be able to save the profile until you do.

If you have item session defaults already established (see that section below), you can select one as a shortcut here, then save it as an import profile:

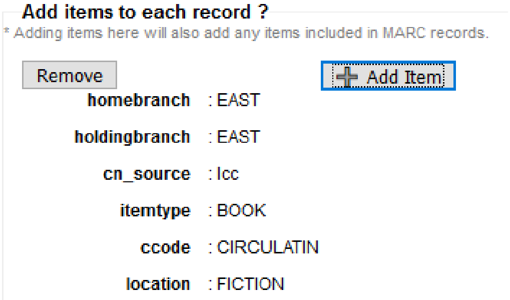


Item data

Field	Value
Permanent location ✱	Eastern Branch
Current location ✱	Eastern Branch
Availability	
Barcode	
Item type ✱	Book
Collection code	Circulating Book
Shelving location	FICTION
Full call number	

Apply defaults: East Fiction Books

When you have configured your default fields, click the Add to Import button. You'll see your settings on the screen:


Add items to each record ?

* Adding items here will also add any items included in MARC records.

homebranch : EAST
holdingbranch : EAST
cn_source : lcc
itemtype : BOOK
ccode : CIRCULATIN
location : FICTION

Make sure you've entered a profile name (above) if you want to save this profile for future use. It will be saved when you click the Stage for Import button.

9.2.6.4 952 Item Formatting

If you create batches of records on OCLC, or get records from a vendor, you can format them to include item information. Create a 952 entry with item details, and when you import the title record the system will create an item record. Note that you MUST use the actual codes, not the descriptions for the library, location, item type, etc. The system is case-sensitive, so make sure your codes are entered exactly as they were created on your system (usually in upper case).

If your site uses collection-scoped permissions (catsources), you MUST have one 942$x per title with the appropriate catsource policy code.

952 (add as many as you have items for that title) – here are the most common fields you'll want to set:

- $8 collection code
- $a owning library code
- $b current library code
- $c shelving location code
- $o full call number, including cutter
- $p barcode
- $v replacement price (if available) -- this is what's used to determine billing cost to patrons for lost items. (No dollar sign in front of the price.) Sites which do not charge patrons for lost items should leave this field empty.
- $y itemtype code

The above are the most common fields (unless your library doesn't use a field such as shelving location or collection code). **The $a, $b, and $y are absolutely necessary – do not create items without branchcode settings and preferably also an item type**. There are some other 952 subfields that you might want to use, depending on your data, but these are not critical for a data load:

- $7 set to 1 if the item is not for loan (set to negative value -1 to allow holds on On-Order materials)
- $d date acquired (format dates as YYYY-MM-DD)
- $e source of acquisition (name or abbreviation of publisher or vendor)

- $g original purchase price
- $h volume/issue information for serial items
- $t copy number (if creating more than one copy)
- $x internal note (visible in staff mode, for specific notes about the item)
- $z public note (visible to patrons in the Discovery Layer, for specific notes about the item)

See the item record create/edit screen for other subfields if needed.

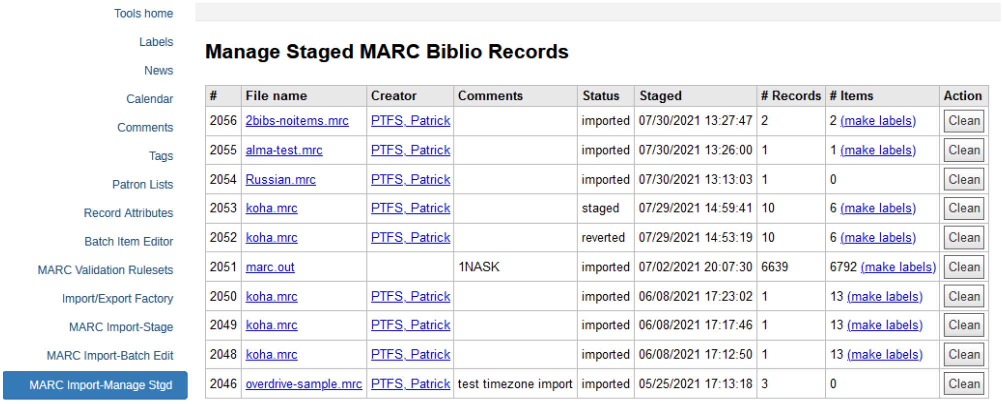
A sample 952 entry might look like this (format is the MarcEdit flat display):

```
=952  \\$w2009-07-12$p39344008005024$v7.00$40$00$oSCI FIC ANTHONY$bMAIN$10 $d2007-03-
20$8SCIFI$h(PB)$70$cSTACKS$g7.00$yBK$aMAIN
```

The entry should be all one line (the above is broken for display). Do **NOT** put a space between the subfield code and the entry – use $yBK, not $y BK. Also do not leave a space after an entry – use yBKaMAIN, not $yBK $aMAIN.

9.2.6.5 Manage Staged Biblio Records

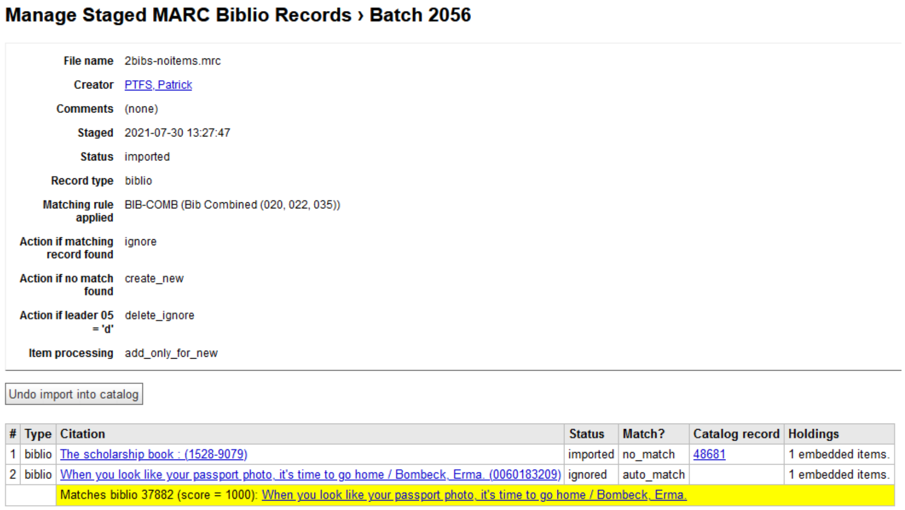
To manage biblio import files, go to Tools, MARC Import - Manage Staged Records. You'll see a list of all files that have been uploaded, along with their current status. A status of "staged" means the file has been uploaded but not imported into the catalog. A status of "imported" means the file has been imported into the catalog. A status of "reverted" means the file had been imported, but later reversed. The records were then deleted from the catalog but still remain in the reservoir. You can remove the batch from the reservoir entirely by clicking the Clean button (status changes to "cleaned"), but this cannot be undone, so be careful.



Manage Staged MARC Biblio Records

#	File name	Creator	Comments	Status	Staged	# Records	# Items	Action
2056	2bibs-noitems.mrc	PTFS, Patrick		imported	07/30/2021 13:27:47	2	2 (make labels)	Clean
2055	alma-test.mrc	PTFS, Patrick		imported	07/30/2021 13:26:00	1	1 (make labels)	Clean
2054	Russian.mrc	PTFS, Patrick		imported	07/30/2021 13:13:03	1	0	Clean
2053	koha.mrc	PTFS, Patrick		staged	07/29/2021 14:59:41	10	6 (make labels)	Clean
2052	koha.mrc	PTFS, Patrick		reverted	07/29/2021 14:53:19	10	6 (make labels)	Clean
2051	marc.out		1NASK	imported	07/02/2021 20:07:30	6639	6792 (make labels)	Clean
2050	koha.mrc	PTFS, Patrick		imported	06/08/2021 17:23:02	1	13 (make labels)	Clean
2049	koha.mrc	PTFS, Patrick		imported	06/08/2021 17:17:46	1	13 (make labels)	Clean
2048	koha.mrc	PTFS, Patrick		imported	06/08/2021 17:12:50	1	13 (make labels)	Clean
2046	overdrive-sample.mrc	PTFS, Patrick	test timezone import	imported	05/25/2021 17:13:18	3	0	Clean

Click on the filename you want to manage, and it will show you details about the records. In the top part of the screen, you will see the current settings and can opt to apply a different matching rule:

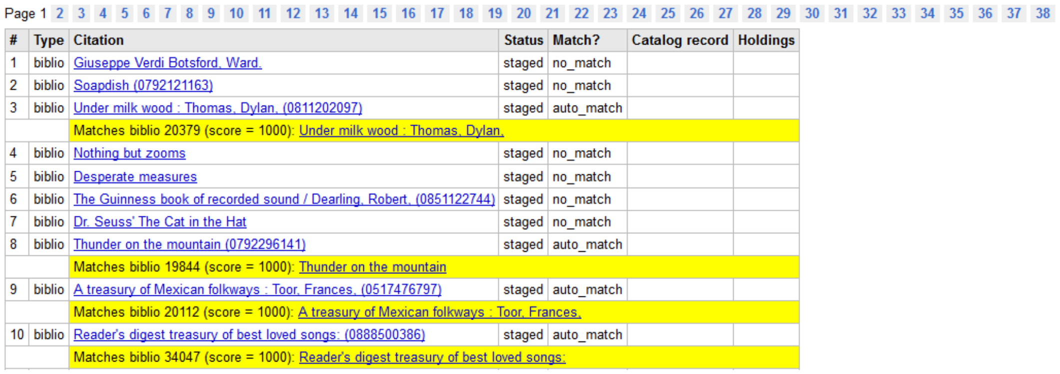


Manage Staged MARC Biblio Records › Batch 2056

File name	2bibs-noitems.mrc
Creator	PTFS, Patrick
Comments	(none)
Staged	2021-07-30 13:27:47
Status	imported
Record type	biblio
Matching rule applied	BIB-COMB (Bib Combined (020, 022, 035))
Action if matching record found	ignore
Action if no match found	create_new
Action if leader 05 = 'd'	delete_ignore
Item processing	add_only_for_new

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	biblio	The scholarship book : (1528-9079)	imported	no_match	48681	1 embedded items.
2	biblio	When you look like your passport photo, it's time to go home / Bombeck, Erma. (0060183209)	ignored	auto_match		1 embedded items.
		Matches biblio 37882 (score = 1000): When you look like your passport photo, it's time to go home / Bombeck, Erma.				

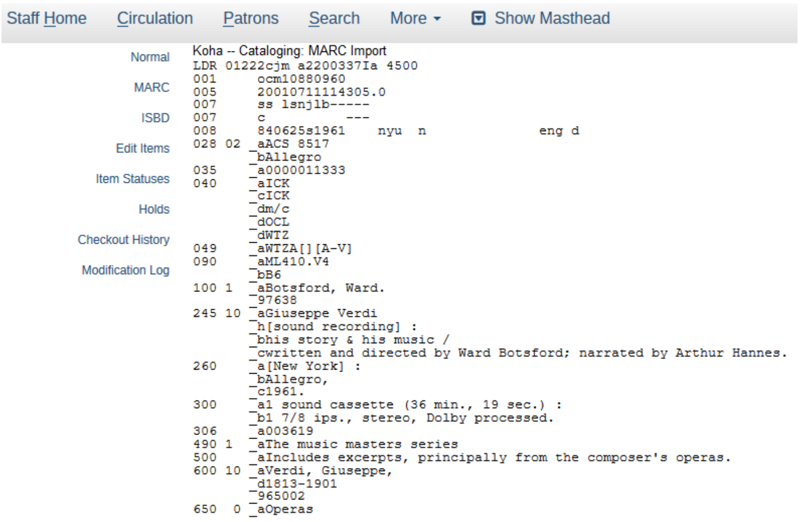
Note that there is a link next to Creator – this is the staff record of the person who uploaded the batch. Scroll down, and the bottom part of the screen has links for each record in the batch. Larger batches will have page options to move between records, like this:



Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	biblio	Giuseppe Verdi Botsford, Ward.	staged	no_match		
2	biblio	Soapdish (0792121163)	staged	no_match		
3	biblio	Under milk wood : Thomas, Dylan. (0811202097)	staged	auto_match		
		Matches biblio 20379 (score = 1000): Under milk wood : Thomas, Dylan.				
4	biblio	Nothing but zooms	staged	no_match		
5	biblio	Desperate measures	staged	no_match		
6	biblio	The Guinness book of recorded sound / Dearling, Robert. (0851122744)	staged	no_match		
7	biblio	Dr. Seuss' The Cat in the Hat	staged	no_match		
8	biblio	Thunder on the mountain (0792296141)	staged	auto_match		
		Matches biblio 19844 (score = 1000): Thunder on the mountain				
9	biblio	A treasury of Mexican folkways : Toor, Frances. (0517476797)	staged	auto_match		
		Matches biblio 20112 (score = 1000): A treasury of Mexican folkways : Toor, Frances.				
10	biblio	Reader's digest treasury of best loved songs. (0888500386)	staged	auto_match		
		Matches biblio 34047 (score = 1000): Reader's digest treasury of best loved songs.				

If you click on a title in the list, it will show the MARC record (use the browser back button to return to the batch):

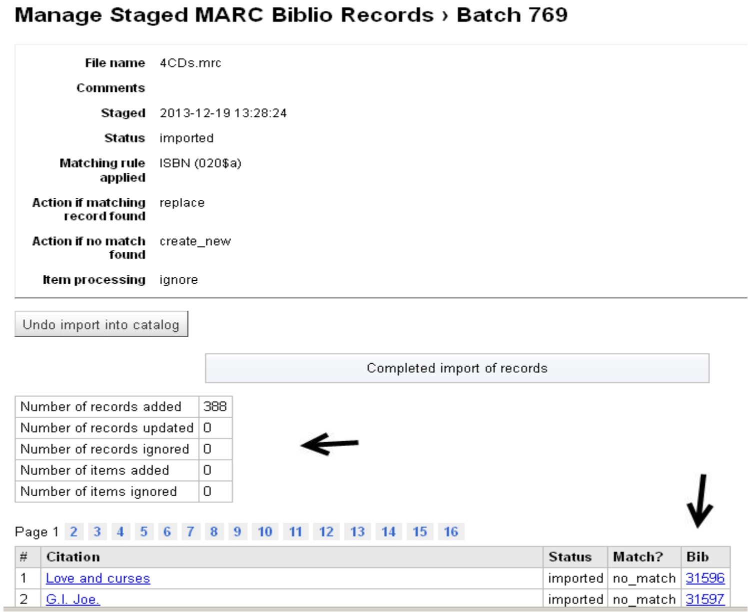


Koha -- Cataloging: MARC Import

```
LDR 01222cjm a2200337Ia 4500
001       ocm10880960
005       20010711114305.0
007       ss lsnjlb-----
007       c         ---
008       840625s1961    nyu  n              eng d
028 02 _aACS 8517
       _bAllegro
035    _a0000011333
040    _aICK
       _cICK
       _dm/c
       _dOCL
       _dWTZ
049    _aWTZA[][A-V]
090    _aML410.V4
       _bB6
100 1  _aBotsford, Ward.
       _97638
245 10 _aGiuseppe Verdi
       _h[sound recording] :
       _bhis story & his music /
       _cwritten and directed by Ward Botsford; narrated by Arthur Hannes.
260    _a[New York] :
       _bAllegro,
       _c1961.
300    _a1 sound cassette (36 min., 19 sec.) :
       _b1 7/8 ips., stereo, Dolby processed.
306    _a003619
490 1  _aThe music masters series
500    _aIncludes excerpts, principally from the composer's operas.
600 10 _aVerdi, Giuseppe,
       _d1813-1901
       _965002
650  0 _aOperas
```

If the incoming record matched a title already in the catalog, you'll see a link to that record highlighted in yellow; you can open the existing title to compare. When you are ready to import, click the Import Into Catalog button found between those two sections of the screen.

While the file is importing, you'll see a progress bar on the screen. When the import is complete, the screen will summarize the work done and confirm completion of the import. It may take a few minutes for the records to be fully indexed and searchable.



Manage Staged MARC Biblio Records › Batch 769

File name	4CDs.mrc
Comments	
Staged	2013-12-19 13:28:24
Status	imported
Matching rule applied	ISBN (020$a)
Action if matching record found	replace
Action if no match found	create_new
Item processing	ignore

Completed import of records

Number of records added	388
Number of records updated	0
Number of records ignored	0
Number of items added	0
Number of items ignored	0

#	Citation	Status	Match?	Bib
1	Love and curses	imported	no_match	31596
2	G.I. Joe.	imported	no_match	31597

The summary screen shows record counts and also lists each title. As with the Manage Staged Records screen, clicking on the title will open a window with the MARC record. On this screen, however, the last column has a link to the newly-loaded title record. Clicking that link will take you to the title.

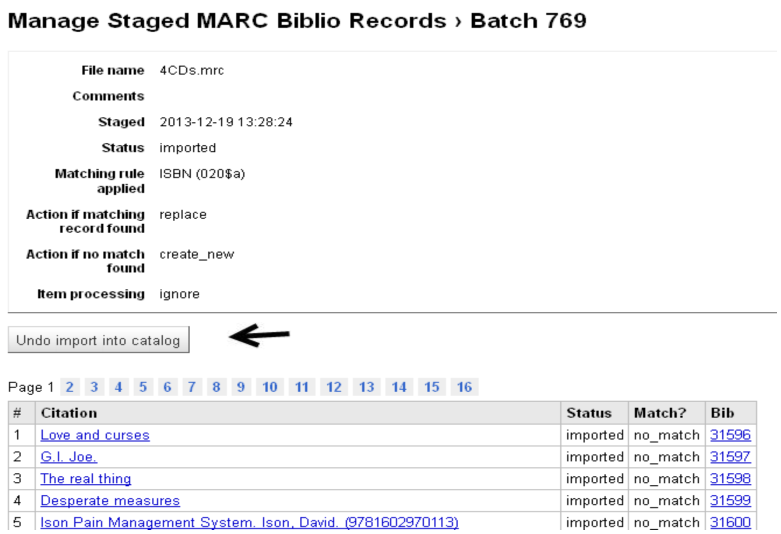
WARNING: Large files can take a long time to both upload and import, and may outlast the browser's timeout. In general, do not try to import files larger than about 1,000 records; break them up into smaller files.

9.2.6.6 Reverting Batches

An imported batch of bibliographic records can be reverted, which deletes the records from the main catalog but leaves them in the reservoir. Some sites use this for temporary records, such as subscription-based eresources, which are then removed when the subscription expires and is not renewed. This is not recommended as a standard practice, though.

However, there are times you may want to revert a batch – if you see problems with the item record formatting after load, or realize that you've loaded the wrong records. **Be aware that if you have manually deleted ANY of the title records, the revert will not work. None of the records after that point in the batch will be removed.**

To revert a batch, go to Tools, Biblio Import - Manage Staged Records. Locate the batch you want to unload and click on its name. That takes you into the details screen for that batch.



Manage Staged MARC Biblio Records › Batch 769

File name 4CDs.mrc

Comments

Staged 2013-12-19 13:28:24

Status imported

Matching rule applied ISBN (020$a)

Action if matching record found replace

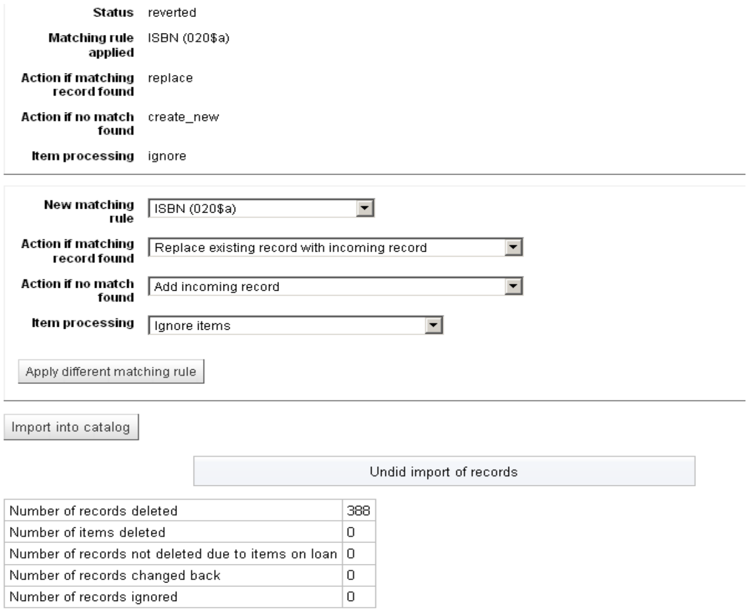
Action if no match found create_new

Item processing ignore

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

#	Citation	Status	Match?	Bib
1	Love and curses	imported	no_match	31596
2	G.I. Joe.	imported	no_match	31597
3	The real thing	imported	no_match	31598
4	Desperate measures	imported	no_match	31599
5	Ison Pain Management System. Ison, David. (9781602970113)	imported	no_match	31600

Click on the 'Undo import into catalog' button to revert the batch. You'll see a progress meter while the system is working. When it has finished, the screen will change to show details about the batch. The status has changed to reverted. The screen will also summarize the delete actions.



Status reverted

Matching rule applied ISBN (020$a)

Action if matching record found replace

Action if no match found create_new

Item processing ignore

New matching rule ISBN (020$a)

Action if matching record found Replace existing record with incoming record

Action if no match found Add incoming record

Item processing Ignore items

Undid import of records

Number of records deleted	388
Number of items deleted	0
Number of records not deleted due to items on loan	0
Number of records changed back	0
Number of records ignored	0

You could apply a different matching rule and redo the import, if desired.

9.3 Editing New or Existing Bibliographic Records

Whichever method you use to open a bibliographic record in the editor, you will use the same tools and techniques to edit it. You need to become familiar with the editor screen and how to enter data.

9.3.1 Screen Layout

At the top of the bib record itself, extensive information about this record shows in a summary box. This includes the biblionumber and title, the record type and status, whether holdings and/or item records are attached, and whether changes need to be saved.

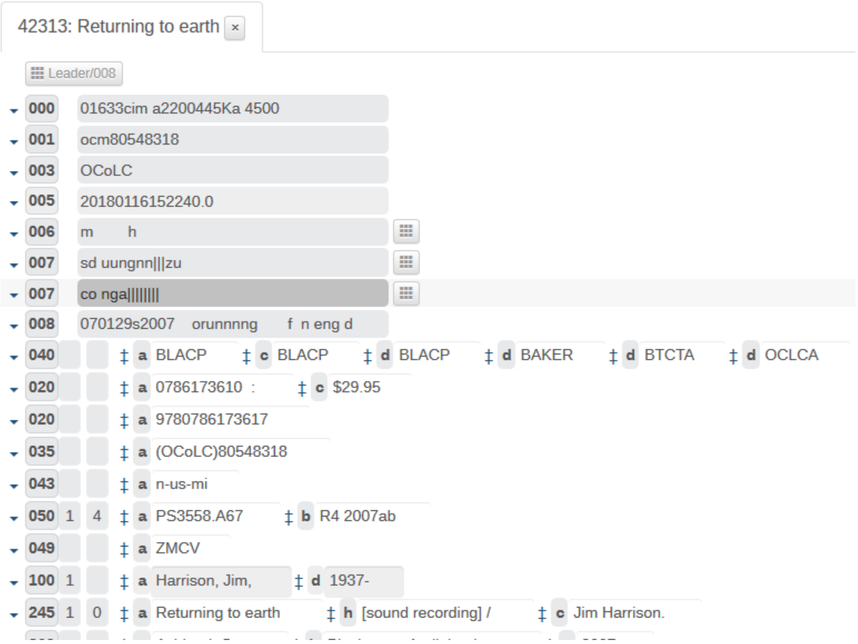
37629: copy of The University and the state :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0
DLSO count:1

Holdings [Manage]
(none)
Record Attributes [edit]
(none)
Modification log

CATALOG record
Save to reservoir Save
Last saved: 2015-11-04 07:46:01

At any point you can return to the title display without saving changes by clicking the blue square-circle/arrow icon next to the Active Catalog Record line. The left part of this header is color-coded – brown for bibliographic records, yellow for authority records, and green for MFHD records.

The bottom half of the bibliographic display shows the full bibliographic record, on a single page.



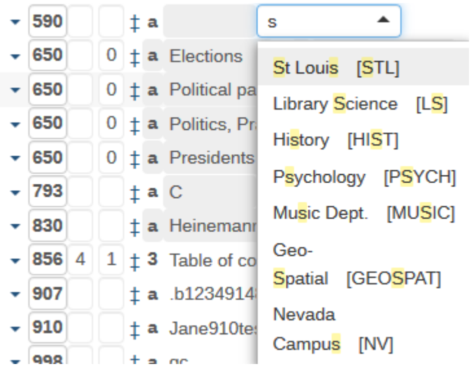
42313: Returning to earth
Leader/008

```
000  01633cim a2200445Ka 4500
001  ocm80548318
003  OCoLC
005  20180116152240.0
006  m      h
007  sd uungnn|||zu
007  co nga|||||||
008  070129s2007    orunnnng      f  n eng d
040       ‡ a BLACP ‡ c BLACP ‡ d BLACP ‡ d BAKER ‡ d BTCTA ‡ d OCLCA
020       ‡ a 0786173610 :  ‡ c $29.95
020       ‡ a 9780786173617
035       ‡ a (OCoLC)80548318
043       ‡ a n-us-mi
050  1 4  ‡ a PS3558.A67 ‡ b R4 2007ab
049       ‡ a ZMCV
100  1    ‡ a Harrison, Jim, ‡ d 1937-
245  1 0  ‡ a Returning to earth ‡ h [sound recording] / ‡ c Jim Harrison.
```

9.3.1.1 Navigating Between Fields

All fields not under authority control can be edited by moving the cursor to the field/subfield and typing new text. Fields under authority control cannot be edited from the bibliographic record; the authority record must be edited for changes to be made to these fields. See the section Link Bibliographic Record to an Authority Record for further details.

Within the editor, users can tab or right-arrow between fields or subfields. If a user adds a new subfield, the subfield code gets focus automatically. If users tab into a field controlled by an authorized value dropdown (such as the 942$n visible/suppressed setting), users can type a letter to show matching entries in the dropdown.



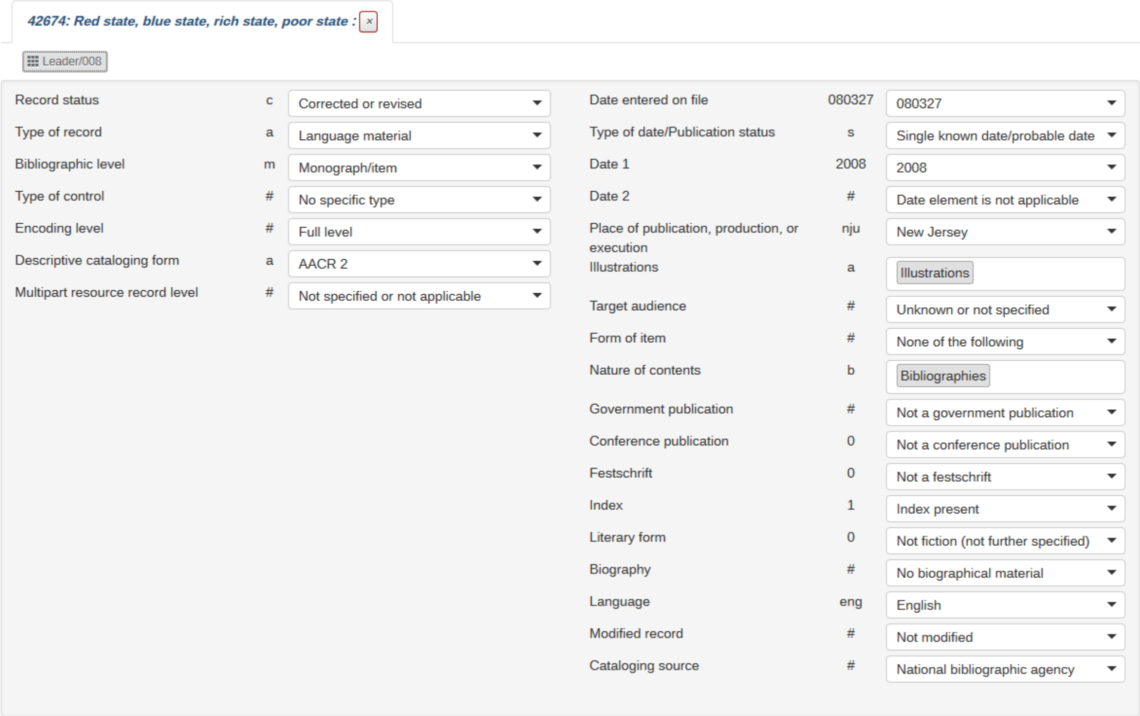
At that point, users can continue typing for an exact match, or use the down-arrow key to move to the desired entry (and press Enter to select).

(NOTE: if the field already has a value, you will need to backspace to remove that value before typing a go-to letter.)

9.3.1.2 Leader/008 Edit Screen

The Leader and 008 can be expanded to a screen where users can make individual selections. This screen has been updated and given additional functionality. Click the Leader/008 button:

to expand those options.

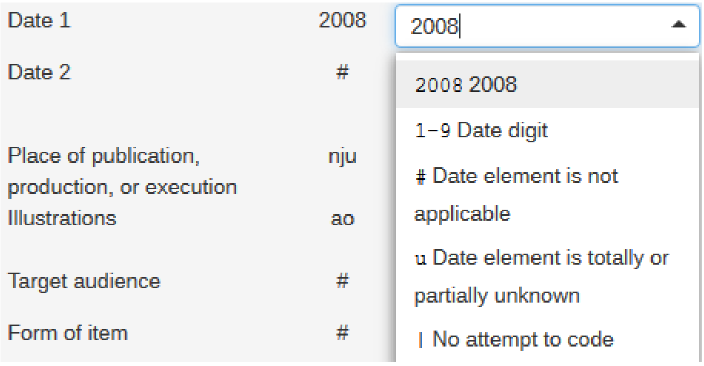

42674: Red state, blue state, rich state, poor state :

Record status	c	Corrected or revised
Type of record	a	Language material
Bibliographic level	m	Monograph/item
Type of control	#	No specific type
Encoding level	#	Full level
Descriptive cataloging form	a	AACR 2
Multipart resource record level	#	Not specified or not applicable

Date entered on file	080327	080327
Type of date/Publication status	s	Single known date/probable date
Date 1	2008	2008
Date 2	#	Date element is not applicable
Place of publication, production, or execution	nju	New Jersey
Illustrations	a	Illustrations
Target audience	#	Unknown or not specified
Form of item	#	None of the following
Nature of contents	b	Bibliographies
Government publication	#	Not a government publication
Conference publication	0	Not a conference publication
Festschrift	0	Not a festschrift
Index	1	Index present
Literary form	0	Not fiction (not further specified)
Biography	#	No biographical material
Language	eng	English
Modified record	#	Not modified
Cataloging source	#	National bibliographic agency

Each field provides a pick list of terms. New dropdowns have been added for language and place of publication. Full labels are used rather than OCLC Mnemonics.

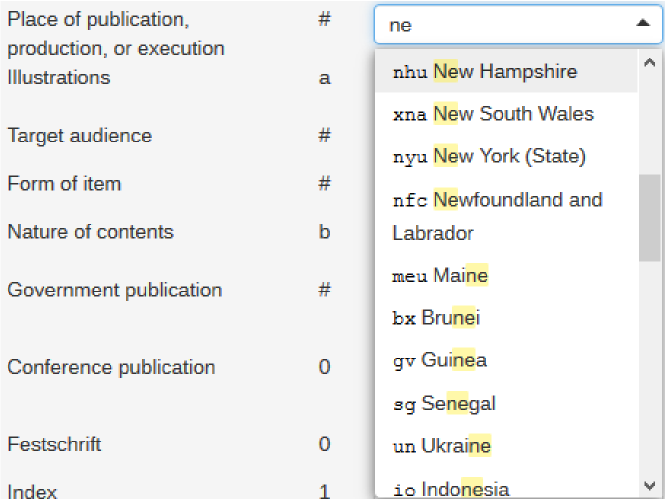
Note that for fields which are text entries such as dates, if the field has a value, that value must be deleted in full and replaced rather than partially edited. For example if a date field says 2008, you can't just select the 8 and replace it with 9; you'll have to type the whole string 2009.



Date 1	2008	2008
Date 2	#	
Place of publication, production, or execution	nju	
Illustrations	ao	
Target audience	#	
Form of item	#	

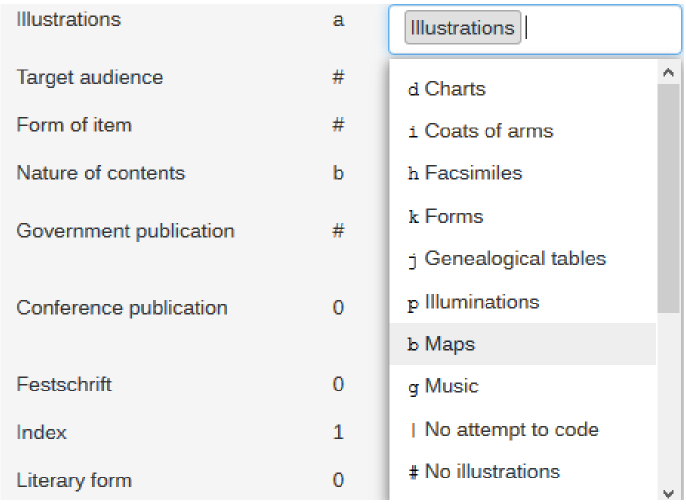
You can select other values for a date field as appropriate (such as No Attempt to Code).

All dropdowns can be searched on code and display value by starting to type in the field (backspace to remove any existing value first). Users can then click on or use the down-arrow to select the desired entry:



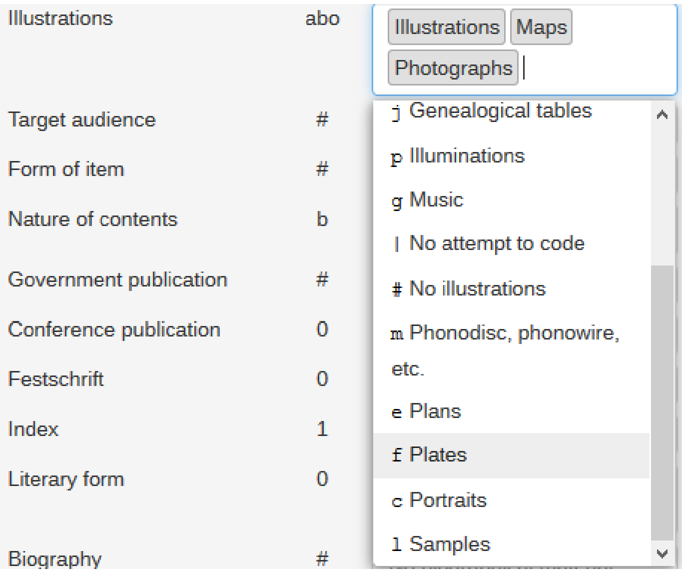
Place of publication, production, or execution	#
Illustrations	a
Target audience	#
Form of item	#
Nature of contents	b
Government publication	#
Conference publication	0
Festschrift	0
Index	1

Some fields may have multiple entries; those are indicated by a gray box for each existing entry. For example, under the Illustrations, this record presently has one entry (for Illustrations):



Illustrations	a
Target audience	#
Form of item	#
Nature of contents	b
Government publication	#
Conference publication	0
Festschrift	0
Index	1
Literary form	0

From the pulldown, users can select additional entries to add:



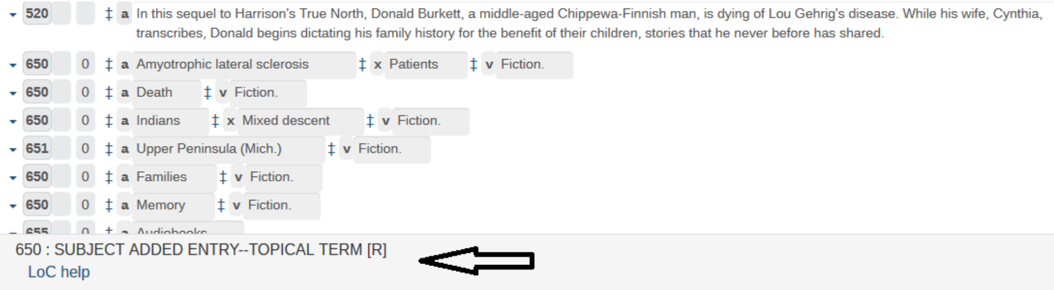
Illustrations	abo
Target audience	#
Form of item	#
Nature of contents	b
Government publication	#
Conference publication	0
Festschrift	0
Index	1
Literary form	0
Biography	#

To remove an unwanted entry, click in the field, use the arrow keys to place the cursor after the one you want to delete and hit the backspace key.

Click the Leader/008 button when you are finished, and the display will collapse back to the standard edit screen, with your new values.

9.3.2 Library of Congress Help

A static footer at the bottom shows the name of the MARC field and a link to the Library of Congress MARC standard page for whichever field has the cursor.



520 ‡ a In this sequel to Harrison's True North, Donald Burkett, a middle-aged Chippewa-Finnish man, is dying of Lou Gehrig's disease. While his wife, Cynthia, transcribes, Donald begins dictating his family history for the benefit of their children, stories that he never before has shared.

650 0 ‡ a Amyotrophic lateral sclerosis ‡ x Patients ‡ v Fiction.
650 0 ‡ a Death ‡ v Fiction.
650 0 ‡ a Indians ‡ x Mixed descent ‡ v Fiction.
651 0 ‡ a Upper Peninsula (Mich.) ‡ v Fiction.
650 0 ‡ a Families ‡ v Fiction.
650 0 ‡ a Memory ‡ v Fiction.

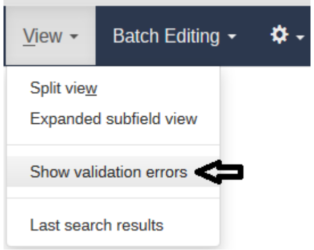
650 : SUBJECT ADDED ENTRY--TOPICAL TERM [R]
LoC help

9.3.3 Validation Error Checking

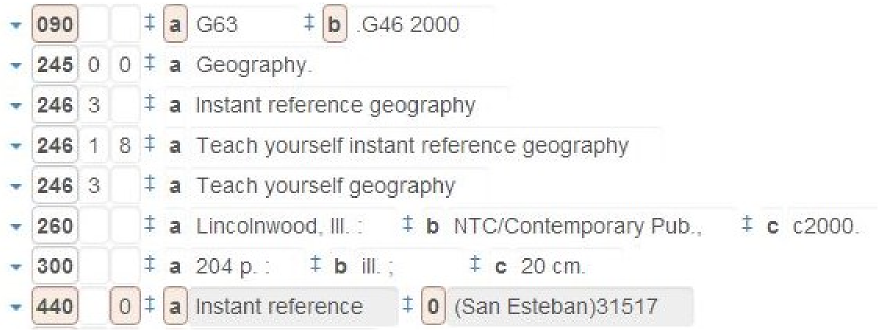
There are two options for checking the validity of your record.

9.3.3.1 Library of Congress Rules

Under the View menu, Validation Errors can be turned on for error checking.

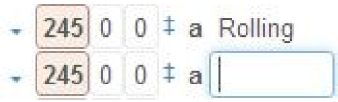


The Library of Congress or rules are reviewed each time a bib record is edited. If Validation Errors is toggled on, any field or subfield that is in conflict with these rules has a visual clue – a red shading in the field and/or subfield label. For instance, this bib record below, the fields and subfields that are in conflict with the LOC rules are shaded in red.



090 ‡ a G63 ‡ b .G46 2000
245 0 0 ‡ a Geography.
246 3 ‡ a Instant reference geography
246 1 8 ‡ a Teach yourself instant reference geography
246 3 ‡ a Teach yourself geography
260 ‡ a Lincolnwood, Ill. : ‡ b NTC/Contemporary Pub., ‡ c c2000.
300 ‡ a 204 p. : ‡ b ill. ; ‡ c 20 cm.
440 0 ‡ a Instant reference ‡ 0 (San Esteban)31517

A bib record with two 245 fields will display both fields in red, indicating to the cataloger that there is a problem:



245 0 0 ‡ a Rolling
245 0 0 ‡ a

Note that the feature is off by default. A user may turn it on, and it will remain on while the user is in the cataloging editor. If the editor is closed and then reopened, it will be off again.

9.3.3.2 Custom Validation Rules

If the MARC Validation Rulesets option is enabled (see Superlibrarian Guide for setup), you can check your record against your own custom rules (requires the granular permissions editcatalogue.mvr.get and editcatalogue.mvr.apply).

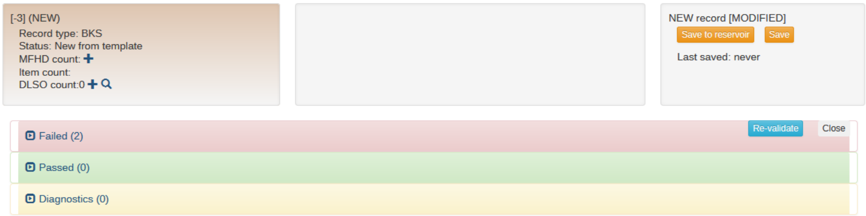
Most sites will not need this feature. Only a few sites have internal cataloging rules beyond the standard Library of Congress rules.

Once your site has created a rule, you can apply it in the cataloging editor under a new Validate dropdown. For example, this system has a rule to check for a required 245:

[-3] (NEW)
Record type: BKS
Status: New from template
MFHD count:
Item count:
DLSO count:0

NEW record [MODIFIED]
Last saved: never

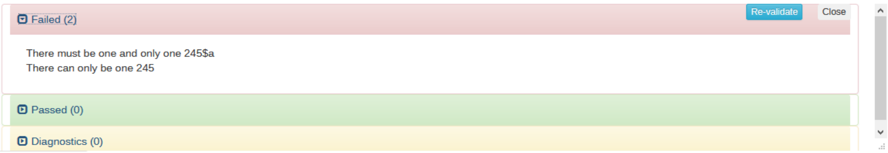
When you have finished editing your record, you can run one of these rules by clicking on it in the dropdown. A results summary will display:



[-3] (NEW)
Record type: BKS
Status: New from template
MFHD count:
Item count:
DLSO count:0

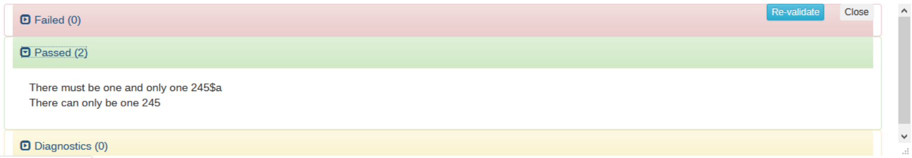
NEW record [MODIFIED]
Last saved: never

If your record doesn't meet the rule's requirements, an error message will show in the Failed section. Click the arrow at left to open the section for details:



There must be one and only one 245$a
There can only be one 245

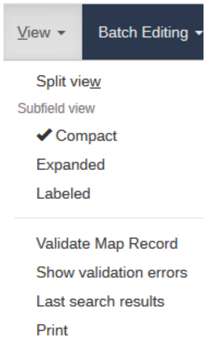
It's important to note that this is just a screen warning. The system will not enforce the rule. The cataloger must edit the record to fix the error. You can then click the Re-validate button to check again, or run it from the menu. If the error is fixed, you'll see a different result (in the Passed group):



There must be one and only one 245$a
There can only be one 245

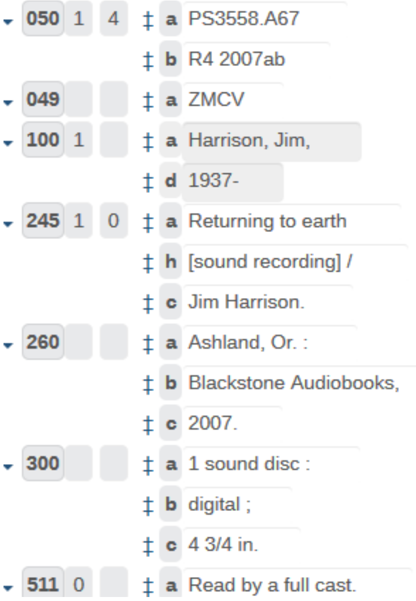
9.3.4 Expanded View Options

The default display in the editor is the tabbed view. There are two other options for an expanded view. In the cataloging editor's menu bar, look under View:



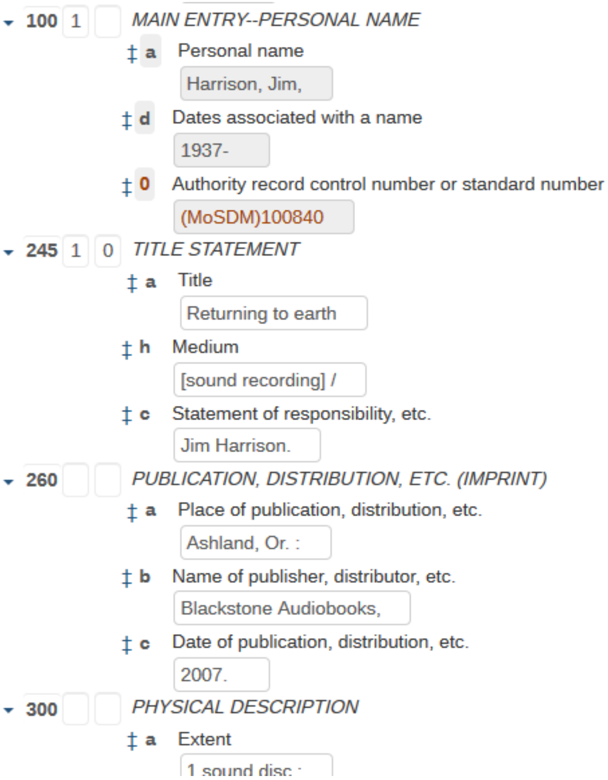
Compact is the regular tabbed view.

Expanded will show the subfields on separate lines rather than on the same line (as shown in other screenshots). The record will display like this:



050 1 4 ‡ a PS3558.A67
‡ b R4 2007ab
049 ‡ a ZMCV
100 1 ‡ a Harrison, Jim,
‡ d 1937-
245 1 0 ‡ a Returning to earth
‡ h [sound recording] /
‡ c Jim Harrison.
260 ‡ a Ashland, Or. :
‡ b Blackstone Audiobooks,
‡ c 2007.
300 ‡ a 1 sound disc :
‡ b digital ;
‡ c 4 3/4 in.
511 0 ‡ a Read by a full cast.

The third option is Labeled, and this will show the MARC field and subfield descriptions:

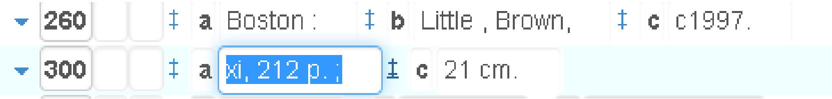


100 1 MAIN ENTRY--PERSONAL NAME
‡ a Personal name
Harrison, Jim,
‡ d Dates associated with a name
1937-
‡ 0 Authority record control number or standard number
(MoSDM)100840
245 1 0 TITLE STATEMENT
‡ a Title
Returning to earth
‡ h Medium
[sound recording] /
‡ c Statement of responsibility, etc.
Jim Harrison.
260 PUBLICATION, DISTRIBUTION, ETC. (IMPRINT)
‡ a Place of publication, distribution, etc.
Ashland, Or. :
‡ b Name of publisher, distributor, etc.
Blackstone Audiobooks,
‡ c Date of publication, distribution, etc.
2007.
300 PHYSICAL DESCRIPTION
‡ a Extent
1 sound disc :

This option will be especially useful for staff members who do not have a lot of cataloging experience.

9.3.5 Editing Bibliographic Fields not under Authority Control

All data within fields NOT under authority control can be editing by moving cursor to the desired field and changing text. For example, to change the 300$a, move cursor to that field. Highlight existing text if you want to delete it, and/or type in desired changes.

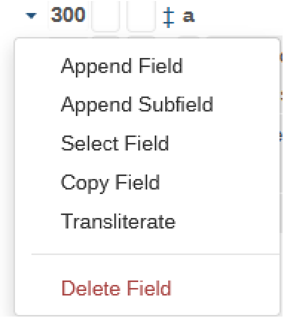

260 ‡ a Boston : ‡ b Little , Brown, ‡ c c1997.
300 ‡ a xi, 212 p. ; ‡ c 21 cm.

Edits to fields under authority control require the Authority record to be edited (see later section). The Cataloging Editor provides a visual clue when a field is under authority control and not editable; the field itself is grayed out, and on the screen a red circle with a line through it appears.

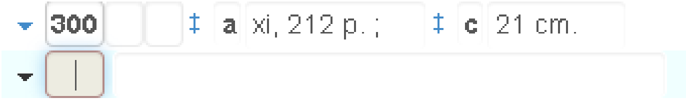

650 1 0 ‡ a Abu-Aish, Sohair M. ‡ 0 (mmm)26293
700 1 ‡ a Bulgakov, Mikhail Afanas§evich, ‡ d 1891-1940. ‡ t Teatral§nyæi roman. ‡ 0 (NNMa)406655

9.3.5.1 Adding Bibliographic Fields and/or Subfields

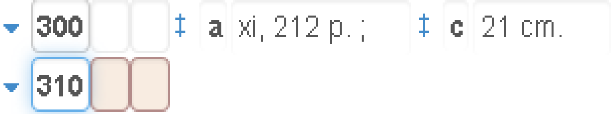
To add a new field to the existing record, navigate to the field directly before/above where the new field will display. Then click the down-arrow next to that field's label:



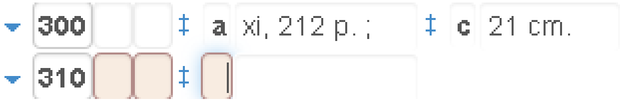
You can add a new field under the current field, insert a subfield into the line where the cursor presently is, or delete the present field. If your cursor is on a field under authority control, some additional options will show; see the section on authority control for the use of those options. Click Append Field to add a new MARC field:


300 ‡ a xi, 212 p. ; ‡ c 21 cm.

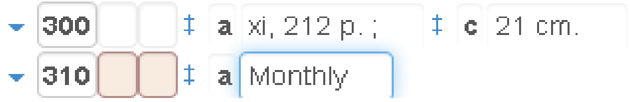
Type the field number into the first data well. Enter any desired indicators into the second and third.


300 ‡ a xi, 212 p. ; ‡ c 21 cm.
310

Then use the pulldown arrow next to the field you just added, and select Insert Subfield. This will give you a data well for the subfield ID:


300 ‡ a xi, 212 p. ; ‡ c 21 cm.
310 ‡

Enter the subfield code (for example, a for $a) and you will get a data well for the actual field content:

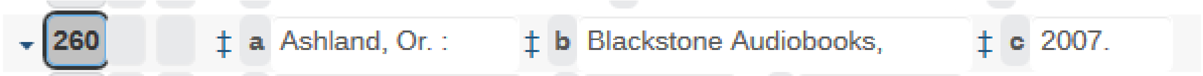

300 ‡ a xi, 212 p. ; ‡ c 21 cm.
310 ‡ a Monthly

Note that as data within the field is being entered, the dynamic link to LOC help is populated and is available for consultation as the field is completed.


310$a : CURRENT PUBLICATION FREQUENCY [NR] -- Current publication frequency [NR]
LoC help

9.3.5.2 Copy and Paste an Entire Field

You can copy an entire field (with indicators and subfields) between records. Click on the tag number (260 in this example) of the field you want to copy and select Copy Field in the tag pulldown, or press Ctrl-C to copy. The entire line will show as selected. In the other record, insert a new field. Click on the blank tag and press Ctrl-V to paste. The field tag, indicators, subfields, and contents will paste and the entire line will show as selected:


260 ‡ a Ashland, Or. : ‡ b Blackstone Audiobooks, ‡ c 2007.

See below for additional information on working between multiple records.

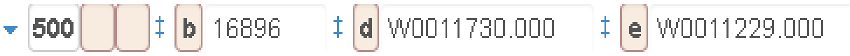
9.3.5.3 Paste Content into One Subfield and Create Additional Subfields

Pasting a string such as this:

‡b 16896 ‡d W0011730.000 ‡e W0011229.000

directly into a subfield box will create the additional subfields ($b, $d, and $e with content):


300 ‡ a xi, 212 p. ; ‡ c 21 cm.
310 ‡ a Monthly
500 ‡

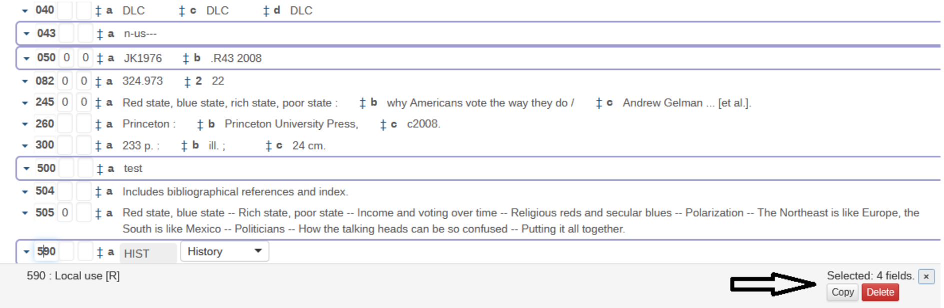


500 ‡ b 16896 ‡ d W0011730.000 ‡ e W0011229.000

In this case, I gave the Add Subfield command but did not enter a subfield letter. I placed the cursor into the first content data well and pasted the string. Note that a space is required before the ‡ symbol and after the subfield letter.

9.3.5.4 Selecting Multiple Fields to Copy or Delete

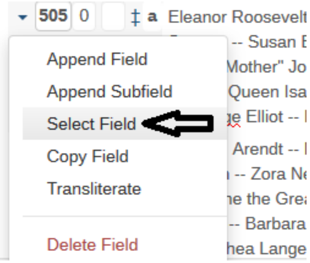
There are several ways to select multiple fields to either copy or delete. A keyboard shortcut option allows selecting fields by doing a ctrl / cursor click on each field. Put your cursor in one field label, do Ctrl-Click, then put your cursor in another field and repeat.



040 ‡ a DLC ‡ c DLC ‡ d DLC
043 ‡ a n-us---
050 0 0 ‡ a JK1976 ‡ b .R43 2008
082 0 0 ‡ a 324.973 ‡ 2 22
245 0 0 ‡ a Red state, blue state, rich state, poor state : ‡ b why Americans vote the way they do / ‡ c Andrew Gelman ... [et al.].
260 ‡ a Princeton : ‡ b Princeton University Press, ‡ c c2008.
300 ‡ a 233 p. : ‡ b ill. ; ‡ c 24 cm.
500 ‡ a test
504 ‡ a Includes bibliographical references and index.
505 0 ‡ a Red state, blue state -- Rich state, poor state -- Income and voting over time -- Religious reds and secular blues -- Polarization -- The Northeast is like Europe, the South is like Mexico -- Politicians -- How the talking heads can be so confused -- Putting it all together.
590 ‡ a HIST

A display at the bottom of the editor tracks how many fields have been selected, and has a Delete button for removing all at once.

Multiple fields can also be done with keyboard hotkeys, or with the mouse. In the pulldown next to each field, choose Select Field (or click in the field number and use the hotkey Alt-= (Alt key and equal sign):



The display then outlines that field in blue. Contine to select other fields as desired. You can either click on the pulldown next to the field, or use the up or down arrow key to navigate to a record and use the Alt-= hotkey. Note that if you add one by mistake, you can deselect it under the pulldown or use the same hotkey Alt-=:

504 ‡ a Includes bibliographical references (p. 361-367) and index.

505 0 ‡ a Eleanor Roosevelt -- Marie Curie -- Margaret Sanger -- Margaret Mead -- Jane Addams -- Mary Wollstonecraft -- Elizabeth Cady Stanton -- Susan B. Anthony -- Harriet Tubman -- The Virgin Mary -- Georgia O'Keeffe -- Frances Perkins -- Jane Austen -- Mary Harris "Mother" Jones -- Simone de Beauvoir -- Queen Elizabeth I -- Rosa Parks -- Helen Keller -- Anne Sullivan -- Sojourner Truth -- Queen Isabella -- Florence Nightingale -- Melanie Klein -- Angelina Grimke -- Sarah Moore Grimke -- Elizabeth Blackwell -- Geroge Elliot -- Ida Bell Wells-Bernett -- Betty Friedan -- Rachel Carson -- Dorothea Lynde Dix.

505 0 ‡ a Hannah Arendt -- Mother Teresa -- Karen Horney -- Emily Dickinson -- Golda Meir -- Virginia Woolf -- Queen Victoria -- Martha Graham -- Zora Neale Hurston -- Harriet Beecher Stowe -- Rosa Luxemburg -- Mary McLeod Bethune -- Charlotte Bronte -- Catherine the Great -- Ida Tarbell -- Jane Goodall -- Emma Goldman -- Coco Chanel -- Dorothy Thompson -- Grace Murray Hopper -- Barbara McClintock -- Elisabeth Kubler-Ross -- Joan of Arc -- Indira Gandhi -- Louise Nevelson -- Emmeline Pankhurst -- Dorothea Lange -- Agnes De Mille -- Sappho -- Nadia Boulanger -- Gwendolyn Brooks -- Maria Montessori.

505 0 ‡ a Marian Anderson -- Anne Frank -- Babe Didrikson Zaharias -- Margaret Thatcher -- Mary Cassatt -- Sarah Bernhardt -- Barbara Tuchman -- Amelia Earhart -- Murasaki Shikibu -- Jessie Redmon Fauset -- Hillary Rodham Clinton -- Leni Riefenstahl -- Margaret Bourke-White -- Frida Kahlo -- Gabriela Mistral -- Flannery O'Connor -- Katherine Graham -- Bessie Smith -- Joan Ganz Cooney -- Cleopatra -- Madame C.J. Walker (Sarah Breedlove) -- Sandra Day O'Connor -- Ruth Bader Ginsburg -- Diane Arbus -- Wu Chao -- Billie Holiday -- Helen Gurley Brown -- Julia Morgan -- Rosa Bonheur -- Mary Pickford.

505 0 ‡ a Maria Callas -- Katherine Hepburn -- Billie Jean King -- Edith Head -- Elsie de Wolfe -- Lucille Ball.

‡ x Biography ‡ 0 (San Esteban)74177

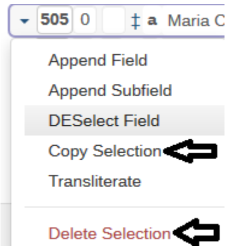
‡ x History ‡ 0 (San Esteban)68100

‡ d 74 ‡ f (PJTEST)74

ETC. NOTE [R] -- Bibliography, etc. note [NR]

As with the first option (Ctrl-Click), the screen shows you how many fields are selected and gives you a delete button.

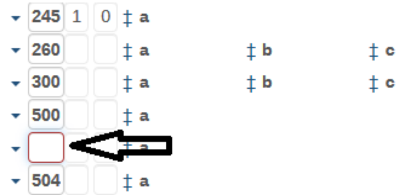
You can also use the pulldown options to delete or copy the selected fields:



505 0 ‡ a Maria C

That action will affect all the selected fields. Deleting will remove them from the edit screen.

If you opt to copy, you can then create a new record or edit an existing one. Create a new field:

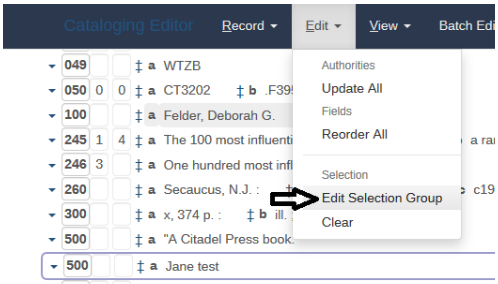


245 1 0 ‡ a
260 ‡ a ‡ b ‡ c
300 ‡ a ‡ b ‡ c
500 ‡ a
504 ‡ a

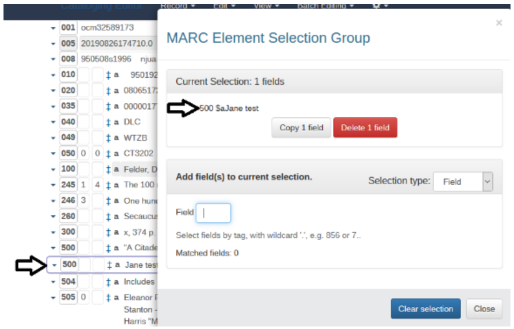
With the cursor in the MARC field box, paste the fields you selected in the first record:

245 1 0 ‡ a
260 ‡ a ‡ b ‡ c
300 ‡ a ‡ b ‡ c
500 ‡ a
505 0 ‡ a Eleanor Roosevelt -- Marie Curie -- Margaret Sanger -- Margaret Mead -- Jane Addams -- Mary Wollstonecraft -- Elizabeth Cady Stanton -- Susan B. Anthony -- Harriet Tubman -- The Virgin Mary -- Georgia O'Keeffe -- Frances Perkins -- Jane Austen -- Mary Harris "Mother" Jones -- Simone de Beauvoir -- Queen Elizabeth I -- Rosa Parks -- Helen Keller -- Anne Sullivan -- Sojourner Truth -- Queen Isabella -- Florence Nightingale -- Melanie Klein -- Angelina Grimke -- Sarah Moore Grimke -- Elizabeth Blackwell -- Geroge Elliot -- Ida Bell Wells-Bernett -- Betty Friedan -- Rachel Carson -- Dorothea Lynde Dix.
505 0 ‡ a Hannah Arendt -- Mother Teresa -- Karen Horney -- Emily Dickinson -- Golda Meir -- Virginia Woolf -- Queen Victoria -- Martha Graham -- Zora Neale Hurston -- Harriet Beecher Stowe -- Rosa Luxemburg -- Mary McLeod Bethune -- Charlotte Bronte -- Catherine the Great -- Ida Tarbell -- Jane Goodall -- Emma Goldman -- Coco Chanel -- Dorothy Thompson -- Grace Murray Hopper -- Barbara McClintock -- Elisabeth Kubler-Ross -- Joan of Arc -- Indira Gandhi -- Louise Nevelson -- Emmeline Pankhurst -- Dorothea Lange -- Agnes De Mille -- Sappho -- Nadia Boulanger -- Gwendolyn Brooks -- Maria Montessori.
505 0 ‡ a Marian Anderson -- Anne Frank -- Babe Didrikson Zaharias -- Margaret Thatcher -- Mary Cassatt -- Sarah Bernhardt -- Barbara Tuchman -- Amelia Earhart -- Murasaki Shikibu -- Jessie Redmon Fauset -- Hillary Rodham Clinton -- Leni Riefenstahl -- Margaret Bourke-White -- Frida Kahlo -- Gabriela Mistral -- Flannery O'Connor -- Katherine Graham -- Bessie Smith -- Joan Ganz Cooney -- Cleopatra -- Madame C.J. Walker (Sarah Breedlove) -- Sandra Day O'Connor -- Ruth Bader Ginsburg -- Diane Arbus -- Wu Chao -- Billie Holiday -- Helen Gurley Brown -- Julia Morgan -- Rosa Bonheur -- Mary Pickford.
505 0 ‡ a Maria Callas -- Katherine Hepburn -- Billie Jean King -- Edith Head -- Elsie de Wolfe -- Lucille Ball.

In addition to the options in the pulldown, you can use Edit Selection Group under the Edit menu button or via the hotkey Alt-g:



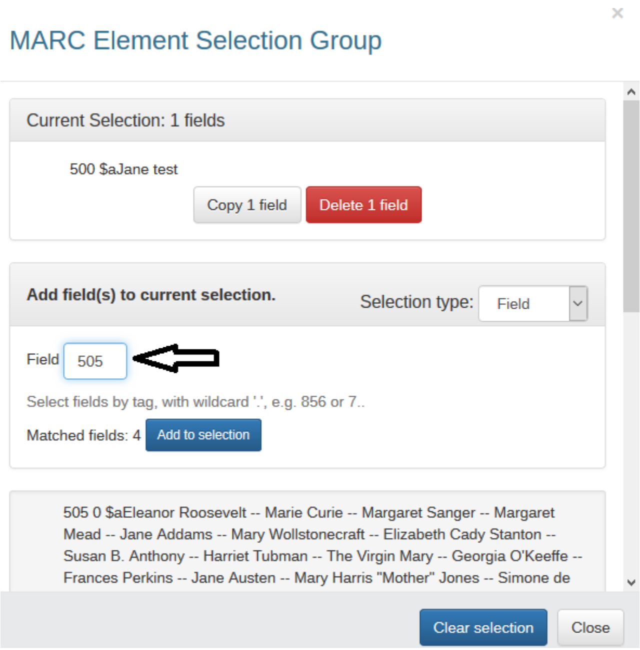
That opens a popup with all your current selections displayed:



Select fields by tag, with wildcard '.', e.g. 856 or 7..

Matched fields: 0

From this popup you can copy or delete (as above). You can also use the Add Fields text box to identify additional fields for selection:



Current Selection: 1 fields

500 $aJane test

Add field(s) to current selection. Selection type: Field

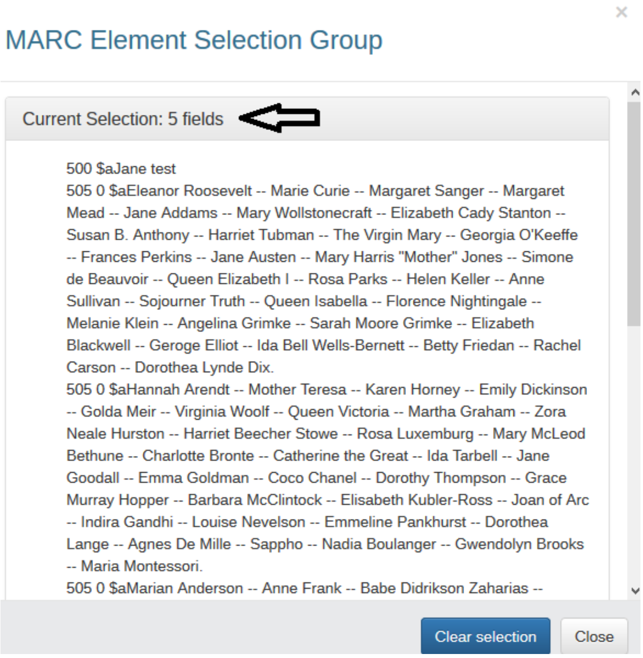
Field 505

Select fields by tag, with wildcard '.', e.g. 856 or 7..

Matched fields: 4

505 0 $aEleanor Roosevelt -- Marie Curie -- Margaret Sanger -- Margaret Mead -- Jane Addams -- Mary Wollstonecraft -- Elizabeth Cady Stanton -- Susan B. Anthony -- Harriet Tubman -- The Virgin Mary -- Georgia O'Keeffe -- Frances Perkins -- Jane Austen -- Mary Harris "Mother" Jones -- Simone de

The popup will show you matching entries – if you want, click the Add to Selection button to add them to your list:



Current Selection: 5 fields

500 $aJane test
505 0 $aEleanor Roosevelt -- Marie Curie -- Margaret Sanger -- Margaret Mead -- Jane Addams -- Mary Wollstonecraft -- Elizabeth Cady Stanton -- Susan B. Anthony -- Harriet Tubman -- The Virgin Mary -- Georgia O'Keeffe -- Frances Perkins -- Jane Austen -- Mary Harris "Mother" Jones -- Simone de Beauvoir -- Queen Elizabeth I -- Rosa Parks -- Helen Keller -- Anne Sullivan -- Sojourner Truth -- Queen Isabella -- Florence Nightingale -- Melanie Klein -- Angelina Grimke -- Sarah Moore Grimke -- Elizabeth Blackwell -- Geroge Elliot -- Ida Bell Wells-Bernett -- Betty Friedan -- Rachel Carson -- Dorothea Lynde Dix.
505 0 $aHannah Arendt -- Mother Teresa -- Karen Horney -- Emily Dickinson -- Golda Meir -- Virginia Woolf -- Queen Victoria -- Martha Graham -- Zora Neale Hurston -- Harriet Beecher Stowe -- Rosa Luxemburg -- Mary McLeod Bethune -- Charlotte Bronte -- Catherine the Great -- Ida Tarbell -- Jane Goodall -- Emma Goldman -- Coco Chanel -- Dorothy Thompson -- Grace Murray Hopper -- Barbara McClintock -- Elisabeth Kubler-Ross -- Joan of Arc -- Indira Gandhi -- Louise Nevelson -- Emmeline Pankhurst -- Dorothea Lange -- Agnes De Mille -- Sappho -- Nadia Boulanger -- Gwendolyn Brooks -- Maria Montessori.
505 0 $aMarian Anderson -- Anne Frank -- Babe Didrikson Zaharias --

The field display updates to show the added fields. You can then proceed with a delete or copy, or clear your selection here and start over. Clicking the Clear Selection button will deselect the fields in the main edit screen. You can also clear all selections with the hotkey Alt-- (Alt and minus sign).

9.3.6 Editing Bibliographic Fields under Authority Control

Fields under authority control cannot be edited from the bibliographic record; changes to those fields must be made in the controlling authority record. The Cataloging Editor provides a visual clue when a field is under authority control and not editable; a red circle with a line through it appears when the cursor is placed on a field or subfield under authority control.

650 1 0 ‡ a Abu-Aish, Sohair M. ‡ 0 (mmm)26293
700 1 ‡ a Bulgakov, Mikhail Afanas§evich, ‡ d 1891-1940. ‡ t Teatral§nyæi roman. ‡ 0 (NNMa)406655

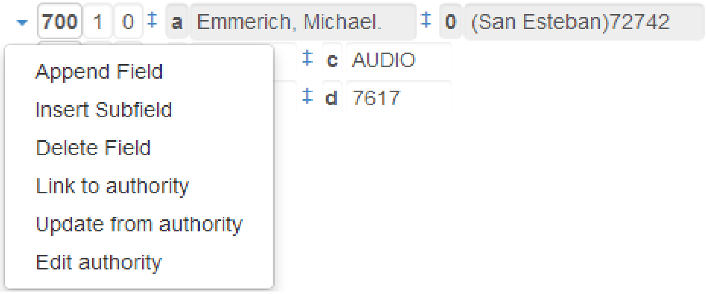
If the authority record was imported from a source like Library of Congress or OCLC, the authority record shows as grayed-out (as above). If the authority is a machine-generated record, the display is red:

100 1 ‡ a Wagner, Jane ‡ 0 (MoSDM)97812

This is a visual cue that the cataloger may want to upload or link to a more complete record. **NOTE: if you are creating a record from scratch (using a template), you MUST create an authority record for any controlled field before you can create that entry in the bibliographic record**. For example, if you do not already have an authority record for the author, you must create one. Then you can add a 1xx/7xx field and link to it. Records imported in batches and by z39.50 automatically create authority records as needed.

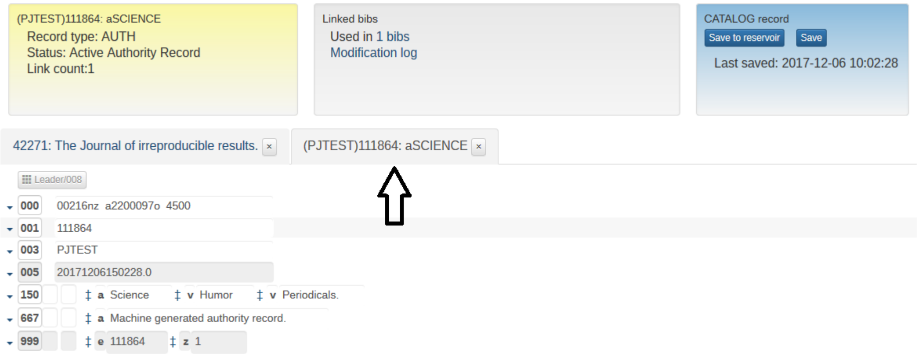
9.3.7 Editing an Authority Record from a Bibliographic Record

To edit an authority record, click the arrow at the left of the field MARC number.



700 1 0 ‡ a Emmerich, Michael. ‡ 0 (San Esteban)72742
‡ c AUDIO
‡ d 7617

Choose Edit Authority and the authority record will open in a tab next to the bib record:



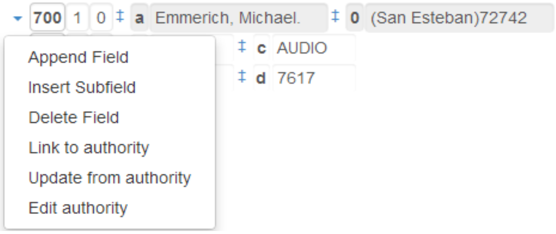
(PJTEST)111864: aSCIENCE
Record type: AUTH
Status: Active Authority Record
Link count:1

Linked bibs
Used in 1 bibs
Modification log

CATALOG record
Last saved: 2017-12-06 10:02:28

000 00216nz a2200097o 4500
001 111864
003 PJTEST
005 20171206150228.0
150 ‡ a Science ‡ v Humor ‡ v Periodicals.
667 ‡ a Machine generated authority record.
999 ‡ e 111864 ‡ z 1

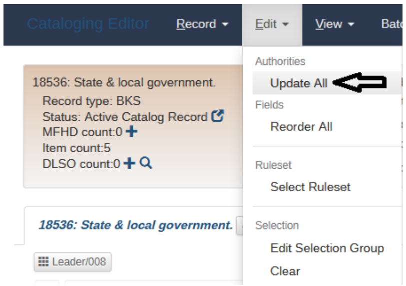
Make any needed changes and Save from the top right-hand side of the record. You can close the record by clicking on the X in the tab header, or leave it open if you want. Then return to the bib record. It should have updated itself automatically with the change to the authority record. If it didn't, you can click the arrow next to the MARC field again, and this time choose Update from Authority.



700 1 0 ‡ a Emmerich, Michael. ‡ 0 (San Esteban)72742
‡ c AUDIO
‡ d 7617

The entry in the bib record will update itself based on the changes you made to the authority record. Other bib records linked to that authority record will automatically update.

You can also update all authority fields in the record at once, if desired. Under Edit, Authorities, select Update All:

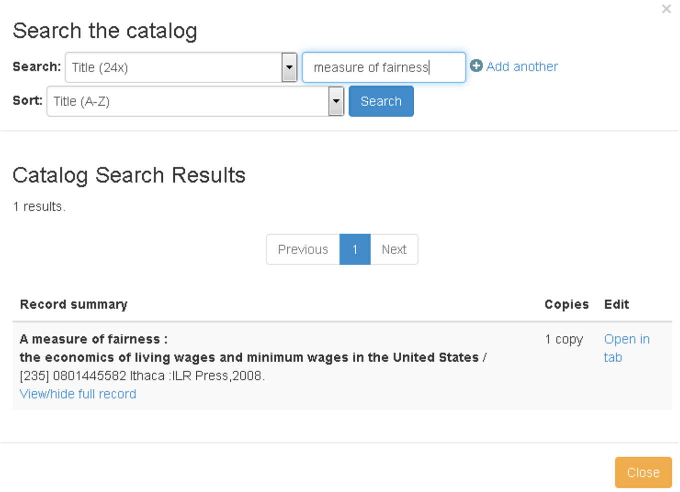


18536: State & local government.
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:5
DLSO count:0

18536: State & local government.

9.3.8 *Viewing Two Bibliographic Records in Tabs or Side by Side*

You can compare bib records by displaying both in the editor. With a single record open, conduct a search and find a second record (either via z39.50 or by searching the catalog)



Search the catalog

Search: Title (24x) measure of fairness

Sort: Title (A-Z)

Catalog Search Results

1 results.

Record summary	Copies	Edit
A measure of fairness : the economics of living wages and minimum wages in the United States / [235] 0801445582 Ithaca :ILR Press,2008. View/hide full record	1 copy	Open in tab

From search results provided by search, choose "Open in tab"

The selected record will appear as a tab in the Cataloging Editor as shown below; the newest selected record will be on the far right side of options. The tab that is active at the moment will show the title in bold and italics, to make it easier to tell which tab you're on.

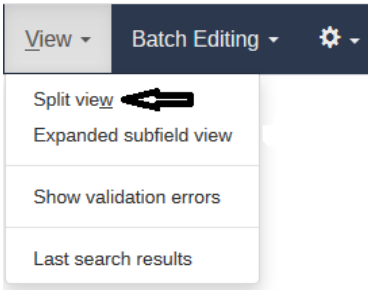
235: A measure of fairness :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:1
DLSO count:0

Holdings [Manage]
1 items
Record Attributes [edit]
(none)
Modification log

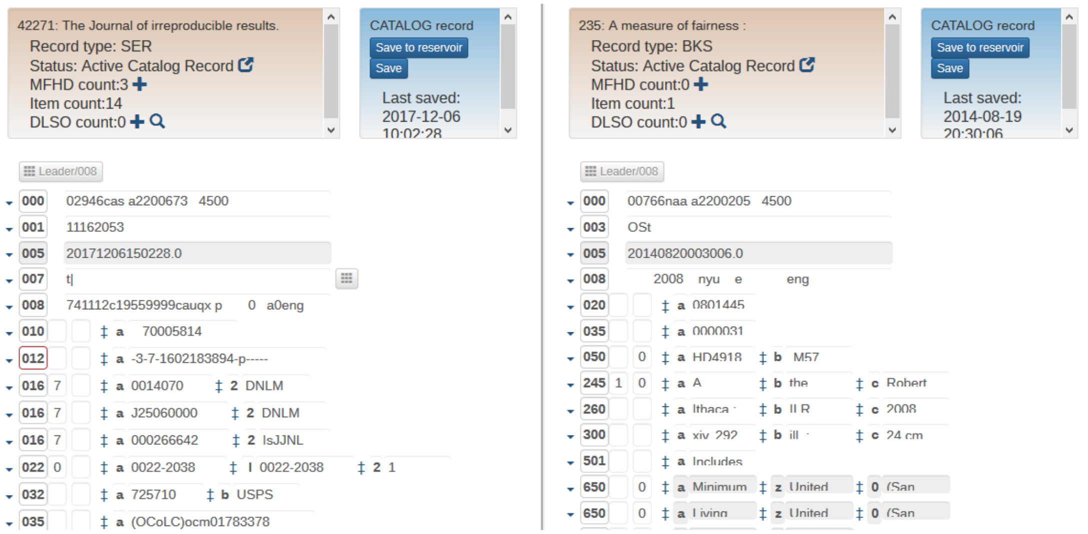
CATALOG record
Last saved: 2018-05-01 15:08:07

```
000  00789naa a2200217   4500
```

If you need to compare records, it may be easier to view both bibliographic records side by side. Go to the View menu at the top of the Cataloging Editor and choose Split View:



The bibliographic records in the tabs will display side by side:



42271: The Journal of irreproducible results.
Record type: SER
Status: Active Catalog Record
MFHD count:3
Item count:14
DLSO count:0

CATALOG record
Last saved: 2017-12-06 10:02:28

```
000      02946cas a2200673   4500
001      11162053
005      20171206150228.0
007      t|
008      741112c19559999cauqx p     0   a0eng
010       ‡ a    70005814
012       ‡ a -3-7-1602183894-p-----
016 7     ‡ a 0014070      ‡ 2 DNLM
016 7     ‡ a J25060000    ‡ 2 DNLM
016 7     ‡ a 000266642    ‡ 2 IsJJNL
022 0     ‡ a 0022-2038    ‡ l 0022-2038    ‡ 2 1
032       ‡ a 725710       ‡ b USPS
035       ‡ a (OCoLC)ocm01783378
```

235: A measure of fairness :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:1
DLSO count:0

CATALOG record
Last saved: 2014-08-19 20:30:06

```
000      00766naa a2200205   4500
003      OSt
005      20140820003006.0
008          2008   nyu    e          eng
020       ‡ a 0801445
035       ‡ a 0000031
050   0   ‡ a HD4918      ‡ b M57
245 1 0   ‡ a A           ‡ b the         ‡ c Robert
260       ‡ a Ithaca :    ‡ b ILR         ‡ c 2008
300       ‡ a xiv, 292    ‡ b ill. ;      ‡ c 24 cm
501       ‡ a Includes
650   0   ‡ a Minimum     ‡ z United      ‡ 0 (San
650   0   ‡ a Living      ‡ z United      ‡ 0 (San
```

To go back to the tab display, click View again and select Tabbed View.

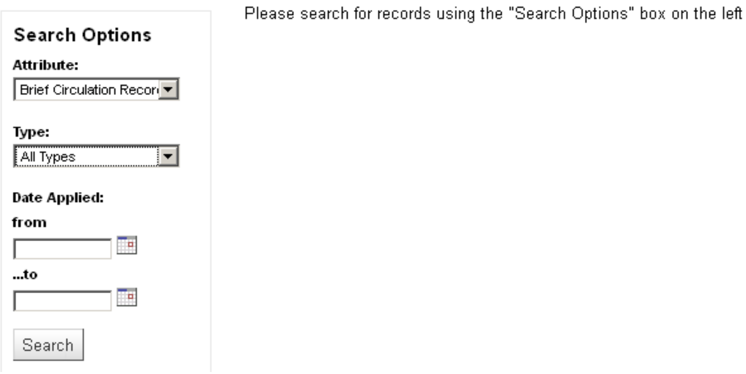
9.3.9 Adding or Editing a Bibliographic Record Attribute

Record attributes allow staff to flag bibliographic records for various reasons, so those records can be identified and receive special handling. This functionality is can be used for:

- Retrieving personal copies that have been placed on reserve, using the Personal Copy attribute in conjunction with creating brief records.
- Retrieving and exporting records that have been marked for export to OCLC or another utility, using the "Ready to Export" attribute.
- Retrieving records that require maintenance as of a certain date, using any of the attributes and the effective dates.
- Records that need circulation or cataloging staff attention upon return.
- Brief catalog records and ILL records.

9.3.9.1 Searching, Exporting, Removing Attributes

Under Tools, Record Attributes staff with appropriate permissions can search for records (bibliographic, item, or both) with attributes using the attribute type or the date applied. Enter a beginning date, an end date or a range of dates if the date applied criterion is needed.



Please search for records using the "Search Options" box on the left

Attribute: Brief Circulation Recor

Type: All Types

Make your selections and click Search; you will get a list of records that match.

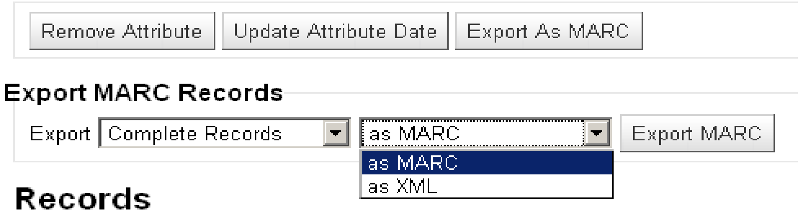
Attribute: Brief Circulation Recor

Records

	Date Applied	Title	Barcode
☑	05/24/2012	Computer Science	

From the list, staff may choose matching records from which to remove the attributes, or may update the date applied for some records in the list.

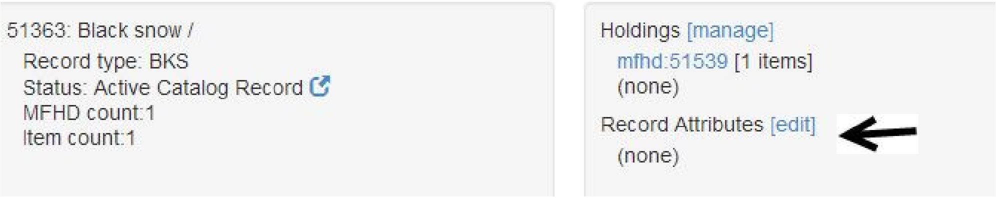
Staff may also export this list in XML format, or export the list as MARC. Click the top-line Export as MARC button and the screen will expand to allow these selections:



If the staff member chooses only to export the records with matching attributes ("only tagged portions" in the pull-down), then bibliographic records will always be exported, but only items that have the matching attribute will be included in the export.

9.3.9.2 Working with Attributes in the Cataloging Editor

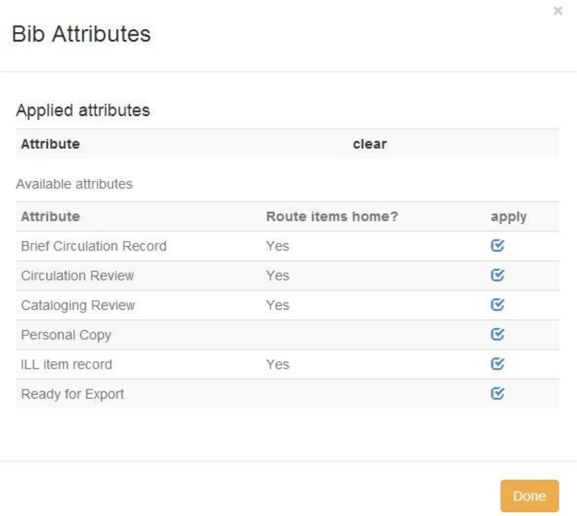
When editing or creating a bibliographic record, you can add or remove record attributes by choosing to edit Record Attributes from the box at the top of the bibliographic record display:



51363: Black snow /
Record type: BKS
Status: Active Catalog Record
MFHD count:1
Item count:1

Holdings [manage]
mfhd:51539 [1 items]
(none)
Record Attributes [edit]
(none)

A new popup box will appear, showing all attributes available. If any attributes are already applied, those will appear on the top. To apply an attribute, click Apply on the checkbox and then click Done. To clear an existing attribute, click Clear.



Applied attributes

Attribute	clear

Available attributes

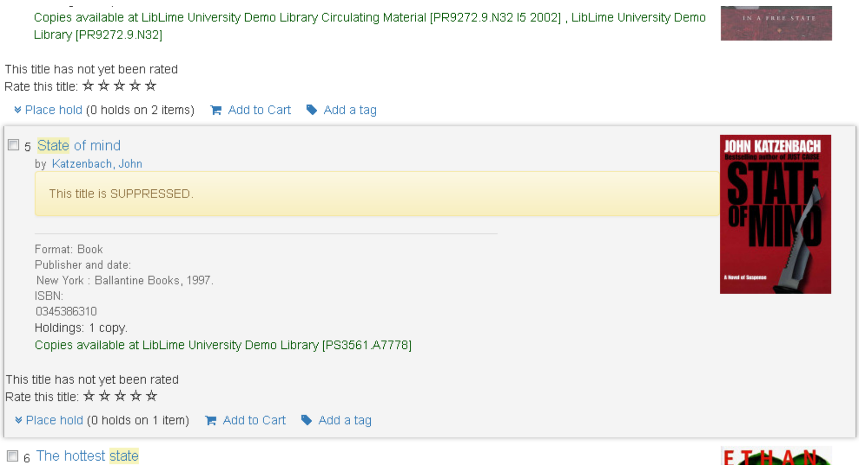
Attribute	Route items home?	apply
Brief Circulation Record	Yes	☑
Circulation Review	Yes	☑
Cataloging Review	Yes	☑
Personal Copy		☑
ILL item record	Yes	☑
Ready for Export		☑

9.3.10 Discovery Layer Suppression

Titles may be suppressed from general view in the Discovery Layer, if desired (syspref OpacSuppression). They are still visible in staff mode. To do so, edit the title record and set the 942 subfield n to a value of 1 (choose Suppressed if the field is linked to a pull-down).

WARNING: Do NOT use the Delete option in the suppress pulldown. That was intended for future development. Setting it here will not delete the record.

After setting the Suppress flag, as soon as the system reindexes the record, it will not be searchable in the Discovery Layer. In staff mode, the results list will show that the title is suppressed:



Copies available at LibLime University Demo Library Circulating Material [PR9272.9.N32 I5 2002] , LibLime University Demo Library [PR9272.9.N32]

This title has not yet been rated
Rate this title: ☆☆☆☆☆

☐ 5 State of mind
by Katzenbach, John

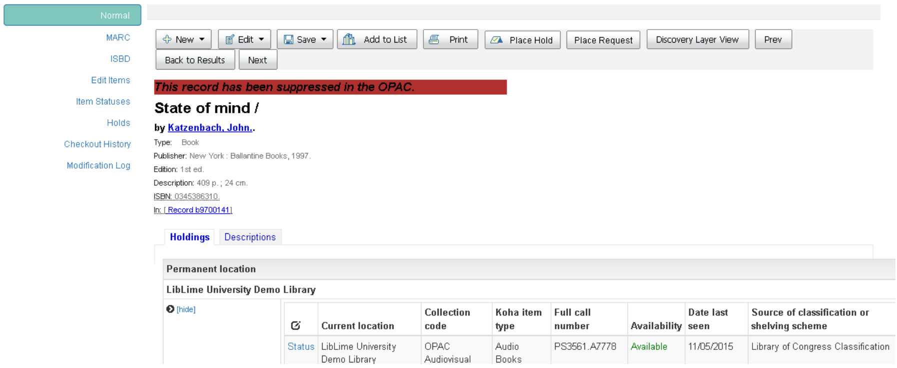
This title is SUPPRESSED.

Format: Book
Publisher and date:
New York : Ballantine Books, 1997.
ISBN:
0345386310
Holdings: 1 copy.
Copies available at LibLime University Demo Library [PS3561.A7778]

This title has not yet been rated
Rate this title: ☆☆☆☆☆

☐ 6 The hottest state

The staff title details page also will show suppression status:



This record has been suppressed in the OPAC.

State of mind /

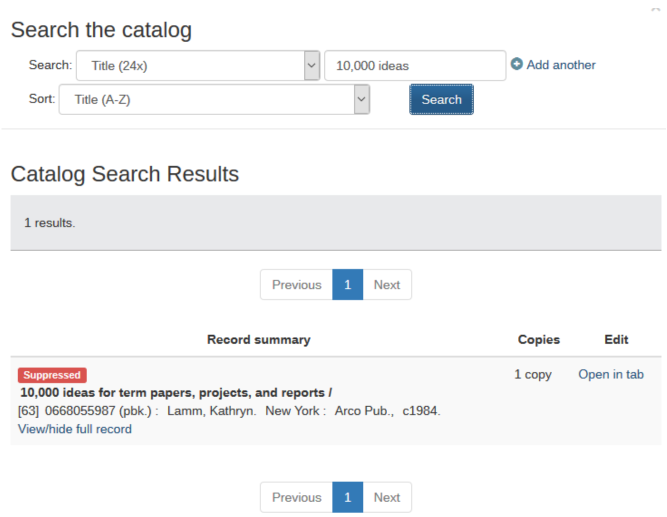
by Katzenbach, John..

Type: Book
Publisher: New York : Ballantine Books, 1997.
Edition: 1st ed.
Description: 409 p. ; 24 cm.
ISBN: 0345386310.
In: [Record b9700141]

Permanent location
LibLime University Demo Library

	Current location	Collection code	Koha item type	Full call number	Availability	Date last seen	Source of classification or shelving scheme
Status	LibLime University Demo Library	OPAC Audiovisual	Audio Books	PS3561.A7778	Available	11/05/2015	Library of Congress Classification

The cataloging editor will show suppressed status in a search from within the editor:



Search the catalog

Search: Title (24x) 10,000 ideas Add another

Sort: Title (A-Z) Search

Catalog Search Results

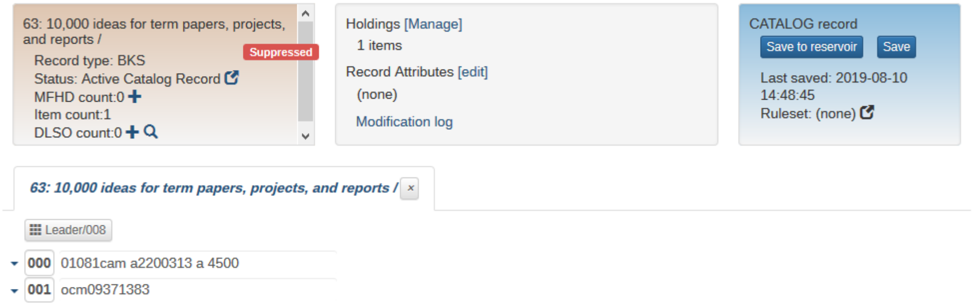
1 results.

Previous 1 Next

Record summary	Copies	Edit
Suppressed **10,000 ideas for term papers, projects, and reports /** [63] 0668055987 (pbk.) : Lamm, Kathryn. New York : Arco Pub., c1984. View/hide full record	1 copy	Open in tab

Previous 1 Next

The red Suppressed flag will also show when you're editing a record:



63: 10,000 ideas for term papers, projects, and reports /
Suppressed
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:1
DLSO count:0

Holdings [Manage]
1 items
Record Attributes [edit]
(none)
Modification log

CATALOG record
Save to reservoir Save
Last saved: 2019-08-10 14:48:45
Ruleset: (none)

63: 10,000 ideas for term papers, projects, and reports /

Leader/008

000 01081cam a2200313 a 4500

001 ocm09371383

9.3.10.1 Item-Level Suppression

In earlier versions, item-level suppression was done through a setting in the bib record; that is now handled through an item status. To suppress Discovery Layer display of a particular item, create a new custom status and mark it for suppression. Then assign that status to the particular item to have it hidden from display. See the Custom Item Statuses section in the Superlibrarian Guide for more information about creating statuses; see Item Status Settings section below for how to apply a status.

9.3.11 Saving a Bibliographic Record

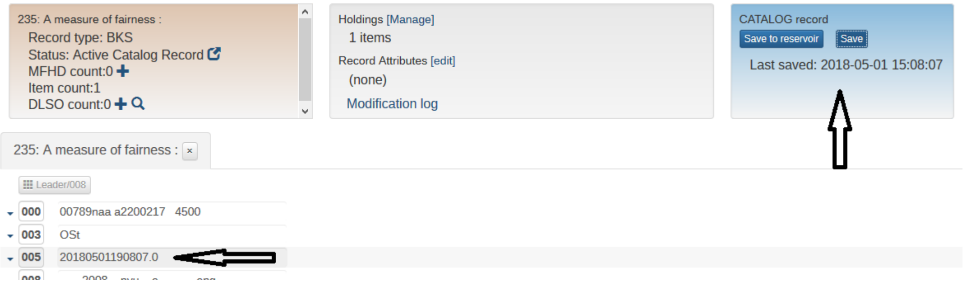
If there are unsaved changes, the Save Status box at the top will reflect that:

CATALOG record [MODIFIED]

Save to reservoir Save

Last saved: 2014-08-19 20:30:06

You can choose to save the record to the reservoir for later approval by a senior staff person, or save it directly. When a bibliographic record is saved, the 005 is updated to reflect the date and time saved. The Save status also changes to show the date and time "last saved"



235: A measure of fairness :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:1
DLSO count:0

Holdings [Manage]
1 items
Record Attributes [edit]
(none)
Modification log

CATALOG record
Last saved: 2018-05-01 15:08:07

235: A measure of fairness :

```
000  00789naa a2200217   4500
003  OSt
005  20180501190807.0
```

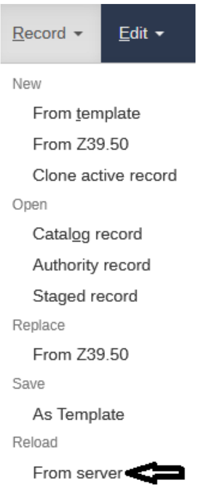
In rare cases, you may receive a "Save failed" error message. If you get a message that states: "There was an error saving the record: Unexpected non-whitespace character after JSON at position 4," there are a couple of things to check. Look in the record for:

- missing subfields
- missing tags
- subfields that are more than one character
- tags that are not numeric

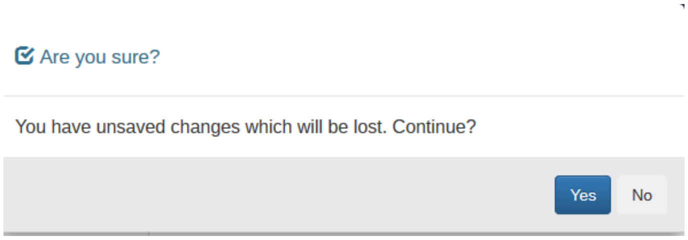
Once the error is found and corrected, you should be able to save the record.

9.3.12 Refreshing a Record

If you have been editing a record, and decide that you need to go back to the original, you can refresh it. Under Record, choose Reload from Server to return it to the version stored in the database.



The system will warn you if you have unsaved changes if you use the Reload option.

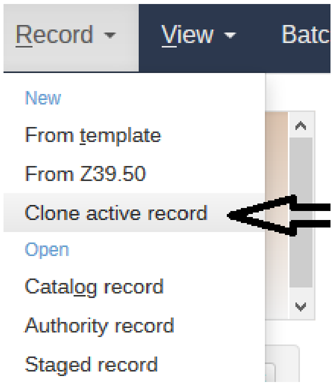

Are you sure?

You have unsaved changes which will be lost. Continue?

This can be useful to refresh one record without saving/closing records open in other tabs.

9.3.13 Cloning a Bibliographic Record

You can clone (duplicate) an existing bib record. In the Cataloging Editor, with the record to be cloned open and in a tab, click on the Record menu and choose Clone Active Record.



A copy of the record will appear in the next tab (with a blank biblio number until saved) This cloned record can be edited and saved. Note that item and holding information from the initial record are not cloned; only bibliographic data is copied.


[-44] 100 Years of Who's who in baseball (NEW)
Record type: BKS
Status: New from clone
MFHD count:
Item count:
DLSO count:0

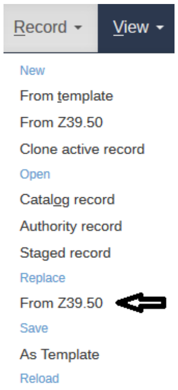
NEW record

Last saved: never

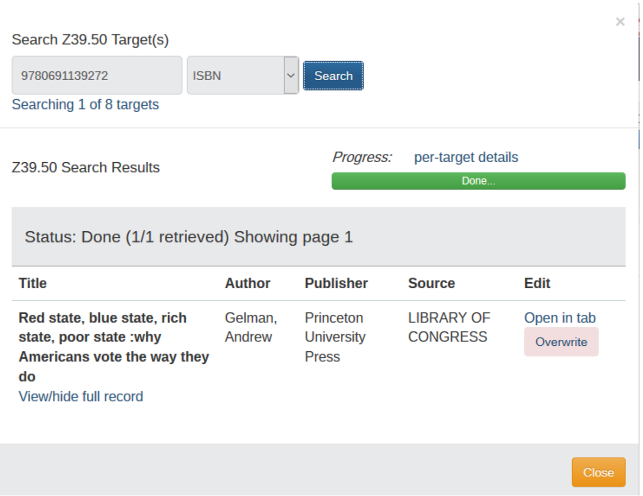
000 01546cam a22003978i 4500
001 18406734
005 20171019212950.0

9.3.14 Replacing Record via z39.50 Search

You can replace an existing record with a new one from a z39.50 search if desired. With the record open in the cataloging editor, go under Record and choose Replace from z39.50:



This will open a z39.50 search window; find an appropriate new record in one of your search targets. You will see two options, Open in Tab or Overwrite:



Search Z39.50 Target(s)

9780691139272 ISBN

Searching 1 of 8 targets

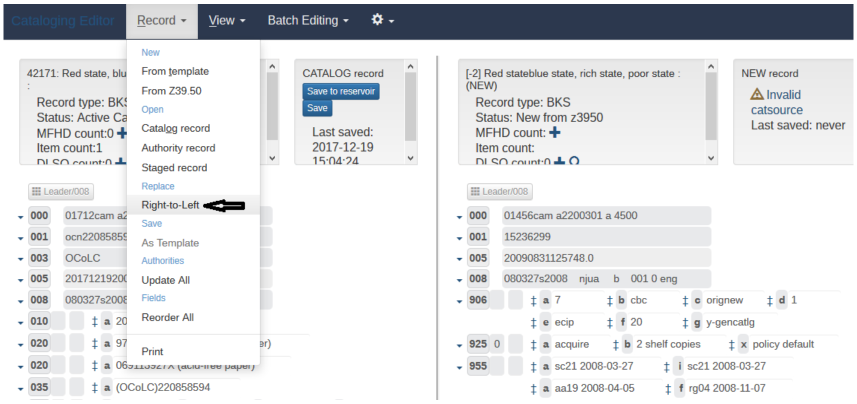
Z39.50 Search Results

Progress:

Status: Done (1/1 retrieved) Showing page 1

Title	Author	Publisher	Source	Edit
Red state, blue state, rich state, poor state :why Americans vote the way they do View/hide full record	Gelman, Andrew	Princeton University Press	LIBRARY OF CONGRESS	Open in tab Overwrite

The Overwrite option will replace the existing record in the editor screen. You must then save the record to get the new version. Open in Tab will open the z39.50 version in a new tab, next to the original record. Then go under the View menu and choose Split View to see both. Verify that the new record is what you want. Then go under Record and select Replace Right-to-Left:



42171: Red state, blu
:
Record type: BKS
Status: Active Ca
MFHD count:0
Item count:1
DLSO count:0

CATALOG record
Last saved:
2017-12-19
15:04:24

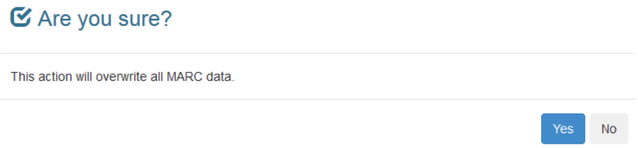
000 01712cam a2
001 ocn22085859
003 OCoLC
005 20171219200
008 080327s2008
010 ‡ a 20
020 ‡ a 97 er)
020 ‡ a 069113927X (acid-free paper)
035 ‡ a (OCoLC)220858594

[-2] Red stateblue state, rich state, poor state :
(NEW)
Record type: BKS
Status: New from z3950
MFHD count:
Item count:
DLSO count:0

NEW record
Invalid catsource
Last saved: never

000 01456cam a2200301 a 4500
001 15236299
005 20090831125748.0
008 080327s2008 njua b 001 0 eng
906 ‡ a 7 ‡ b cbc ‡ c orignew ‡ d 1
‡ e ecip ‡ f 20 ‡ g y-gencatlg
925 0 ‡ a acquire ‡ b 2 shelf copies ‡ x policy default
955 ‡ a sc21 2008-03-27 ‡ i sc21 2008-03-27
‡ a aa19 2008-04-05 ‡ f rg04 2008-11-07

This will replace the original record with the new one from the z39.50 search. You will get a prompt asking you to confirm:



☑ Are you sure?

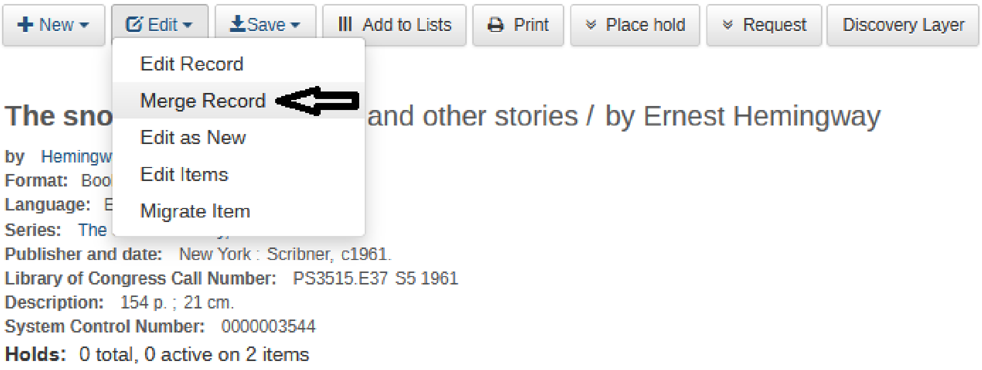
This action will overwrite all MARC data.

After you confirm the overwrite, you will still see both records in the split view, but now the left-hand record should match the right-hand record. Be sure to save the left-hand record or the new version will not be put into place.

9.3.15 Merging Bibliographic Records

Staff with editcatalogue.bib.merge permission can merge bibliographic records. Bibliographic elements of the SAVED bib are retained (MARC data is kept); no bibliographic data is kept from the merged bib. The SAVED bib inherits the holding and item information from the merged bib and any circulation/hold activity. After the holds and item information have been transferred, the merged bibliographic record that no longer has any items or holds attached will be deleted.

To merge bibliographic records, first identify the bibliographic record to be retained and make a note of its biblio number. Search for the bibliographic record you want to merge and view its bibliographic detail page. From the Edit menu choose Merge Record:



The sno and other stories / by Ernest Hemingway

by Hemingw

Format: Boo

Language: E

Series: The

Publisher and date: New York : Scribner, c1961.

Library of Congress Call Number: PS3515.E37 S5 1961

Description: 154 p. ; 21 cm.

System Control Number: 0000003544

Holds: 0 total, 0 active on 2 items

You will get the following screen; enter the biblio number of the record to be retained.

Merge Record

To be saved 18111

To be merged [36714] The snows of Kilimanjaro /

Bib 18111 will be kept

Bib 36714 is shown and all items and corresponding holds will be moved to Bib 18111

Click Continue and you'll get a confirmation screen. In this example, Bib 36714 will be deleted.

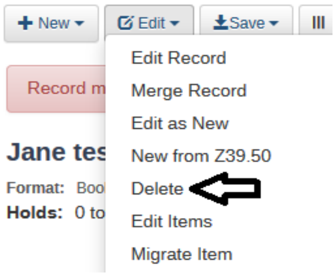

Merge Record

To be saved [18111] The snows of Kilimanjaro,
To be merged [36714] The snows of Kilimanjaro /

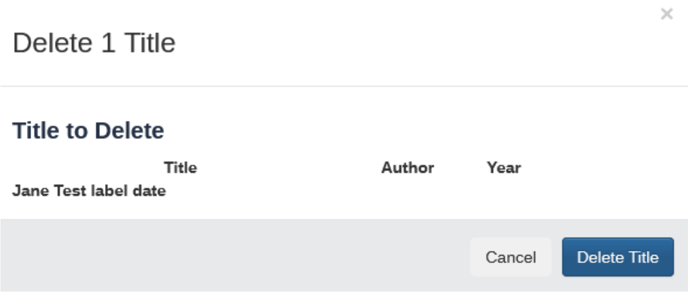
Items from the merged record are now moved to the saved record.

9.3.16 Deleting a Single Bibliographic Record

If you want to delete a title, first delete all items attached to it (see that section). Then, in the staff display, select Edit, Delete Record:



This option will not show if there are items attached. You will get a popup asking you to confirm:


Delete 1 Title

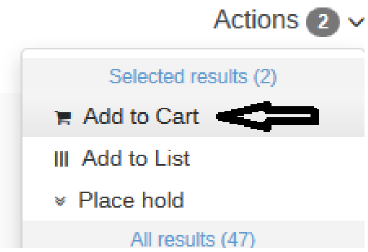
Title to Delete

Title	Author	Year
Jane Test label date		

Click the Delete Title button to confirm.

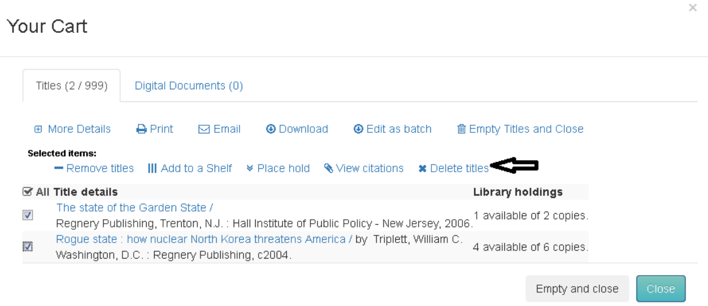
9.3.17 Batch Delete Bibliographic Records

Staff with the appropriate permissions can batch delete bibliographic records through the Cart. Bibliographic records for deletion are identified via standard searching and are placed in the Cart from the search results screen for batch deletion. You can either check the All button at the top, or check individual entries on the results list, then go under Selected and choose Add to Cart.



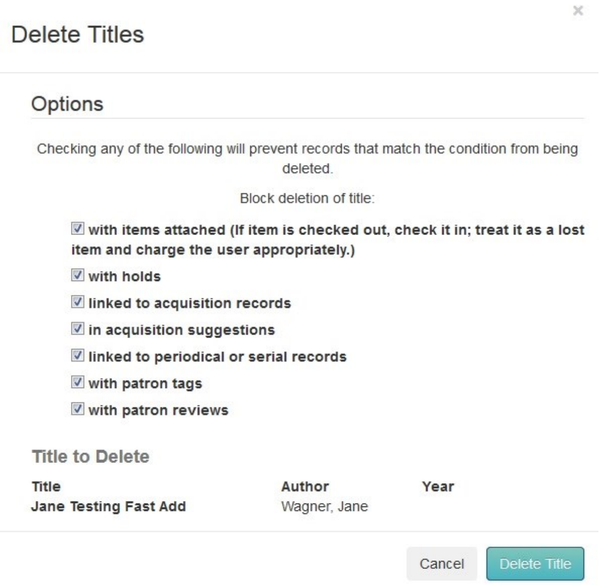
For example, records were selected from a search and moved to the Cart from the search results set. Once bibs are in the cart, the cart can be viewed by clicking on the "Cart" icon.

Within the cart, staff with permission to delete bibs via batch delete will see the option Delete titles. Selecting titles from the cart to delete, either by clicking All or choosing individual items by clicking the box to the left of the title. Then click Delete Titles and the selected bibs will be queued up for batch deletion.



☑ All	Title details	Library holdings
☑	The state of the Garden State / Regnery Publishing, Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.	1 available of 2 copies.
☑	Rogue state : how nuclear North Korea threatens America / by Triplett, William C. Washington, D.C. : Regnery Publishing, c2004.	4 available of 6 copies.

Options for how to handle transactional information linked with bibs selected for deletion are provided.



Checking any of the following will prevent records that match the condition from being deleted.

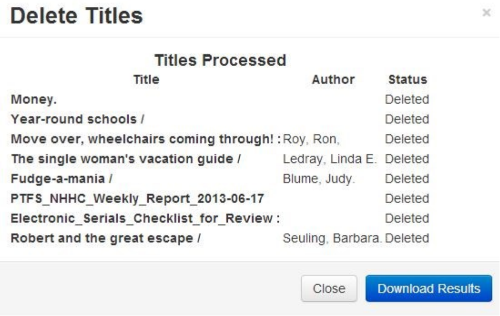
Block deletion of title:

☑ with items attached (If item is checked out, check it in; treat it as a lost item and charge the user appropriately.)
☑ with holds
☑ linked to acquisition records
☑ in acquisition suggestions
☑ linked to periodical or serial records
☑ with patron tags
☑ with patron reviews

Title to Delete

Title	Author	Year
Jane Testing Fast Add	Wagner, Jane	

The choices above will be applied to ALL bibs in this batch delete. If any of them are checked (the default), records with that condition will NOT be deleted. For example, records with items attached, or on hold will not be deleted. Clicking Delete Titles will finalize the delete; a confirmation page will appear:



Titles Processed

Title	Author	Status
Money.		Deleted
Year-round schools /		Deleted
Move over, wheelchairs coming through! :	Roy, Ron,	Deleted
The single woman's vacation guide /	Ledray, Linda E.	Deleted
Fudge-a-mania /	Blume, Judy.	Deleted
PTFS_NHHC_Weekly_Report_2013-06-17		Deleted
Electronic_Serials_Checklist_for_Review :		Deleted
Robert and the great escape /	Seuling, Barbara.	Deleted

9.3.17.1 Deleting Checked Out Items

If you opt to allow deletion of titles where items are checked out, the item will be marked as lost and the patron will be charged a replacement fee and/or surcharge (depending on your configuration). The title will also remain linked to the patron in the patron's Lost Items tab. See the section on Lost Item Handling for more information.

9.3.18 Staging a Record for Review (Reservoir)

Additional cataloging permissions have been added so that you can have a cataloging staff with different tiers of permissions. For example, you could allow some staff to stage bibliographic, MFHD, or authority records and save them in reservoir, but only allow senior catalogers to search and retrieve those records and commit them to the database.

In the scenario provided below, the cataloger has the following permissions:

View Catalogue (catalogue)
Access staff client & search functions (access)
Borrow books (borrow)
Edit Catalogue
Stage a bibliographic record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL
Stage a MFHD record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL
Stage an authority record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL

Search for a record via Z39.50 and bring the record in to the Cataloging editor. The only option available to this staff person is to "Save to reservoir."

Last saved: 2014-08-20 15:50:25

Note that this staff person also only has collection-based (scope source) permission to stage records for materials in the Travel Collection, so no other options show in the 942$x field. (If your site does not use collection-scoped permissions, ignore this setting.)

856 4 2 ‡ 3 Contributor biographical information ‡ u http://www.loc.gov/catdir/enhancements/fy0808/2007052925-b.html
856 4 2 ‡ 3 Publisher description ‡ u http://www.loc.gov/catdir/enhancements/fy0808/2007052925-d.html
942 ‡ x TRAVEL
856 4 1 ‡ 3 Table of contents only ‡ u http://www.loc.gov/catdir/enhancement -t.html

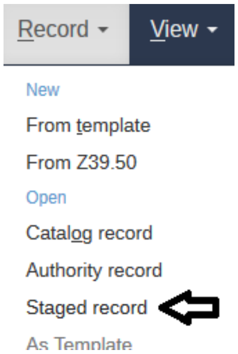
Edit and save the record to the reservoir for review by another staff member by clicking on the Save to Reservoir button.

9.3.18.1 Reviewing and Saving a Staged Record

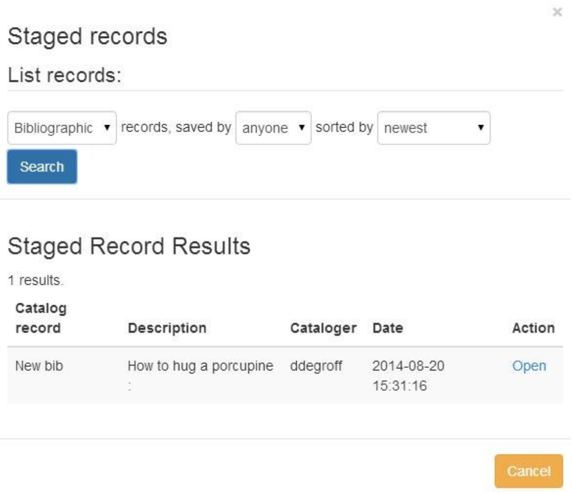
Following up on the above, a senior cataloger can retrieve, review, and save the staged record. In this scenario provided below, cataloger has the following permissions:

View Catalogue (catalogue)
Access staff client & search functions (access)
Borrow books (borrow)
Edit Catalogue
Manage bibliographic records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL
Manage MFHD records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL
Manage authority records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL

This more senior cataloger will go into the Cataloging Editor and search for a staged record:



You can search for bibs, holdings or authorities, and the search can be narrowed to records saved by "me" or "anyone":



Staged records

List records:

Bibliographic records, saved by anyone sorted by newest

Staged Record Results

1 results.

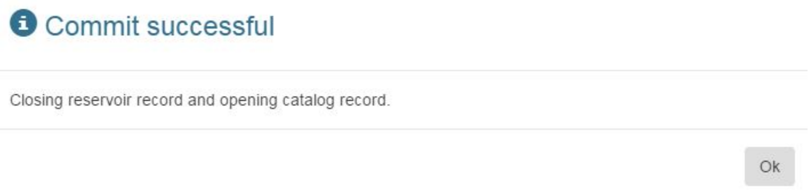
Catalog record	Description	Cataloger	Date	Action
New bib	How to hug a porcupine :	ddegroff	2014-08-20 15:31:16	Open

Clicking on the Open link will launch the saved/staged bib in the editor. The cataloger can modify and review the record and, when ready, either save it again to the reservoir OR commit it to the database by choosing either option from the two provided on the top righthand side of bib display:

Save status

Last saved: 2014-08-20 15:31:16

If the user clicks the Commit to Catalog button, a popup will confirm:

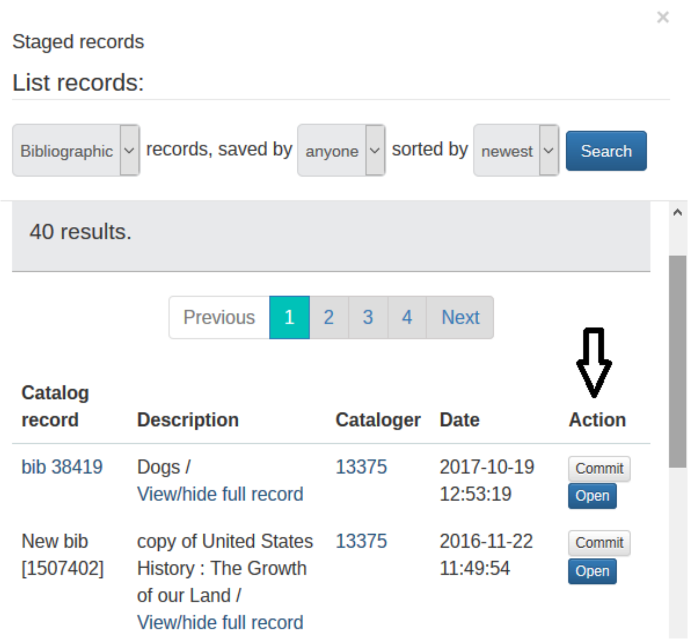


Commit successful

Closing reservoir record and opening catalog record.

The record remains open in the editor screen, but now has a record ID number assigned.

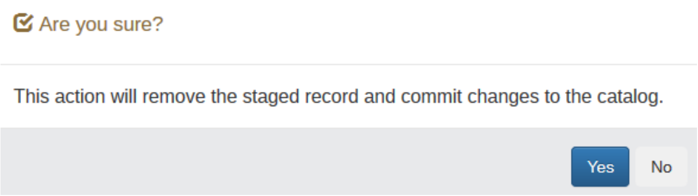
If the user has permission, the reservoir search screen will show both a Commit and an Open button.



40 results.

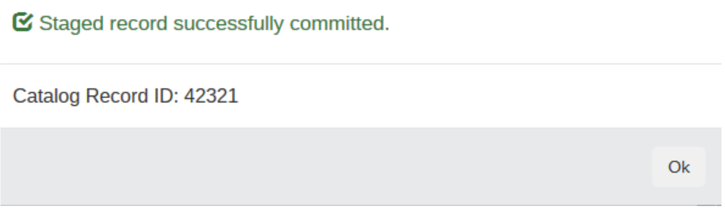
Catalog record	Description	Cataloger	Date	Action
bib 38419	Dogs / View/hide full record	13375	2017-10-19 12:53:19	Commit Open
New bib [1507402]	copy of United States History : The Growth of our Land / View/hide full record	13375	2016-11-22 11:49:54	Commit Open

Commit will save the record to the catalog directly, without opening it in the editor. You'll get an "are you sure" popup:



This action will remove the staged record and commit changes to the catalog.

Clicking Yes will save the record; you'll get a popup with the biblionumber:

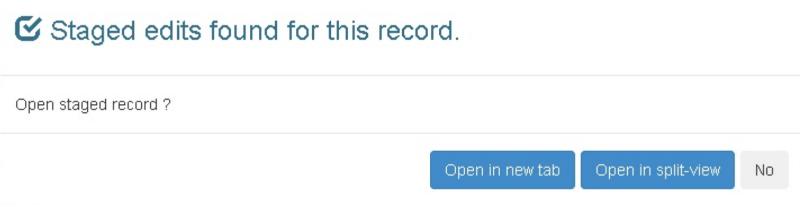


Staged record successfully committed.

Catalog Record ID: 42321

9.3.18.2 Resolving Edit Conflicts

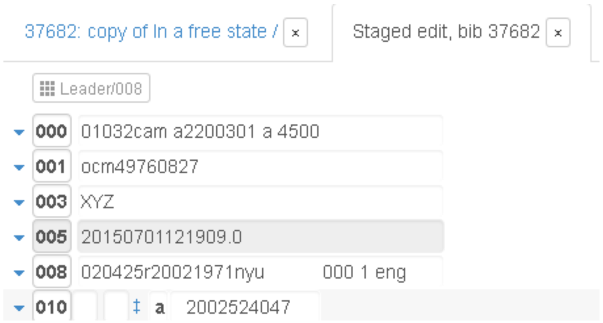
With multiple staff performing cataloging activities, it is possible that one person might have saved edits on a particular title to the reservoir, while another wants to make a different edit to the title. If someone tries to open a title in the Cataloging Editor which has a newer record saved in the reservoir, the system will open a warning screen:



Staged edits found for this record.

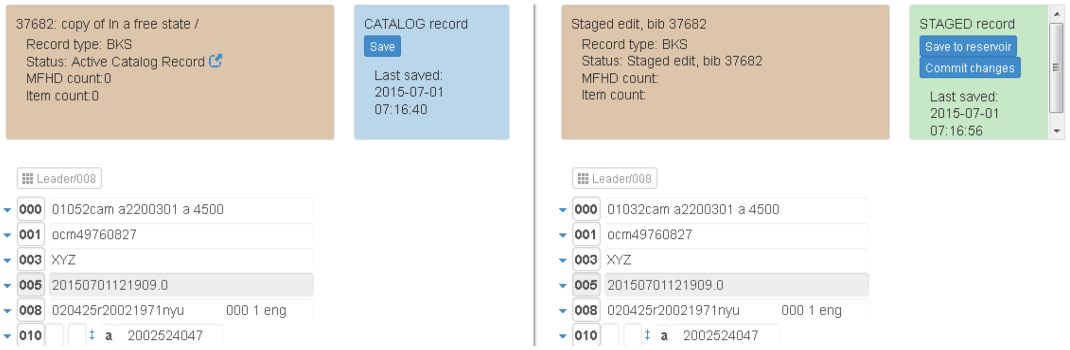
Open staged record ?

The recommended action is to Open in New Tab, so that the staged edits are seen and used in further editing. That opens the saved version and the staged version in separate tabs:



000 01032cam a2200301 a 4500
001 ocm49760827
003 XYZ
005 20150701121909.0
008 020425r20021971nyu 000 1 eng
010 ‡ a 2002524047

You can also open in split view to see the record in its current state and the staged edits side by side.



37682: copy of In a free state /
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0

CATALOG record

Last saved: 2015-07-01 07:16:40

Staged edit, bib 37682
Record type: BKS
Status: Staged edit, bib 37682
MFHD count:
Item count:

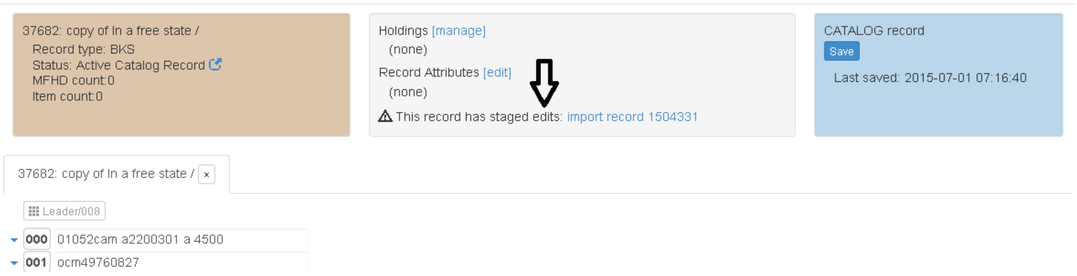
STAGED record

Last saved: 2015-07-01 07:16:56

000 01052cam a2200301 a 4500
001 ocm49760827
003 XYZ
005 20150701121909.0
008 020425r20021971nyu 000 1 eng
010 ‡ a 2002524047

000 01032cam a2200301 a 4500
001 ocm49760827
003 XYZ
005 20150701121909.0
008 020425r20021971nyu 000 1 eng
010 ‡ a 2002524047

If you click No, the record in its current state will open in the editor, but a warning in the header will give the option to import the staged record:



37682: copy of In a free state /
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0

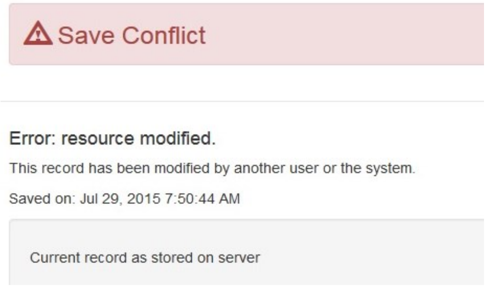
Holdings [manage]
(none)
Record Attributes [edit]
(none)
⚠ This record has staged edits: import record 1504331

CATALOG record

Last saved: 2015-07-01 07:16:40

000 01052cam a2200301 a 4500
001 ocm49760827

It is **STRONGLY** recommended that staff users work from the staged record, and not try to make a different edit while a staged record exists. If someone does make a different edit, there is a last warning at the time the record is saved:



⚠ Save Conflict

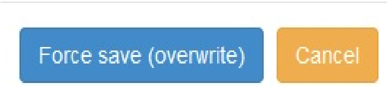
Error: resource modified.

This record has been modified by another user or the system.

Saved on: Jul 29, 2015 7:50:44 AM

Current record as stored on server

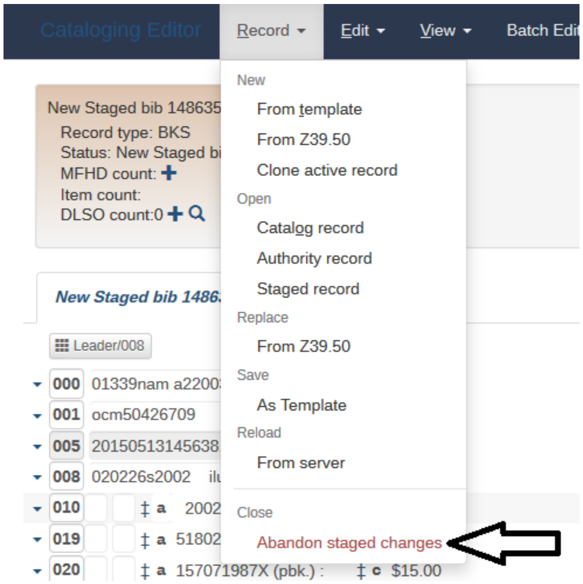
Users can either force a save anyway, or cancel (the recommended action):



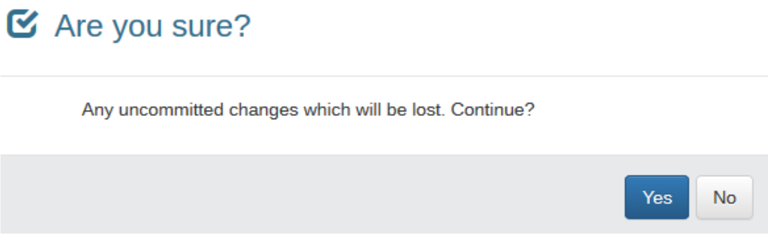
If an edited record is saved without incorporating the staged edits, it will be harder in the future to make those changes.

9.3.18.3 Removing or Abandoning Records in the Reservoir

Once a record was saved to the reservoir, there was no easy way to delete it if that version was no longer wanted. New development will allow for this. First, locate the record in the reservoir and open it in the editor (as above). Then, under the Record menu button, choose Abandon Changes:



You'll get a popup warning:



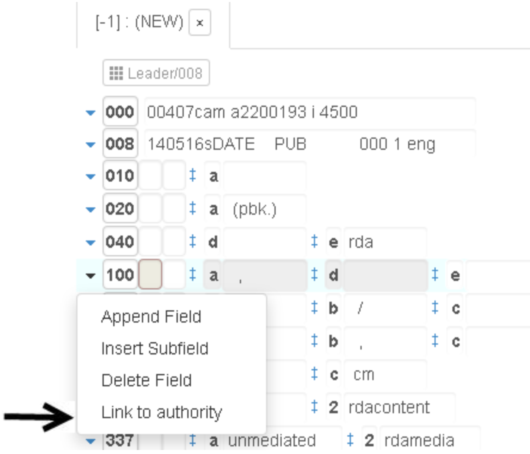
Are you sure?

Any uncommitted changes which will be lost. Continue?

Clicking Yes will remove the record from the reservoir. NOTE: This will also clear the record from the screen. The Abandon Staged Changes option will not show unless you have a reservoir record open. Use the existing Reload From Server option to abandon edits in an existing bib record.

9.3.19 Link Bibliographic Record to an Authority Record

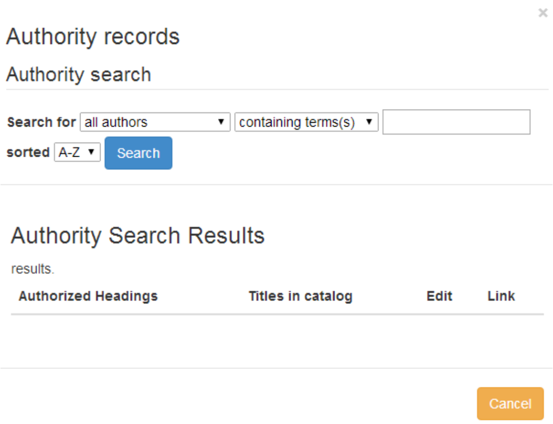
In either an existing or a new record, you will not be able to edit a field that is under authority control. To link the field to an authority record, from the bibliographic record, click the arrow to the left of the MARC number. Choose Link to Authority:



[-1] : (NEW)

000 00407cam a2200193 i 4500
008 140516sDATE PUB 000 1 eng
010 ‡ a
020 ‡ a (pbk.)
040 ‡ d ‡ e rda
100 ‡ a , ‡ d ‡ e
337 ‡ a unmediated ‡ 2 rdamedia

The authority search box will display.



Authority records

Authority search

Search for all authors containing terms(s)

sorted A-Z

Authority Search Results

results.

Authorized Headings	Titles in catalog	Edit	Link

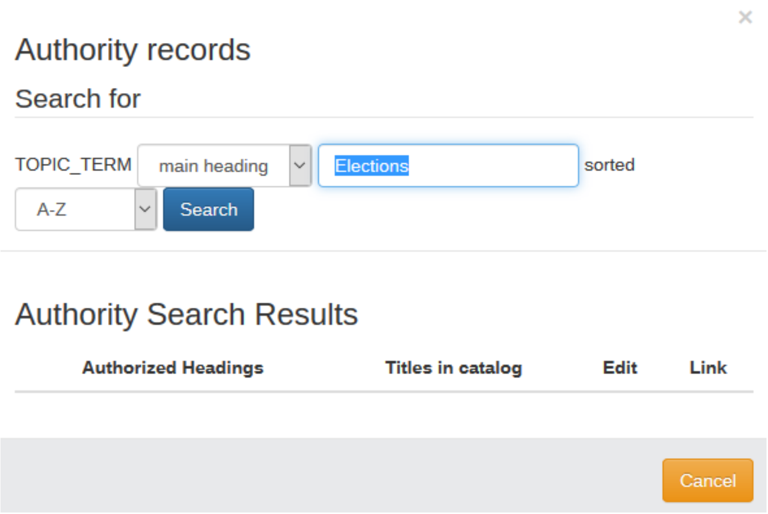
Search for heading desired; all headings meeting the search criteria will be displayed and from the search results page, staff can either edit the heading (by opening it in the editor) or link the heading to the bibliographic record by choosing “Link Authority”.

Shakespeare, William, 1564-1616	20 titles	Open in editor tab	Link Authority

Linked from:

Shakspeare, William, 1564-1616
Šek`spiri, Uiliam, 1564-1616
Saixpēr, Gouilliam, 1564-1616
Shakspere, William, 1564-1616
Shikisbīr, Wilyam, 1564-1616

You can use this process to either link an empty field to an authority record or to change the authority record linked to an existing field. If you are on a bib record field that is already linked to an authority record, the existing term will be highlighted in the popup search window:



Authority records

Search for

TOPIC_TERM: main heading: Elections sorted A-Z

Authority Search Results

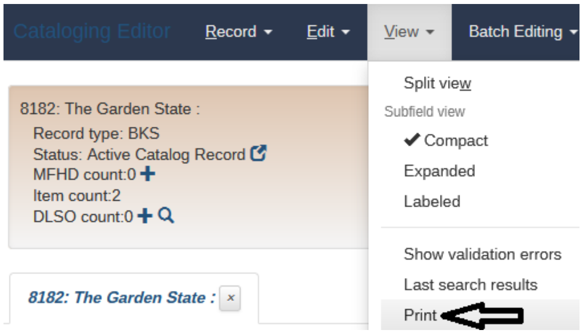
Authorized Headings	Titles in catalog	Edit	Link

You can immediately type over it to search a new term, or hit Enter (or the Search button) to search against the existing term.

A hotkey or keyboard shortcut will also allow linking to an existing record or immediate creation of a machine-generated authority for new records. To create a new authority controlled entry in an existing bib, add the new field and then place the cursor in the MARC tag field (i.e., in the "100") and click alt-a. The shortcut opens an authority search screen; locate the proper record and link to it. For newly-imported bibs, which have authority-controlled terms that are not already in your system, click shift-alt-a. This links all authority-controlled fields in the new record, creating system-generated authority records where needed.

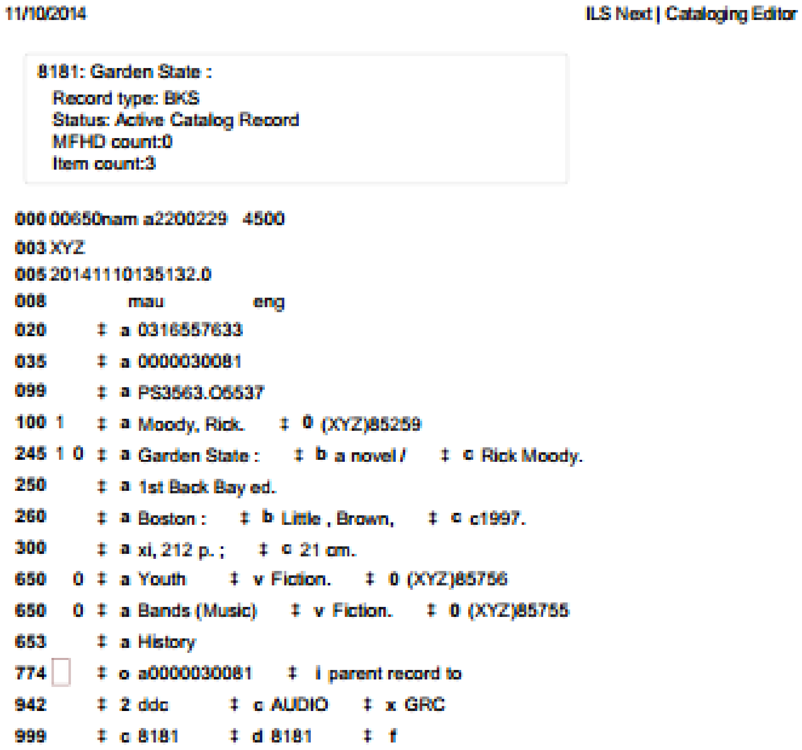
9.3.20 Printing a Bibliographic Record

Within the Cataloging Editor, you can print the full MARC record. Under the View menu at the top, select Print:



8182: The Garden State :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:2
DLSO count:0

The output will look something like this:



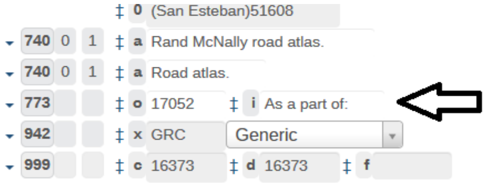
8181: Garden State :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:3

```
000 00650nam a2200229   4500
003 XYZ
005 20141110135132.0
008          mau          eng
020        ‡ a 0316557633
035        ‡ a 0000030081
099        ‡ a PS3563.O5537
100 1      ‡ a Moody, Rick.      ‡ 0 (XYZ)85259
245 1 0    ‡ a Garden State :    ‡ b a novel /    ‡ c Rick Moody.
250        ‡ a 1st Back Bay ed.
260        ‡ a Boston :    ‡ b Little , Brown,    ‡ c c1997.
300        ‡ a xi, 212 p. ;    ‡ c 21 cm.
650   0    ‡ a Youth       ‡ v Fiction.    ‡ 0 (XYZ)85756
650   0    ‡ a Bands (Music)    ‡ v Fiction.    ‡ 0 (XYZ)85755
653        ‡ a History
774 ☐      ‡ o a0000030081    ‡ i parent record to
942        ‡ 2 ddc       ‡ c AUDIO     ‡ x GRC
999        ‡ c 8181      ‡ d 8181      ‡ f
```

9.3.21 Linking Parent/Child Records (Host Unit/Constituent Unit)

The system can display links between a parent record (773) and child record (774). The link is made on the subfield o ($o) of each record. If the entry in $o is alphanumeric, the system searches against the ctrlnum index (035$a or 001). If the entry is completely numeric, the system assumes it is a biblionumber and links to the relevant record. A descriptive note can be entered in subfield n if desired. In this catalog editor view, the parent record is on the left, with three 774 field links including to the child record on the right. The child record has a 773 link to the parent record.

651 0 ‡ a United States ‡ v Road maps. ‡ 0 (XYZ)87300
651 0 ‡ a Canada ‡ v Road maps. ‡ 0 (XYZ)87295
651 0 ‡ a Mexico ‡ v Road maps. ‡ 0 (XYZ)87296
774 0 8 ‡ o 253 ‡ n Just some random atlases.
774 0 8 ‡ o 16373 ‡ i Related material
774 1 ‡ o 143



‡ 0 (San Esteban)51608
740 0 1 ‡ a Rand McNally road atlas.
740 0 1 ‡ a Road atlas.
773 ‡ o 17052 ‡ i As a part of:
942 ‡ x GRC Generic
999 ‡ c 16373 ‡ d 16373 ‡ f

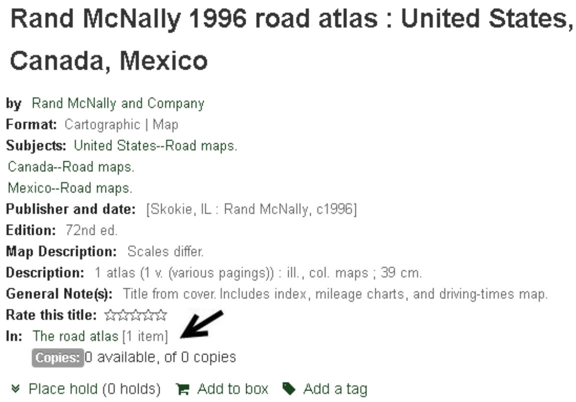
In the Discovery Layer, the parent record has three 774 entries for child records:

The road atlas : United States, Canada & Mexico

by Rand McNally and Company
Subjects: Cities and towns--United States.--Maps.
Cities and towns--Canada--Maps.
Cities and towns--Mexico--Maps.
United States--Road maps.
Canada--Road maps.
Mexico--Road maps.
Publisher and date: Skokie, IL. : Rand McNally & Company ; c2001.
Edition: Updated 2001 ed.
ISBN: 0528903179 (pbk.) :
Description: 1 atlas (140 p.) : ill., col. maps ; 39 cm.
General Note(s): Includes index.
Rate this title: ☆☆☆☆☆
Summary: **Other title:** Rand McNally: the road atlas. Rand McNally road atlas.
Containing: AAA road atlas : [1 item] Just some random atlases.
Rand McNally 1996 road atlas : Related material
1996 road atlas--United States, Canada, Mexico.
Copies: 1 available, of 1 copy

(Note that the third entry does not have a $n descriptive note, so the title display just shows the linked title.)

Each of the child records, in turn has a 773 entry linking to the parent record:

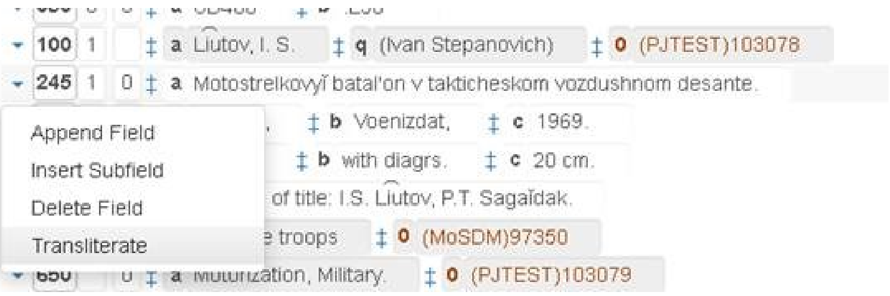


Rand McNally 1996 road atlas : United States, Canada, Mexico

by Rand McNally and Company
Format: Cartographic | Map
Subjects: United States--Road maps.
Canada--Road maps.
Mexico--Road maps.
Publisher and date: [Skokie, IL : Rand McNally, c1996]
Edition: 72nd ed.
Map Description: Scales differ.
Description: 1 atlas (1 v. (various pagings)) : ill., col. maps ; 39 cm.
General Note(s): Title from cover. Includes index, mileage charts, and driving-times map.
Rate this title: ☆☆☆☆☆
In: The road atlas [1 item]
Copies: 0 available, of 0 copies

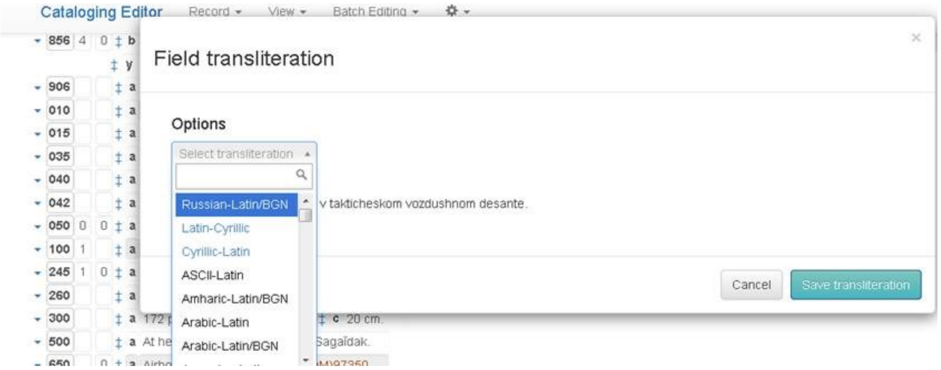
9.3.22 Transliteration Macro

A new macro allows transliterating entries between Roman and non-Roman character sets (Latin to Cyrillic, Cyrillic to Latin, etc.). **NOTE: This is not a translation tool; it matches and transliterates a keyboard character to its matching character in another language. If the original entry is incorrect, the transliterated entry will also be incorrect.** In the cataloging editor, use the pulldown next to a field with a foreign language entry, and select Transliterate:

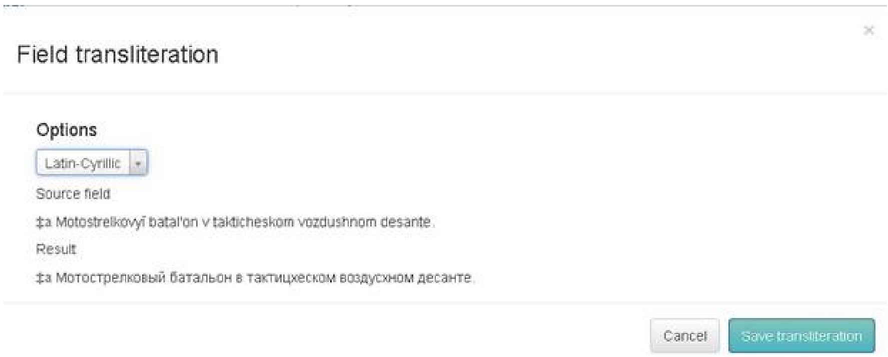


100 1 ‡ a Li͡utov, I. S. ‡ q (Ivan Stepanovich) ‡ 0 (PJTEST)103078
245 1 0 ‡ a Motostrelkovyĭ batal'on v takticheskom vozdushnom desante.
‡ b Voenizdat, ‡ c 1969.
‡ b with diagrs. ‡ c 20 cm.
of title: I.S. Li͡utov, P.T. Sagaĭdak.
e troops ‡ 0 (MoSDM)97350
650 0 ‡ a Motorization, Military. ‡ 0 (PJTEST)103079

The system checks the fixed fields for a language entry, moves likely options to the top of the pulldown in the popup window, and highlights them in blue:



For this example, select Latin-Cyrillic, since the original entry is in Roman (Latin) characters. When you choose an option, it displays the transliteration on the popup window:



Latin-Cyrillic

Source field

‡a Motostrelkovyĭ batal'on v takticheskom vozdushnom desante.

Result

‡a Мотострелковый батальон в тактицхеском воздусхном десанте.

If it is acceptable, click the Save Transliteration button. The editor creates an 880 field in the record that is linked to the original field (in this case, the 245):

100 1 ‡ a Li͡utov, I. S. ‡ q (Ivan Stepanovich) ‡ 0 (PJTEST)103078
245 1 0 ‡ 6 880-01 ‡ a Motostrelkovyĭ batal'on v takticheskom vozdushnom desante.
880 1 0 ‡ 6 245-01 ‡ a Мотострелковый батальон в тактицхеском воздусхном десанте.
260 ‡ a Moskva, ‡ b Voenizdat, ‡ c 1969.

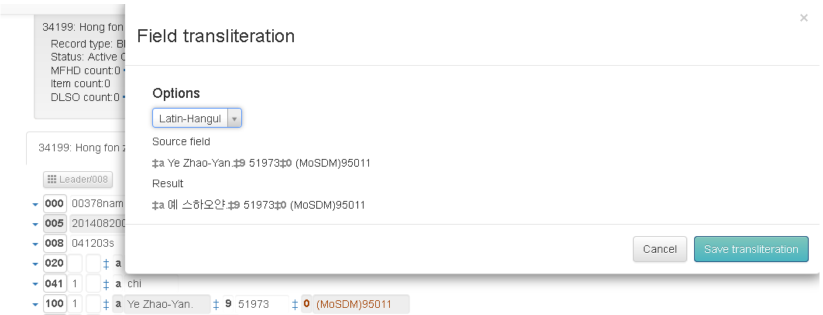
The 880 alternate graphic entry will display after each field that it’s paired with:

Istoki konfliktov na Severnom Kavkaze / I.V. Starodubrovskaia, D.V. Sokolov

Истоки конфликтов на Северном Кавказе / И.В. Стародубровская, Д.В Соколов

by Starodubrovskai͡a, I. VСтародубровская, И. В., Sokolov, D. V., Соколов, Д. В., author
Rossiĭskai͡a akademii͡a narodnogo khozi͡aĭstva i gosudarstvennoĭ sluzhby pri Prezidente Rossiĭskoĭ Federat͡sii,
Российская академия народного хозяйства и государственной службы при Президенте Российской Федерации,
Format: Book
Series: Ėkonomicheskai͡a politika, mezhdu krizisom i modernizat͡sieĭ
Экономическая политика, между кризисом и модернизацией
Ėkonomicheskai͡a politika, mezhdu krizisom i modernizat͡sieĭ.
Subjects: Terrorism--Russia (Federation)--Caucasus, Northern.
Islam--Russia (Federation)--Caucasus, Northern.
Russia (Federation)--Ethnic relations.
Ethnic relations.
Islam.
Terrorism.
Caucasus, Northern.
Russia (Federation)
Publisher and date: Moskva : Izdatel'skiĭ dom "Delo", 2016. Москва : Издательский дом "Дело", 2016.
ISBN: 9785774910823; 5774910822
Call Number: DK511.C2 S73 2016
Geographic Area Code: e-urr--
Description: 277 pages ; 21 cm.
System Control Number: (OCoLC)939505565
General Note(s):
At head of title: Rosiĭskai͡a akademii͡a narodnogo khozi͡aĭstva i gosudarstvennoĭ sluzhby pri Prezidente Rossiĭskoĭ Federat͡sii.
At head of title: Росийская академия народного хозяйства и государственной службы при Президенте Российской Федерации.

Many language options are available, including Chinese, Japanese, Korean, Persian, and Arabic. You can create a transliterated entry for author fields which are under authority control, such as this example with a Chinese author:



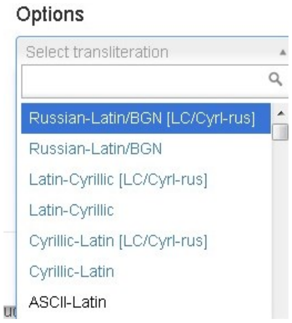
Field transliteration

Options: Latin-Hangul

Source field
‡a Ye Zhao-Yan.‡9 51973‡0 (MoSDM)95011

Result
‡a 예 스하오얀.‡9 51973‡0 (MoSDM)95011

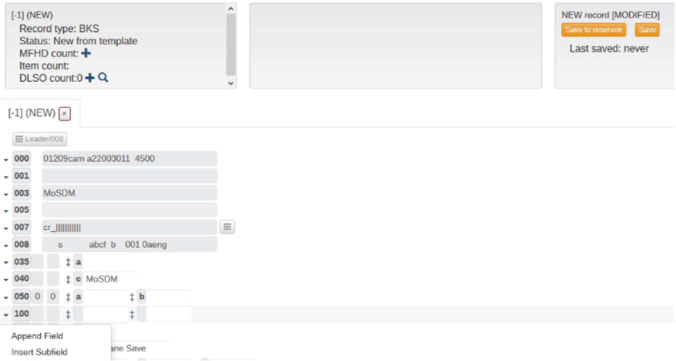
NOTE: The Cyrillic transliteration is based on the ISO-9 standard, not the older ALA-LC tables. Support has been added for the ALA Cyrillic/Russian variant – the ones labeled with notes of [LC/Cyrl-rus]:



Other language transliterations use the current standard for that language, not the ALA-LC version.

9.3.23 Retrieving an Unsaved Record

If you were working on a catalog record in the editor but weren't ready to save, the record was lost if you needed to step out to another staff function or if the browser or computer unexpectedly closed. Now, a copy of the record is saved and re-opened the next time you enter the editor. In this example, a new record was created from template, and given a title, but none of the other fields was completed:


[-1] (NEW)
Record type: BKS
Status: New from template
MFHD count:
Item count:
DLSO count:0

NEW record [MODIFIED]
Last saved: never

000 01209cam a22003011 4500
001
003 MoSDM
005
007 cr_||||||||||
008 s abcf b 001 0aeng
035 ‡ a
040 ‡ c MoSDM
050 0 0 ‡ a ‡ b
100 ‡ ‡

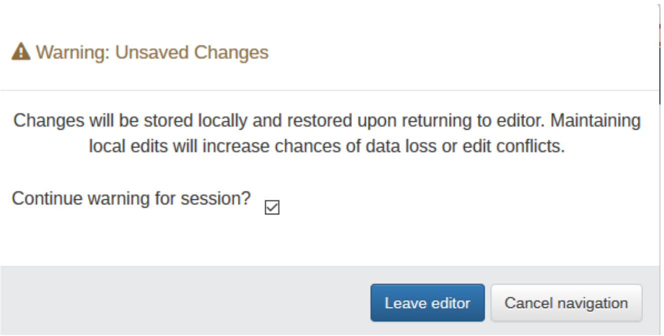
The browser was closed without saving or logging out; when the browser was reopened and went back into the cataloging editor, that record was on the screen. A Recovered label at top indicated the status:


[-1] (NEW)
Record type: BKS
Status: New from template
MFHD count:
Item count:
DLSO count:0

NEW record [MODIFIED]
Last saved: never

000 01209cam a22003011 4500
001
003 MoSDM
005
007 cr_||||||||||
008 s abcf b 001 0aeng
035 ‡ a
040 ‡ c MoSDM
050 0 0 ‡ a ‡ b
100 ‡ ‡
110 ‡
245 1 0 ‡ a Test Jane Save

If the browser remains open but you step out to another function, you'll get a screen warning:


Warning: Unsaved Changes

Changes will be stored locally and restored upon returning to editor. Maintaining local edits will increase chances of data loss or edit conflicts.

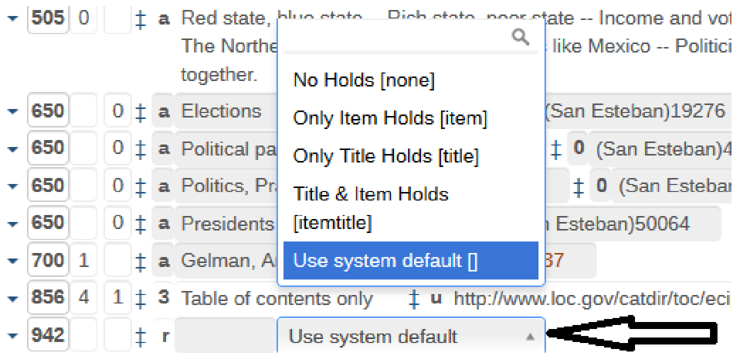
Continue warning for session? ☑

If you choose to leave the editor, and then come back, the recovered record will be in the editor screen.

9.3.24 Individual Record Holds Control

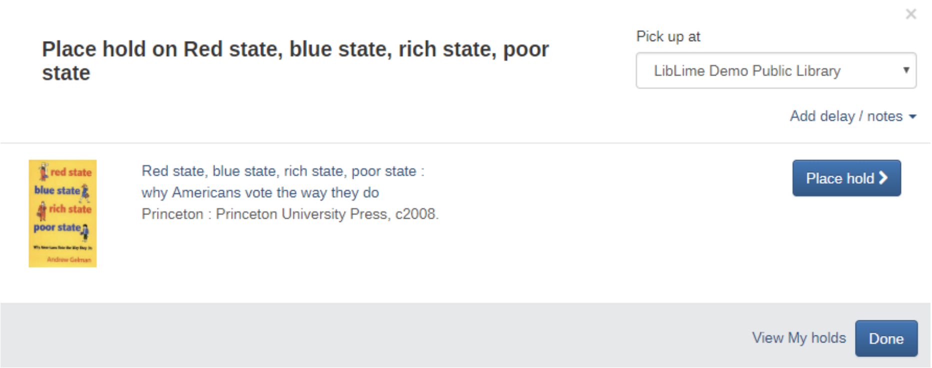
Certain sites want to specify hold policies at the individual title or item level. This is an optional feature; you can ignore it and let system-wide holds policies remain in effect.

A new system preference OPACDefaultHoldPolicy can be used to set a system-wide default. Otherwise, a policy can be set in each title record. Add a 942 subfield r entry to the title:



That field has a pulldown with allowable values. You can choose to allow No Holds, Only Item Holds, Only Title Holds, Title & Item Holds, or the system default. **(Note that choosing system default is the equivalent of un-setting the field and leaving it blank. If you choose that, the cataloging editor will remove the now-empty 942 when the record is saved.)**

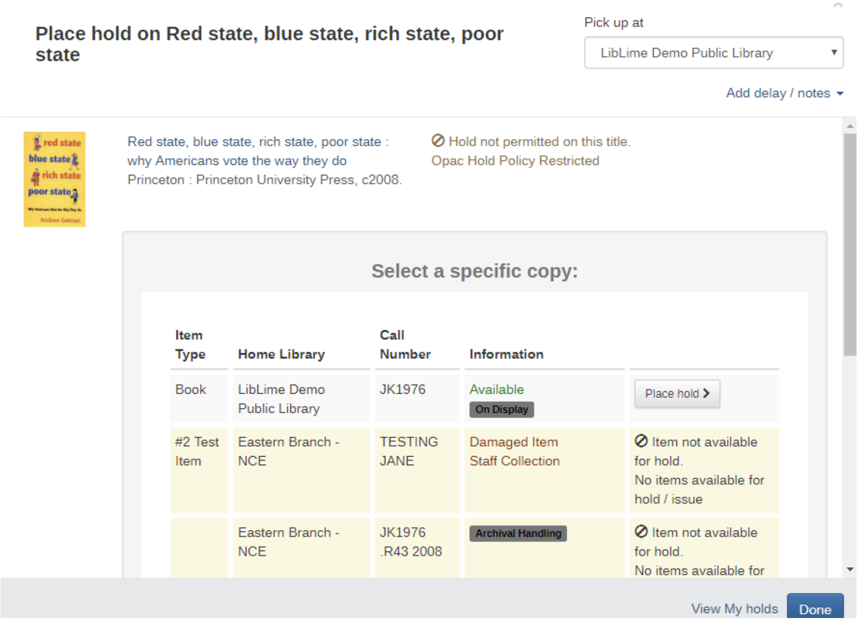
The setting in this field will override general hold policies for this title. Patrons will only be able to place the type of hold specified. For example, this title is now set to allow Only Title Holds. When a patron tries to place a hold, there is no option to choose an individual copy:


Place hold on Red state, blue state, rich state, poor state

Pick up at: LibLime Demo Public Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

If the setting is changed to Only Item Holds, the patron must choose an individual copy for a hold:


Place hold on Red state, blue state, rich state, poor state

Pick up at: LibLime Demo Public Library

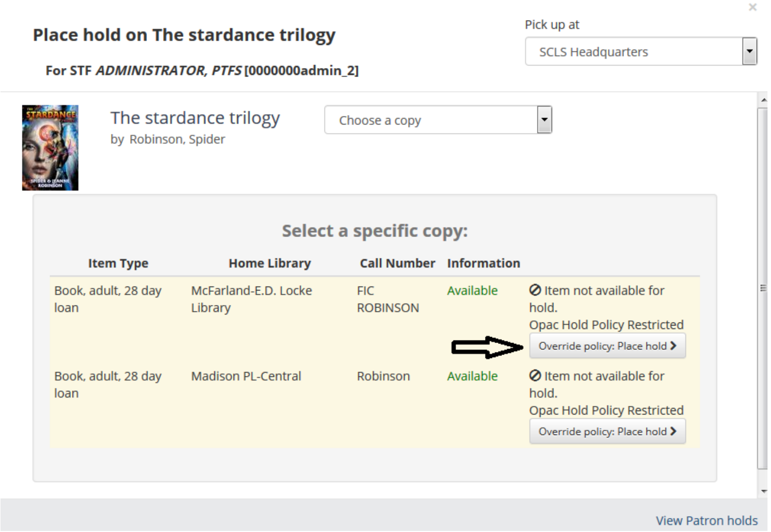
Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Hold not permitted on this title.
Opac Hold Policy Restricted

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	JK1976	Available On Display	Place hold
#2 Test Item	Eastern Branch - NCE	TESTING JANE	Damaged Item Staff Collection	Item not available for hold. No items available for hold / issue
	Eastern Branch - NCE	JK1976 .R43 2008	Archival Handling	Item not available for hold. No items available for

Staff users with the OR_hold_policy_block granular permission will be able to select and place item-level holds for a patron:


Place hold on The stardance trilogy

For STF *ADMINISTRATOR, PTFS* [0000000admin_2]

Pick up at: SCLS Headquarters

The stardance trilogy
by Robinson, Spider

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book, adult, 28 day loan	McFarland-E.D. Locke Library	FIC ROBINSON	Available	Item not available for hold. Opac Hold Policy Restricted Override policy: Place hold
Book, adult, 28 day loan	Madison PL-Central	Robinson	Available	Item not available for hold. Opac Hold Policy Restricted Override policy: Place hold

9.4 Managing Holdings Records

The system now has full support for the MARC21 Format for Holdings Records. [MARC holdings records] contain the holdings information—what copies are owned and where they are held—for bibliographic items in both physical and electronic forms.[1] These are primarily used for serial records; they are not required for all records.

The hierarchy is that a bib record links to a holdings record, which links to item(s) records. There can be multiple holdings records and/or item records per title. Items do not have to be placed under the MFHD record; they can be created and saved separately.

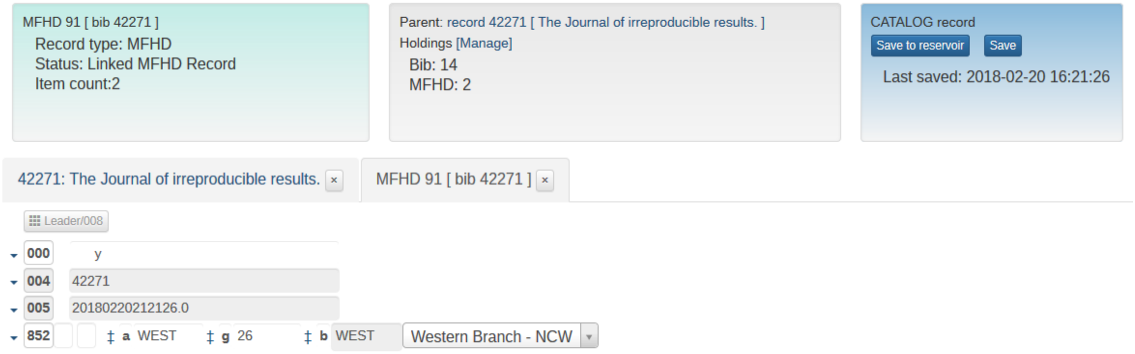
In the Cataloging Editor, when a bibliographic record is displayed, if a MFHD is available, it can also be displayed. The holdings area of the record header has a link to the MFHD (or MFHDs, if more than one are attached). Click Manage to display the MFHD along with item details.

42271: The Journal of irreproducible results.
Record type: SER
Status: Active Catalog Record
MFHD count:3
Item count:14
DLSO count:0

Holdings [Manage]
mfhd:91 [2 items]
mfhd:109 [6 items]
mfhd:110 [4 items]
2 items
Record Attributes [edit]

CATALOG record
Last saved: 2017-12-06 10:02:28

Click on the “mfhd #####” link to view the holdings record in another tab.



MFHD 91 [bib 42271]
Record type: MFHD
Status: Linked MFHD Record
Item count:2

Parent: record 42271 [The Journal of irreproducible results.]
Holdings [Manage]
Bib: 14
MFHD: 2

CATALOG record
Last saved: 2018-02-20 16:21:26

000 y
004 42271
005 20180220212126.0
852 ‡ a WEST ‡ g 26 ‡ b WEST Western Branch - NCW

In a holdings record display, the header box has a different display. The background is blue (as opposed to brown for a bibliographic record or yellow for an authority record). The record type is MFHD and the status is Linked MFHD record. The display has a link to the parent bib record and to any items attached.

You can edit and save the holdings record as needed from the catalog editor.

---

[1] http://www.loc.gov/marc/umh/UMHpt1-6.html#pt1

9.4.1 Creating a Holding Record

To add a new holding record to a bibliographic record, you must first have the bib record open in the cataloging editor. Then click the plus sign next to the line that reads MFHD Count:

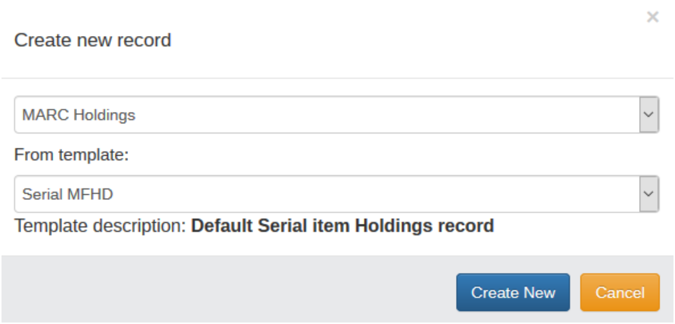
6624: English journal.
Record type: SER
Status: Active Catalog Record
MFHD count:0
Item count:2
DLSO count:0

Holdings [Manage]
2 items
Record Attributes [edit]
(none)
Modification log

CATALOG record

Last saved: 2016-11-18 15:14:17

This opens the "from template" popup. There should only be one template for holdings records, so just click the Create New button:



Create new record

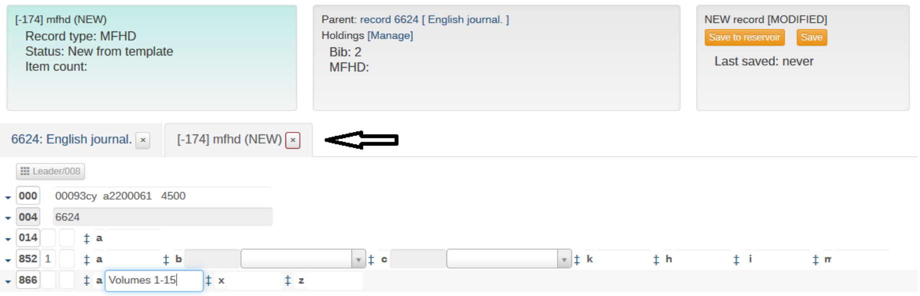
MARC Holdings

From template:

Serial MFHD

Template description: **Default Serial item Holdings record**

The empty template will open in a new tab; enter data as desired and save holding record. The link between the newly created holding record and the bib will be created.



[-174] mfhd (NEW)
Record type: MFHD
Status: New from template
Item count:

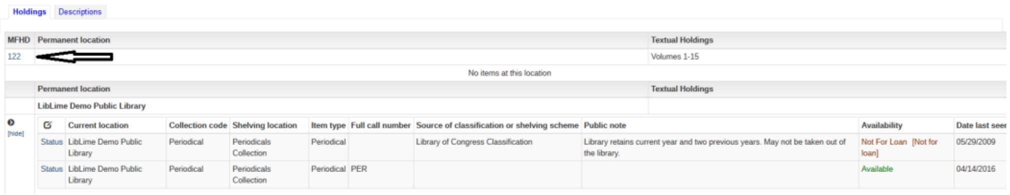
Parent: record 6624 [English journal.]
Holdings [Manage]
Bib: 2
MFHD:

NEW record [MODIFIED]

Last saved: never

```
000   00093cy  a2200061   4500
004   6624
014       ‡ a
852 1     ‡ a        ‡ b            ‡ c            ‡ k      ‡ h      ‡ i      ‡ m
866       ‡ a Volumes 1-15  ‡ x       ‡ z
```

When you save the holdings record and go back to the bib record, the holdings record shows as a separate entry in the holdings table:



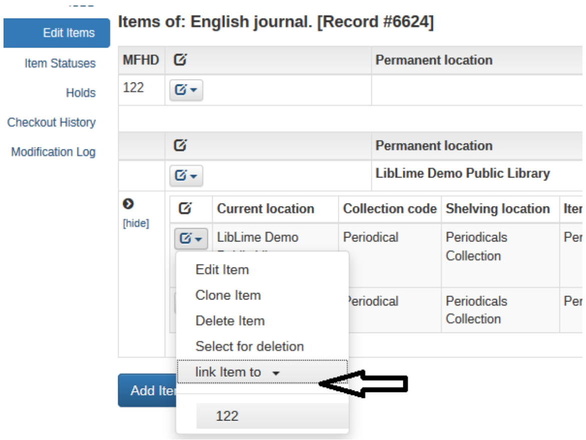
MFHD	Permanent location	Textual Holdings
122		Volumes 1-15

No items at this location

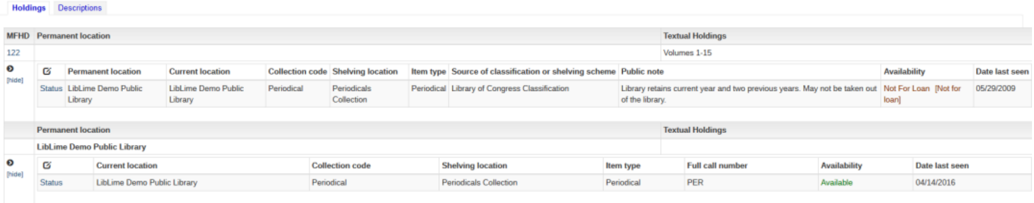
Permanent location	Textual Holdings
LibLime Demo Public Library	

	Current location	Collection code	Shelving location	Item type	Full call number	Source of classification or shelving scheme	Public note	Availability	Date last seen
Status	LibLime Demo Public Library	Periodical	Periodicals Collection	Periodical		Library of Congress Classification	Library retains current year and two previous years. May not be taken out of the library.	Not For Loan [Not for loan]	05/29/2009
Status	LibLime Demo Public Library	Periodical	Periodicals Collection	Periodical	PER			Available	04/14/2016

Note that existing items were not automatically attached to the new record. On the Edit Items tab, you can select each item and link it to the MFHD record:



The item is then attached to the MFHD record.



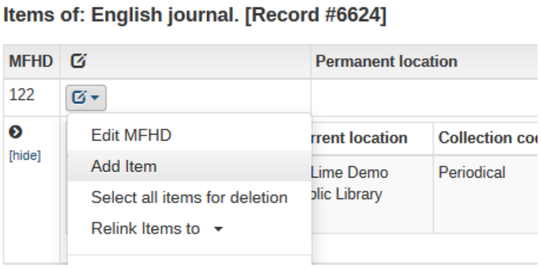
MFHD	Permanent location	Textual Holdings
122		Volumes 1-15

	Permanent location	Current location	Collection code	Shelving location	Item type	Source of classification or shelving scheme	Public note	Availability	Date last seen
Status	LibLime Demo Public Library	LibLime Demo Public Library	Periodical	Periodicals Collection	Periodical	Library of Congress Classification	Library retains current year and two previous years. May not be taken out of the library.	Not For Loan [Not for loan]	05/29/2009

Permanent location	Textual Holdings
LibLime Demo Public Library	

	Current location	Collection code	Shelving location	Item type	Full call number	Availability	Date last seen
Status	LibLime Demo Public Library	Periodical	Periodicals Collection	Periodical	PER	Available	04/14/2016

From the Edit Items tab, you could add new items to a holdings record as well as separately:



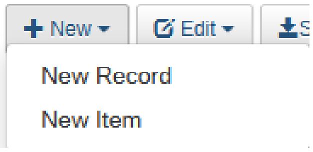
9.5 Managing Item Records

Items (individual copies) can be attached to a title record. Sites may choose to not add items for certain types of titles, such as electronic resources, but having an item record can make it easier to search. Any physical item that circulates must have an item record.

NOTE: If your site restricts create/update/delete permissions on item records, you will be able to see items belonging to other branches. However, if you attempt to edit or delete them, you will not be able to save your changes. Best practice is to only edit your own branch's items, unless you have been given permissions for other branches.

9.5.1 Create an Item

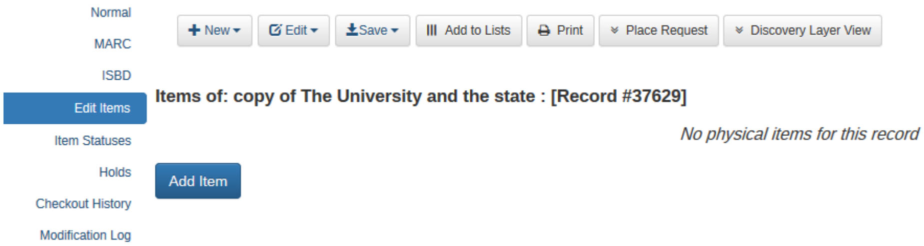
Items are created in the Item Editor. Search for an existing bibliographic record and display it. Click New, New Item.



That takes you to the Edit Items sidebar tab (you could also just click that sidebar menu link as well).

From this screen you can either add new items or edit existing items. It is now possible to control both what item fields display and the order in which they display in this screen, the Discovery Layer, and the item add/edit screen. This feature is described in the Superlibrarian Training Guide (Item Fields section). Be aware that the fields and display order on your system may not match the screenshots in this manual.

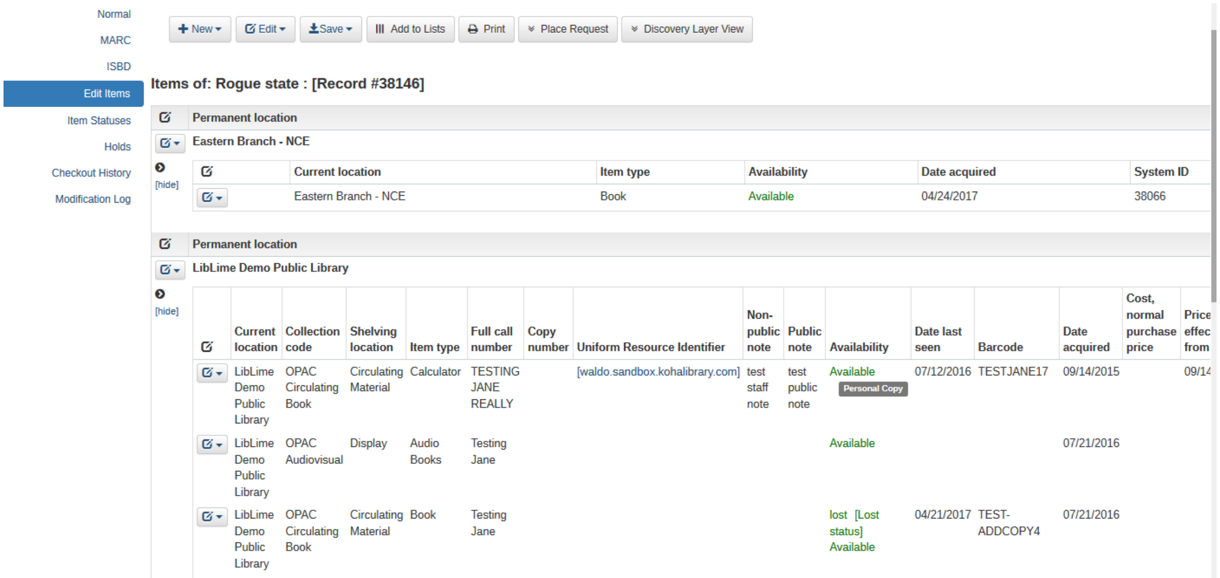
If the title has no existing items, you'll get a screen with an Add Item button:



Items of: copy of The University and the state : [Record #37629]

No physical items for this record

If there are existing items, you'll get a table showing the items. From this screen you can either add new items or edit existing ones.



Items of: Rogue state : [Record #38146]

Permanent location

Eastern Branch - NCE

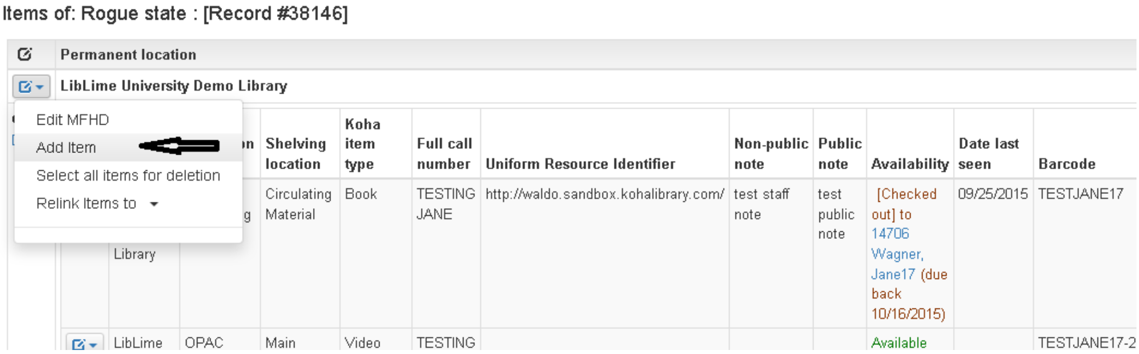
Current location	Item type	Availability	Date acquired	System ID
Eastern Branch - NCE	Book	Available	04/24/2017	38066

Permanent location

LibLime Demo Public Library

Current location	Collection code	Shelving location	Item type	Full call number	Copy number	Uniform Resource Identifier	Non-public note	Public note	Availability	Date last seen	Barcode	Date acquired	Cost, normal purchase price	Price effec from
LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Calculator	TESTING JANE REALLY		[waldo.sandbox.kohalibrary.com]	test staff note	test public note	Available Personal Copy	07/12/2016	TESTJANE17	09/14/2015		09/14
LibLime Demo Public Library	OPAC Audiovisual	Display	Audio Books	Testing Jane					Available			07/21/2016		
LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Book	Testing Jane					lost [Lost status] Available	04/21/2017	TEST-ADDCOPY4	07/21/2016		

To add a new item, click the edit icon at the top of the screen (or the Add Item button). If there is a serials holding record, you may want to add the item under it; otherwise use the top-level:



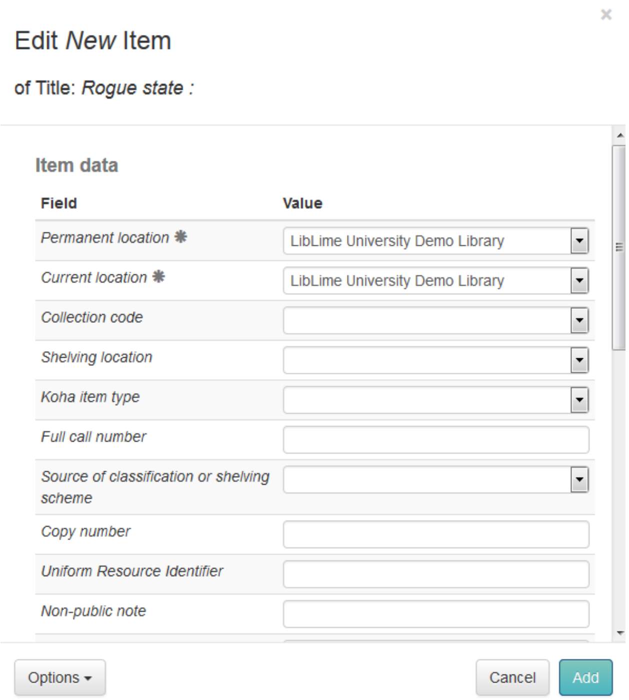
Items of: Rogue state : [Record #38146]

Permanent location

LibLime University Demo Library

		Shelving location	Koha item type	Full call number	Uniform Resource Identifier	Non-public note	Public note	Availability	Date last seen	Barcode
Library		Circulating Material	Book	TESTING JANE	http://waldo.sandbox.kohalibrary.com/	test staff note	test public note	[Checked out] to 14706 Wagner, Jane17 (due back 10/16/2015)	09/25/2015	TESTJANE17
LibLime	OPAC	Main	Video	TESTING				Available		TESTJANE17-2

This opens a popup window with item fields. Note that which fields display, and the order in which they display, is configurable in Administration, Item Fields (see Superlibrarian Guide), so your site may show different fields than these screenshots.



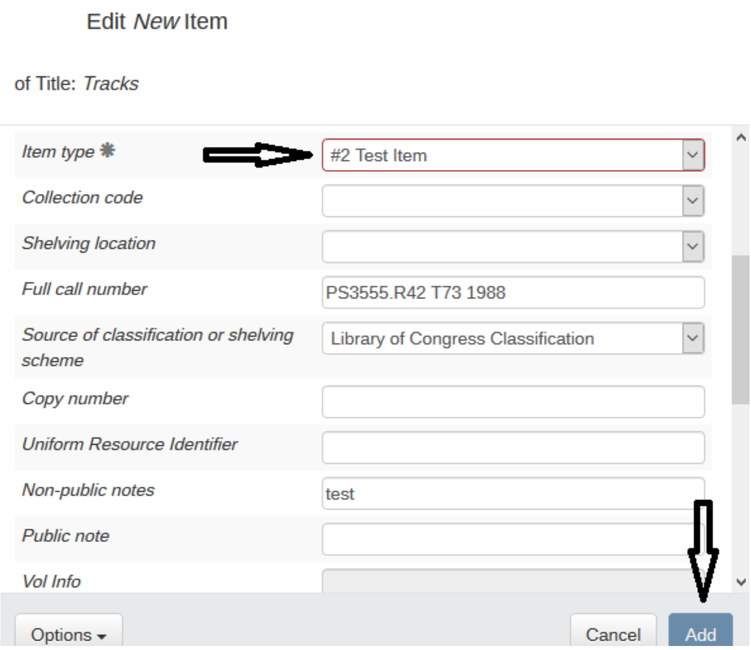
Edit *New* Item

of Title: *Rogue state :*

Item data

Field	Value
Permanent location ✱	LibLime University Demo Library
Current location ✱	LibLime University Demo Library
Collection code	
Shelving location	
Koha item type	
Full call number	
Source of classification or shelving scheme	
Copy number	
Uniform Resource Identifier	
Non-public note	

Fields marked as required on your system are indicated with an asterisk symbol. NOTE: If a required field is not completed, the field will be outlined in red and the Add button grayed (disabled). You must put a value in that field before you can save the record. If the required field is linked to an authorized list of some kind (a pulldown with values), the first entry in the list will show. However, the field is still outlined in red. You must select the value you want before you'll be able to save the record.

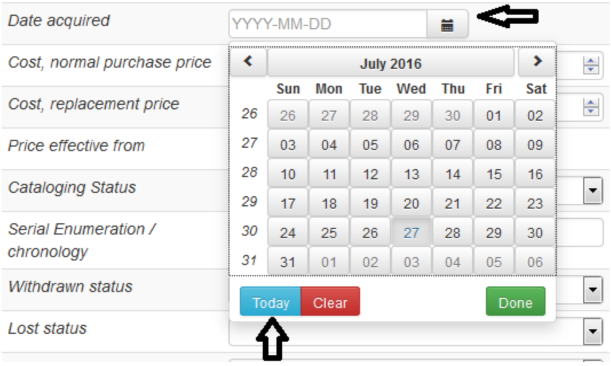


Edit *New* Item

of Title: *Tracks*

Item type ✱	#2 Test Item
Collection code	
Shelving location	
Full call number	PS3555.R42 T73 1988
Source of classification or shelving scheme	Library of Congress Classification
Copy number	
Uniform Resource Identifier	
Non-public notes	test
Public note	
Vol Info	

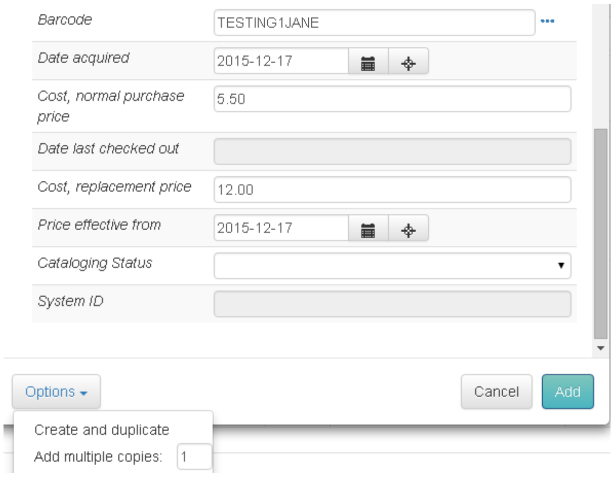
Certain fields are linked to controlled lists of values, such as branchcode and item type. Other fields are free-text entry. If your system is configured to automatically create barcodes, the system will automatically fill in the next number. Dates can be entered manually (in format YYYY-MM-DD), or you can use the calendar widget:



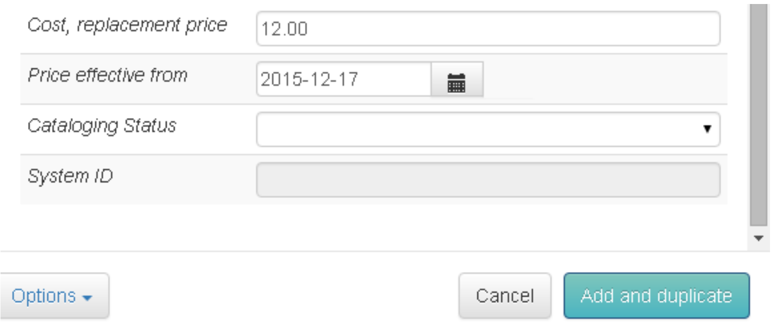
You can use the left/right arrow keys to navigate through the calendar and pick a date. The Today button at the bottom will populate the field with the current day's date (generally used for date acquired). If you leave the Date Acquired field blank, the system will auto-populate it with the current date when you save.

Fill in your needed item data. At minimum, you MUST select a permanent and current location (these are branch codes) and an item type. You probably will want to enter other data such as a call number, barcode, and replacement price if your site charges for replacing lost items. When the data entry is complete, scroll to the bottom of the page and click the Add button.

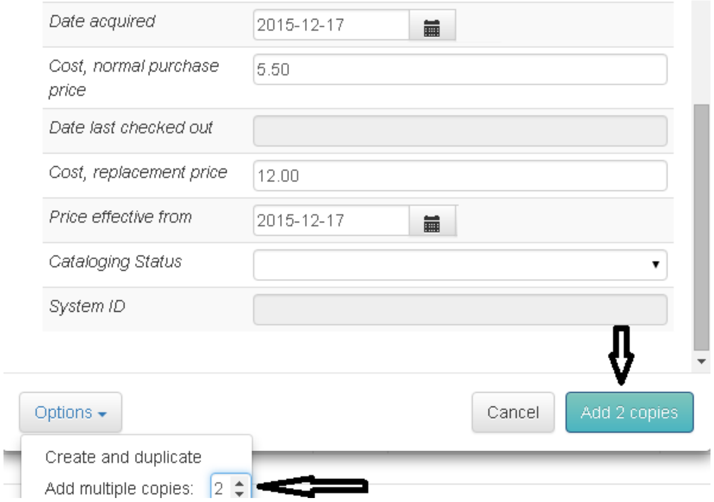
If desired for multiple copies of the same title, staff can duplicate the item just created. Click the Options button at the bottom of the screen.


Barcode TESTING1JANE
Date acquired 2015-12-17
Cost, normal purchase price 5.50
Date last checked out
Cost, replacement price 12.00
Price effective from 2015-12-17
Cataloging Status
System ID
Add multiple copies: 1

Create and Duplicate changes the Add button to Add and Duplicate:


Cost, replacement price 12.00
Price effective from 2015-12-17
Cataloging Status
System ID

That will save that item and create another with the same values (except barcode). Add Multiple Copies lets you specify the number of copies to be made – selecting it changes the button to Add X Copies:

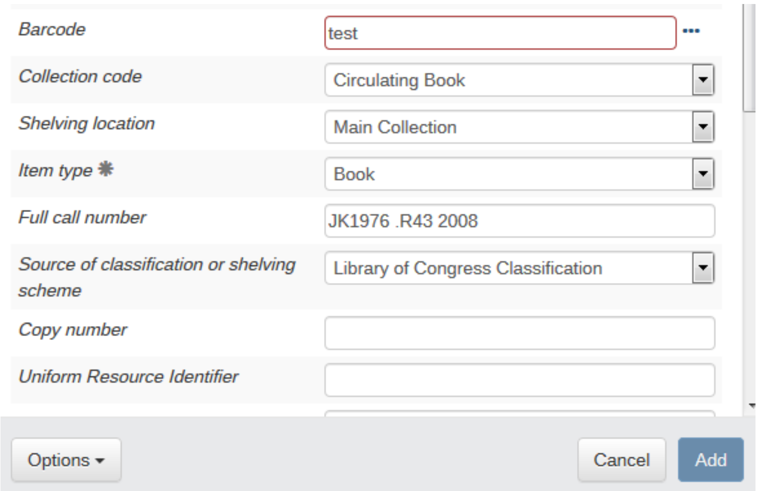


Date acquired: 2015-12-17
Cost, normal purchase price: 5.50
Date last checked out:
Cost, replacement price: 12.00
Price effective from: 2015-12-17
Cataloging Status:
System ID:
Add multiple copies: 2

The system will create that many copies, incrementing the original barcode sequentially.

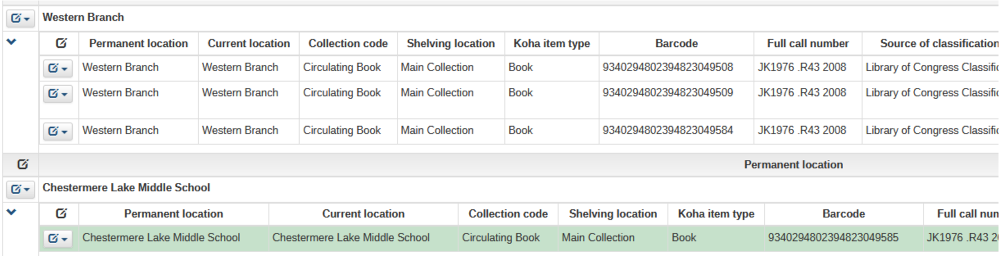
9.5.1.1 Validate Codabar Barcodes

If configured (see Item Fields section of Superlibrarian Guide), creating or editing an item may require a valid codabar barcode. If you try to enter an invalid number, the barcode field will be highlighted, and the Add/Save button will be grayed out. You will be unable to save the item record until you enter a valid barcode.



Barcode: test
Collection code: Circulating Book
Shelving location: Main Collection
Item type: Book
Full call number: JK1976 .R43 2008
Source of classification or shelving scheme: Library of Congress Classification
Copy number:
Uniform Resource Identifier:

NOTE: When you save a new (or edited) item, that item will temporarily display with a green background, as a visual cue so you can spot your item in what might be a lengthy list. If you added an item to a library which didn't already have any items, that library's section will temporarily show out of sequence, at the point on the screen (usually the bottom) where you initiated the action. After a screen refresh or a move away from/back to the screen, the library will show in its proper order. This was done intentionally to give you a visual cue that the item was created; triggering an immediate resort upon saving the item might hide it from view.



Western Branch

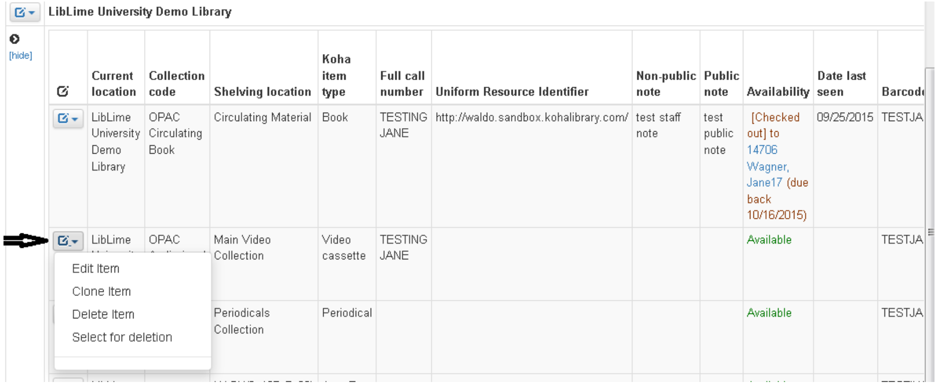
	Permanent location	Current location	Collection code	Shelving location	Koha item type	Barcode	Full call number	Source of classification
	Western Branch	Western Branch	Circulating Book	Main Collection	Book	9340294802394823049508	JK1976 .R43 2008	Library of Congress Classific
	Western Branch	Western Branch	Circulating Book	Main Collection	Book	9340294802394823049509	JK1976 .R43 2008	Library of Congress Classific
	Western Branch	Western Branch	Circulating Book	Main Collection	Book	9340294802394823049584	JK1976 .R43 2008	Library of Congress Classific

Chestermere Lake Middle School

	Permanent location	Current location	Collection code	Shelving location	Koha item type	Barcode	Full call nun
	Chestermere Lake Middle School	Chestermere Lake Middle School	Circulating Book	Main Collection	Book	9340294802394823049585	JK1976 .R43 2

9.5.2 Edit an Item Record

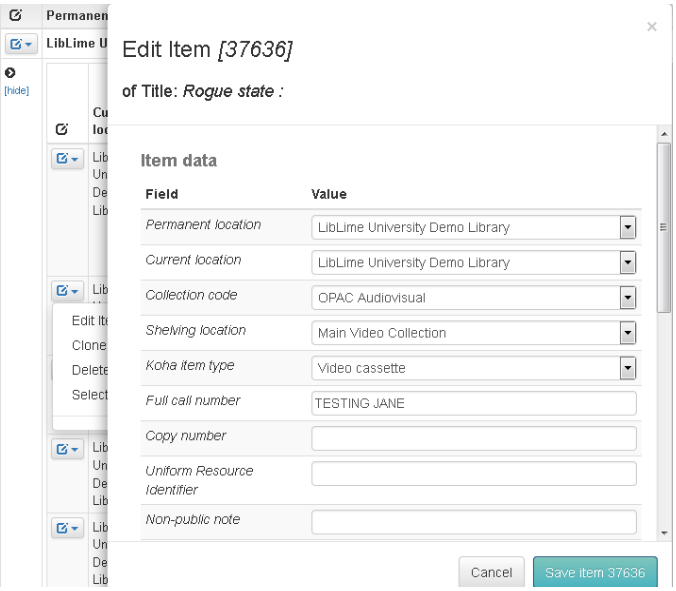
To edit an existing item, click icon next to that entry in the table display:



LibLime University Demo Library

	Current location	Collection code	Shelving location	Koha item type	Full call number	Uniform Resource Identifier	Non-public note	Public note	Availability	Date last seen	Barcode
	LibLime University Demo Library	OPAC Circulating Book	Circulating Material	Book	TESTING JANE	http://waldo.sandbox.kohalibrary.com/	test staff note	test public note	[Checked out] to 14706 Wagner, Jane17 (due back 10/16/2015)	09/25/2015	TESTJA
	LibLime	OPAC	Main Video Collection	Video cassette	TESTING JANE				Available		TESTJA
			Periodicals Collection	Periodical					Available		TESTJA

The item popup window appears, but with the data for that particular item:



Edit Item *[37636]*

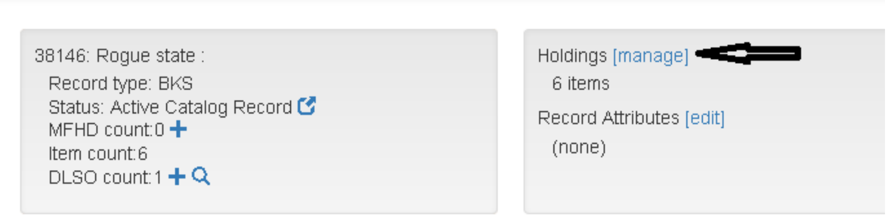
of Title: *Rogue state :*

Item data

Field	Value
Permanent location	LibLime University Demo Library
Current location	LibLime University Demo Library
Collection code	OPAC Audiovisual
Shelving location	Main Video Collection
Koha item type	Video cassette
Full call number	TESTING JANE
Copy number	
Uniform Resource Identifier	
Non-public note	

Make the desired changes and click the Save button at the bottom. As noted in the section on adding items, required fields will be marked with an asterisk. If a required field does not have a value, the field will be outlined in red and the Save button will be grayed (disabled). You will not be able to save changes unless required fields have a value.

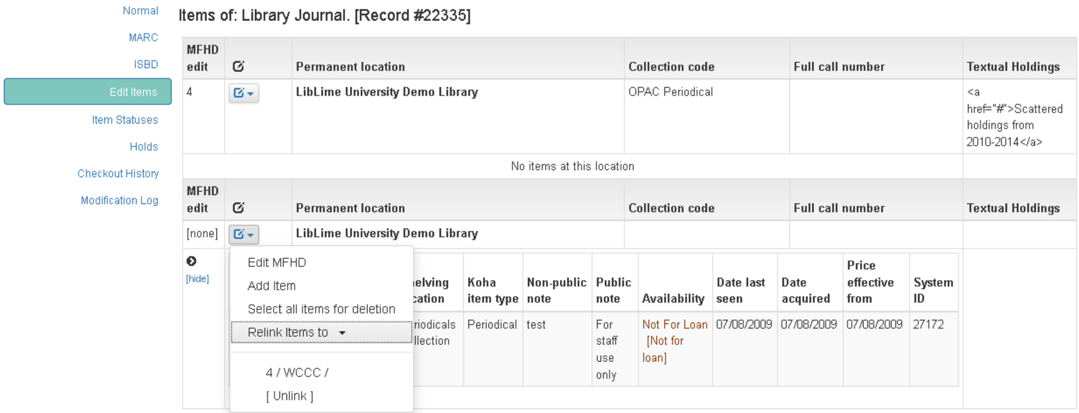
You can also reach item records from the Cataloging Editor. Click the Manage link next to items:


38146: Rogue state :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:6
DLSO count:1

Holdings [manage]
6 items
Record Attributes [edit]
(none)

This will take you to the Edit Items tab of the staff bib display; the same starting place as above. From that tab, select the item you want to edit and click the edit icon.

If there are MARC holdings records attached, the display will be slightly different. You can also choose to link the items to a different holdings record with the Relink Items entry on the edit item icon:



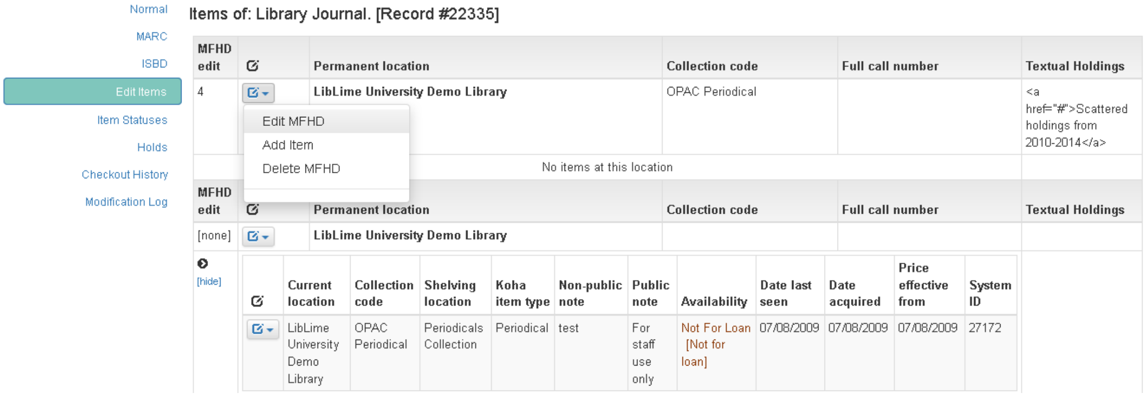
Items of: Library Journal. [Record #22335]

MFHD edit		Permanent location	Collection code	Full call number	Textual Holdings
4		LibLime University Demo Library	OPAC Periodical		Scattered holdings from 2010-2014
No items at this location					

MFHD edit		Permanent location	Collection code	Full call number	Textual Holdings
[none]		LibLime University Demo Library			

…elving …cation	Koha item type	Non-public note	Public note	Availability	Date last seen	Date acquired	Price effective from	System ID
…riodicals …llection	Periodical	test	For staff use only	Not For Loan [Not for loan]	07/08/2009	07/08/2009	07/08/2009	27172

Note that if you choose Edit MFHD under top-level display you will be taken to the Cataloging Editor and into the serial holdings record.



Items of: Library Journal. [Record #22335]

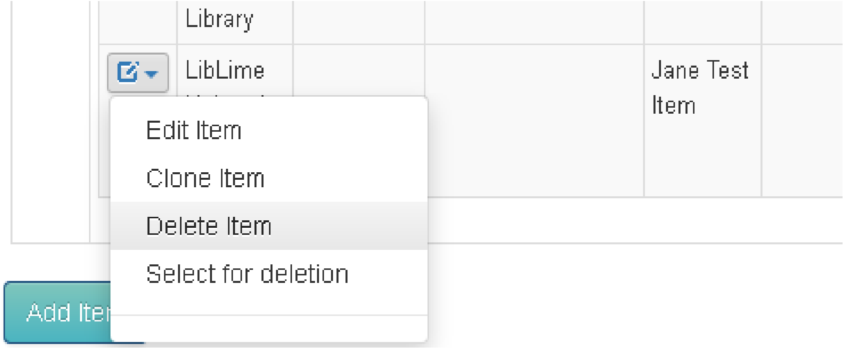
MFHD edit		Permanent location	Collection code	Full call number	Textual Holdings
4		LibLime University Demo Library	OPAC Periodical		Scattered holdings from 2010-2014
No items at this location					

MFHD edit		Permanent location	Collection code	Full call number	Textual Holdings
[none]		LibLime University Demo Library			

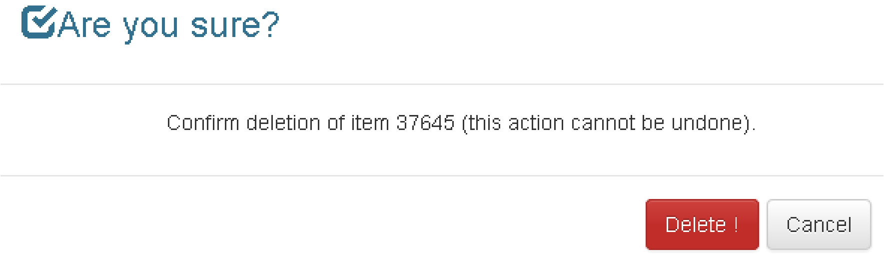
	Current location	Collection code	Shelving location	Koha item type	Non-public note	Public note	Availability	Date last seen	Date acquired	Price effective from	System ID
	LibLime University Demo Library	OPAC Periodical	Periodicals Collection	Periodical	test	For staff use only	Not For Loan [Not for loan]	07/08/2009	07/08/2009	07/08/2009	27172

9.5.3 Delete Item(s)

If your login has permissions, you can delete an individual item by selecting Delete from the menu in the edit icon:



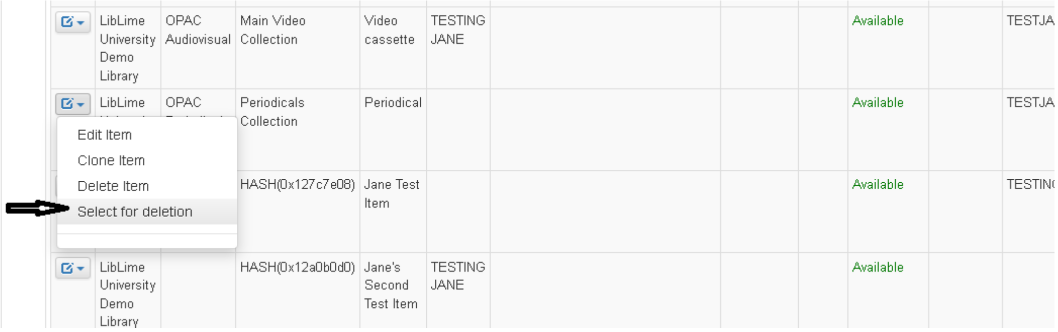
You'll get a popup screen asking you to confirm the deletion.



Are you sure?

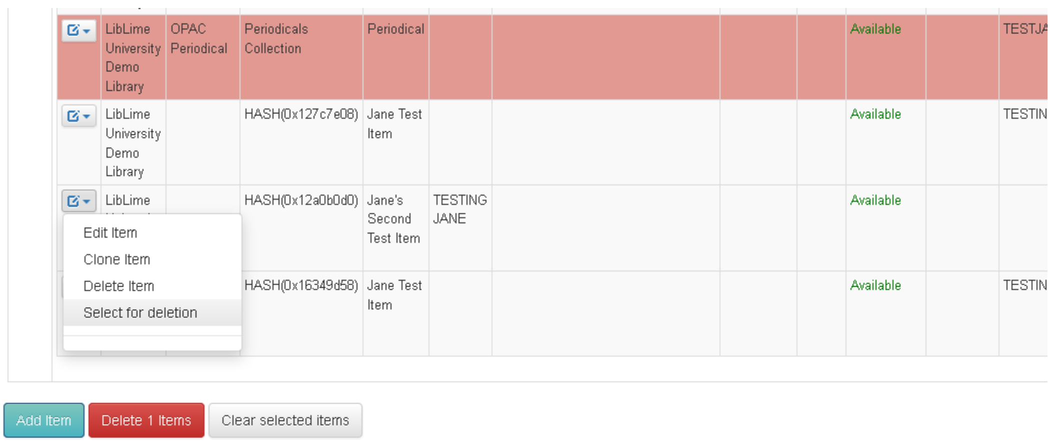
Confirm deletion of item 37645 (this action cannot be undone).

You can also select multiple items for deletion. Under the top line's icon there is an option to select all for deletion. If you only want certain ones, use the icon next to each item and choose Select for Deletion:



LibLime University Demo Library	OPAC Audiovisual	Main Video Collection	Video cassette	TESTING JANE	Available	TESTJA
LibLime	OPAC	Periodicals Collection	Periodical		Available	TESTJA
		HASH(0x127c7e08)	Jane Test Item		Available	TESTIN
LibLime University Demo Library		HASH(0x12a0b0d0)	Jane's Second Test Item	TESTING JANE	Available	

That entry is highlighted in red in the items table, and you can select another item.

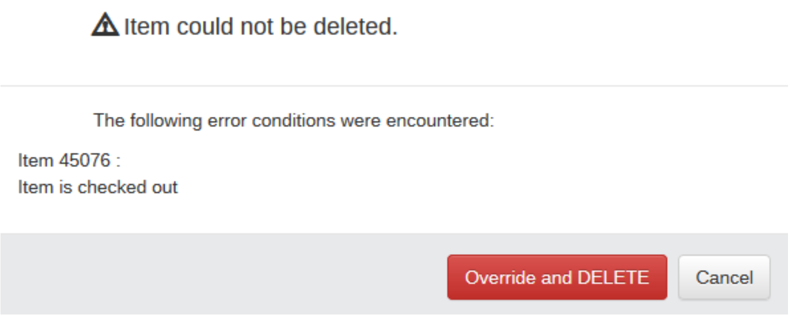


	LibLime University Demo Library	OPAC Periodical	Periodicals Collection	Periodical					Available		TESTJA
	LibLime University Demo Library		HASH(0x127c7e08)	Jane Test Item					Available		TESTIN
	LibLime		HASH(0x12a0b0d0)	Jane's Second Test Item	TESTING JANE				Available		
			HASH(0x16349d58)	Jane Test Item					Available		TESTIN

When you have selected all you want, click the Delete X (count) Items button. You can clear your selections with the Clear Selected Items button.

9.5.3.1 Deleting Checked-Out Items

It is possible (although not recommended) to delete an item that is checked out to someone. If you choose a checked-out item for deletion, you'll get an extra popup window after the "are you sure" popup:



⚠ Item could not be deleted.

The following error conditions were encountered:

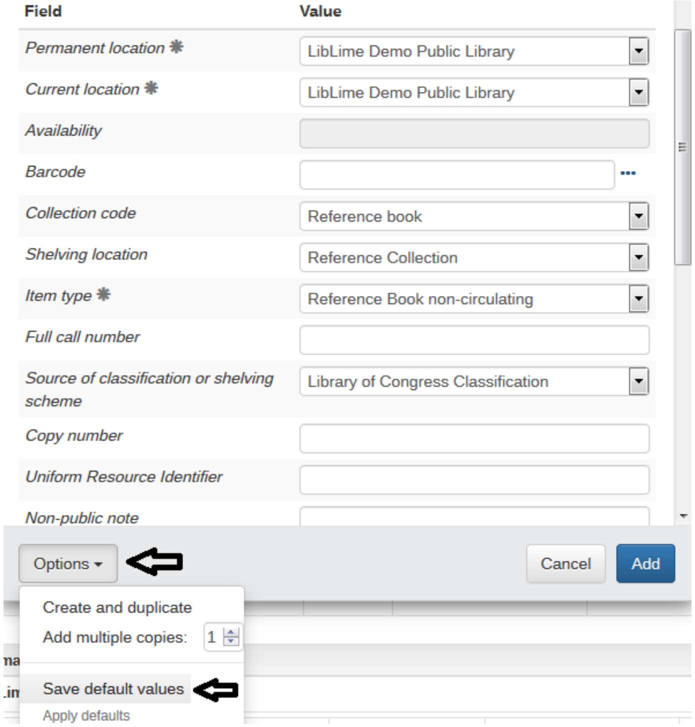
Item 45076 :
Item is checked out

If you choose to override and delete, the item will be deleted. It will be removed from the patron's list of checkouts and added to the patron's Lost Items tab. The patron will be charged any applicable replacement costs and surcharges.

9.5.4 Item Session Defaults

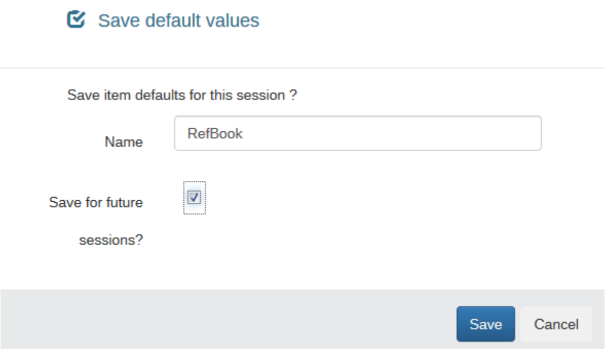
9.5.4.1 Defaults for Field Values

Catalogers can set session defaults (and save them for future use) when creating multiple items with the same characteristics. A sample use case might be creating items for new book arrivals, or for pieces of a monographic series, where all the settings are the same for each item except the barcode. In the Add Item screen, set the various fields to the desired values (and clear any fields unique to this item, such as barcode or perhaps call number). Then, at the bottom under Options, click Save Default Values.



Field	Value
Permanent location ✱	LibLime Demo Public Library
Current location ✱	LibLime Demo Public Library
Availability	
Barcode	
Collection code	Reference book
Shelving location	Reference Collection
Item type ✱	Reference Book non-circulating
Full call number	
Source of classification or shelving scheme	Library of Congress Classification
Copy number	
Uniform Resource Identifier	
Non-public note	

That opens a popup window where you can name your default set.



Save default values

Save item defaults for this session ?

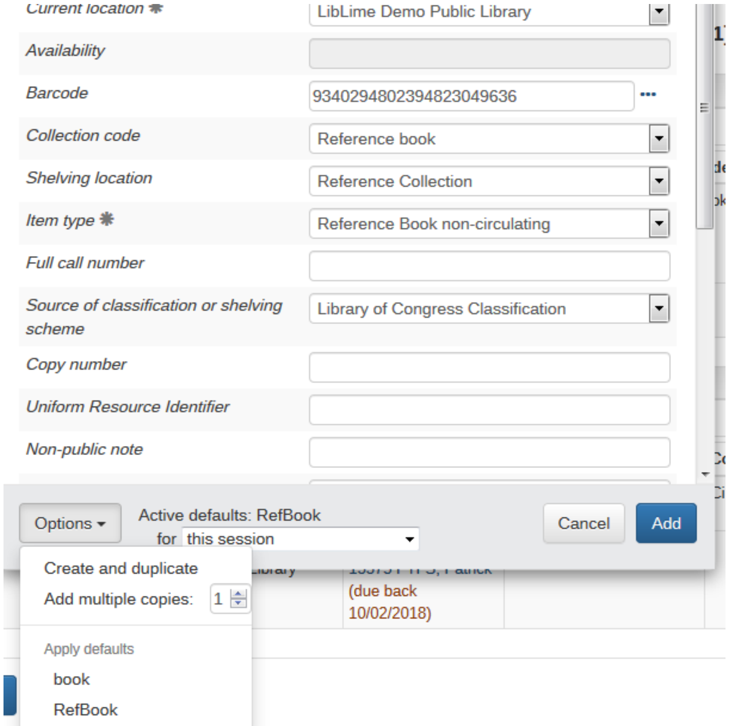
Name: RefBook

Save for future sessions? ☑

Note that you can save this set for future sessions (check that box) or only have it available during your currently logged-in session.

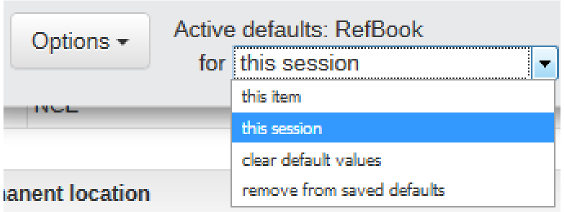
WARNING: If your site uses auto-generated barcodes, be sure to clear that field before saving your default set. Otherwise using the set will try to set the same barcode for all new items.

The next item you create in the current session will retain those settings. Your saved set is available under the Options dropdown:



Current location: LibLime Demo Public Library
Availability:
Barcode: 9340294802394823049636
Collection code: Reference book
Shelving location: Reference Collection
Item type: Reference Book non-circulating
Full call number:
Source of classification or shelving scheme: Library of Congress Classification
Copy number:
Uniform Resource Identifier:
Non-public note:
Active defaults: RefBook for this session

You could select another default set (like "book" in the above screenshot). You could also choose to clear the defaults from the current item, change the active default from the session to just the current item, or delete the default set.

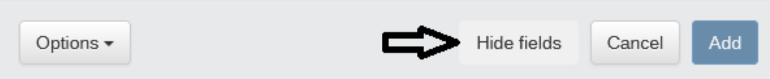


Active defaults: RefBook for this session

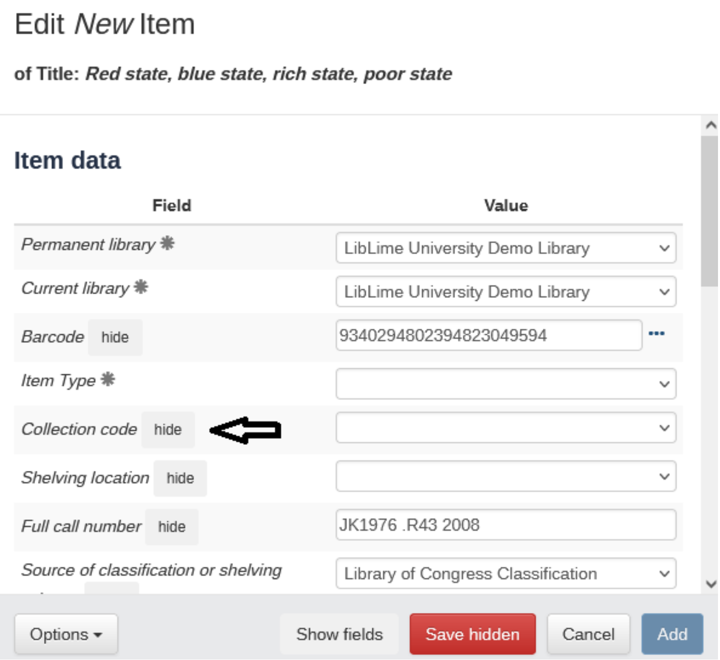
Saved default sets are tied to the user's homebranch. Defaults set by one user will be visible to other staff from the same branch, but will not be visible to staff at other branches.

9.5.4.2 Hidden Field Defaults

Staff users can also opt to hide individual fields from item add or edit screens. These are saved as user preferences, so one user's settings won't affect another. At the bottom of the edit screen click the new Hide Fields button:



A "hide" button appears next to any field that is not marked as required:



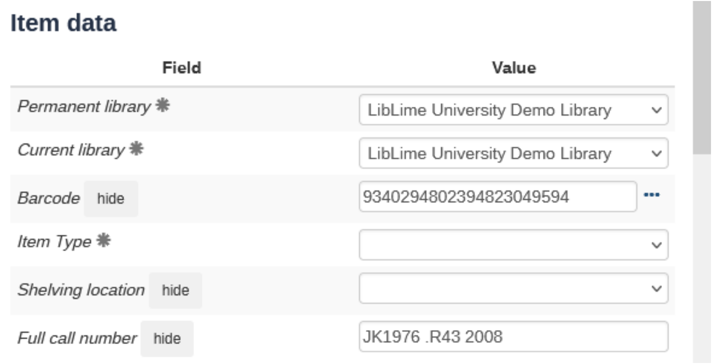
Edit *New* Item

of Title: ***Red state, blue state, rich state, poor state***

Item data

Field	Value
Permanent library ✱	LibLime University Demo Library
Current library ✱	LibLime University Demo Library
Barcode hide	9340294802394823049594
Item Type ✱	
Collection code hide	
Shelving location hide	
Full call number hide	JK1976 .R43 2008
Source of classification or shelving	Library of Congress Classification

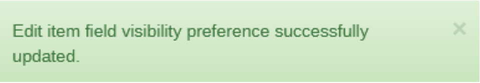
Clicking that button will hide that field – in this example, collection code:



Item data

Field	Value
Permanent library ✱	LibLime University Demo Library
Current library ✱	LibLime University Demo Library
Barcode hide	9340294802394823049594
Item Type ✱	
Shelving location hide	
Full call number hide	JK1976 .R43 2008

If you want to save that, click the red Save Hidden button at the bottom. You’ll see a popup confirming the save:



Edit item field visibility preference successfully updated.

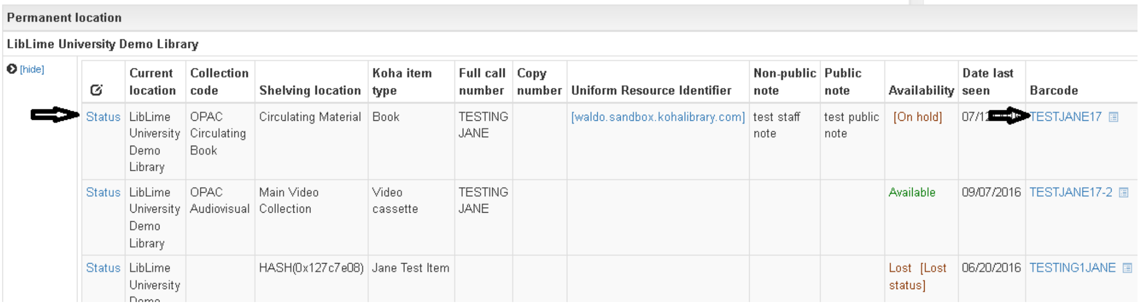
You can log out and back in, and that field will still be hidden. If you want to restore the field to the screen, click the Show Fields button at the bottom:

Note that this will update your user preferences, removing all the saved hidden settings. You will see the same “successfully updated” popup as above.

9.5.5 Item Status Settings

The old Items tab has been renamed Item Statuses. This tab is where staff can set certain statuses, like Lost or Damaged. It also has links to some circulation history and settings for item attributes. **NOTE: the setting for Withdrawn status has been removed from this screen; sites should enable it for display in the item edit screen (see Superlibrarian Guide section on Item Fields) and set Withdrawn status there as needed.**

You can get to the tab by clicking either the Status link or the barcode link in the item display:



Permanent location

LibLime University Demo Library

	Current location	**Collection code**	**Shelving location**	**Koha item type**	**Full call number**	**Copy number**	**Uniform Resource Identifier**	**Non-public note**	**Public note**	**Availability**	**Date last seen**	**Barcode**
Status	LibLime University Demo Library	OPAC Circulating Book	Circulating Material	Book	TESTING JANE		[waldo.sandbox.kohalibrary.com]	test staff note	test public note	[On hold]	07/1	TESTJANE17
Status	LibLime University Demo Library	OPAC Audiovisual	Main Video Collection	Video cassette	TESTING JANE					Available	09/07/2016	TESTJANE17-2
Status	LibLime University		HASH(0x127c7e08)	Jane Test Item						Lost [Lost status]	06/20/2016	TESTING1JANE

Or by selecting the Item Statuses option in the sidebar menu:

Rogue state :

Biblionumber: 38146
ISBN: 0895260689
Publisher: Washington, D.C. : Regnery Publishing, c2004.
Physical details: 246 p., [8] p. of plates : ill. ; 24 cm.
No of items: 15

Barcode TESTJANE17

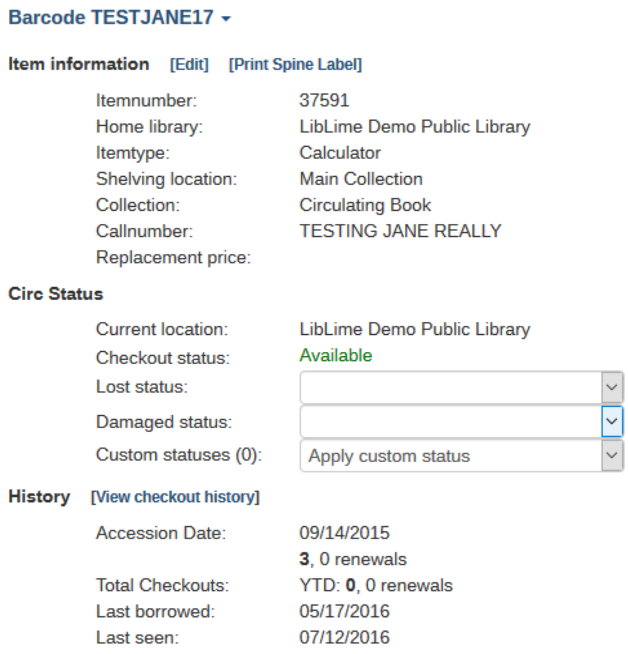
Item information [Edit this item]

Itemnumber:	37591
Home library:	LibLime Demo Public Library
Itemtype:	Calculator
Shelving location:	CIRCULATING
Callnumber:	TESTING JANE REALLY
Replacement price:	

Circ Status

Current location: LibLime Demo Public Library

Scroll down to the item you want to change. The Edit This Item link will open that item in the editor screen. The Statuses section will let you change statuses. A new granular permission, editcatalogue.item.status, explicitly controls who is allowed to change status on an item.



Barcode TESTJANE17

Item information [Edit] [Print Spine Label]

Itemnumber: 37591
Home library: LibLime Demo Public Library
Itemtype: Calculator
Shelving location: Main Collection
Collection: Circulating Book
Callnumber: TESTING JANE REALLY
Replacement price:

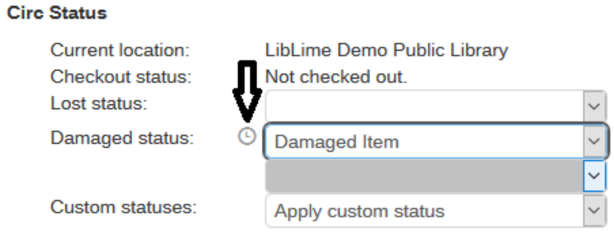
Circ Status

Current location: LibLime Demo Public Library
Checkout status: Available
Lost status:
Damaged status:
Custom statuses (0): Apply custom status

History [View checkout history]

Accession Date: 09/14/2015
Total Checkouts: **3**, 0 renewals
YTD: **0**, 0 renewals
Last borrowed: 05/17/2016
Last seen: 07/12/2016

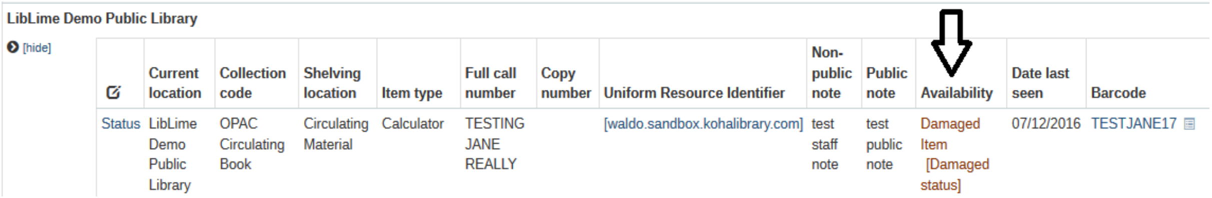
For example, to mark the item damaged, use the pulldown to select the damaged status. You will see a brief clock icon as the system records the new status.



Circ Status

Current location: LibLime Demo Public Library
Checkout status: Not checked out.
Lost status:
Damaged status: Damaged Item
Custom statuses: Apply custom status

When that is finished (only a second or two), the item shows as Damaged both on this tab and in the item display:

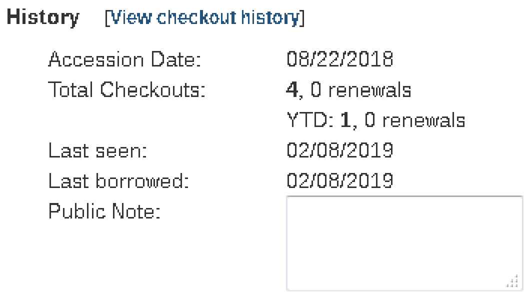


LibLime Demo Public Library

[hide]

	Current location	Collection code	Shelving location	Item type	Full call number	Copy number	Uniform Resource Identifier	Non-public note	Public note	Availability	Date last seen	Barcode
Status	LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Calculator	TESTING JANE REALLY		[waldo.sandbox.kohalibrary.com]	test staff note	test public note	Damaged Item [Damaged status]	07/12/2016	TESTJANE17

The Item Status tab also shows brief circulation history for each item, including number of checkouts:

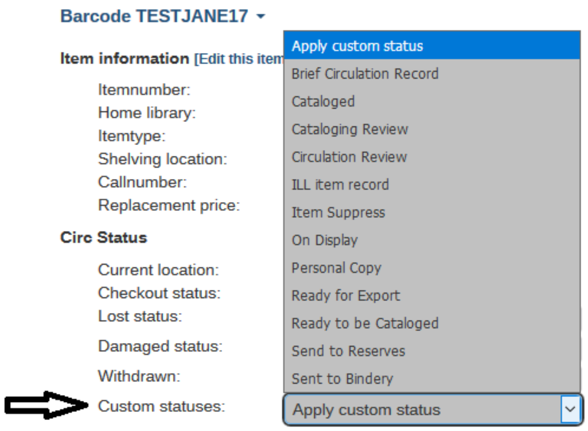


History [View checkout history]

Accession Date: 08/22/2018
Total Checkouts: **4**, 0 renewals
YTD: **1**, 0 renewals
Last seen: 02/08/2019
Last borrowed: 02/08/2019
Public Note:

9.5.5.1 Custom Item Status

The previous Item Attribute settings have been replaced by Custom Item Statuses. See the Superlibrarian Guide for configuration information. On the Item Statuses tab, one or more custom statuses can be applied to an individual item record:


Barcode TESTJANE17

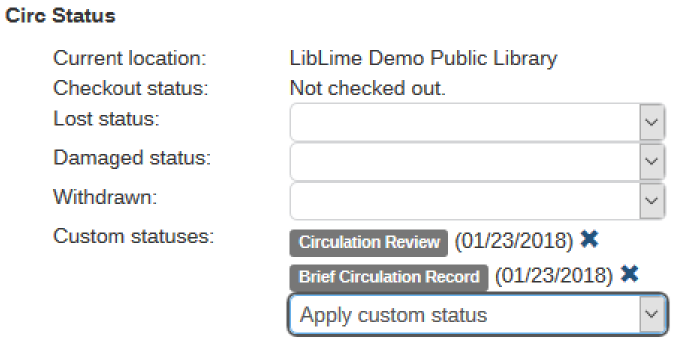
Item information [Edit this item]

Itemnumber:
Home library:
Itemtype:
Shelving location:
Callnumber:
Replacement price:

Circ Status

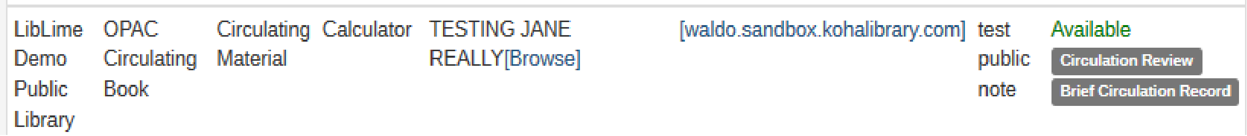
Current location:
Checkout status:
Lost status:
Damaged status:
Withdrawn:
Custom statuses: Apply custom status

Select a policy and it will apply to the item. You can then apply another status if desired.


Circ Status

Current location: LibLime Demo Public Library
Checkout status: Not checked out.
Lost status:
Damaged status:
Withdrawn:
Custom statuses: Circulation Review (01/23/2018) ✖
Brief Circulation Record (01/23/2018) ✖
Apply custom status

The status shows in the item display in both staff and Discovery Layer view:



LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Calculator	TESTING JANE REALLY[Browse]	[waldo.sandbox.kohalibrary.com]	test public note	Available Circulation Review Brief Circulation Record

A status can be removed manually by clicking the X next to it on the Item Statuses tab display. Depending on its configuration, a status may also be removed at item checkin or checkout. If specified in the setup, holds may be blocked while an item has the status.

9.5.5.2 Reports to Find Items with Custom Statuses

Here are a couple of SQL reports to count and identify items which have custom statuses applied. This one gives a count of how many times a status is used:

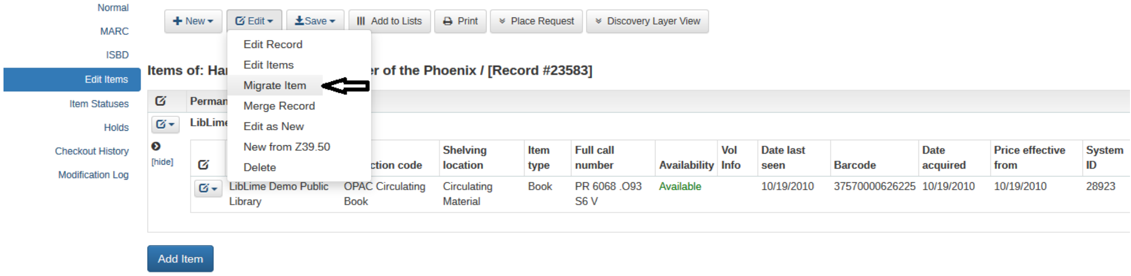
```
select name,count(*) from item_itemstatus join itemstatus on ( itemstatus.id =
itemstatus_id) group by itemstatus_id order by name
```

This one lists titles and items which have one or more statuses applied:

```
select   biblio.title,   barcode,items.biblionumber,   itemnumber,   (select
group_concat(name) from item_itemstatus join itemstatus on ( itemstatus.id =
itemstatus_id) where item_id=items.itemnumber) as "itemstatus" from items join
biblio on (items.biblionumber = biblio.biblionumber) where (select count(*)
from item_itemstatus where item_id=itemnumber) > 0 order by title
```

9.5.6 Moving Items to Another Title

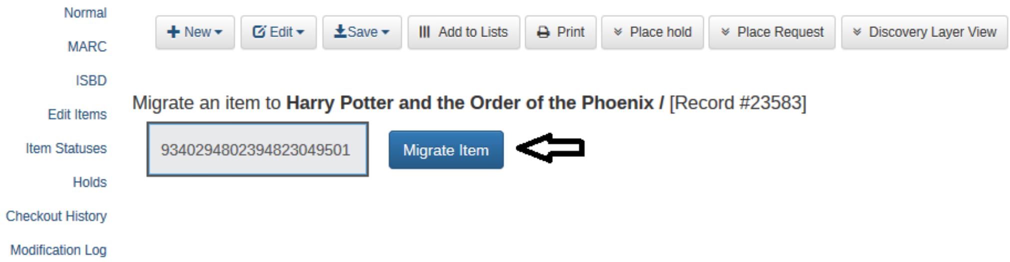
You can move an item from one title to another without deleting either title. First, copy the barcode of the item you want to move (items cannot be moved if they don't have a barcode). On the record **to which** you want to move the item, go to the Edit Items tab. At the top, click the Edit button and choose Migrate Item.



Items of: Ha… r of the Phoenix / [Record #23583]

	ction code	Shelving location	Item type	Full call number	Availability	Vol Info	Date last seen	Barcode	Date acquired	Price effective from	System ID
LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Book	PR 6068 .O93 S6 V	Available		10/19/2010	37570000626225	10/19/2010	10/19/2010	28923

At the next screen, enter the barcode of the item to be moved and click the Migrate Item button:



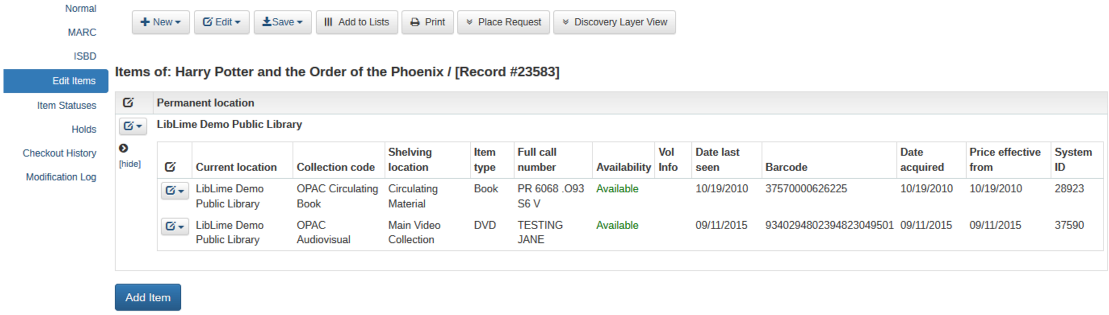
Migrate an item to **Harry Potter and the Order of the Phoenix /** [Record #23583]

9340294802394823049501

You'll get a popup indicating success (or warning if there is a problem):

The item was migrated successfully

The screen stays on this function and you can enter another barcode to be moved, if desired. When finished, go to the Normal or Edit Items tab to see the items:



Items of: Harry Potter and the Order of the Phoenix / [Record #23583]

Permanent location

LibLime Demo Public Library

Current location	Collection code	Shelving location	Item type	Full call number	Availability	Vol Info	Date last seen	Barcode	Date acquired	Price effective from	System ID
LibLime Demo Public Library	OPAC Circulating Book	Circulating Material	Book	PR 6068 .O93 S6 V	Available		10/19/2010	37570000626225	10/19/2010	10/19/2010	28923
LibLime Demo Public Library	OPAC Audiovisual	Main Video Collection	DVD	TESTING JANE	Available		09/11/2015	9340294802394823049501	09/11/2015	09/11/2015	37590

9.5.7 GUIDE/UUID Item Fields

Certain sites want to create a GUIDE/UUID unique identifier for each item. Provision has been made for this in subfields in the item record. If your site uses this, $S is the site ID code (based off a default entry in the authorized value GUIDE_SITE), and $i is the system-generated UUID. If you leave those subfields blank, the system will auto-generate the values. You can also enter specific values for already-existing identifiers.

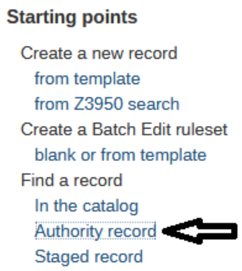
By default, the display of the GUIDE/UUID is hidden in the staff and Discovery Layer bib display. See the Item Fields part of the Superlibrarian Guide for information on how to show or hide item fields. Most sites will not use this feature.

9.6 Managing Authority Records

Much of this was covered in the section on managing bibliographic records above. However, authority records can be searched, edited, and saved without going through the bibliographic record. NOTE: there are new granular permissions which allow finer control for who is allowed to view, edit, or delete authority records. The stage and commit permissions control creating an authority record, both through batch import and manually in the cataloging editor.

9.6.1 Searching for Authority Records

From the staff client, launch the Cataloging Editor. From Starting Points, Find a record, select Authority Record.



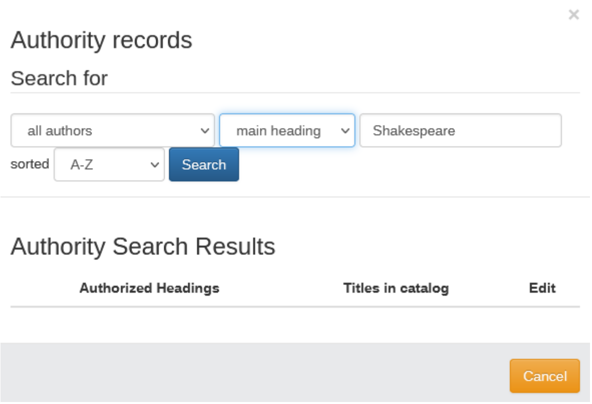
Starting points

Create a new record
- from template
- from Z3950 search

Create a Batch Edit ruleset
- blank or from template

Find a record
- In the catalog
- Authority record
- Staged record

A search window will appear; enter your search term and any options (type of authority, containing or starting with the search term).



Authority records

Search for

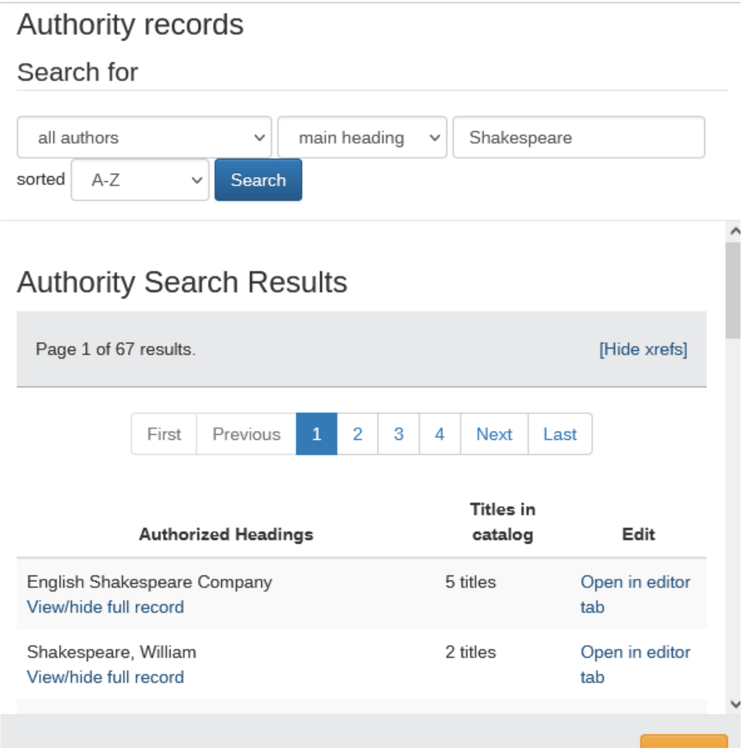
all authors | main heading | Shakespeare

sorted A-Z

Authority Search Results

Authorized Headings	Titles in catalog	Edit

Search results will show in the window underneath the display of the search terms.



Authority records

Search for

all authors | main heading | Shakespeare

sorted A-Z

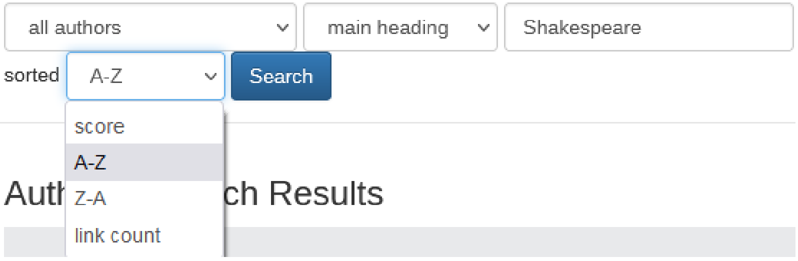
Authority Search Results

Page 1 of 67 results.

Authorized Headings	Titles in catalog	Edit
English Shakespeare Company View/hide full record	5 titles	Open in editor tab
Shakespeare, William View/hide full record	2 titles	Open in editor tab

The above image shows a search for any author record with the main entry of “Shakespeare”. The search results display lists the heading, and shows how many titles in the system are using it. It also has a link to open the heading in the Cataloging Editor.

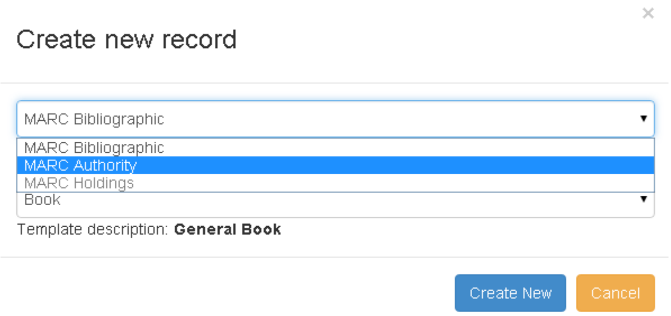
A sort option will allow you to sort by several options, including the number of linked records, so that you can see the most-used entries in the search results:



all authors
main heading
Shakespeare
sorted A-Z

9.6.2 Creating Authority Records

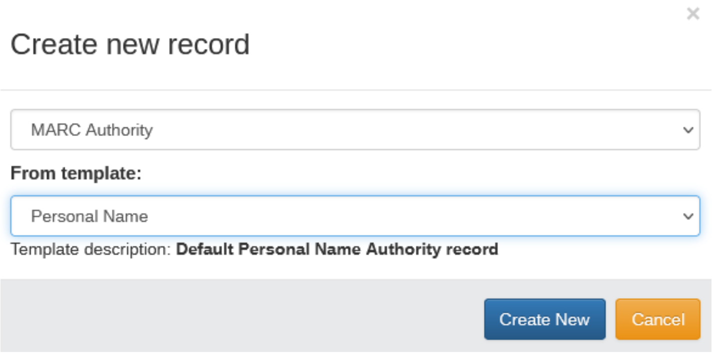
You can create a new authority record from scratch in the Cataloging Editor. Create a new record from template, then, in the popup, choose MARC Authority from the first pulldown:



Create new record

MARC Bibliographic
Book
Template description: **General Book**

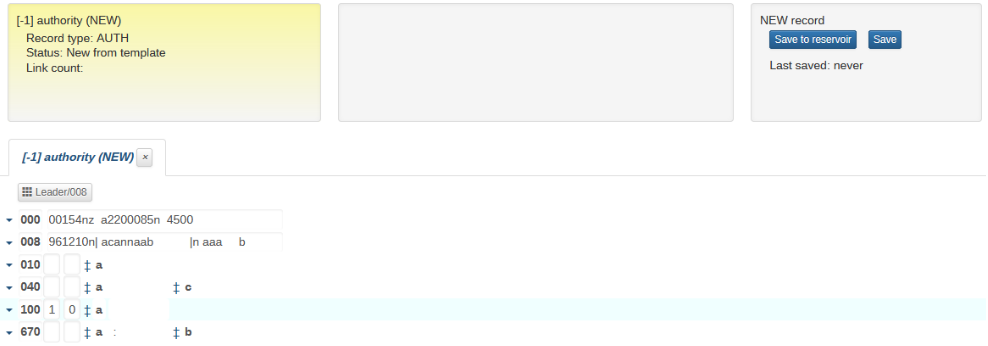
In the second pulldown, select the type of authority to be created (personal name, subject, etc.):



Create new record

MARC Authority
From template:
Personal Name
Template description: **Default Personal Name Authority record**

Then click the Create New button and an empty record will open in the Cataloging Editor.



[-1] authority (NEW)
Record type: AUTH
Status: New from template
Link count:

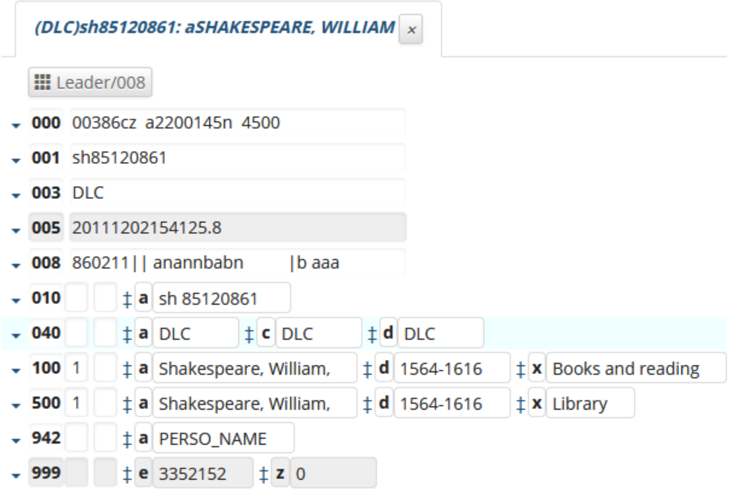
NEW record
Last saved: never

```
000  00154nz  a2200085n  4500
008  961210n| acannaab        |n aaa     b
010        ‡ a
040        ‡ a              ‡ c
100  1  0  ‡ a
670        ‡ a  :           ‡ b
```

Enter the needed data and save; the record will be available for linking to a bib record after a minute or two for indexing.

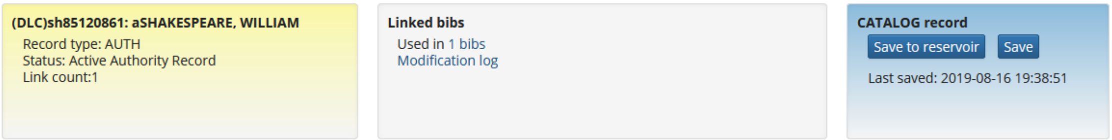
9.6.3 Editing Authority Records

When you open the link in the Cataloging Editor, the display is similar to editing a bib record.   Move the cursor to the field to be edited and type your desired text.



```
000  00386cz  a2200145n  4500
001  sh85120861
003  DLC
005  20111202154125.8
008  860211|| anannbabn        |b aaa
010        ‡ a sh 85120861
040        ‡ a DLC        ‡ c DLC        ‡ d DLC
100  1     ‡ a Shakespeare, William,  ‡ d 1564-1616  ‡ x Books and reading
500  1     ‡ a Shakespeare, William,  ‡ d 1564-1616  ‡ x Library
942        ‡ a PERSO_NAME
999        ‡ e 3352152    ‡ z 0
```

At the top of the authority record itself information about this record shows in a summary box (yellow background for authority records). You'll see the status, how many bibs use this authority, and whether changes need saving.

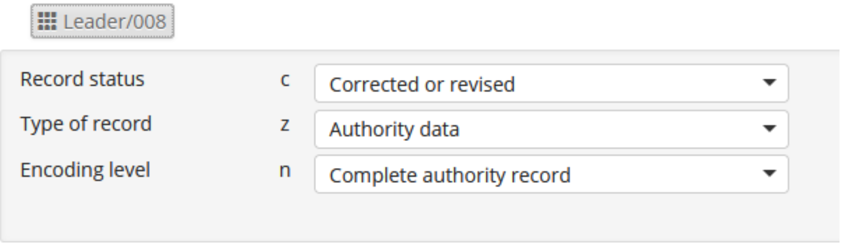


(DLC)sh85120861: aSHAKESPEARE, WILLIAM
Record type: AUTH
Status: Active Authority Record
Link count:1

Linked bibs
Used in 1 bibs
Modification log

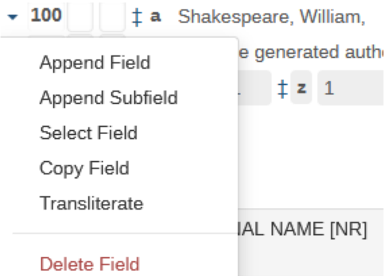
CATALOG record
Last saved: 2019-08-16 19:38:51

To edit the Leader (000) and the 008, click on the Leader008 tag. The Cataloging editor opens up the Leader in an interactive box (shown below). Clicking on any of the arrows to the right of each entry shows the full list of options for each spot in the Leader and 008.



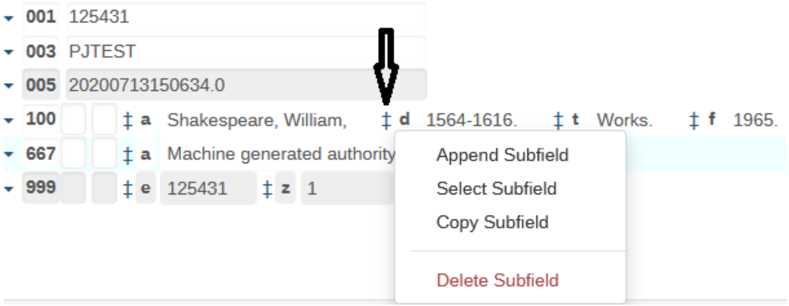
Record status c Corrected or revised
Type of record z Authority data
Encoding level n Complete authority record

To append or delete a field or to add a new subfield, click on the arrow just to the left of the field to be edited; a list of options will display.



100 ‡ a Shakespeare, William,
e generated auth
‡ z 1
IAL NAME [NR]

To append or delete a subfield, click on the image just to the left of the subfield and a menu will display



001 125431
003 PJTEST
005 20200713150634.0
100 ‡ a Shakespeare, William, ‡ d 1564-1616. ‡ t Works. ‡ f 1965.
667 ‡ a Machine generated authority
999 ‡ e 125431 ‡ z 1

Changes can be saved by clicking on the SAVE option to the top righthand side of the Cataloging Editor; staff can save a record and have it remain open so that during the process of editing, they can save their work. The system displays the last edit date and time.

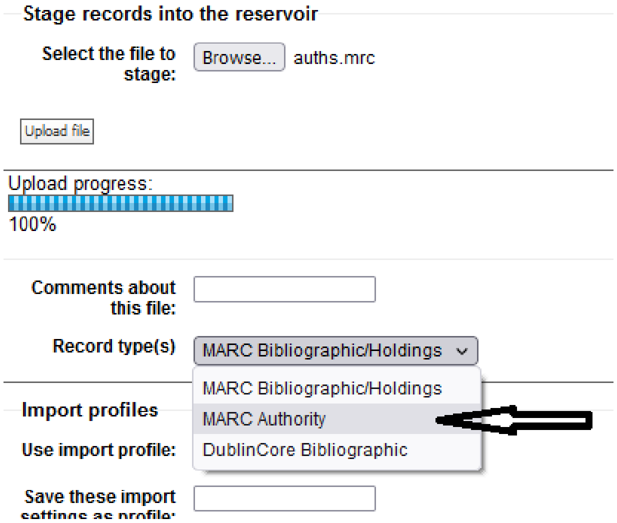
Last saved: Jul 13, 2020

After saving, the reindexing and relinking of headings to all relevant bibs may take a few minutes as the indexing catches up.

9.6.4 Importing Authority Records

Authority records are now imported through the same tool and in the same manner as bibliographic records. See that section above.

Authorities must be imported as a separate file, not mixed in with bibliographic records. Records to be imported must be in UTF8 format. This format is established when exporting the authority records from the source. Please check with the provider of your authority records if you have any questions on this step. After uploading the file, note that you MUST specify that the records are authority records:

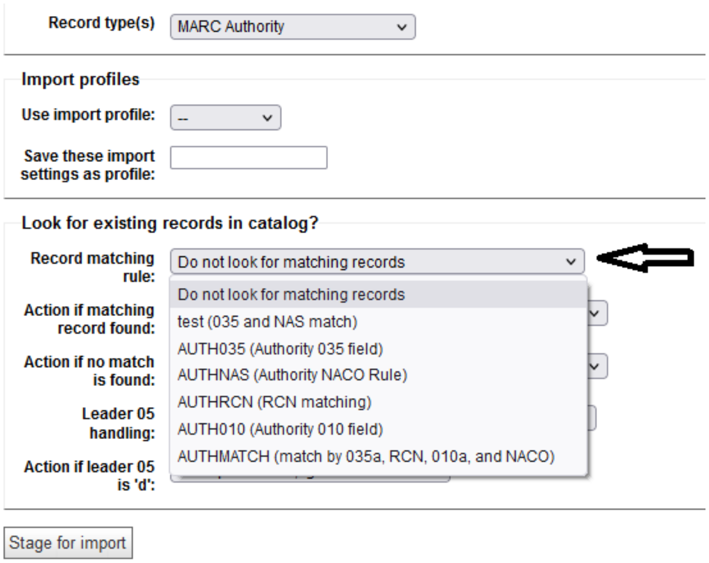


auths.mrc

100%

Making this selection removes the inappropriate item selection fields seen in the earlier bib import section and gives you options for authority imports.

You can create matching rules for authority imports (see the Superlibrarian Training Guide) and use those matching rules to overlay existing brief or outdated records. Available match points include the 035$a, the NACO, and the RCN (combination of 001 and 003 fields). Use the Record Matching Rule pulldown to select an authority matching rule from those defined on the system:

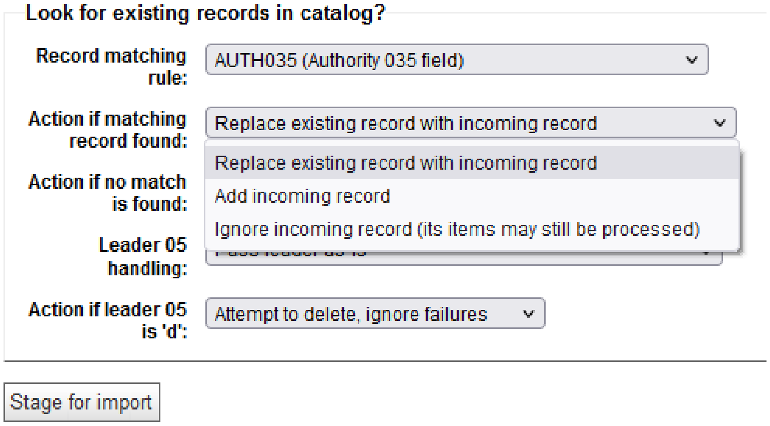


Record type(s): MARC Authority

Use import profile: --

Record matching rule: Do not look for matching records

Once you have selected your rule, set your options for (1) what to do if a match is found:

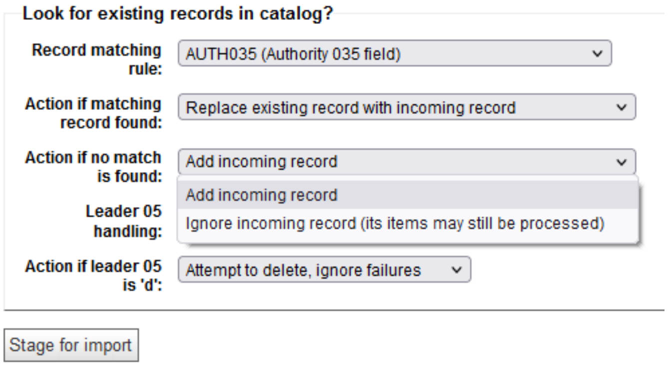


Record matching rule: AUTH035 (Authority 035 field)

Action if matching record found: Replace existing record with incoming record

Action if leader 05 is 'd': Attempt to delete, ignore failures

And (2) what to do if no match is found:



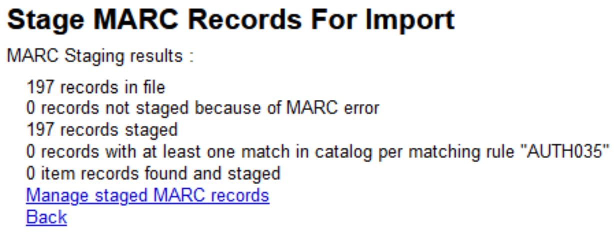
Record matching rule: AUTH035 (Authority 035 field)

Action if matching record found: Replace existing record with incoming record

Action if no match is found: Add incoming record

Action if leader 05 is 'd': Attempt to delete, ignore failures

When you click the Stage for Import button, the system applies the matching rule against any authority records already in the database. If any are found, the count will reflect that.

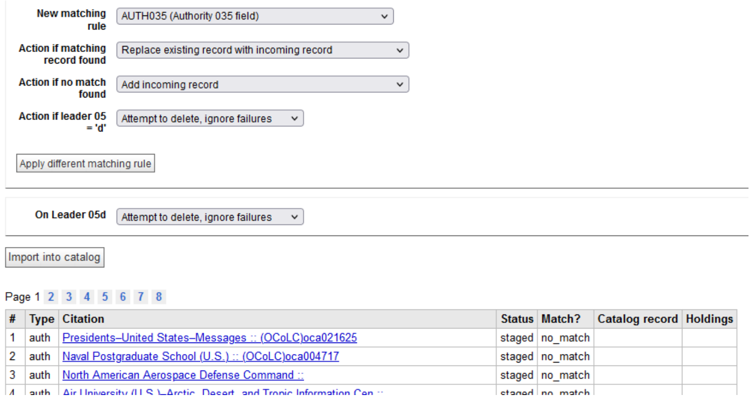


Stage MARC Records For Import

MARC Staging results :

197 records in file
0 records not staged because of MARC error
197 records staged
0 records with at least one match in catalog per matching rule "AUTH035"
0 item records found and staged
Manage staged MARC records
Back

Follow the link or go into Manage Staged Records to load the batch:



New matching rule: AUTH035 (Authority 035 field)
Action if matching record found: Replace existing record with incoming record
Action if no match found: Add incoming record
Action if leader 05 = 'd': Attempt to delete, ignore failures

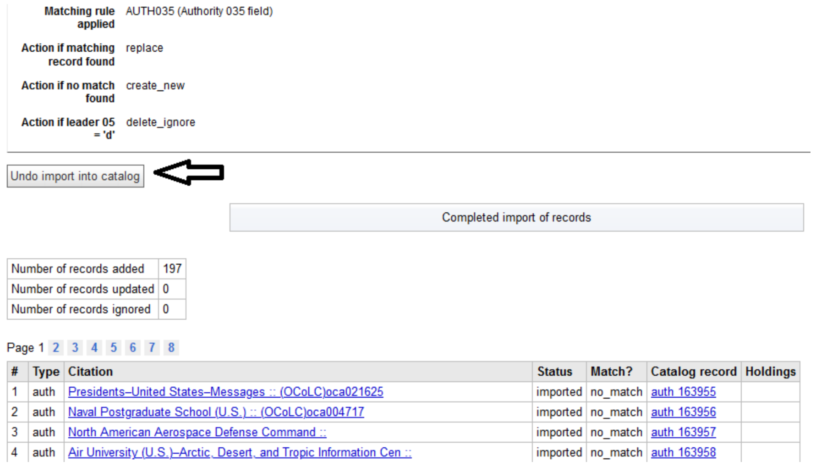
On Leader 05d: Attempt to delete, ignore failures

Page 1 2 3 4 5 6 7 8

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	auth	Presidents–United States–Messages :: (OCoLC)oca021625	staged	no_match		
2	auth	Naval Postgraduate School (U.S.) :: (OCoLC)oca004717	staged	no_match		
3	auth	North American Aerospace Defense Command ::	staged	no_match		
4	auth	Air University (U.S.)–Arctic, Desert, and Tropic Information Cen ::	staged	no_match		

As with bibliographic record batches, the screen will show the records and any matches. You can change the matching rule, or click Import Into Catalog to load the records.

Once a batch of authority records has been imported, it can be reverted (unloaded), similar to reverting a batch of bibliographic records. Use the Undo Import Into Catalog button on the batch display page:



Matching rule applied: AUTH035 (Authority 035 field)
Action if matching record found: replace
Action if no match found: create_new
Action if leader 05 = 'd': delete_ignore

Completed import of records

Number of records added	197
Number of records updated	0
Number of records ignored	0

Page 1 2 3 4 5 6 7 8

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	auth	Presidents–United States–Messages :: (OCoLC)oca021625	imported	no_match	auth 163955	
2	auth	Naval Postgraduate School (U.S.) :: (OCoLC)oca004717	imported	no_match	auth 163956	
3	auth	North American Aerospace Defense Command ::	imported	no_match	auth 163957	
4	auth	Air University (U.S.)–Arctic, Desert, and Tropic Information Cen ::	imported	no_match	auth 163958	

However, please note: **ANY AUTHORITY RECORD WHICH HAS BEEN LINKED TO A BIBLIOGRAPHIC RECORD WILL NOT BE REMOVED**. The system will not report this as a problem. Users should be aware of that scenario.

NOTE: The RCN (control) number is created from the authority record’s 001 and 003 fields. If either of those fields is missing, the authority importer will handle as follows:

- If 003 exists and 001 is missing, then delete the 003. The RCN will be auto-generated.

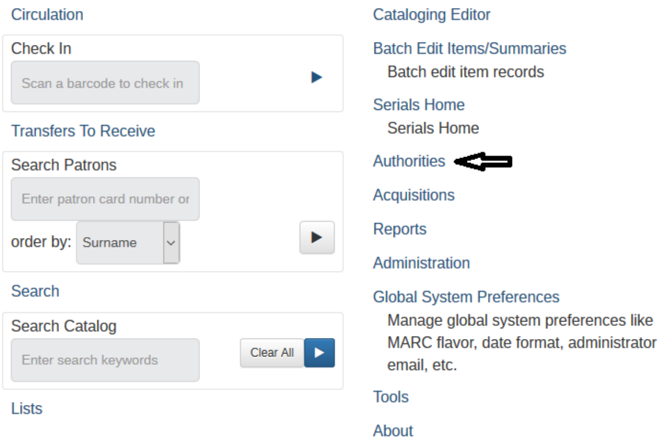
- If 001 exists and 003 is missing, the 001 will be prefixed with (unknown) and copied to an 035. The RCN will be auto-generated.

The cataloging editor will also follow the above. In addition, it will warn the user if the RCN will be changed AND it affects linked bibs. If there are no linked bibs, there is no warning for the RCN update.

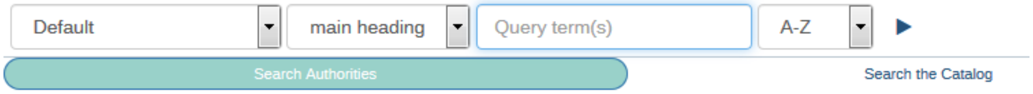
If you edit an authority record and change the RCN, you need to wait a few minutes for the indexer to process the change. Then reload the record (Record, Reload From Server) so that the screen correctly displays the number of linked bibs.

9.6.5 Legacy Authority Search/Display

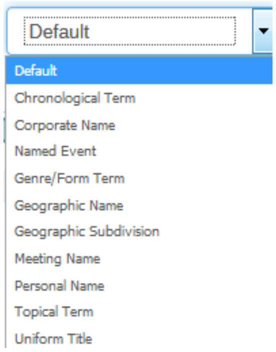
Authority records can be searched and displayed from an older tool, the legacy Authorities feature. From the More menu or the staff home menu, select Authorities:



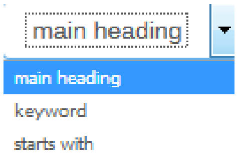
This opens a masthead search box:



The Default entry searches all authorities; you can also specify a type of record:

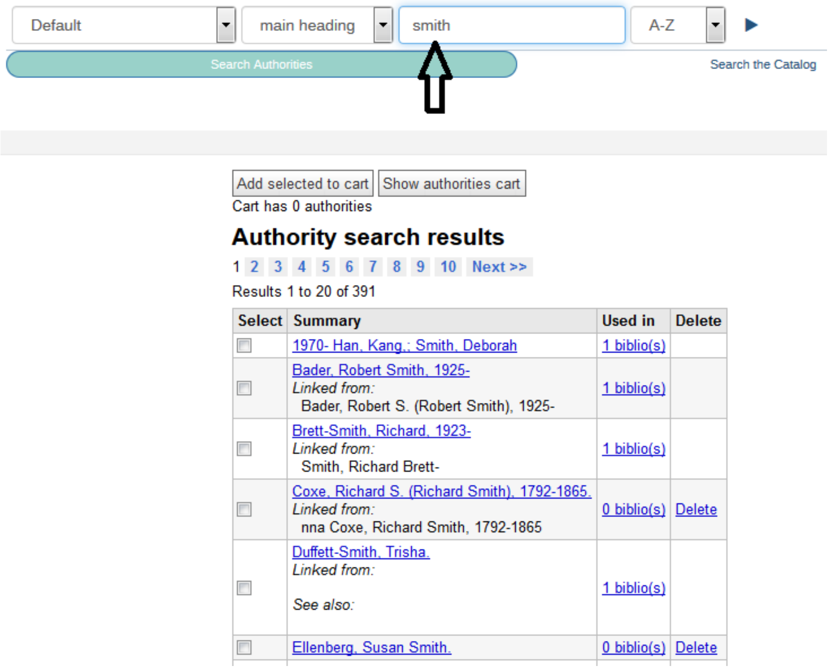


You can specify whether the term is the main heading or other options:



The default sort is alphabetical; you can change it to reverse alphabetical or relevance (score).

Searching a term brings up a list of records:



Cart has 0 authorities

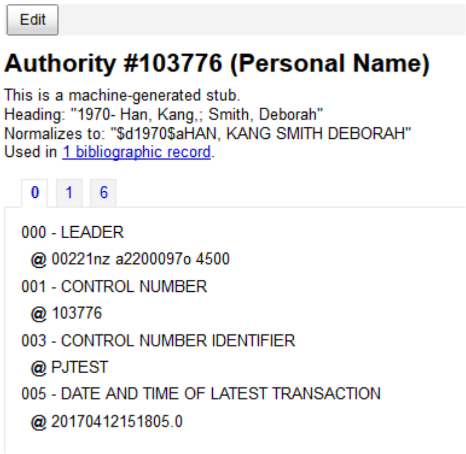
Authority search results

1 2 3 4 5 6 7 8 9 10 Next >>

Results 1 to 20 of 391

Select	Summary	Used in	Delete
☐	1970- Han, Kang,; Smith, Deborah	1 biblio(s)	
☐	Bader, Robert Smith, 1925- *Linked from:* Bader, Robert S. (Robert Smith), 1925-	1 biblio(s)	
☐	Brett-Smith, Richard, 1923- *Linked from:* Smith, Richard Brett-	1 biblio(s)	
☐	Coxe, Richard S. (Richard Smith), 1792-1865. *Linked from:* nna Coxe, Richard Smith, 1792-1865	0 biblio(s)	Delete
☐	Duffett-Smith, Trisha. *Linked from:* *See also:*	1 biblio(s)	
☐	Ellenberg, Susan Smith.	0 biblio(s)	Delete

This list tells you how many title records use the term; clicking that count will do a search for all the titles using the term. You can also merge or delete authorities from this list (below). Click on an entry to display the record:



Authority #103776 (Personal Name)

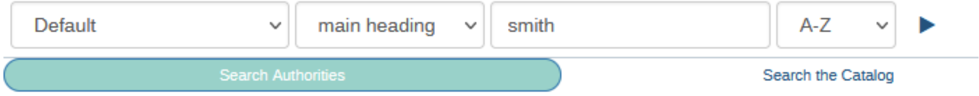
This is a machine-generated stub.
Heading: "1970- Han, Kang,; Smith, Deborah"
Normalizes to: "$d1970$aHAN, KANG SMITH DEBORAH"
Used in 1 bibliographic record.

000 - LEADER
@ 00221nz a2200097o 4500
001 - CONTROL NUMBER
@ 103776
003 - CONTROL NUMBER IDENTIFIER
@ PJTEST
005 - DATE AND TIME OF LATEST TRANSACTION
@ 20170412151805.0

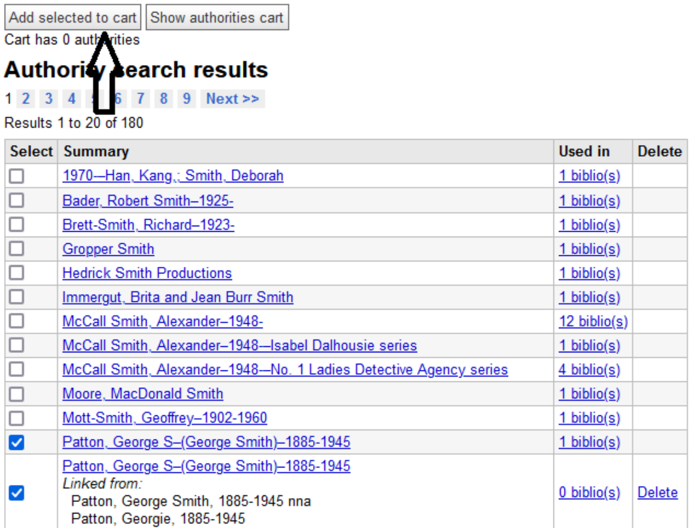
If you click the Edit button here, the record will open in the cataloging editor.

9.6.6 Merging Authority Records

Two authority records can be merged together. All of the authorized fields on the linked bibs of the removed authority records are automatically linked to the surviving authority record and the $0 subfields RCN numbers are updated. From the staff home page or the More menu, click on Authorities. In the legacy tool, search for the authority term(s):



Select the ones you want and click the Add Selected to Cart button:



Cart has 0 authorities

Authority search results

1 2 3 4 5 6 7 8 9 Next >>

Results 1 to 20 of 180

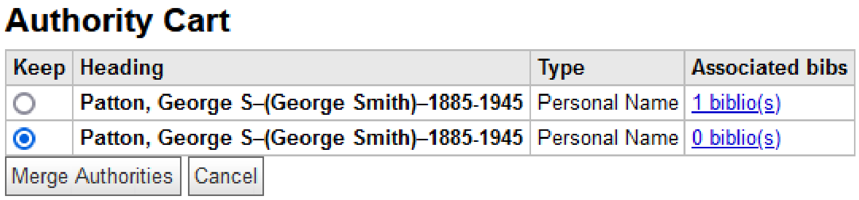
Select	Summary	Used in	Delete
☐	1970–Han, Kang,; Smith, Deborah	1 biblio(s)	
☐	Bader, Robert Smith–1925-	1 biblio(s)	
☐	Brett-Smith, Richard–1923-	1 biblio(s)	
☐	Gropper Smith	1 biblio(s)	
☐	Hedrick Smith Productions	1 biblio(s)	
☐	Immergut, Brita and Jean Burr Smith	1 biblio(s)	
☐	McCall Smith, Alexander–1948-	12 biblio(s)	
☐	McCall Smith, Alexander–1948–Isabel Dalhousie series	1 biblio(s)	
☐	McCall Smith, Alexander–1948–No. 1 Ladies Detective Agency series	4 biblio(s)	
☐	Moore, MacDonald Smith	1 biblio(s)	
☐	Mott-Smith, Geoffrey–1902-1960	1 biblio(s)	
☑	Patton, George S–(George Smith)–1885-1945	1 biblio(s)	
☑	Patton, George S–(George Smith)–1885-1945 *Linked from:* Patton, George Smith, 1885-1945 nna Patton, Georgie, 1885-1945	0 biblio(s)	Delete

The cart counter updates to show how many records were added. Click the Show Authorities Cart button to continue.

Cart has 2 authorities (empty)

Authority search results

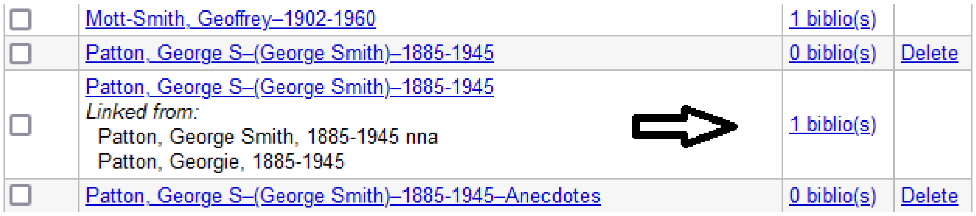
A new screen opens with your records listed. Click the radio button next to the one you want to keep, and then click Merge Authorities.



Authority Cart

Keep	Heading	Type	Associated bibs
○	**Patton, George S–(George Smith)–1885-1945**	Personal Name	1 biblio(s)
●	**Patton, George S–(George Smith)–1885-1945**	Personal Name	0 biblio(s)

That heading will be kept and any bibs attached to the other heading will be transferred to the one you choose to keep. The Cart window will close. Back on the authorities search screen, you may need to wait a few minutes for the indexing to catch up with the changes. Then refresh your browser to see the results – the count of associated bibs should increase on the record you kept, and the other one should show zero. At this point, you can empty your borrower cart and delete the second record.



☐	Mott-Smith, Geoffrey–1902-1960	1 biblio(s)	
☐	Patton, George S–(George Smith)–1885-1945	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945 *Linked from:* Patton, George Smith, 1885-1945 nna Patton, Georgie, 1885-1945	1 biblio(s)	
☐	Patton, George S–(George Smith)–1885-1945–Anecdotes	0 biblio(s)	Delete

9.6.7 Deleting Authority Records

If an authority record is not linked to any biblio records, you can delete it through the old Authorities interface. From the staff home page or the More dropdown, click Authorities. Then search for your term. In the results list, if the term is not linked, there will be a Delete option:

Authority search results

1 2 3 4 5 6 7 8 9 Next >>

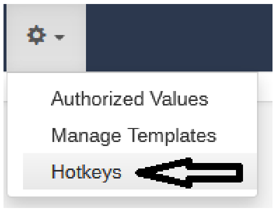
Results 1 to 20 of 180

Select	Summary	Used in	Delete
☐	1970—Han, Kang,; Smith, Deborah	1 biblio(s)	
☐	Bader, Robert Smith–1925-	1 biblio(s)	
☐	Brett-Smith, Richard–1923-	1 biblio(s)	
☐	Gropper Smith	1 biblio(s)	
☐	Hedrick Smith Productions	1 biblio(s)	
☐	Immergut, Brita and Jean Burr Smith	1 biblio(s)	
☐	McCall Smith, Alexander–1948-	12 biblio(s)	
☐	McCall Smith, Alexander–1948—Isabel Dalhousie series	1 biblio(s)	
☐	McCall Smith, Alexander–1948—No. 1 Ladies Detective Agency series	4 biblio(s)	
☐	Moore, MacDonald Smith	1 biblio(s)	
☐	Mott-Smith, Geoffrey–1902-1960	1 biblio(s)	
☐	Patton, George S–(George Smith)–1885-1945	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945 *Linked from:* Patton, George Smith, 1885-1945 nna Patton, Georgie, 1885-1945	1 biblio(s)	
☐	Patton, George S–(George Smith)–1885-1945–Anecdotes	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945–Archives	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945–Correspondence	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945–Death and burial–Photographs	0 biblio(s)	Delete
☐	Patton, George S–(George Smith)–1885-1945–Death and burial	0 biblio(s)	Delete

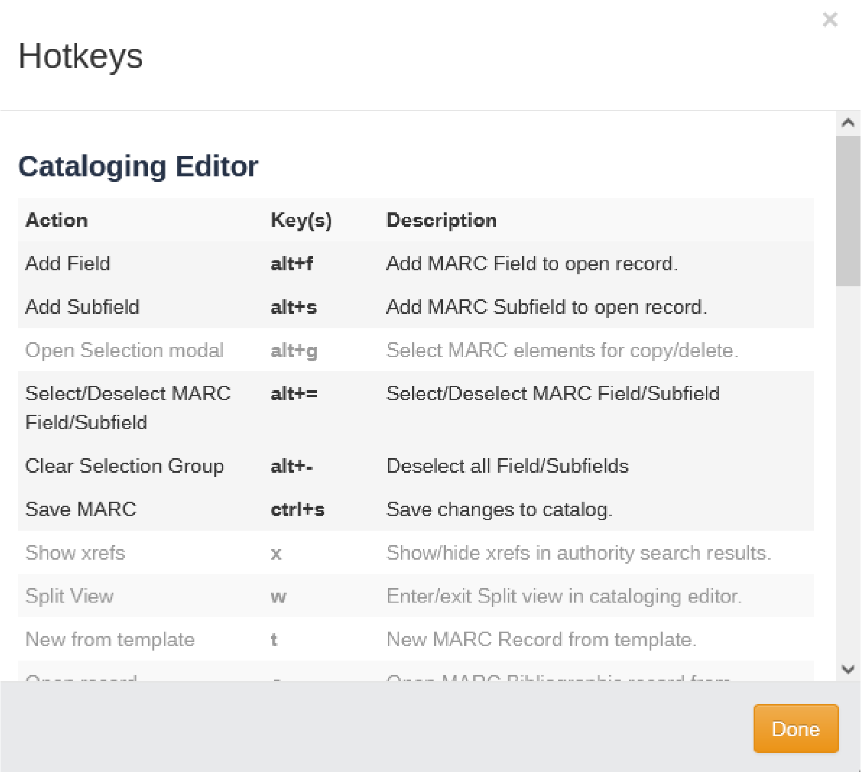
You'll get an "are you sure" popup to confirm. It may take a couple of minutes for the indexing to catch up and the term to drop out of searches.

9.7 HotKeys

See section **1.5 Hotkeys** above. From within the Cataloging Editor, you can see hotkeys that are configured to streamline cataloging. Go to the gearbox icon and select Hotkeys, or use the hotkey forward slash (/).



(Press the Escape key or click somewhere outside the date entry fields so that no field has focus. Then type a forward slash.) A popup window will show available shortcuts. If you open it within the Cataloging Editor, you'll only see hotkeys that are specific to the Cataloging Editor. If a hotkey is not functional in your current location, it will be grayed out.



Cataloging Editor

Action	Key(s)	Description
Add Field	alt+f	Add MARC Field to open record.
Add Subfield	alt+s	Add MARC Subfield to open record.
Open Selection modal	alt+g	Select MARC elements for copy/delete.
Select/Deselect MARC Field/Subfield	alt+=	Select/Deselect MARC Field/Subfield
Clear Selection Group	alt+-	Deselect all Field/Subfields
Save MARC	ctrl+s	Save changes to catalog.
Show xrefs	x	Show/hide xrefs in authority search results.
Split View	w	Enter/exit Split view in cataloging editor.
New from template	t	New MARC Record from template.

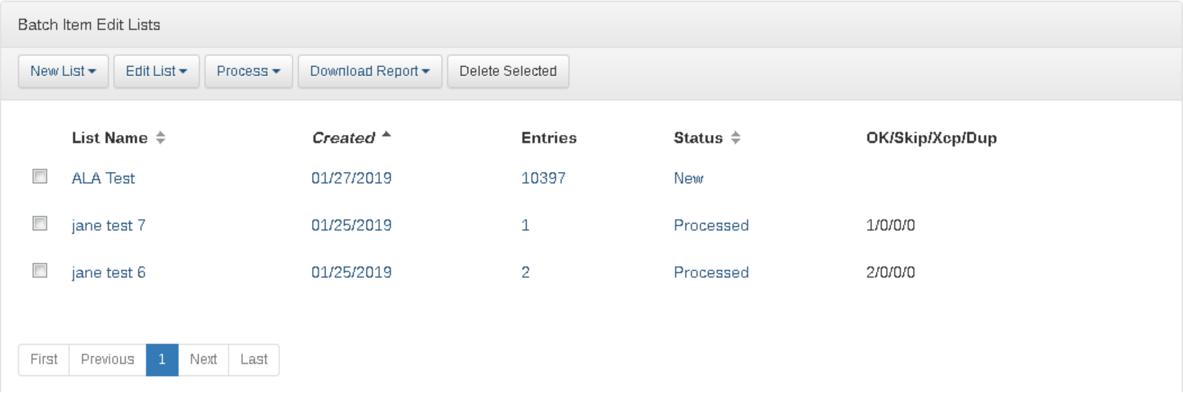
9.8 Batch Edit Items

Previous versions of the code had multiple versions of a batch item editor. Those have been replaced with a single edit tool that includes options from each of the old ones. (**NOTE**: To use the tool itself requires the editcatalogue.item_list permission. That lets you manage item lists within the tool, but you can't actually do any batch operations unless you also have the editcatalogue.item.batch_update and/or editcatalogue.item.batch_delete permission.) You should always try batch edits on the sandbox first, to be sure your settings are correct.

The popup message notifications for Batch item delete complete and Batch item edit complete should be enabled in the staff Role or individual patron records.

The new tool is designed to perform batch processing as a background job, using the same async process as reports do. It is possible to override that and perform edits in real time, but that it not advised. Background processing allows sites to perform edits on larger batches. Doing those edits in real time risks having the job and the browser time out.

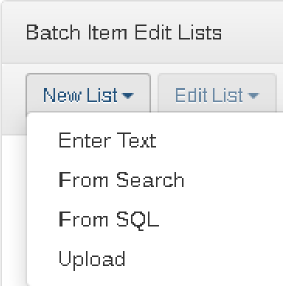
Open the new tool under Tools, Batch Item Editor. Any existing batches will show with their statuses. In this example, two lists have been processed (note the counts in the last column), while one has been defined but not yet processed:



	List Name	Created	Entries	Status	OK/Skip/Xcp/Dup
☐	ALA Test	01/27/2019	10397	New	
☐	jane test 7	01/25/2019	1	Processed	1/0/0/0
☐	jane test 6	01/25/2019	2	Processed	2/0/0/0

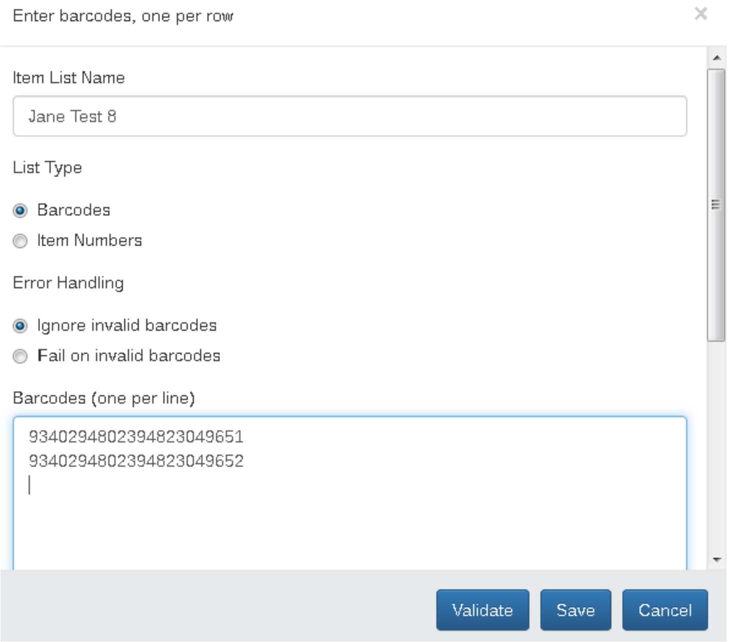
9.8.1 Creating a Batch List

Lists for batch item editing can be created in a number of ways. Click the New List button for options.



9.8.1.1 Enter Text

The Enter Text option allows users to manually enter either item numbers (the default) or barcodes. You must give the batch a name, and then select either barcode or item number input. Then type or paste in a list of entries:



Enter barcodes, one per row

Item List Name: Jane Test 8

List Type

● Barcodes
○ Item Numbers

Error Handling

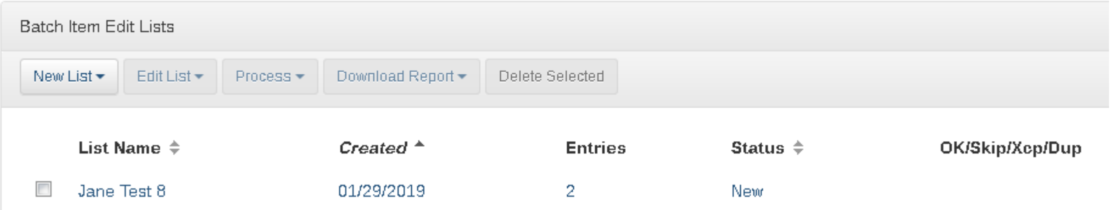
● Ignore invalid barcodes
○ Fail on invalid barcodes

Barcodes (one per line)

```
9340294802394823049651
9340294802394823049652
```

You can use the Validate button to check your entries against records existing in the system. If an invalid entry is found, it will be removed from your list with no warning.

Click Save to save your list.

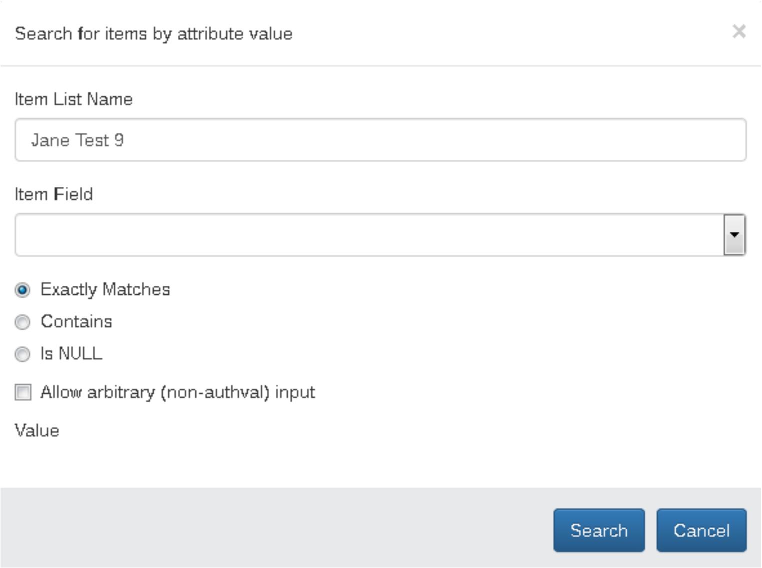


Batch Item Edit Lists

	List Name	Created	Entries	Status	OK/Skip/Xcp/Dup
☐	Jane Test 8	01/29/2019	2	New	

9.8.1.2 From Search

This option allows you to create a batch based on a search. Give your batch a name and then enter search criteria.



Search for items by attribute value

Item List Name

Jane Test 9

Item Field

● Exactly Matches

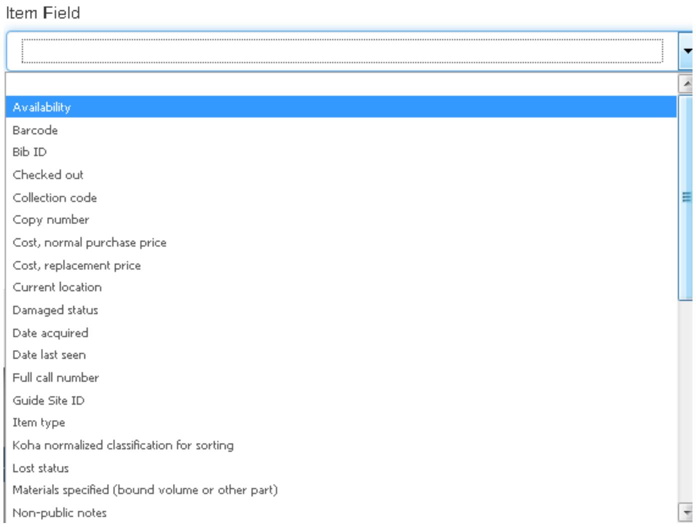
○ Contains

○ Is NULL

☐ Allow arbitrary (non-authval) input

Value

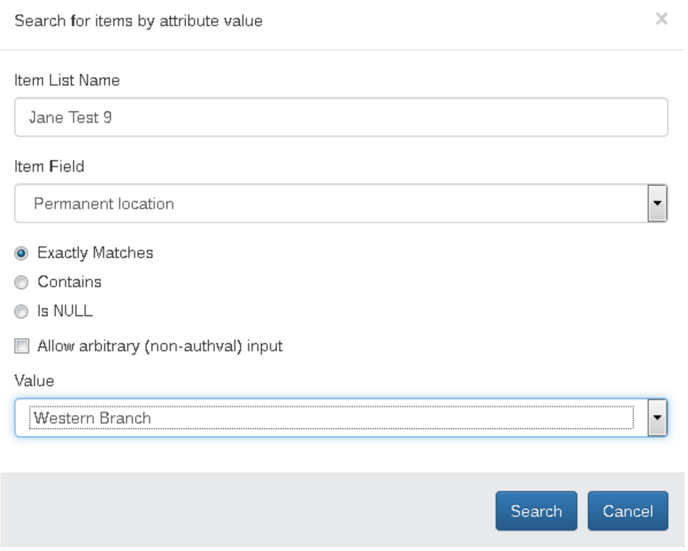
First, use the Item Field pulldown to select the item field to search on.



Item Field

- Availability
- Barcode
- Bib ID
- Checked out
- Collection code
- Copy number
- Cost, normal purchase price
- Cost, replacement price
- Current location
- Damaged status
- Date acquired
- Date last seen
- Full call number
- Guide Site ID
- Item type
- Koha normalized classification for sorting
- Lost status
- Materials specified (bound volume or other part)
- Non-public notes

This example looks for items belonging to the WEST branch. Note that if you pick a field controlled by some kind of list (branch, item type, shelving location, etc.) you will choose your search value from a pulldown with those values. If your search field is free-text (such as call number or a notes field), you can type in a matching value.



Item List Name: Jane Test 9

Item Field: Permanent location

● Exactly Matches
○ Contains
○ Is NULL

☐ Allow arbitrary (non-authval) input

Value: Western Branch

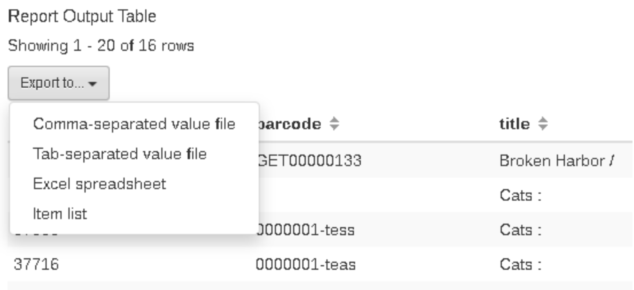
When you have entered your terms, click Search. The batch will be created with all matching entries (see below for further options once you open the batch for processing).

9.8.1.3 From SQL

The From SQL option allows you to create an edit batch list based on a SQL report. Under Reports, structure a report with your search criteria, making sure that the first output field is itemnumber. For example:

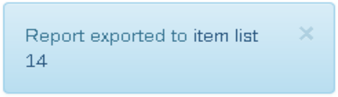
select itemnumber, barcode, biblio.title from items JOIN biblio on items.biblionumber = biblio.biblionumber WHERE itemtype = 'BK' order by biblio.title

When you run the report and look at the output, one of the options will be Item List. Select that:



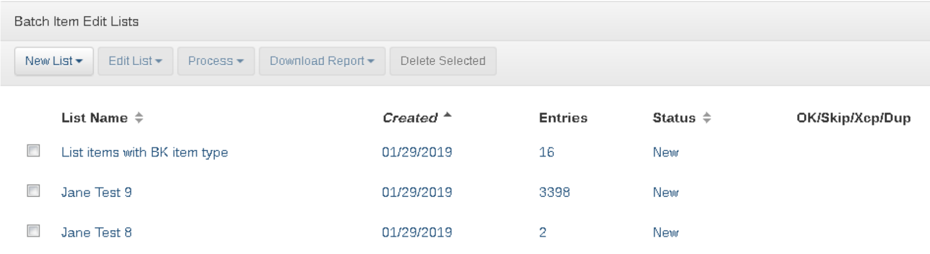
	barcode	title
	GET00000133	Broken Harbor /
		Cats :
	0000001-tess	Cats :
37716	0000001-teas	Cats :

A popup will tell you that a list has been created:



Report exported to item list 14

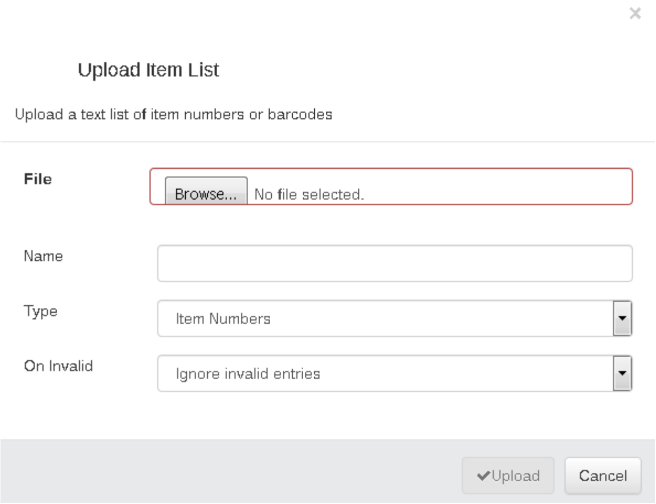
Back under Tools, Batch Item Editor, you will see your report output in the list of existing batches, with the name of the report:



	List Name	Created	Entries	Status	OK/Skip/Xcp/Dup
☐	List items with BK item type	01/29/2019	16	New	
☐	Jane Test 9	01/29/2019	3398	New	
☐	Jane Test 8	01/29/2019	2	New	

9.8.1.4 Upload

The last option for creating an edit batch list is to upload a file. Click New List, Upload and you'll get a popup asking for a filename:



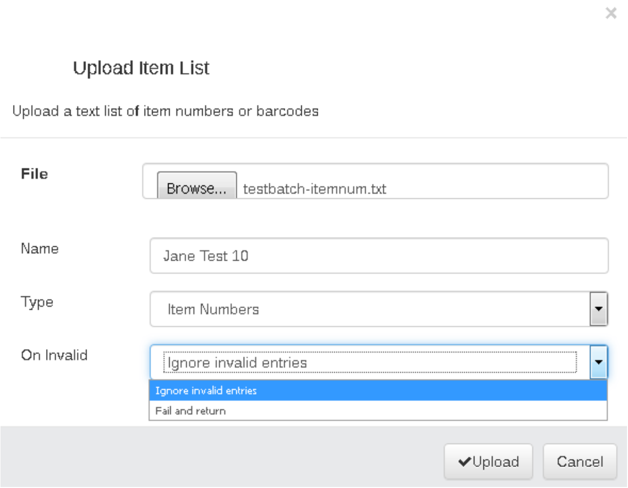
File: No file selected.

Name:

Type: Item Numbers

On Invalid: Ignore invalid entries

Browse your computer to find your upload file – note that you can use either item numbers (the default) or barcodes. Give your list a name.



File: testbatch-itemnum.txt

Name: Jane Test 10

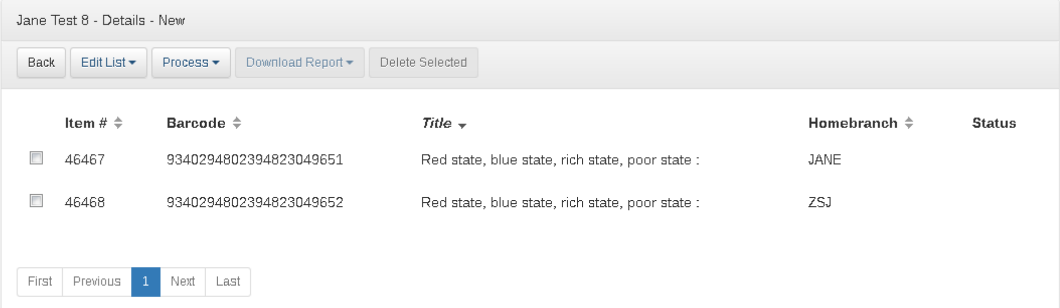
Type: Item Numbers

On Invalid: Ignore invalid entries

Specify how you want invalid entries handled – either ignore them and continue processing, or stop processing at the first failure.

9.8.2 Editing a List

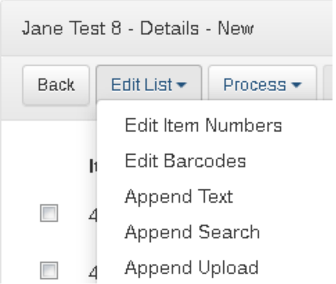
However you created your list, the next step is to open it and prepare for processing. Click on the name of a list from the main screen, and it opens that batch. You will see a list of items included in the batch:



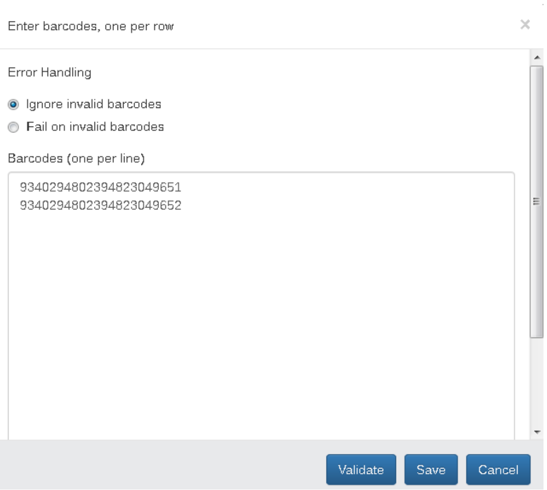
	Item #	Barcode	Title	Homebranch	Status
☐	46467	9340294802394823049651	Red state, blue state, rich state, poor state :	JANE	
☐	46468	9340294802394823049652	Red state, blue state, rich state, poor state :	ZSJ	

If your batch is OK as is, you don't need to edit it; you could proceed to the next step (Process). However, you do have some options to change what items are in the list.

You can add items to the list if desired. To do so, click the Edit List button.



The two Edit options show you the items already in the list (ether barcodes or item numbers), and allow you to remove entries or add more manually:



Error Handling

● Ignore invalid barcodes

○ Fail on invalid barcodes

Barcodes (one per line)

9340294802394823049651
9340294802394823049652

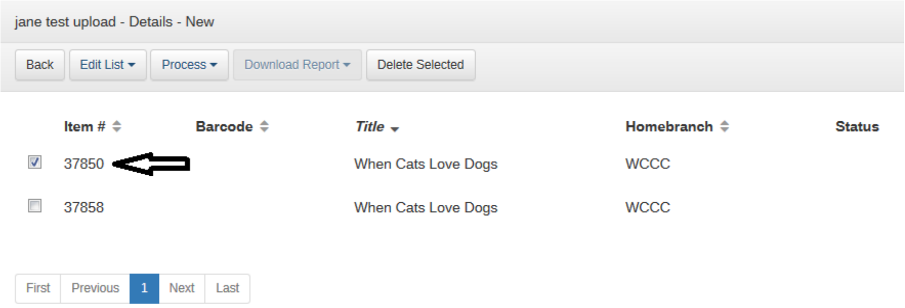
Append Text is similar, except that you do not see the list of items already in the batch.

Append Search and Append Upload allow you to either run a search or upload a file (as described above) to add more items to this batch.

9.8.2.1 Using the Checkboxes

If you don't want a particular item to be included in the edit, click the checkbox next to it and then click the Delete Selected button at the top.

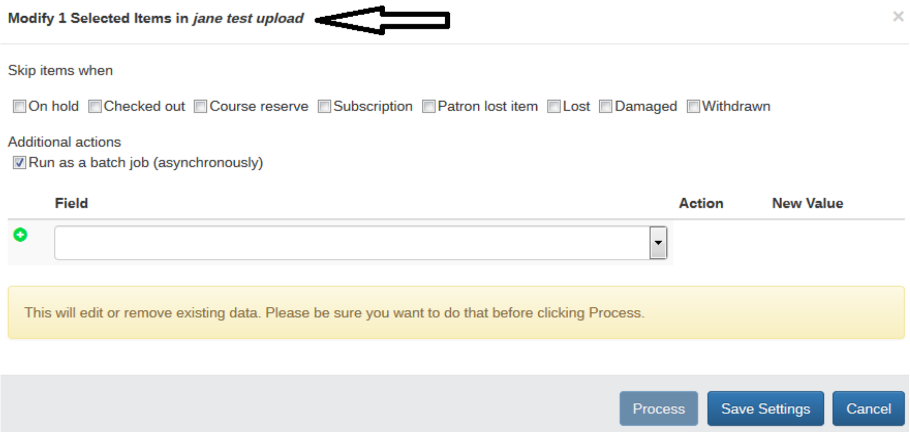
You can also use the checkboxes to select only certain items from the list for processing. In this example, one item is selected:



jane test upload - Details - New

	Item #	Barcode	Title	Homebranch	Status
☑	37850		When Cats Love Dogs	WCCC	
☐	37858		When Cats Love Dogs	WCCC	

When you go into the Process screen (see below), the top of the screen will tell you how many items will be processed:



Modify 1 Selected Items in *jane test upload*

Skip items when

☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

Additional actions

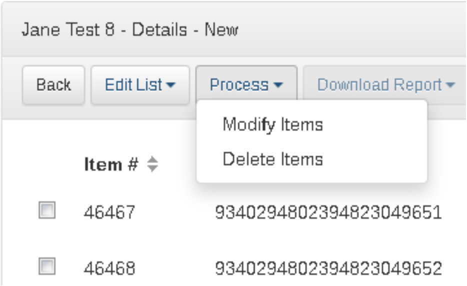
☑ Run as a batch job (asynchronously)

Field	Action	New Value

This will edit or remove existing data. Please be sure you want to do that before clicking Process.

9.8.3 Processing a List

Once the contents of your batch are as you want them, you need to tell the tool what to do with the batch. Click the Process button to begin. You may either modify items or delete them.

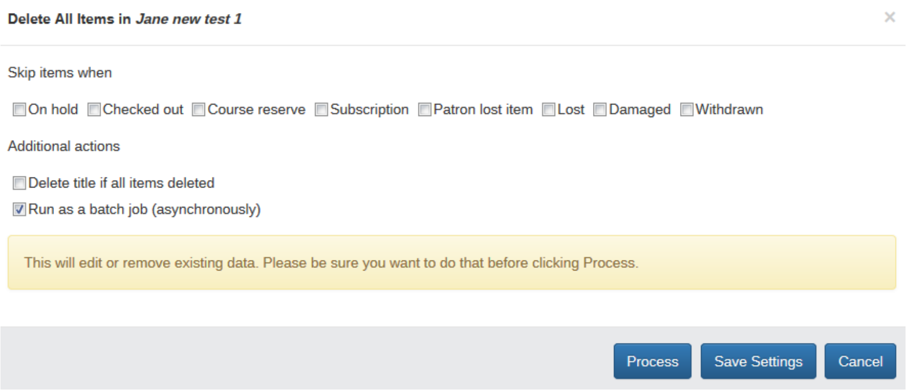


Jane Test 8 - Details - New

	Item #	
☐	46467	9340294802394823049651
☐	46468	9340294802394823049652

9.8.3.1 Deleting Items

If you want to delete items, specify your failsafes on the popup. For example, you do not want to delete an item that is currently checked out. Think about the other options, such as On Hold, Course Reserve, Subscription (linked to a serials subscription), Patron Lost (on a patron's record as being lost), or otherwise lost, damaged, or withdrawn.



Delete All Items in *Jane new test 1*

Skip items when

☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

Additional actions

☐ Delete title if all items deleted

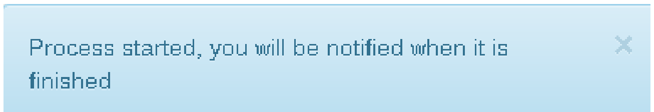
☑ Run as a batch job (asynchronously)

This will edit or remove existing data. Please be sure you want to do that before clicking Process.

At the bottom you have an option to also delete the title if the last item is deleted. The "run as a batch job" option means the batch edit will run in the background. You should leave this checked, especially for large batches, so that your browser doesn't time out during the processing.

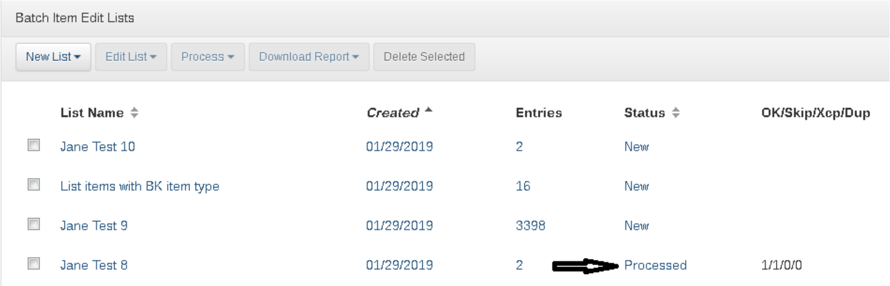
Save Settings will record your setup on this batch, so if you don't want to process right away, you don't have to redo your selections.

When you are ready, click Process and a popup will display:



Process started, you will be notified when it is finished

When the batch has finished, you'll see the status on the main page of the tool:



	List Name	Created	Entries	Status	OK/Skip/Xcp/Dup
☐	Jane Test 10	01/29/2019	2	New	
☐	List items with BK item type	01/29/2019	16	New	
☐	Jane Test 9	01/29/2019	3398	New	
☐	Jane Test 8	01/29/2019	2	Processed	1/1/0/0

Once a list has been processed, the summary in the right-hand column (OK/Skip/Xcp/Dup) indicates the count for records that were processed okay, skipped due to a condition such as being checked out, not processed due

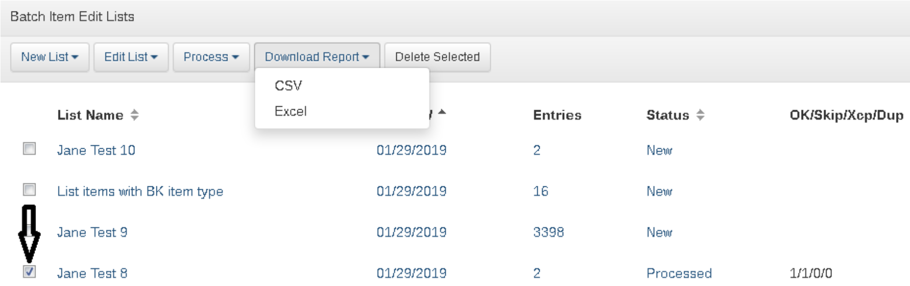
to error, or not processed due to being a duplicate. In this example, one record was processed and another was skipped. Clicking on the batch name displays details:


Jane Test 8 - Details - 1 Processed, 1 Skipped, 0 Errors, 0 Duplicates

	Item #	Barcode	Title	Homebranch	Status
☐	46467		Red state, blue state, rich state, poor state :	(deleted)	deleted
☐	46468	9340294802394823049652	Red state, blue state, rich state, poor state :	ZSJ	skip (checked_out)

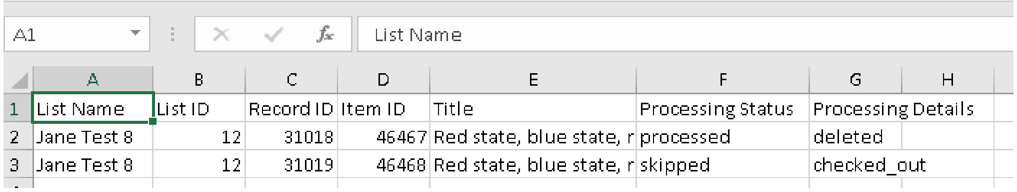
In this case, one record was not deleted because it was checked out.

You can click Download Report from this screen, or on the main page, you can click the checkbox beside the batch name, and then Download Report:



	List Name		Entries	Status	OK/Skip/Xcp/Dup
☐	Jane Test 10	01/29/2019	2	New	
☐	List items with BK item type	01/29/2019	16	New	
☐	Jane Test 9	01/29/2019	3398	New	
☑	Jane Test 8	01/29/2019	2	Processed	1/1/0/0

You can download as a .csv or send it directly to Excel. The report will show the same information as the batch details screen above:

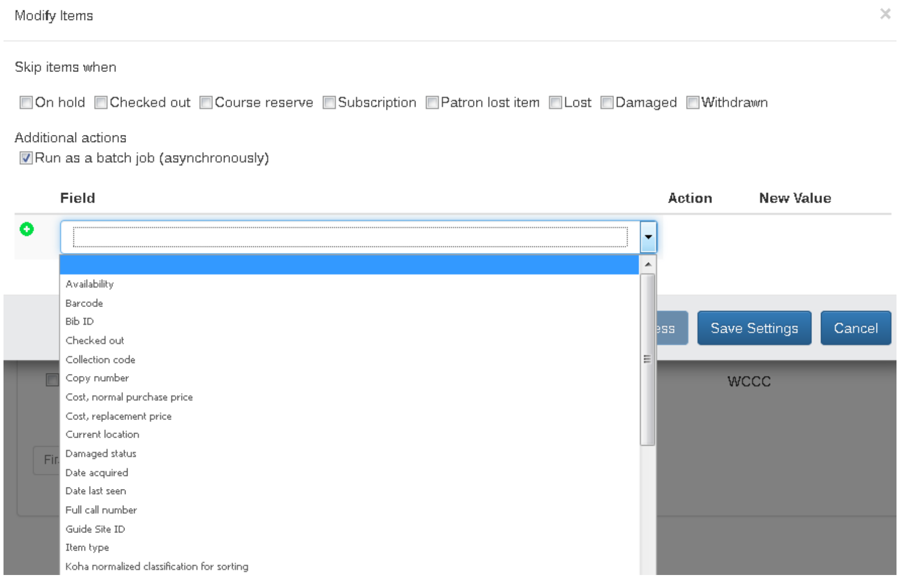


	A	B	C	D	E	F	G	H
1	List Name	List ID	Record ID	Item ID	Title	Processing Status	Processing Details	
2	Jane Test 8	12	31018	46467	Red state, blue state, r	processed	deleted	
3	Jane Test 8	12	31019	46468	Red state, blue state, r	skipped	checked_out	

9.8.3.2 Modifying Items

The other option for batch work is to modify items in the list. With the batch open, click Process and then choose Modify. That brings up a window with options. As with Delete, you can tell the system to skip items with specified statuses such as checked out or on hold. Also as with Delete, you want to keep the option to process in the background checked.

The main part of this window is your selection of what and how to edit.



Modify Items

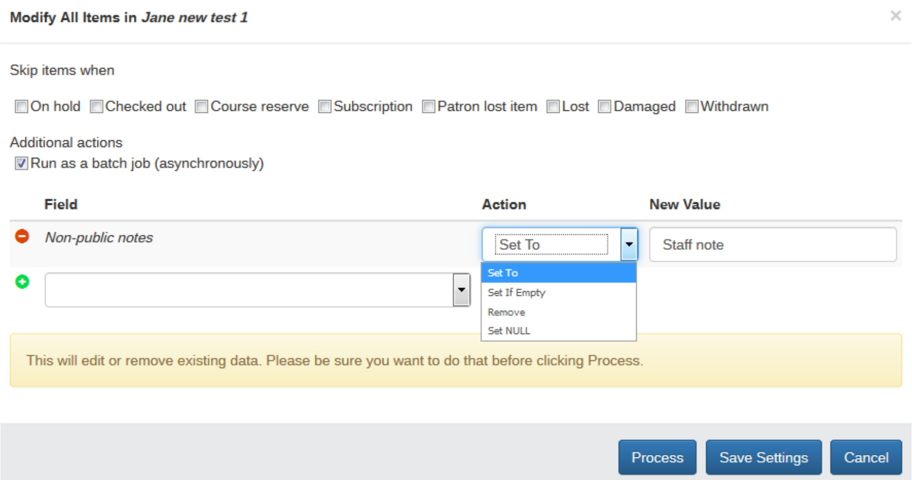
Skip items when

☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

Additional actions

☑ Run as a batch job (asynchronously)

Under Field, use the dropdown to select the item field you want to edit. Then the Action window specifies what you want to do, and the New Value is what you want to change. In this example, I've selected the staff note field and entered a new note.



Modify All Items in *Jane new test 1*

Skip items when

☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

Additional actions

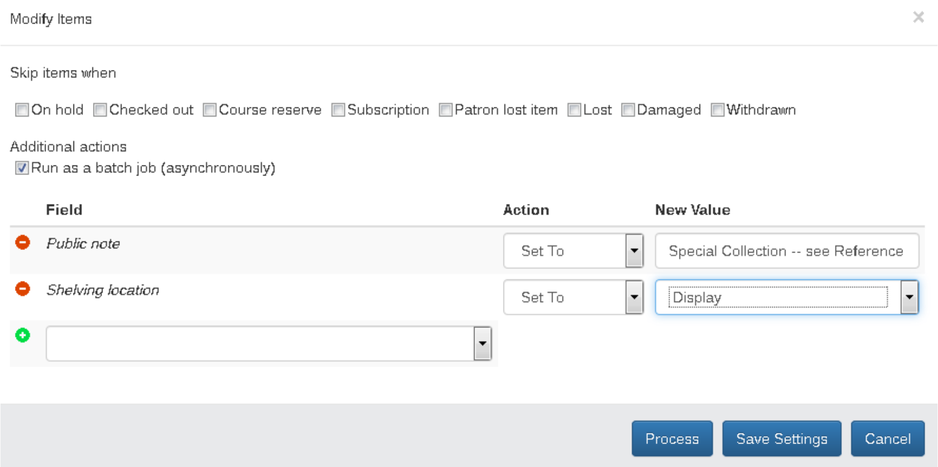
☑ Run as a batch job (asynchronously)

Field	Action	New Value
Non-public notes	Set To	Staff note

This will edit or remove existing data. Please be sure you want to do that before clicking Process.

With the default action of Set To, this would add that note to every item in the batch. Note that there is a "Set If Empty" option – this would add the note to any record that did not have an entry in that field, but would not overwrite existing entries. You could also enter text to match and delete from the field, or set the field to null (empty).

You can make several edits in one operation. Here, for example, I'm changing shelving location in addition to adding the note:



Modify Items

Skip items when

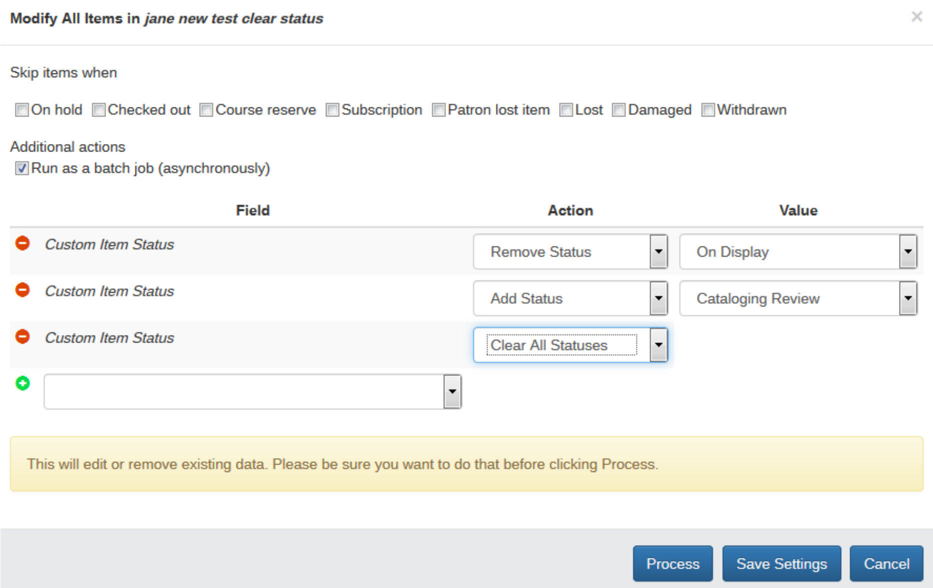
☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

Additional actions

☑ Run as a batch job (asynchronously)

Field	Action	New Value
Public note	Set To	Special Collection -- see Reference
Shelving location	Set To	Display

You can also set or clear a Custom Item Status with the tool. To remove an individual status, you must specify which status you want to remove. To remove all statuses, select Clear All Statuses:



Modify All Items in *jane new test clear status*

Skip items when

☐ On hold ☐ Checked out ☐ Course reserve ☐ Subscription ☐ Patron lost item ☐ Lost ☐ Damaged ☐ Withdrawn

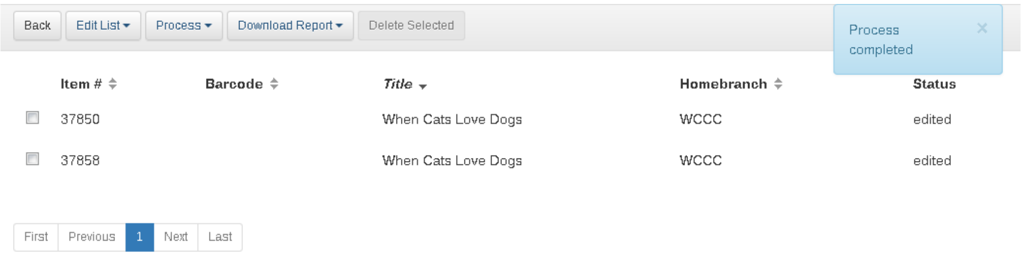
Additional actions

☑ Run as a batch job (asynchronously)

Field	Action	Value
Custom Item Status	Remove Status	On Display
Custom Item Status	Add Status	Cataloging Review
Custom Item Status	Clear All Statuses	

This will edit or remove existing data. Please be sure you want to do that before clicking Process.

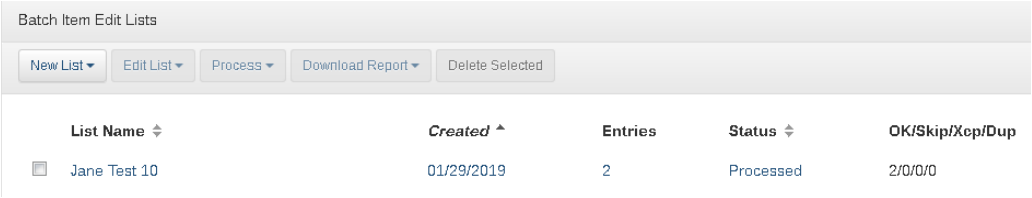
The Save Settings button will allow you to save the settings so far on this batch, if you aren’t yet ready to run the edits. (Settings are also saved when you process the batch.) Click the Process button if you are ready to proceed. You’ll be notified when it finishes, and will see the status on the list details page:



Process completed

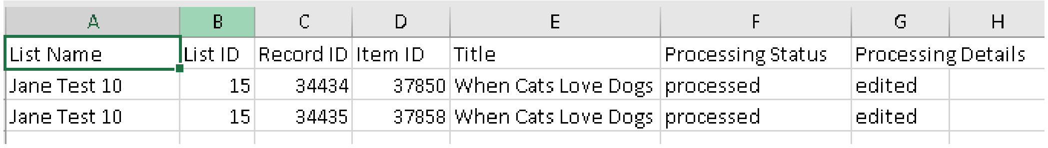
	Item #	Barcode	Title	Homebranch	Status
☐	37850		When Cats Love Dogs	WCCC	edited
☐	37858		When Cats Love Dogs	WCCC	edited

You will also see the status summary on the main page:



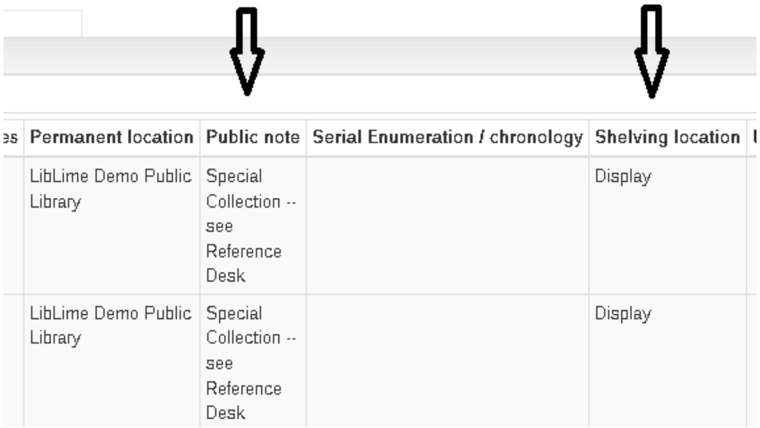
	List Name	Created	Entries	Status	OK/Skip/Xcp/Dup
☐	Jane Test 10	01/29/2019	2	Processed	2/0/0/0

As with the Delete operation, you can also download a .csv or Excel report:



List Name	List ID	Record ID	Item ID	Title	Processing Status	Processing Details
Jane Test 10	15	34434	37850	When Cats Love Dogs	processed	edited
Jane Test 10	15	34435	37858	When Cats Love Dogs	processed	edited

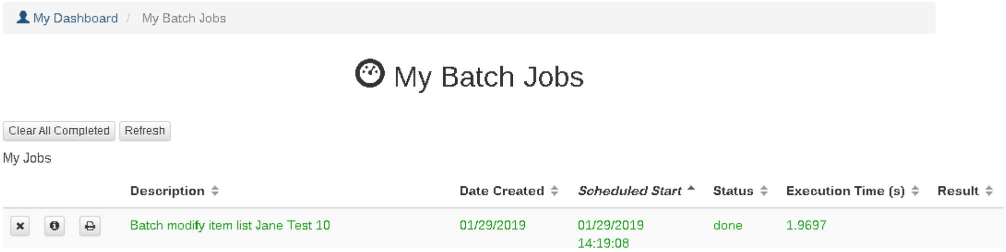
Check the item records to verify the change:



Permanent location	Public note	Serial Enumeration / chronology	Shelving location
LibLime Demo Public Library	Special Collection -- see Reference Desk		Display
LibLime Demo Public Library	Special Collection -- see Reference Desk		Display

9.8.4 Monitoring Progress

As with other background jobs (reports, batch edit rulesets), you can check the status of a batch item edit in your dashboard My Jobs screen:



	Description	Date Created	Scheduled Start	Status	Execution Time (s)	Result
	Batch modify item list Jane Test 10	01/29/2019	01/29/2019 14:19:08	done	1.9697	

If a job seems to be hung up ("pending" or just not started after a reasonable amount of time), the async process might not be running. Open a helpdesk ticket asking to have it restarted.

9.9 Batch Edit Bib Records

Batches of MARC records can be edited and fields or subfields can be added, removed, or modified. **This is a very complex operation; be sure to practice on your sandbox and make sure your ruleset works absolutely correctly.** Records to be edited are assembled in three ways: as a staged import batch (such as an OCLC upload), from a SQL report defining the titles to include, or from a Cart. Rulesets can be created to add, edit, or remove MARC data. A ruleset can also be applied to the import of a digital object file (for full Bibliovation systems), allowing a title record to be created with certain data already specified.

Access is controlled by the new batch_edit_marc (Batch edit staged MARC records) permission under the Tools group. Another new permissions group under the Edit Catalogue group:

bert -- Manage Batch Edit Ruleset templates
  update -- Create/Update/Delete Batch Edit Ruleset templates

is required to be able to create, edit, or delete rulesets.

Be warned that there is no Undo feature – once an edit is triggered, it cannot be undone.

The new Batch Edit feature applies rulesets to collections of bib records (import batches). A ruleset is a MARC record with additional metadata which controls how fields and subfields are to be modified. Note that a ruleset is not the same thing as a template, although there are some similarities.

NOTE: the appearance changed and additional operations have been added; not all screenshots have been updated.

9.9.1 Types of Actions Possible

Batch Edit Rulesets provide the following operations on MARC fields (note that the list may change with new development).

- Add a new MARC field, with provided subfields and values and (optional) indicators
- Delete a MARC field (with optional indicator matching)
- Replace a MARC field (i.e., if a match is found, change it, otherwise add a new one), with optional indicator specific matching
- Set a default for a field (i.e., if a field is added only if it doesn't exist).
- Copy From allows copying entries from one field to another
- Swap With will swap the contents of two fields
- Field Reference and Subfield Reference allow you to specify indicator and subfield settings to match
- Subfield Specific Operations. In this case whenever a match is found to the field (and optional indicators), the subfields will be individually processed, with similar operations as above:
    - Add a new subfield
    - Delete a subfield
    - Replace a subfield
    - Set a default value for a subfield
    - Swap With allows swapping subfield values

- Regular Expression Substitution uses a regex to change values
- Authval Control will filter subfields against an authorized value, removing non-authorized entries
- Subfield References will append a new subfield with the contents of another field's specified subfield
- Subfield Ranges allow you to specify a range of subfields for action
- Ref Table Lookup allows basing a change on an authorized value or table list (like item type)
- Conditional will take the specified action based on some other value in the record (e.g., if XXX$x is THIS, set YYY$y to THAT)

Each of these operations is represented by a different symbol:

- plus for add
- minus for delete
- pencil in box
- empty box for default
- two sheets of paper for copy from
- left and right arrows for swap with
- wrench for subfield regex
- padlock for authval control
- two vertical lines for Ignore (applies to leader only)
- crossing arrows for change to new value
- lightning bolt for subfield references
- bulleted list for subfield-specific (and then subfields will have their own symbols).

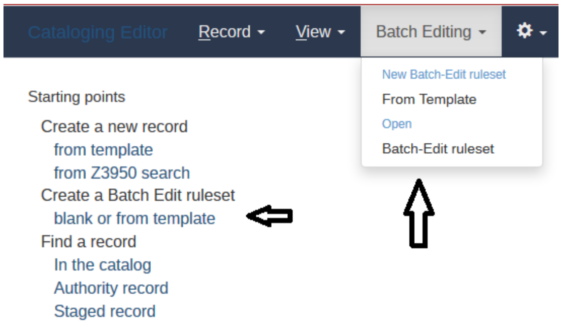
Click on the symbol next to the field number to cycle through options. The leader has only two different symbols and states: replace and ignore (pause symbol). In most cases you will want to set the leader to ignore so you do not overwrite the leader value of your records in your import batch.

A brief note on indicators. For field delete, replace, and default-to, indicators appearing next to the tag specify the match conditions. Use a "*" (asterisk) to mean "match any indicator value". A space (blank) will match exactly that, and not a numeric value. For replace, a second set of indicators will appear so you can change the indicators if desired.

No attempt is made to respect repeating vs nonrepeating field or subfield semantics.

9.9.2 Create a Ruleset

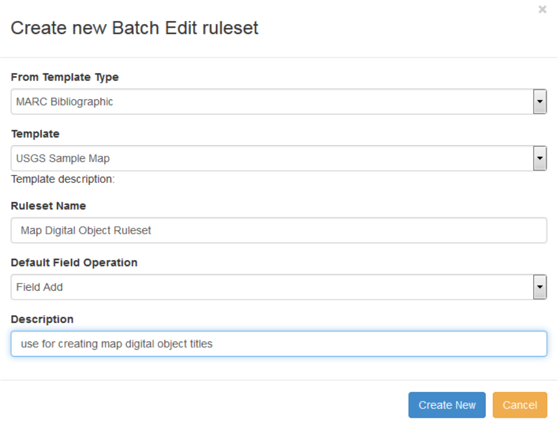
The first step is to create a ruleset within the Cataloging Editor. In the editor, either click on the link under Create a Batch Edit Ruleset, or go under Batch Editing and select From Template.



You have the option to create a ruleset either based on an existing MARC template, or from scratch. Which you choose depends on what you want to do. For example, to create a ruleset to use as the basis for digital objects (full Bibliovation systems only), you would probably want to create from template so that all needed MARC fields are already present. To create a ruleset to add, edit, or delete data, you would want to create from scratch and add only the fields you want to modify.

9.9.2.1 *Create Ruleset from Template*

To create from template, select MARC bibliographic from the first pulldown, then select your desired template from the second. Give it a name and a description.



Create new Batch Edit ruleset

From Template Type
MARC Bibliographic

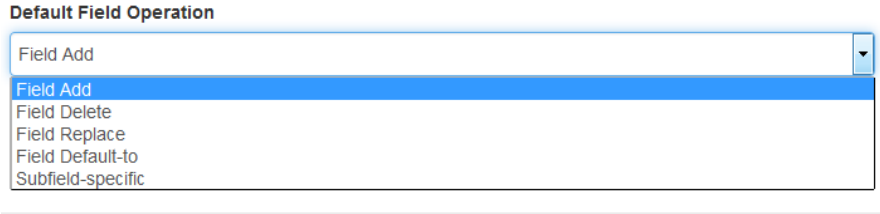
Template
USGS Sample Map
Template description:

Ruleset Name
Map Digital Object Ruleset

Default Field Operation
Field Add

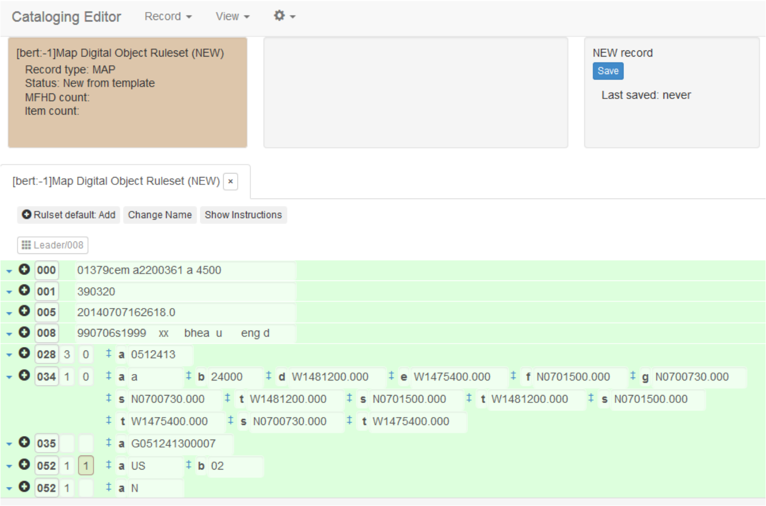
Description
use for creating map digital object titles

Under Default Field Operation, you have choices for adding, deleting, or replacing, either at the field or subfield level. This controls the default action in the ruleset; it doesn't prevent you from setting one field for a different action. Select the action you're most likely to use in this ruleset.



Default Field Operation
Field Add

Click Create New and the ruleset will open in the editor.



[bert:-1]Map Digital Object Ruleset (NEW)
Record type: MAP
Status: New from template
MFHD count:
Item count:

NEW record
Last saved: never

[bert:-1]Map Digital Object Ruleset (NEW)

```
000        01379cem a2200361 a 4500
001        390320
005        20140707162618.0
008        990706s1999    xx    bhea  u     eng d
028  3  0  ‡ a 0512413
034  1  0  ‡ a a  ‡ b 24000  ‡ d W1481200.000  ‡ e W1475400.000  ‡ f N0701500.000  ‡ g N0700730.000
           ‡ s N0700730.000  ‡ t W1481200.000  ‡ s N0701500.000  ‡ t W1481200.000  ‡ s N0701500.000
           ‡ t W1475400.000  ‡ s N0700730.000  ‡ t W1475400.000
035        ‡ a G051241300007
052  1  1  ‡ a US  ‡ b 02
052  1     ‡ a N
```

Since this is based off a template, various MARC fields are already present, and some are pre-filled with data. For a ruleset, leave ONLY the fields you want to either create or modify; delete all other fields. Edit the ruleset field data as needed. **For any special characters, such as :, !, @, etc., you MUST escape the character – put a backslash before it**. Otherwise the script won't interpret it properly. For example, if you're adding or editing an email address, you must enter that string formatted as

myaddress\@mycompany.com

At the top of the display are some tabs; click on the Show Instructions tab for help.

Batch Edit Ruleset Templates give rules for how to modify a MARC record. The action symbol specifies the rule to be applied; click it to cycle through different actions. Actions can apply at the field level or at the subfield level (when the ☰ symbol is shown next to the field). The 🔀 symbol separates match criteria, on the left, from the changes to be applied, on the right.

Symbol	Meaning in Fields	Meaning in Subfields
⊕ Add	Add this field to the MARC. If the MARC already has this field, another will be appended with the specified subfields. Subfields support reference links and code ranges (see below).	Add this subfield to the field. If the field already has this subfield, another subfield will be appended. Supports reference links and code ranges (see below).
⊖ Delete	Remove all matching fields from the MARC.	Remove all matching subfields from the field. Supports code ranges
✎ Replace	Remove any matching fields from the MARC, and replace with the one from the ruleset template. Subfields support reference links and code ranges.	Remove any matching subfields from the field, and replace. Supports reference links and code ranges.
▢ Default	Add this field to the MARC only if the MARC does not already have a matching field. Subfields support reference links and code ranges.	Add this subfield to the field only if the field does not already have a matching subfield. Supports reference links and code ranges
Copy From	Add a new field, copied from the field referenced. The 'a' subfield should contain a field reference link (see below). Does nothing if the field isn't present; if multiple fields match, only the first is used. To replace instead of adding, use a *Delete* followed by a *Copy From*	Not available; use *Add, Replace, or Default with a subfield reference link.*
⇄ Swap With	Swap the first matching field with the first one referenced in the 'a' subfield.	Swap the first matching subfield with the first one referenced in the value.
🔧 Modify	Not available at field level	Modify the subfield value with a regular expression substitution pattern. Uses Perl format regex substitution patterns (quick tutorial and examples). All matching subfields will be modified. Supports code ranges.
🔒 Validate	Not available at field level	Validate the subfield value against the specified authorized value category. If the subfield's value is not present in that category, it is deleted. Supports code ranges.
☰ Subfields	For every matching field, apply changes at the subfield level (see the Subfields column)	
⏸ Ignore	Do not update the leader field (leader only). All MARC records, including ruleset templates, must have a leader, however if this symbol is shown, the leader will not be applied to any MARC batches.	
🔀 Change to	The field tag and indicators (if applicable) to the *left* of this symbol are the match criteria. Use a '*' in the indicators to match any indicator. For non-deletes, the indicators and subfields to the *right* of this symbol will be applied to matching fields.	The code (letter) to the *left* of this symbol is the match criterion; you can use a single subfield letter ("a"), a range ("a-c"), commas ("a-c,d-f"), or asterisk for all subfields ("*"). For non-deletes, the subfield value to the *right* of this symbol will be applied to the matching code in this field
⚡ Ref Link		The subfield value is a reference link (see below).
📋 Ref Table Lookup		The subfield value is a reference link with table lookup (see below).
❓ Conditional		Apply this rule only if the indicated field/subfield has a value (see below).

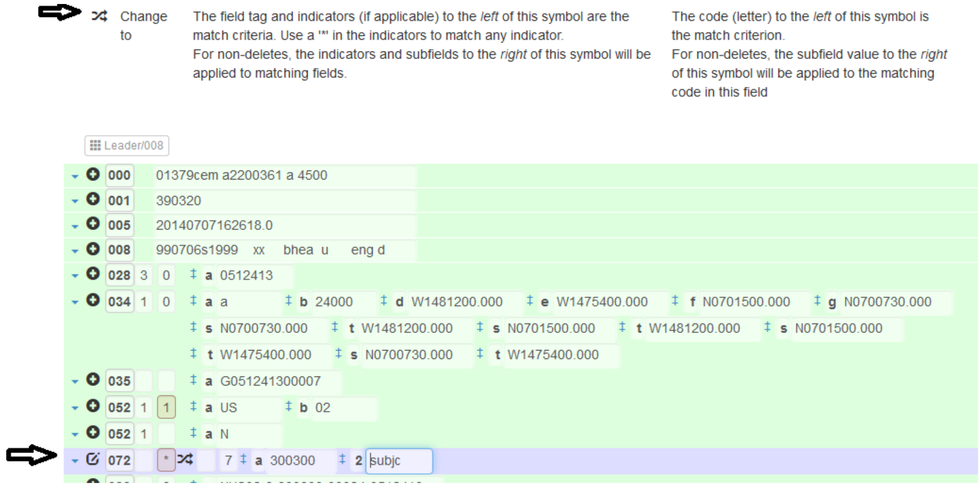
Some subfield actions support reference links. For example, when adding a subfield, instead of specifying a subfield value, you can specify a reference to a field and subfield in the MARC record being processed. To add a subfield using a reference link instead of literal value, use the "Insert Ref Link" or "Append Ref Link"; a ⚡ symbol will appear next to the subfield action. Specify the reference field in the value space using "999$x" format, e.g. "245$a". You can optionally restrict by indicator by appending a "|1=#" or "|2=#" or both. For example, "245$a|1=1|2=0" would be the value of the first 'a' subfield in the first 245 with ind1=1 and ind2=0. The subfield-level *Swap* action always takes a reference link. The field-level *Copy From* and *Swap* actions also take reference links, but without the subfield code, e.g. "245|1=0".

To add a subfield using a reference link with table lookup, use "Insert Ref Lookup" or "Append Ref Lookup". Specify the field reference (as above), and the authorized value category (prefixed with an @), e.g., "942$x @catsource" or "993$a|1=#|2=# @itemtype". The default lookup direction is from code to value; to reverse this add a ! before e.g. "908$x !@catsource".

You can apply conditionals to most rules with "Insert Conditional" or "Append Conditional". If the condition is not met, all further processing of that rule stops. Specify the condition in the value space. It must include a field specification (same as the reference field format), and may also include a value, either an exact value or regular expression. For example, "999" (must have a 999 field), "999$x" (must have 999$x), "999$x|1=1|2=0" (must have 999$x with ind1=1 and ind2=0), "999$x foo" (must have 999$x with value "foo"), "999$x|1=1|2=0 /foo/i" (must match regular expression pattern /foo/i).

Some subfield actions support code ranges. A code range allows you to specify multiple codes at a time. You can separate code ranges with commas (no spaces). For example, ✎ **a-c,e-f 🔀Foo** would replace ALL subfields a, b, c, e, and f with the value "Foo".

Read through the instructions to be sure you understand all the possible actions. Add, delete, and replace will take that action on any matching MARC fields or subfields. You can also add a field only if it does not already exist. Change To allows matching on field and indicators to change the indicated values. For example, this template had an 072 with a second indicator of 7. In this change, any 072 with any indicator will be changed to match the new values.



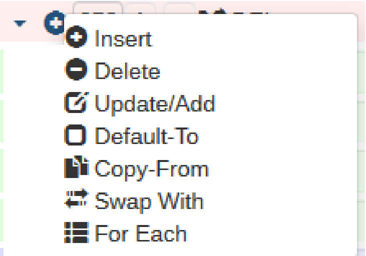
Change to — The field tag and indicators (if applicable) to the *left* of this symbol are the match criteria. Use a '*' in the indicators to match any indicator.
For non-deletes, the indicators and subfields to the *right* of this symbol will be applied to matching fields.

The code (letter) to the *left* of this symbol is the match criterion.
For non-deletes, the subfield value to the *right* of this symbol will be applied to the matching code in this field

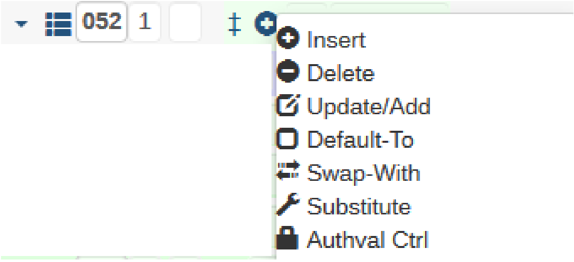
```
000        01379cem a2200361 a 4500
001        390320
005        20140707162618.0
008        990706s1999   xx    bhea  u     eng d
028  3  0  ‡ a 0512413
034  1  0  ‡ a a  ‡ b 24000  ‡ d W1481200.000  ‡ e W1475400.000  ‡ f N0701500.000  ‡ g N0700730.000
           ‡ s N0700730.000  ‡ t W1481200.000  ‡ s N0701500.000  ‡ t W1481200.000  ‡ s N0701500.000
           ‡ t W1475400.000  ‡ s N0700730.000  ‡ t W1475400.000
035        ‡ a G051241300007
052  1  1  ‡ a US  ‡ b 02
052  1     ‡ a N
072     *     7 ‡ a 300300  ‡ 2 subjc
```

Click the Hide Instructions tab header to close the instructions and return to full screen.

To change a field setting, click the icon immediately to the left of the field tag. If you started with Add Field as the default, it will be a plus sign (as in the above screenshots). A dropdown menu shows you the options:

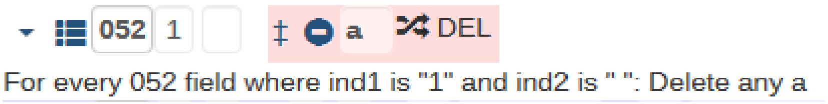


You can also choose to make changes at the subfield level. On this example, the left-hand icon is first changed to Modify Subfields. Then an icon (defaulting to insert) appears at the subfield level, and any/all can be marked for deletion (or changes).



At the top of the edit screen, a tab Show Rule Summaries will toggle on/off a descriptor line about what your ruleset will do.

For example, setting the above field to delete subfield a:

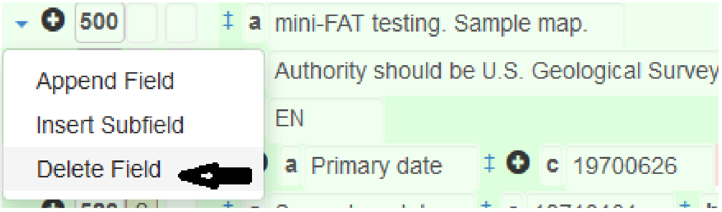


For every 052 field where ind1 is "1" and ind2 is " ": Delete any a

Note that you can set the rule based on indicators – if you want your rule to apply to all indicators, use an asterisk in the indicator fields:

For every 052 field: Delete any a

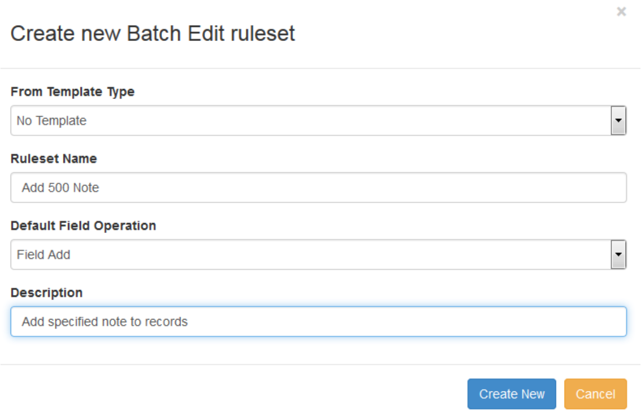
To remove a field itself from your ruleset, use the familiar catalog editor down arrow field commands:



When finished, save your ruleset. You can then apply it to batches (see later instructions).

9.9.2.2 Create Ruleset from Scratch

Creating from template is useful for applying to digital object loads (full Bibliovation systems only), or for doing major MARC edits to selected records. To do a minor, specific change, you will want to create from scratch. As above, create a new ruleset. This time, leave the first selection as No Template:



Create new Batch Edit ruleset

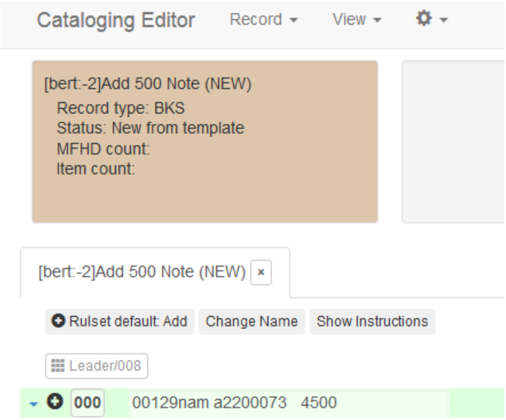
From Template Type: No Template

Ruleset Name: Add 500 Note

Default Field Operation: Field Add

Description: Add specified note to records

Give it a name and description and click Create New. The ruleset opens in the editor with only a default leader (required).

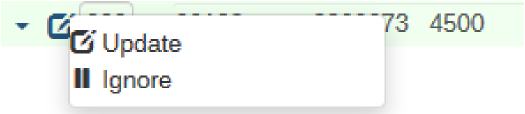


[bert:-2]Add 500 Note (NEW)
Record type: BKS
Status: New from template
MFHD count:
Item count:

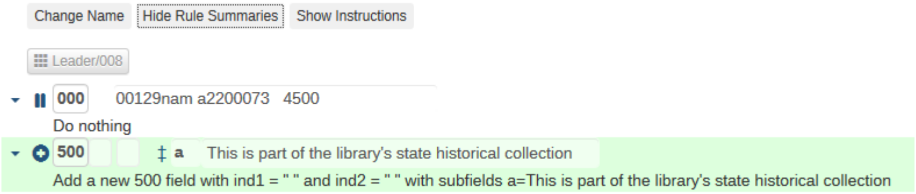
[bert:-2]Add 500 Note (NEW) ×

000 00129nam a2200073 4500

Since a leader is required, but you may not want to overwrite existing leaders, change the symbol there to Ignore



so that the system will ignore the ruleset leader. Then add the field and subfield(s) you want. Remember that you can turn on the Show Rule Summaries toggle to verify what the ruleset will do.



000 00129nam a2200073 4500
Do nothing
500 ‡ a This is part of the library's state historical collection
Add a new 500 field with ind1 = " " and ind2 = " " with subfields a=This is part of the library's state historical collection

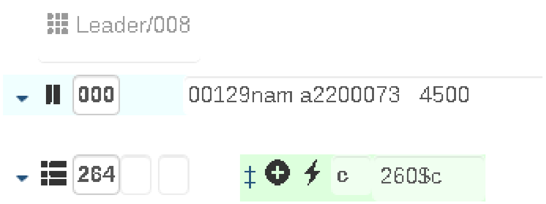
Save the ruleset for later use.

Note that if you are using subfield operations

the batch edit will ONLY make changes on records which have the specified field(s). If one or both of the fields (with the swap or reference operations) don't exist, the record will be skipped.

- subfield add will add a new subfield
- subfield delete will delete any matching subfield
- subfield update/insert will update the field if not present, otherwise add the field
- subfield default-to will add the subfield only if not present

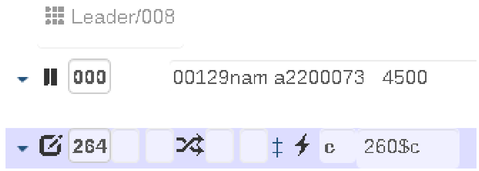
For example, this subfield reference will copy the first 260$c into the 264$c.


Leader/008

000 00129nam a2200073 4500

264 ‡ c 260$c

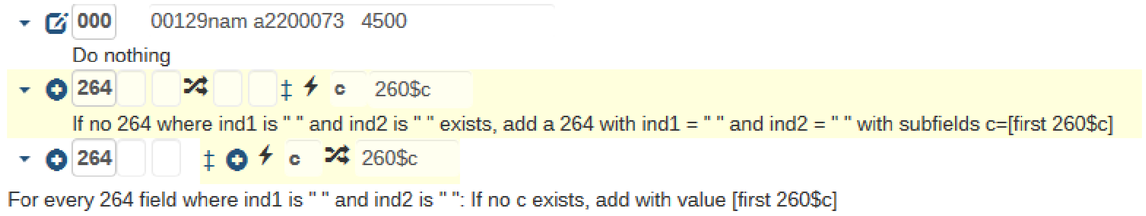
However, if the record does not have a 264 field, nothing will happen. You could change the subfield operator symbol for a Replace symbol:


Leader/008

000 00129nam a2200073 4500

264 ‡ c 260$c

This would add a 264 if needed and copy the value into $c, or add a new $c to an existing 264. However, if the record already had a 264$c, it would not overwrite it – it would add a second $c. You may want to set up multiple rulesets – first one to create a 264 if needed, and then this one to copy the content. For example:


000 00129nam a2200073 4500

Do nothing

264 ‡ c 260$c

If no 264 where ind1 is " " and ind2 is " " exists, add a 264 with ind1 = " " and ind2 = " " with subfields c=[first 260$c]

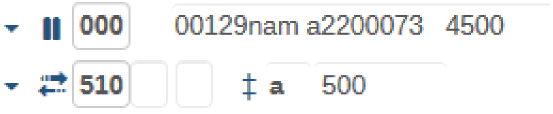
264 ‡ c 260$c

For every 264 field where ind1 is " " and ind2 is " ": If no c exists, add with value [first 260$c]

This creates a 264 if needed. If one already exists, other subfields will not be removed, which would happen with the first example.

Always test your rulesets on sandbox and make sure you understand what they do. Use a sample batch of records with a variety of fields and subfields.

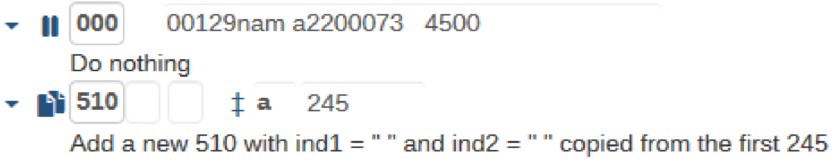
Here is an example of a ruleset to swap fields:


000 00129nam a2200073 4500

510 ‡ a 500

This would swap the 510 with the first 500 field found. If the record does not have both a 510 and a 500, nothing will happen.

This example will copy the 245 into a 510 field:

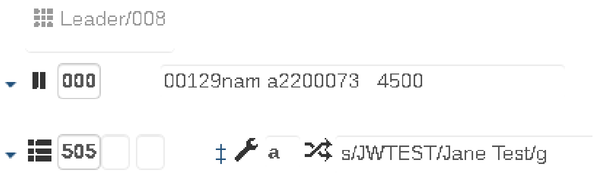

000 00129nam a2200073 4500

Do nothing

510 ‡ a 245

Add a new 510 with ind1 = " " and ind2 = " " copied from the first 245

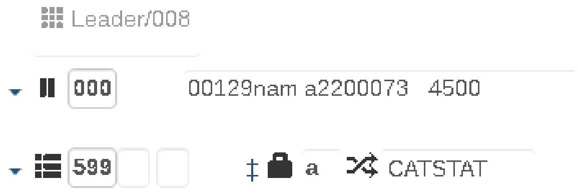
This example will apply a regex to the 505$a. If the entry JWTEST is found, it will edit the subfield to read Jane Test instead:



000 00129nam a2200073 4500

505 ‡ a s/JWTEST/Jane Test/g

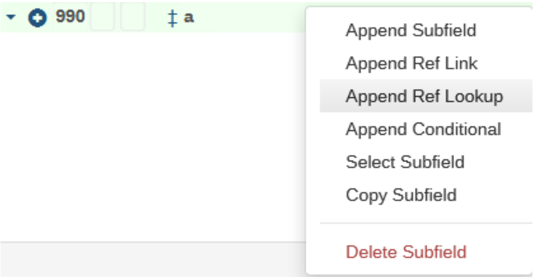
This example will check the contents of the 599$a against an authorized value named CATSTAT. If the entry is not found in the authval, it will be deleted.



000 00129nam a2200073 4500

599 ‡ a CATSTAT

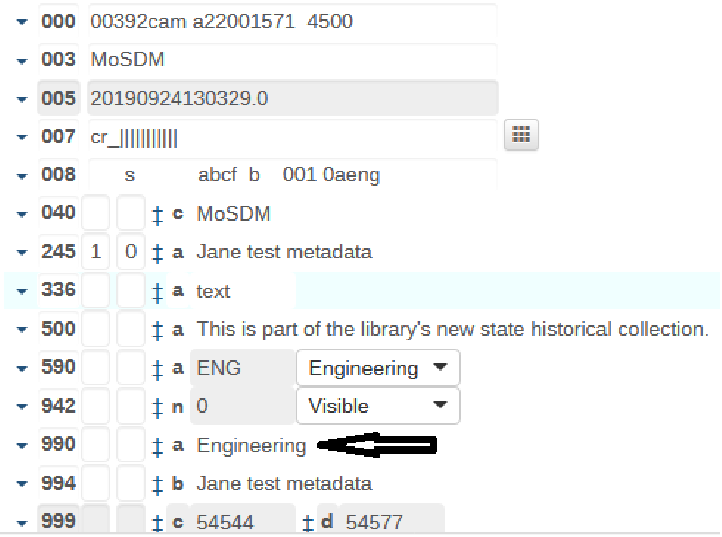
You can also use the Ref Lookup option to insert descriptions from an authval-linked field. For example, on this system the 590 is linked to an authval named DEPARTMENT. You can insert the description from that field into another field. Start with adding a field and subfield a. Then, on subfield a, right-click and select Append Ref Lookup:



You can then delete the original $a and edit the ref lookup subfield:

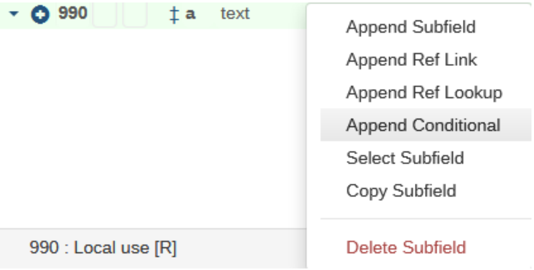
990 ‡ a 590a @DEPARTMENT

This will create a 990$a with the description of the authval stored in the 590. You must use the @ symbol and the name of the authval. Here is the bib record after the ruleset has been applied:



000 00392cam a22001571 4500
003 MoSDM
005 20190924130329.0
007 cr_||||||||||
008 s abcf b 001 0aeng
040 ‡c MoSDM
245 1 0 ‡a Jane test metadata
336 ‡a text
500 ‡a This is part of the library's new state historical collection.
590 ‡a ENG Engineering
942 ‡n 0 Visible
990 ‡a Engineering
994 ‡b Jane test metadata
999 ‡c 54544 ‡d 54577

The conditional option allows an edit based on the presence of another field. For example, to add a note field based on the content of another field, start with an add subfield. Then, on subfield a, do an Append Conditional:



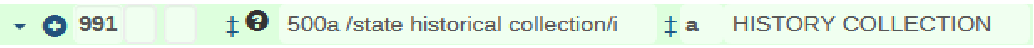
990 ‡a text

990 : Local use [R]

Then delete the original $a so that the conditional is the first entry, and add your lookup. This example checks for the existence of a 336$a. If found, it inserts a 990$a:

990 ‡? 336a ‡a 336 found

You can also check for the presence of specific text with a regex. This example looks for a particular string in the 500, and adds a 991$a if found:

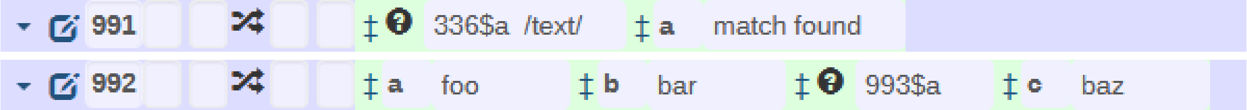


991 ‡? 500a /state historical collection/i ‡a HISTORY COLLECTION

In these examples, the 990 or 991 will only be created if the condition is met. If the original $a entry had not been deleted, the field would have been created with that $a, and then the conditional statement would have been checked.

You can add multiple conditionals on one line. The system will process them one at a time. If a conditional fails, processing stops. None of the remaining statements will be processed.

Here are two more examples of a conditional change:

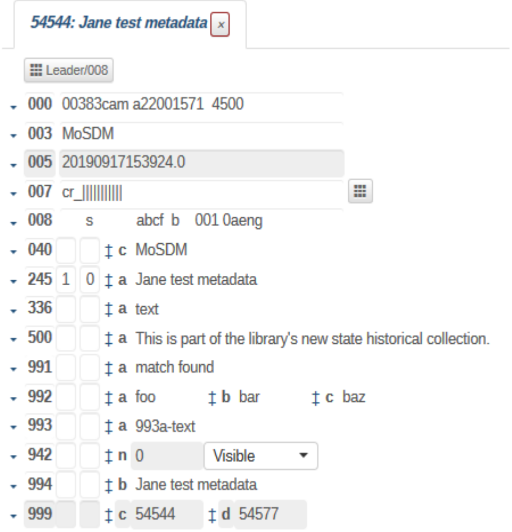


```
991  ‡ 336$a /text/   ‡ a  match found
992  ‡ a  foo   ‡ b  bar   ‡ 993$a   ‡ c  baz
```

In the first, if the 336$a contains the string “text”, the ruleset will add a 991$a with a value of “match found”. If there is no matching 336$a, nothing happens.

In the second, the system will add a 992 with $a of “foo”, $b of “bar”. Then, if there is a 993$a with any content, the ruleset will add a $c of “baz”.

Here’s an example of a record after this ruleset was run:

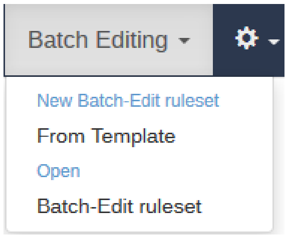


54544: Jane test metadata

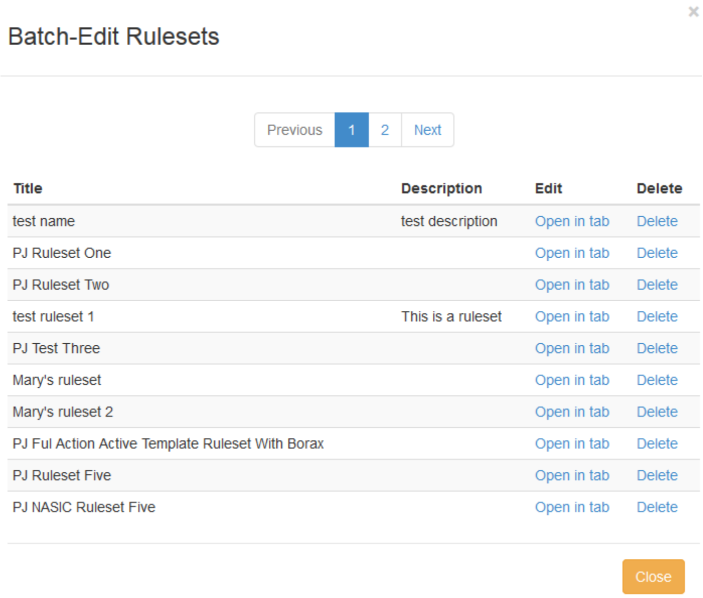
```
000  00383cam a22001571  4500
003  MoSDM
005  20190917153924.0
007  cr_||||||||||
008      s        abcf  b    001 0aeng
040        ‡ c  MoSDM
245  1  0  ‡ a  Jane test metadata
336        ‡ a  text
500        ‡ a  This is part of the library's new state historical collection.
991        ‡ a  match found
992        ‡ a  foo     ‡ b  bar     ‡ c  baz
993        ‡ a  993a-text
942        ‡ n  0    Visible
994        ‡ b  Jane test metadata
999        ‡ c  54544   ‡ d  54577
```

9.9.3 Editing or Deleting a Ruleset

After a ruleset has been created, you can edit it under Batch Editing, Open, Batch Edit Ruleset:



Select your ruleset from the list and click Open in Tab. Note that you can also delete existing rulesets from this screen.



Batch-Edit Rulesets

Title	Description	Edit	Delete
test name	test description	Open in tab	Delete
PJ Ruleset One		Open in tab	Delete
PJ Ruleset Two		Open in tab	Delete
test ruleset 1	This is a ruleset	Open in tab	Delete
PJ Test Three		Open in tab	Delete
Mary's ruleset		Open in tab	Delete
Mary's ruleset 2		Open in tab	Delete
PJ Ful Action Active Template Ruleset With Borax		Open in tab	Delete
PJ Ruleset Five		Open in tab	Delete
PJ NASIC Ruleset Five		Open in tab	Delete

Then make your changes and save the record. If you are editing an existing ruleset, an option will appear on the header row to allow you to save it as a new name:

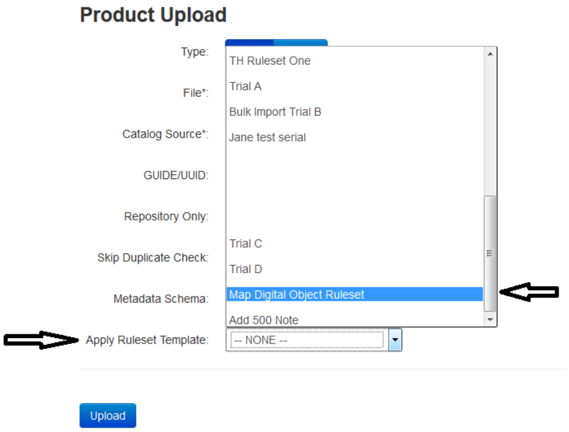
000 00129nam a2200073 4500

510 ‡a 245

You can also just click the Save button at top to save under the same name.

9.9.4 Applying Ruleset to Digital Object Load

For Bibliovation sites, if the user has the batch_edit_marc permission, the option to select a ruleset will show on the digital object upload screen:



Product Upload

Type:

File*:

Catalog Source*:

GUIDE/UUID:

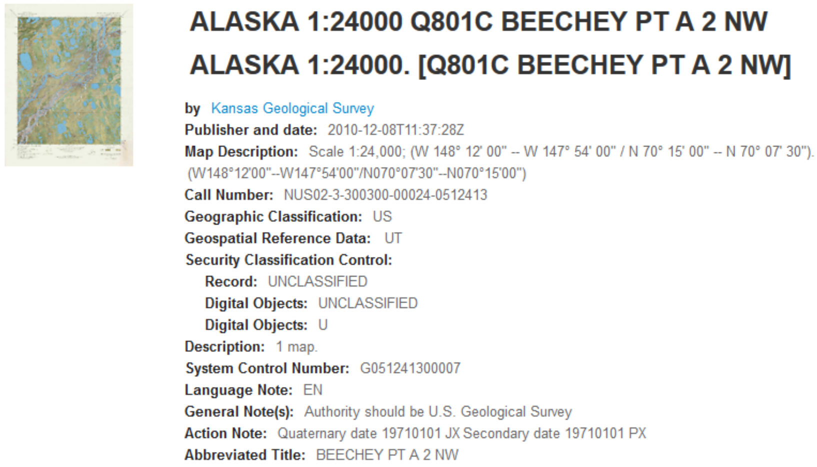
Repository Only:

Skip Duplicate Check:

Metadata Schema:

Apply Ruleset Template: -- NONE --

Select the ruleset and click Upload. As with other digital object uploads, the record must still be imported from Manage Staged Records. Once it is imported, the title record will include all fields/subfields specified in the ruleset:



ALASKA 1:24000 Q801C BEECHEY PT A 2 NW

ALASKA 1:24000. [Q801C BEECHEY PT A 2 NW]

by Kansas Geological Survey

Publisher and date: 2010-12-08T11:37:28Z

Map Description: Scale 1:24,000; (W 148° 12' 00" -- W 147° 54' 00" / N 70° 15' 00" -- N 70° 07' 30"). (W148°12'00"--W147°54'00"/N070°07'30"--N070°15'00")

Call Number: NUS02-3-300300-00024-0512413

Geographic Classification: US

Geospatial Reference Data: UT

Security Classification Control:

Record: UNCLASSIFIED

Digital Objects: UNCLASSIFIED

Digital Objects: U

Description: 1 map.

System Control Number: G051241300007

Language Note: EN

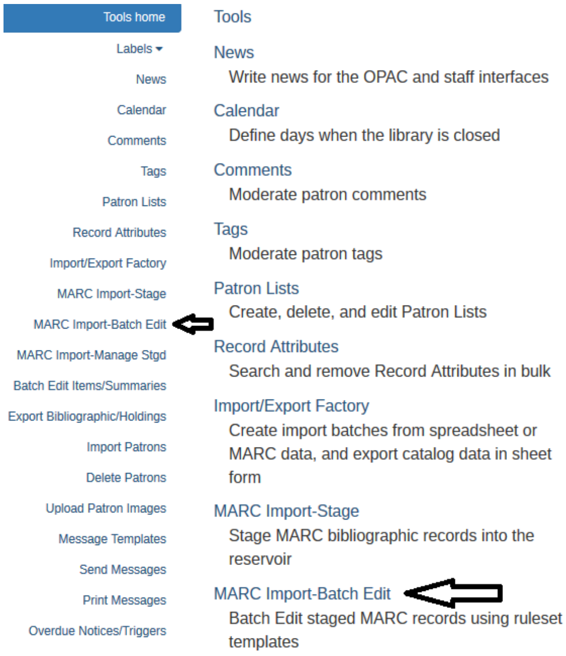
General Note(s): Authority should be U.S. Geological Survey

Action Note: Quaternary date 19710101 JX Secondary date 19710101 PX

Abbreviated Title: BEECHEY PT A 2 NW

9.9.5 Applying Ruleset to Bibliographic Batch Load

You can also apply a ruleset to an import batch of bibliographic records while it is staged; you can't apply to a batch that has already been imported. If you have the batch_edit_marc permission, you will see a new option under the Tools menu for MARC Import Batch Edit:



Tools

News
Write news for the OPAC and staff interfaces

Calendar
Define days when the library is closed

Comments
Moderate patron comments

Tags
Moderate patron tags

Patron Lists
Create, delete, and edit Patron Lists

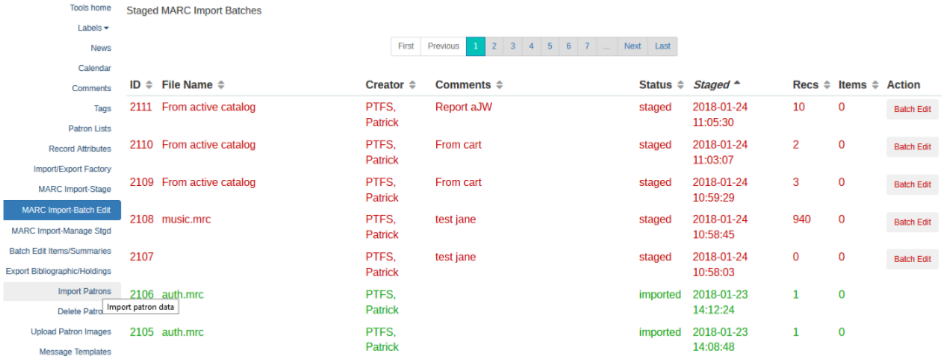
Record Attributes
Search and remove Record Attributes in bulk

Import/Export Factory
Create import batches from spreadsheet or MARC data, and export catalog data in sheet form

MARC Import-Stage
Stage MARC bibliographic records into the reservoir

MARC Import-Batch Edit
Batch Edit staged MARC records using ruleset templates

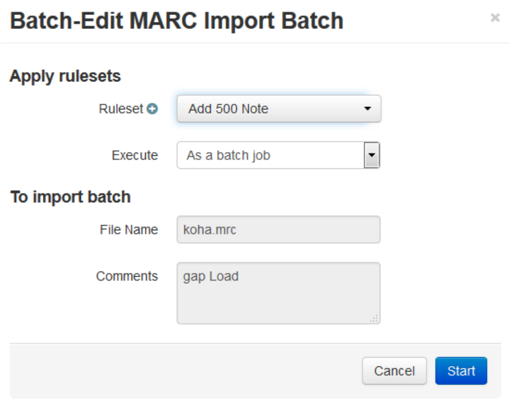
In that tool, you'll see a list of batches.



Staged MARC Import Batches

ID	File Name	Creator	Comments	Status	Staged	Recs	Items	Action
2111	From active catalog	PTFS, Patrick	Report aJW	staged	2018-01-24 11:05:30	10	0	Batch Edit
2110	From active catalog	PTFS, Patrick	From cart	staged	2018-01-24 11:03:07	2	0	Batch Edit
2109	From active catalog	PTFS, Patrick	From cart	staged	2018-01-24 10:59:29	3	0	Batch Edit
2108	music.mrc	PTFS, Patrick	test jane	staged	2018-01-24 10:58:45	940	0	Batch Edit
2107		PTFS, Patrick	test jane	staged	2018-01-24 10:58:03	0	0	Batch Edit
2106	auth.mrc	PTFS, Patrick		imported	2018-01-23 14:12:24	1	0	
2105	auth.mrc	PTFS, Patrick		imported	2018-01-23 14:08:48	1	0	

Batches which can be edited show in red and have a Batch Edit button next to them. Click that button and use the first pulldown on the popup window to select a ruleset.



Batch-Edit MARC Import Batch

Apply rulesets

Ruleset: Add 500 Note

Execute: As a batch job

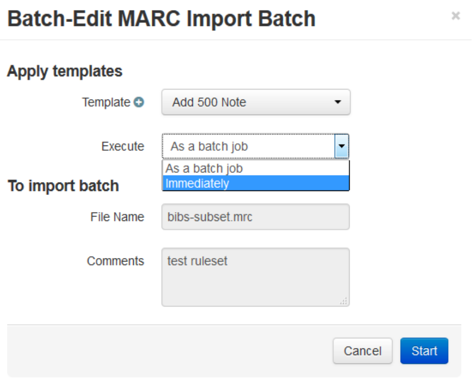
To import batch

File Name: koha.mrc

Comments: gap Load

Then click Start. Note that the new Tools group granular permission async_jobs Manage asynchronous (batch) jobs

is required to be able to run background jobs. Background processing is always preferable, but for smaller batches you could choose Execute Immediately:



Batch-Edit MARC Import Batch

Apply templates

Template: Add 500 Note

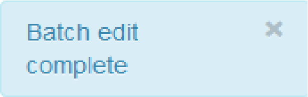
Execute: As a batch job

To import batch

File Name: bibs-subset.mrc

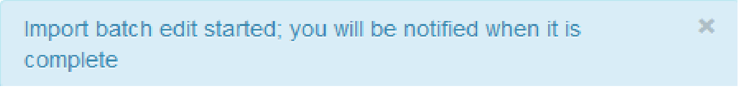
Comments: test ruleset

You'll get a popup if the job was successful:



Batch edit complete

If background processing is available and selected, the edit runs in the background (strongly recommended for large batches):



Import batch edit started; you will be notified when it is complete

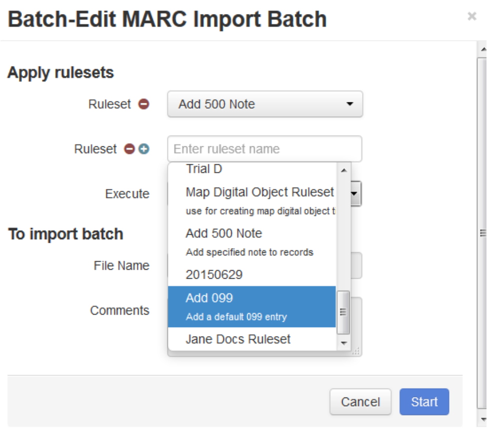
There are new messaging options for batch job processing (Job Finished, Job Failed, Job Timed Out). Depending on your selections, you may be notified, or you may check status under your account in the new My Batch Jobs tab. In these screenshots, a popup (above) says the job has finished. The dashboard My Messages status column also shows that it is done.

My Messages

		Date	Category	Code	Title	Content
✖	🖶	2018-01-24 11:06:10	Jobs	async.done	Job finished	Your job Batch editing From active catalog: Jane 5.20test has completed
✖	🖶	2018-01-24 11:05:10	Reports	report.completed	Report completed	Report Report aJW has completed. See report run summary.

9.9.5.1 Applying Multiple Rulesets

It is possible to apply more than one template in a batch edit; the changes will be made sequentially. To do so, on the batch edit screen, click the plus sign next to the Template pulldown label. That adds another field. Select the ruleset(s) you want to add:



Batch-Edit MARC Import Batch

Apply rulesets

Ruleset: Add 500 Note

Ruleset: Enter ruleset name

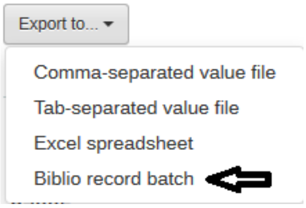
Then process the edit.

9.9.6 Creating a Batch from a SQL Report

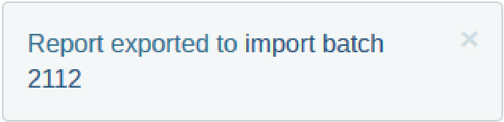
The above section describes how to apply a batch edit ruleset to a newly-staged batch. You may also edit records already in the catalog. You will need to be able to identify them with a SQL query. Build your query, and as the first field select the record's biblionumber. For example, to edit all titles where an item belongs to the EAST branch:

> select biblio.biblionumber, biblio.title, biblio.author, items.barcode from items JOIN biblio on (items.biblionumber = biblio.biblionumber) where homebranch = 'EAST'

Run the query to validate the results. If the first column in the report is biblionumber, you will now have a new export option:



Exporting as Biblio Record Batch gathers the records identified in this query and places them as a batch ready for a batch edit operation. The report screen gives you the batch number:

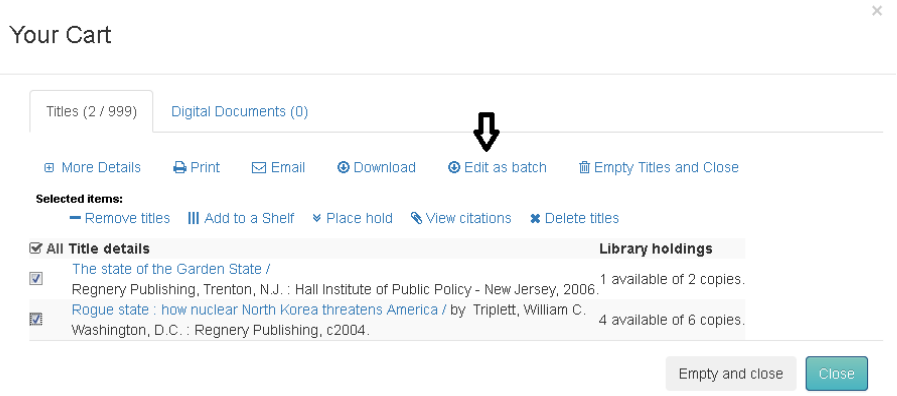


Report exported to import batch 2112

Since this approach edits every record identified by the SQL command, you will need to be very precise in your report structure. Look at the output and verify that you do want to edit every title.

9.9.7 Creating a Batch from the Cart

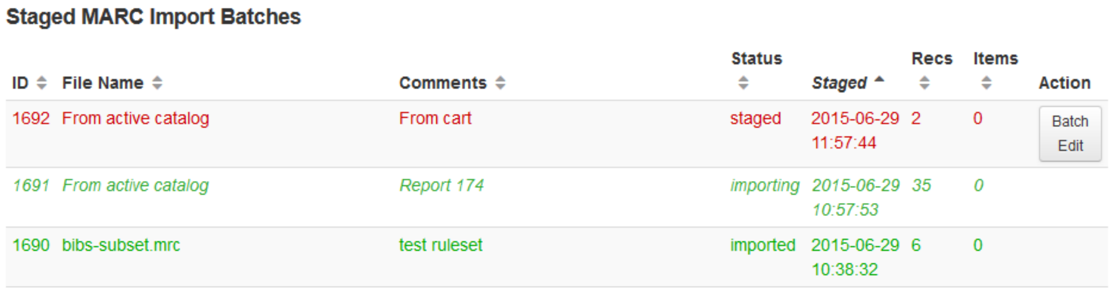
It may be difficult to create a SQL query to exactly define the records you want to edit. If so, you can also assemble an edit batch in the Cart. Search the catalog, add records to the cart, and continue searching/adding until you have all of them assembled. Then, in the Cart, you'll see a new option, Edit as Batch. Click that, and the system will create a batch for editing:



☑ All	Title details	Library holdings
☑	The state of the Garden State / Regnery Publishing, Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.	1 available of 2 copies.
☑	Rogue state : how nuclear North Korea threatens America / by Triplett, William C. Washington, D.C. : Regnery Publishing, c2004.	4 available of 6 copies.

9.9.8 Editing from SQL Report or Cart

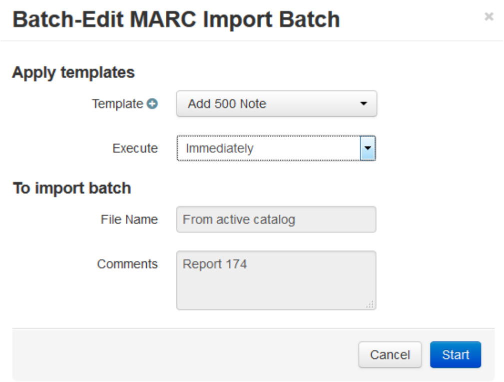
After creating a batch from either a SQL report or from the Cart, go into Tools, MARC Import Batch Edit and check the list. Note that your records are assembled as a batch and labeled "From active catalog" – if you created from a report, it shows the report ID number. If you created from the Cart, it says "from cart" instead.



Staged MARC Import Batches

ID	File Name	Comments	Status	Staged	Recs	Items	Action
1692	From active catalog	From cart	staged	2015-06-29 11:57:44	2	0	Batch Edit
1691	From active catalog	Report 174	importing	2015-06-29 10:57:53	35	0	
1690	bibs-subset.mrc	test ruleset	imported	2015-06-29 10:38:32	6	0	

In either case, as above, click the Batch Edit button, select your ruleset, and execute it.



Apply templates

Template: Add 500 Note

Execute: Immediately

To import batch

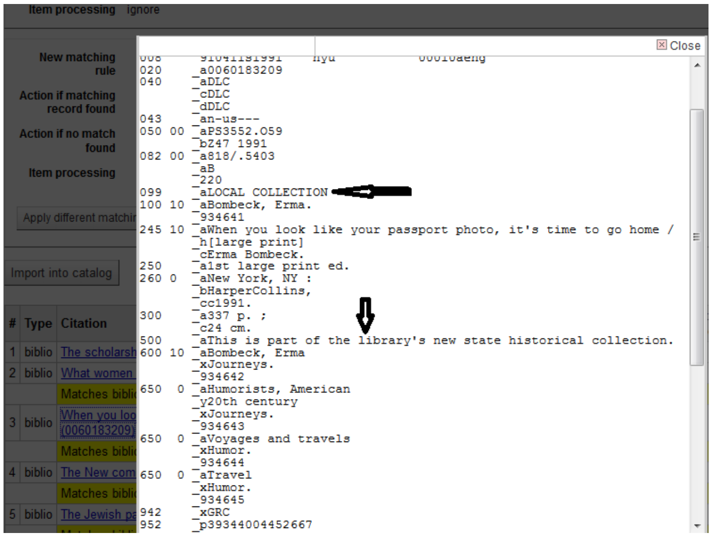
File Name: From active catalog

Comments: Report 174

When you are notified that the batch edit is complete, go into Manage Staged Records for that batch number.

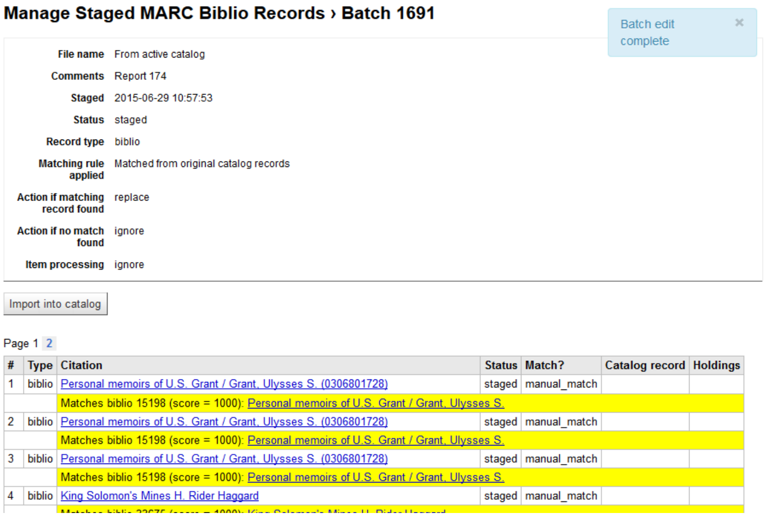
9.9.9 Importing the Edited Batch

No matter how you created the batch and made the edits, the final step for all batch edits is to import the records into (or back into) the catalog. Go into Manage Staged Records and locate your batch. You can verify your edit by looking at the MARC, before you bring the edited records into the catalog. Click on the title for any record in the batch, and check that fields were added or changed:



```
020     _a0060183209
040     ‾aDLC
        ‾cDLC
        ‾dDLC
043     ‾an-us---
050 00  ‾aPS3552.O59
        ‾bZ47 1991
082 00  ‾a818/.5403
        ‾aB
        ‾220
099     ‾aLOCAL COLLECTION
100 10  ‾aBombeck, Erma.
        ‾934641
245 10  ‾aWhen you look like your passport photo, it's time to go home /
        ‾h[large print]
        ‾cErma Bombeck.
250     ‾a1st large print ed.
260 0   ‾aNew York, NY :
        ‾bHarperCollins,
        ‾cc1991.
300     ‾a337 p. ;
        ‾c24 cm.
500     ‾aThis is part of the library's new state historical collection.
600 10  ‾aBombeck, Erma
        ‾xJourneys.
        ‾934642
650   0 ‾aHumorists, American
        ‾y20th century
        ‾xJourneys.
        ‾934643
650   0 ‾aVoyages and travels
        ‾xHumor.
        ‾934644
650   0 ‾aTravel
        ‾xHumor.
        ‾934645
942     ‾xGRC
952     ‾p39344004452667
```

If the edits are correct, click the Import Into Catalog button to complete the change.



Manage Staged MARC Biblio Records › Batch 1691

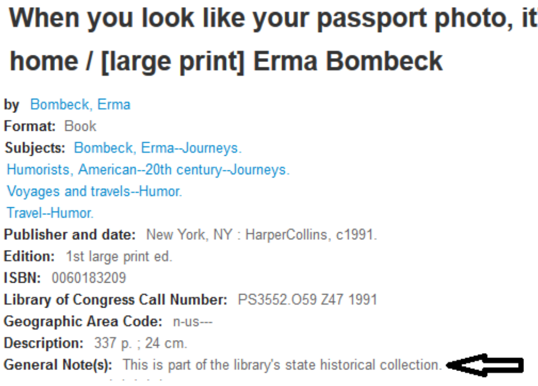
Batch edit complete

File name	From active catalog
Comments	Report 174
Staged	2015-06-29 10:57:53
Status	staged
Record type	biblio
Matching rule applied	Matched from original catalog records
Action if matching record found	replace
Action if no match found	ignore
Item processing	ignore

Page 1 2

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	biblio	Personal memoirs of U.S. Grant / Grant, Ulysses S. (0306801728)	staged	manual_match		
		Matches biblio 15198 (score = 1000): Personal memoirs of U.S. Grant / Grant, Ulysses S.				
2	biblio	Personal memoirs of U.S. Grant / Grant, Ulysses S. (0306801728)	staged	manual_match		
		Matches biblio 15198 (score = 1000): Personal memoirs of U.S. Grant / Grant, Ulysses S.				
3	biblio	Personal memoirs of U.S. Grant / Grant, Ulysses S. (0306801728)	staged	manual_match		
		Matches biblio 15198 (score = 1000): Personal memoirs of U.S. Grant / Grant, Ulysses S.				
4	biblio	King Solomon's Mines H. Rider Haggard	staged	manual_match		

For existing records, the import will overlay the old records with the edited records. Then open one of the records to verify your edit.

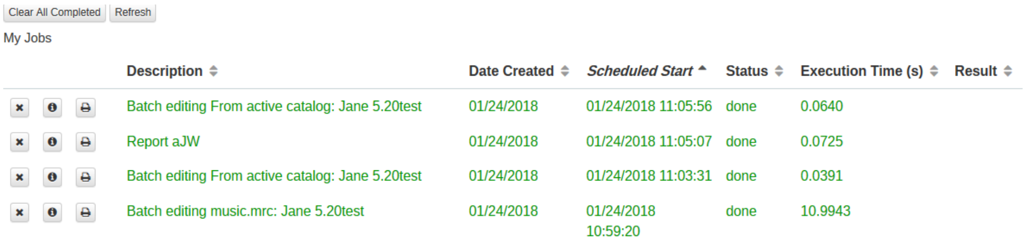


When you look like your passport photo, it's time to go home / [large print] Erma Bombeck

by Bombeck, Erma
Format: Book
Subjects: Bombeck, Erma--Journeys.
Humorists, American--20th century--Journeys.
Voyages and travels--Humor.
Travel--Humor.
Publisher and date: New York, NY : HarperCollins, c1991.
Edition: 1st large print ed.
ISBN: 0060183209
Library of Congress Call Number: PS3552.O59 Z47 1991
Geographic Area Code: n-us---
Description: 337 p. ; 24 cm.
General Note(s): This is part of the library's state historical collection.

9.9.10 Checking Status of a Ruleset Edit

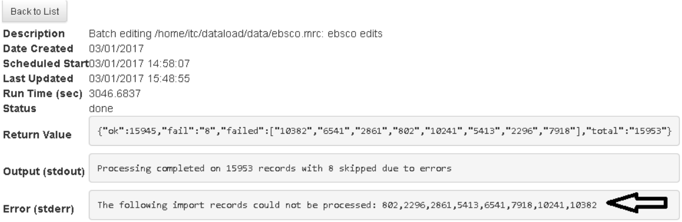
Any time you run a batch edit, you can check progress and results in the My Batch Jobs section of your account. Go to your Discovery Layer account screen, then select My Batch Jobs. (Depending on your messaging options, you may also get popups or entries in the My Messages tab.) You'll see entries and current status for all of your batch jobs (reports, batch edits, etc.).



My Jobs

	Description	Date Created	*Scheduled Start*	Status	Execution Time (s)	Result
✖ ⓘ 🖶	Batch editing From active catalog: Jane 5.20test	01/24/2018	01/24/2018 11:05:56	done	0.0640	
✖ ⓘ 🖶	Report aJW	01/24/2018	01/24/2018 11:05:07	done	0.0725	
✖ ⓘ 🖶	Batch editing From active catalog: Jane 5.20test	01/24/2018	01/24/2018 11:03:31	done	0.0391	
✖ ⓘ 🖶	Batch editing music.mrc: Jane 5.20test	01/24/2018	01/24/2018 10:59:20	done	10.9943	

When a batch edit has finished, click on the “i” icon to view the output. This is an important step – you need to see if any records were skipped (usually because of bad characters in the MARC data). If that happens, the output will give the record numbers skipped:



Description Batch editing /home/itc/dataload/data/ebsco.mrc: ebsco edits
Date Created 03/01/2017
Scheduled Start 03/01/2017 14:58:07
Last Updated 03/01/2017 15:48:55
Run Time (sec) 3046.6837
Status done

Return Value

```
{"ok":15945,"fail":"8","failed":["10382","6541","2861","802","10241","5413","2296","7918"],"total":"15953"}
```

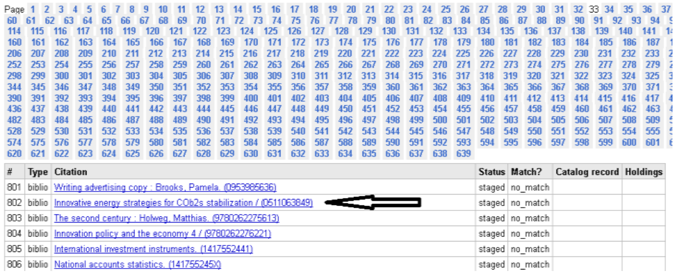
Output (stdout)

```
Processing completed on 15953 records with 8 skipped due to errors
```

Error (stderr)

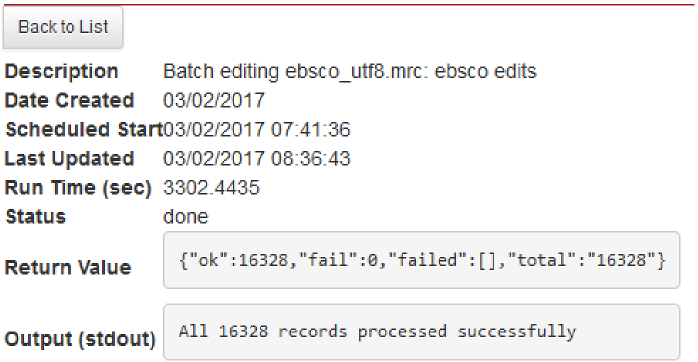
```
The following import records could not be processed: 802,2296,2861,5413,6541,7918,10241,10382
```

These correspond to the record numbers in the import batch:



#	Type	Citation	Status	Match?	Catalog record	Holdings
801	biblio	Writing advertising copy : Brooks, Pamela. (0953985636)	staged	no_match		
802	biblio	Innovative energy strategies for COb2s stabilization / (0511063849)	staged	no_match		
803	biblio	The second century : Holweg, Matthias. (9780262275613)	staged	no_match		
804	biblio	Innovation policy and the economy 4 / (9780262276221)	staged	no_match		
805	biblio	International investment instruments. (1417552441)	staged	no_match		
806	biblio	National accounts statistics. (141755245X)	staged	no_match		

If the batch edit finished OK, the batch jobs entry will say so:



Description Batch editing ebsco_utf8.mrc: ebsco edits
Date Created 03/02/2017
Scheduled Start 03/02/2017 07:41:36
Last Updated 03/02/2017 08:36:43
Run Time (sec) 3302.4435
Status done

Return Value

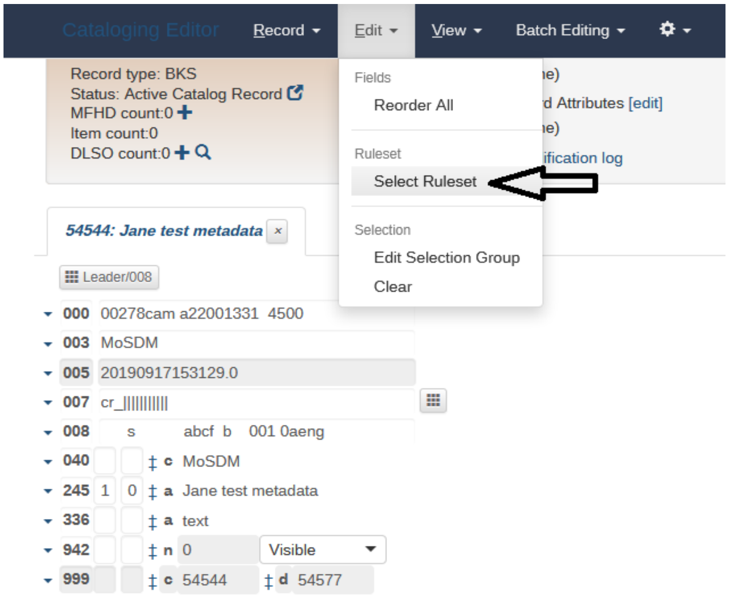
```
{"ok":16328,"fail":0,"failed":[],"total":"16328"}
```

Output (stdout)

```
All 16328 records processed successfully
```

9.9.11 Applying a Ruleset within the Cataloging Editor

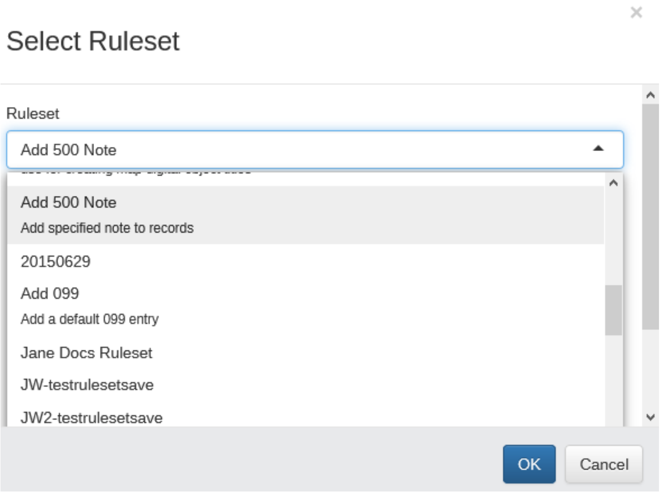
Staff with the appropriate granular permission (editcatalogue.bert.apply) can apply a ruleset to a record open in the cataloging editor. With your record open, go under Edit and choose Select Ruleset:



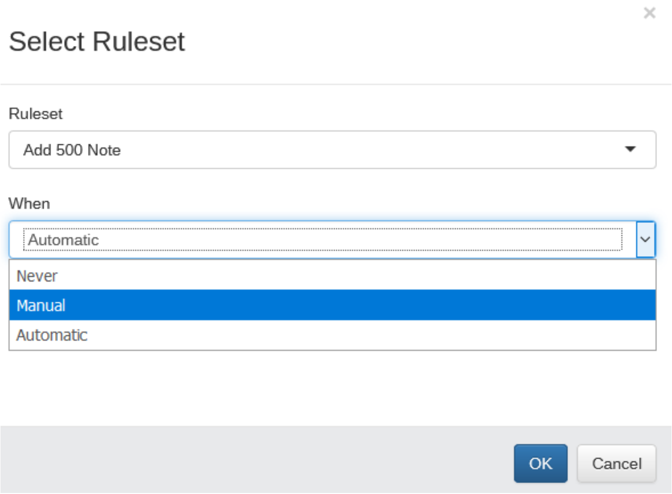
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0
DLSO count:0

```
000  00278cam a22001331  4500
003  MoSDM
005  20190917153129.0
007  cr_||||||||||
008       s        abcf  b    001 0aeng
040       ‡ c  MoSDM
245  1  0 ‡ a  Jane test metadata
336       ‡ a  text
942       ‡ n  0          Visible
999       ‡ c  54544     ‡ d  54577
```

From the popup, select your ruleset:



You have the option to run the change immediately (Manual) or as a background job (Automatic) – Manual is suggested in this scenario.



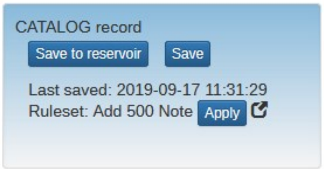
Select Ruleset

Ruleset: Add 500 Note

When: Automatic

- Never
- Manual
- Automatic

Once you've made your selection, you'll see an option to apply in the upper right corner of the record display:

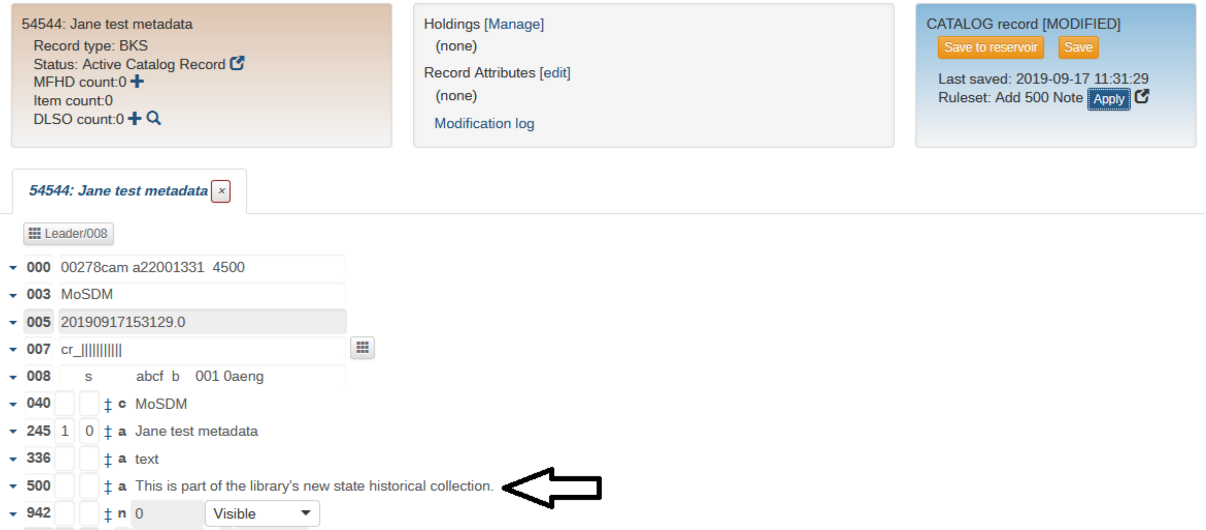


CATALOG record

Last saved: 2019-09-17 11:31:29

Ruleset: Add 500 Note

Click the Apply button to run it. This particular example added a 500 field to the record, and the status has changed to indicate that you need to save the record:



54544: Jane test metadata
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0
DLSO count:0

Holdings
(none)
Record Attributes
(none)

CATALOG record [MODIFIED]
Last saved: 2019-09-17 11:31:29
Ruleset: Add 500 Note

54544: Jane test metadata

```
000  00278cam a22001331  4500
003  MoSDM
005  20190917153129.0
007  cr_|||||||||||
008       s        abcf  b   001 0aeng
040       ‡ c MoSDM
245 1 0   ‡ a Jane test metadata
336       ‡ a text
500       ‡ a This is part of the library's new state historical collection.
942       ‡ n 0  Visible
```

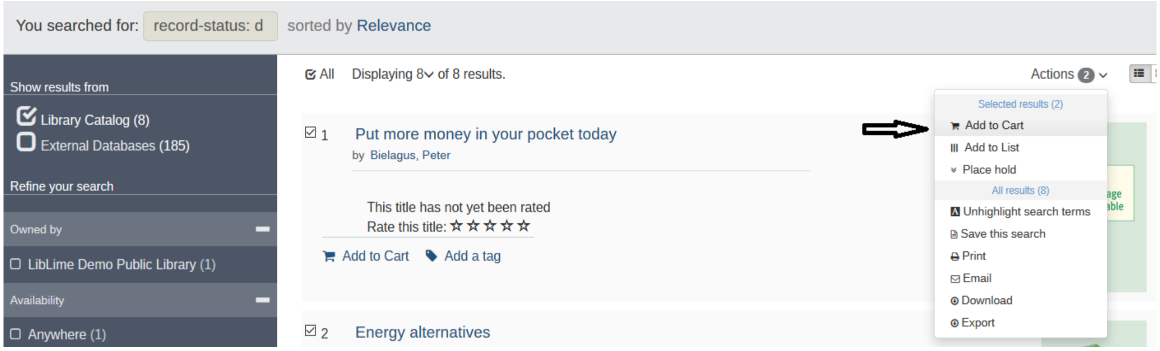
The ruleset selection stays in place during the cataloging session so you can move to another bib record and apply it again. You can change to a different ruleset either with the icon next to it on the display, or by going under Edit, Select Ruleset.

9.10 Identifying and Deleting Records Flagged as Deleted in the Leader

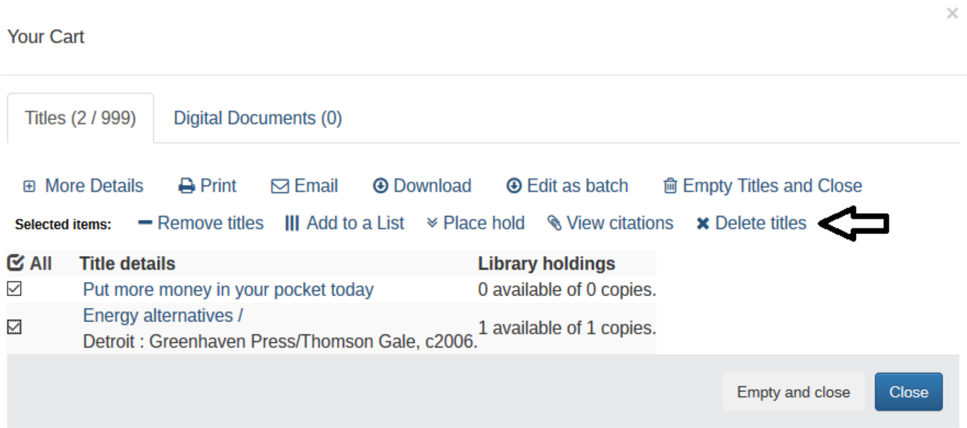
An index has been added to identify records with the delete flag in the bib leader (d in position 5). Do a keyword search for this string:

record-status:d

From the results list, you can select records to add to the Cart.



If you have the appropriate permissions, you can delete those titles from within the cart.



☑ All	Title details	Library holdings
☑	Put more money in your pocket today	0 available of 0 copies.
☑	Energy alternatives / Detroit : Greenhaven Press/Thomson Gale, c2006.	1 available of 1 copies.

9.11 Forcing Reindex of a Single Record

Occasionally a record may not index properly for various reasons. Both staff and Discovery Layer view of a title will show when a record’s last-edited timestamp is out of sync with its last index time; this is visible only to staff users.

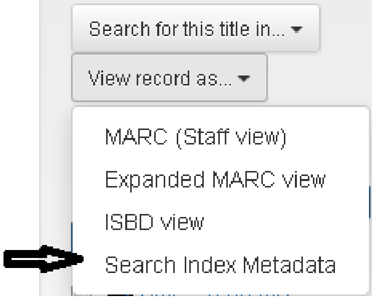
Record may not be current in the search index

Food in Mexico / by Paolo Gomez

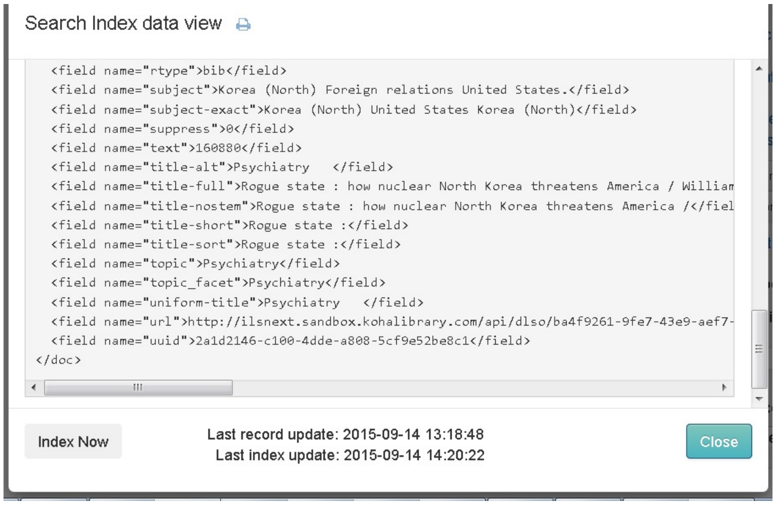
by Gomez, Paolo, 1948-
Format: Book
Series: International food library.
Subjects: Cookery, Mexican--Juvenile literature

Staff users with the editcatalogue.bib.reindex granular permission can force the record into the queue for an index update. From the view in the screenshot above, click the View Metadata button.

To check or force a reindex, in the Discovery Layer view of the title click the View Record As button in the right-hand sidebar, then select Search Index Metadata:



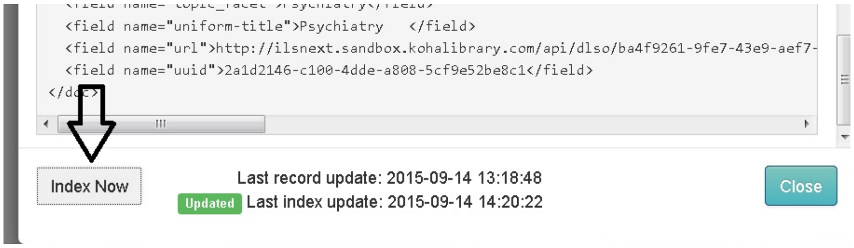
From either, a popup will show the Solr index data (primarily for system administrators) and the last timestamps. A button allows the user to index the record:



```
  <field name="rtype">bib</field>
  <field name="subject">Korea (North) Foreign relations United States.</field>
  <field name="subject-exact">Korea (North) United States Korea (North)</field>
  <field name="suppress">0</field>
  <field name="text">160880</field>
  <field name="title-alt">Psychiatry   </field>
  <field name="title-full">Rogue state : how nuclear North Korea threatens America / Willia
  <field name="title-nostem">Rogue state : how nuclear North Korea threatens America /</fiel
  <field name="title-short">Rogue state :</field>
  <field name="title-sort">Rogue state :</field>
  <field name="topic">Psychiatry</field>
  <field name="topic_facet">Psychiatry</field>
  <field name="uniform-title">Psychiatry   </field>
  <field name="url">http://ilsnext.sandbox.kohalibrary.com/api/dlso/ba4f9261-9fe7-43e9-aef7-
  <field name="uuid">2a1d2146-c100-4dde-a808-5cf9e52be8c1</field>
</doc>
```

Last record update: 2015-09-14 13:18:48
Last index update: 2015-09-14 14:20:22

Clicking the Index Now button updates the record:



```
  <field name="uniform-title">Psychiatry   </field>
  <field name="url">http://ilsnext.sandbox.kohalibrary.com/api/dlso/ba4f9261-9fe7-43e9-aef7-
  <field name="uuid">2a1d2146-c100-4dde-a808-5cf9e52be8c1</field>
</doc>
```

Last record update: 2015-09-14 13:18:48

Updated Last index update: 2015-09-14 14:20:22

If you close and reopen the popup, you’ll see that the index timestamp has been updated. Refresh your browser if needed to see changes on the screen.

10. Label Printing

Library staff may use third-party software for label printing or may use the built-in function.

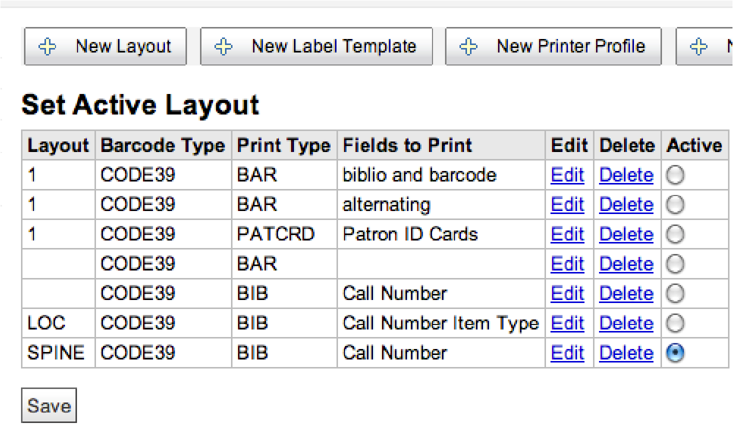
NOTE: The system will now remember settings by userid for layout, template, and last search index used to add records to a batch. Previous version system-wide settings for layout and template have been dropped; each user must select the desired settings on first use. Those settings are tied to that user's login and will be remembered next time. Other users can select and retain different settings as desired. In the search box for adding items to a batch, the system will also remember the index (keyword, title, acquisition date, etc.) last used by the login. There is also a new feature, "Only search for my records," which can limit the search to bibs created by that user. IMPORTANT: This depends on a table change and cannot be used to find bibs created before the version 6.0 upgrade where this feature was added.

10.1 Label Initial Setup

In order to use the Label function, it is necessary to set up two pieces of information: Templates and Layouts. **Templates** reflect the actual size of the label and paper you will be printing. **Layouts** contain the fields of data you want to print. Profiles define the printer settings; these settings are optional.

10.1.1 Layouts

Layouts designate the fields of data to be printed. From the main staff page, go to Tools, Label Home/Layouts. The first page that comes up will be the Set Active Layout window as shown below (your list of Layouts may have different entries). All users MUST select and save an active layout (click the radio button for Active and save).



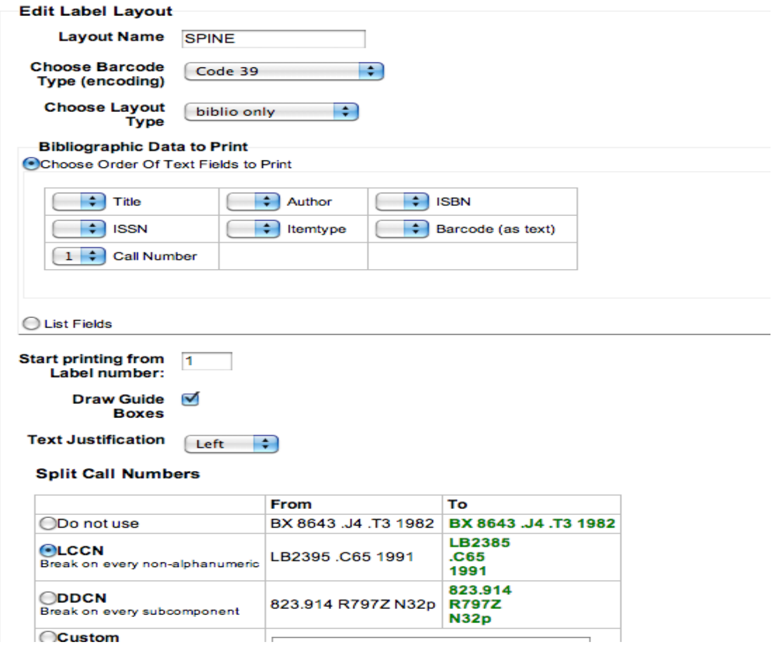
Set Active Layout

Layout	Barcode Type	Print Type	Fields to Print	Edit	Delete	Active
1	CODE39	BAR	biblio and barcode	Edit	Delete	○
1	CODE39	BAR	alternating	Edit	Delete	○
1	CODE39	PATCRD	Patron ID Cards	Edit	Delete	○
	CODE39	BAR		Edit	Delete	○
	CODE39	BIB	Call Number	Edit	Delete	○
LOC	CODE39	BIB	Call Number Item Type	Edit	Delete	○
SPINE	CODE39	BIB	Call Number	Edit	Delete	●

TIP: Make sure to double check that your settings have been saved prior to proceeding. To do this, select, save the active layout button, click save, and then go back in to the layouts to confirm the save was successful. There are a number of preloaded label layouts loaded within the system. Check to see if one fits the labels your site uses, before setting up a new layout.

In the example above, the "SPINE" layout shows a Print Type of "BIB", which indicates it will print Bibliographic data. (Compare this with the Layouts above that show print types of BAR for printing barcodes.)

Click Edit to change an existing Layout, or New Layout to create a new one. You will see the Edit Label Layout window:



Edit Label Layout

Layout Name: SPINE

Choose Barcode Type (encoding): Code 39

Choose Layout Type: biblio only

Bibliographic Data to Print

● Choose Order Of Text Fields to Print

Title	Author	ISBN
ISSN	Itemtype	Barcode (as text)
1 Call Number		

○ List Fields

Start printing from Label number: 1

Draw Guide Boxes: ☑

Text Justification: Left

Split Call Numbers

	From	To
○ Do not use	BX 8643 .J4 .T3 1982	BX 8643 .J4 .T3 1982
● LCCN Break on every non-alphanumeric	LB2395 .C65 1991	LB2385 .C65 1991
○ DDCN Break on every subcomponent	823.914 R797Z N32p	823.914 R797Z N32p
○ Custom		

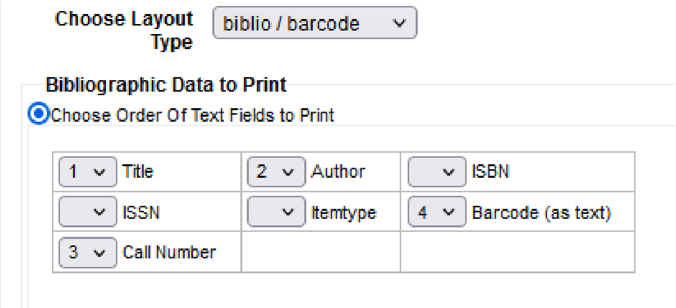
In the example above, the Layout Name is "SPINE". This Layout was created to print spine labels on books. A typical spine label would display a call number and maybe a copy number. Barcode Type should always be set to Code 39. The Layout Type is set to "biblio only" because the call number of a book is bibliographic in nature, i.e. "biblio" data. Other choices are:

- **barcode only** (for printing barcodes)

- **biblio only** (for printing bibliographic data such as call number, MARC fields like 250, 035, etc.)
- **barcode/biblio** (for printing both the barcode and bibliographic data, with barcode being printed first)
- **biblio/barcode** (for printing both the bibliographic data and barcode, with bibliographic data being printed first)
- **alternating labels** (not in use)
- **csv output** (not in use)

Remember to specify biblio/barcode if you want to include both bib and item data (with bib data first). Using barcode/biblio will put the barcode first.

There are two options for specifying data to print. Bibliographic Data to Print lets you select from certain predetermined fields. In this example, the label will print title, author, call number, and barcode, in that order. If other fields are desired, click the up/down arrow next to the chosen field and chosen a numerical order in which to print it.



Choose Layout Type biblio / barcode

Bibliographic Data to Print

● Choose Order Of Text Fields to Print

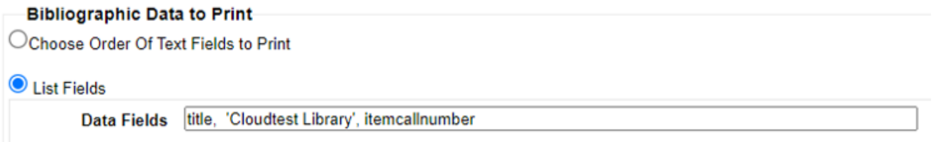
1 Title	2 Author	ISBN
ISSN	Itemtype	4 Barcode (as text)
3 Call Number		

The output would look like this:

Founding mothers :
Roberts, Cokie.
E176 .R63 2004
37570000497064

37570000497064

The other option is List Fields. You can include item fields by listing the field name, and/or MARC subfields by enclosing them in double quotation marks, like “035a” – you can also include free text as a label, by putting it in single quotes. Make sure you separate all entries with a comma. For example, including ‘Cloudtest Library’ in the string will print that text on the label:



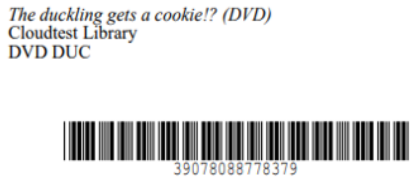
Bibliographic Data to Print

○ Choose Order Of Text Fields to Print

● List Fields

Data Fields title, 'Cloudtest Library', itemcallnumber

That will produce


The duckling gets a cookie!? (DVD)
Cloudtest Library
DVD DUC

39078088778379

Including “035a” will print that field on the label:


Bibliographic Data to Print

○ Choose Order Of Text Fields to Print

● List Fields

Data Fields title, "035a", itemcallnumber

The output will look like this:

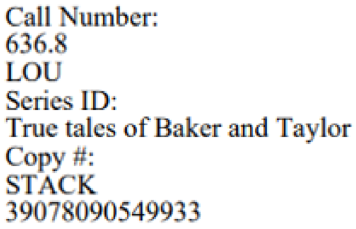

The duckling gets a cookie!? (DVD)
(OCoLC)952497427
DVD DUC

39078088778379

You can label a field by having a phrase in single quotes before the field in double quotes. Here’s a complex example – in the list fields:

'Call Number: ', itemcallnumber, 'Series ID: ', "246a", 'Copy #: ', copynumber, location, barcode

Brought back this:

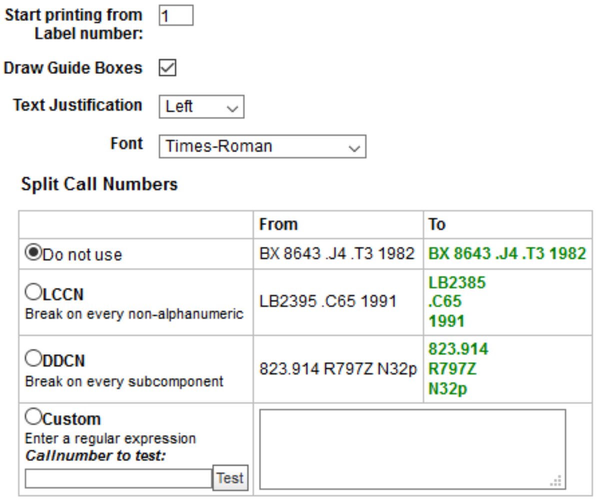

Call Number:
636.8
LOU
Series ID:
True tales of Baker and Taylor
Copy #:
STACK
39078090549933

Note that if the bib record does not have any matching data, a label will show anyway, like Series ID and Edition in the above example.

You must explicitly list all desired subfields to pick up data. For example, "099a", "099b", “099c”, "099d" rather than just “099”.

If you would like to switch between using “list fields” and “choose order of text fields”, clear the text listed in the “list fields” field prior to selecting “choose order of text fields”, and prior to saving.

The remaining layout options have to do with formatting the label itself.



Start printing from Label number: 1

Draw Guide Boxes ☑

Text Justification Left

Font Times-Roman

Split Call Numbers

	From	To
● Do not use	BX 8643 .J4 .T3 1982	**BX 8643 .J4 .T3 1982**
○ **LCCN** Break on every non-alphanumeric	LB2395 .C65 1991	**LB2385** **.C65** **1991**
○ **DDCN** Break on every subcomponent	823.914 R797Z N32p	**823.914** **R797Z** **N32p**
○ **Custom** Enter a regular expression ***Callnumber to test:*** Test		

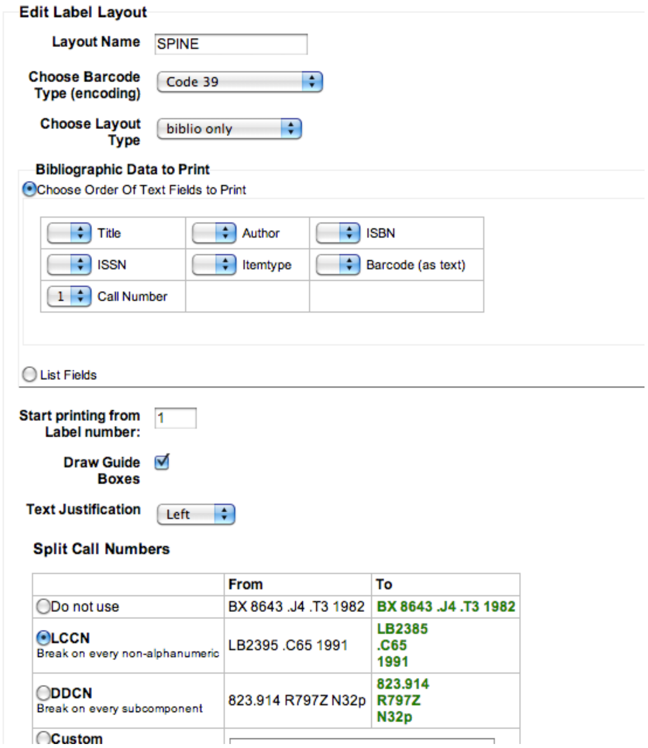
The Start printing from Label number box is typically set to 1 to begin printing with the first label in a set.

Draw Guide Boxes can be selected to give an indication of how the labels will line up on a sheet of label stock when printed. It is recommended to select this box and conduct a trial run of printing. Once the trial is complete and labels are successfully setup, the box should be de-selected. If you do not deselect draw guide boxes after testing, these lines will continue to print on your label sheets.

Text Justification can be set to Left, Center or Right. You can select various font options (Time Roman, Courier, Helvetica and normal, bold, italic). (Note that font options can also be selected in the template; if there is a conflict, the setting in the layout will take precedence.)

Split Call Numbers will depend on the type of label to be printed. Typically spine labels would be split using the LCCN or DDCN splitting routine. Your library may choose "Do not use" if the data is to be printed horizontally.

NOTE: Only the title and call number will split data across multiple lines. Other entries, such as copy number, will be truncated if the data is too wide for one line.



Edit Label Layout

Layout Name: SPINE

Choose Barcode Type (encoding): Code 39

Choose Layout Type: biblio only

Bibliographic Data to Print

● Choose Order Of Text Fields to Print

Title	Author	ISBN
ISSN	Itemtype	Barcode (as text)
1 Call Number		

○ List Fields

Start printing from Label number: 1

Draw Guide Boxes: ☑

Text Justification: Left

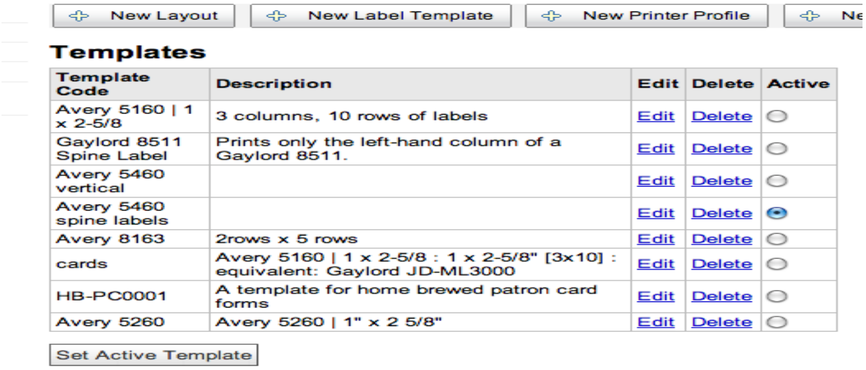
Split Call Numbers

	From	To
○ Do not use	BX 8643 .J4 .T3 1982	BX 8643 .J4 .T3 1982
● LCCN Break on every non-alphanumeric	LB2395 .C65 1991	LB2385 .C65 1991
○ DDCN Break on every subcomponent	823.914 R797Z N32p	823.914 R797Z N32p
○ Custom		

TIP: When creating a new Layout and multiple staff (or libraries) will be using the Label interface, it is a good idea to give each layout a unique name, even when using the same types of labels. For example: MJSPINE for "Mary Jane's spine layout".

10.1.2 Templates

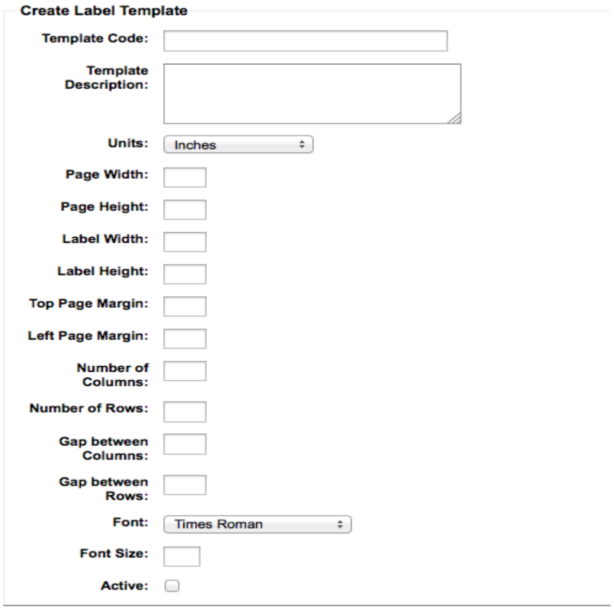
Templates define the paper and dimensions of the label stock. All users MUST set and save an active template (click the radio button for Active and save).



Templates

Template Code	Description	Edit	Delete	Active
Avery 5160 | 1 x 2-5/8	3 columns, 10 rows of labels	Edit	Delete	○
Gaylord 8511 Spine Label	Prints only the left-hand column of a Gaylord 8511.	Edit	Delete	○
Avery 5460 vertical		Edit	Delete	○
Avery 5460 spine labels		Edit	Delete	●
Avery 8163	2rows x 5 rows	Edit	Delete	○
cards	Avery 5160 | 1 x 2-5/8 : 1 x 2-5/8" [3x10] : equivalent: Gaylord JD-ML3000	Edit	Delete	○
HB-PC0001	A template for home brewed patron card forms	Edit	Delete	○
Avery 5260	Avery 5260 | 1" x 2 5/8"	Edit	Delete	○

Create a New Template or edit an existing one to match the label stock you will be using. It will be helpful to have a ruler and the actual label stock in front of you. Note the forms will look different, depending on whether you are creating a NEW template or editing an existing one. The new template form displays as below:



Create Label Template

Template Code:

Template Description:

Units: Inches

Page Width:

Page Height:

Label Width:

Label Height:

Top Page Margin:

Left Page Margin:

Number of Columns:

Number of Rows:

Gap between Columns:

Gap between Rows:

Font: Times Roman

Font Size:

Active: ☐

Assign a Template Code and complete the fields to match your label stock. Pay particular attention to the Label Width and Label Height. Units allow the choice of Inches, Centimeters, Millimeters or Postscript Points. (TIP: Some libraries find more success using Millimeters or Centimeters.)

TIP: Make sure to double check that your settings have been saved prior to proceeding. To do this, select, save an active template, and then go back in to the template to confirm the save was successful.

The Edit Template displays as shown below:

Edit Label Template

Template ID: 3

Template Code: Avery 5460 vertical

Template Description: Default description

Units: US Inches

Page Height: 5.625 in

Page Width: 3.625 in

Label Width: 1.5 in

Label Height: 0.75 in

Top Page Margin: 2 in

Left Page Margin: 7 in

Top Text Margin: 0.38 in

Left Text Margin: 0.35 in

Number of Columns: 2

Number of Rows: 1

Gap between Columns: 0.25 in

Gap between Rows: 0 in

Profile: default/default

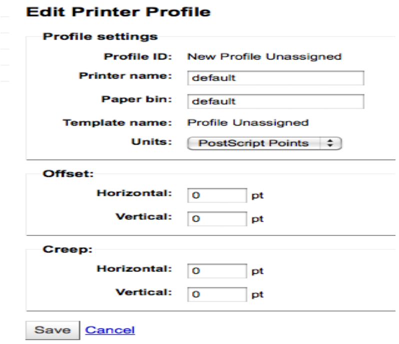
TIP: When multiple staff (or libraries) will be using the Label interface, it is a good idea to give each template a unique name, even when using the same types of labels. For example: MIDAVERY5460 for Midtown Branch Avery 5460 labels.

There is also an option to select a font in the template. Note that font options can also be selected in the layout; if there is a conflict, the setting in the layout will take precedence.

10.1.3 Profiles

The Profile names the specific printer to be used in printing of labels. The profile can be named whatever you like – the actual name of the printer, or a generic “default”. Each standalone printer where you send labels will need to be defined. For example: if technical services share a printer with circulation or IT or a second department, you will define that shared printer. If labels are being printed in both technical services and circulation on two different printers, both printers will need to be defined.

NOTE: Profile is not required; however, some libraries experience printer “creep” during large batch printing. In these cases, editing the Printer Profile can prove helpful.



Edit Printer Profile

Profile settings

Profile ID: New Profile Unassigned

Printer name: default

Paper bin: default

Template name: Profile Unassigned

Units: PostScript Points

Offset:

Horizontal: 0 pt

Vertical: 0 pt

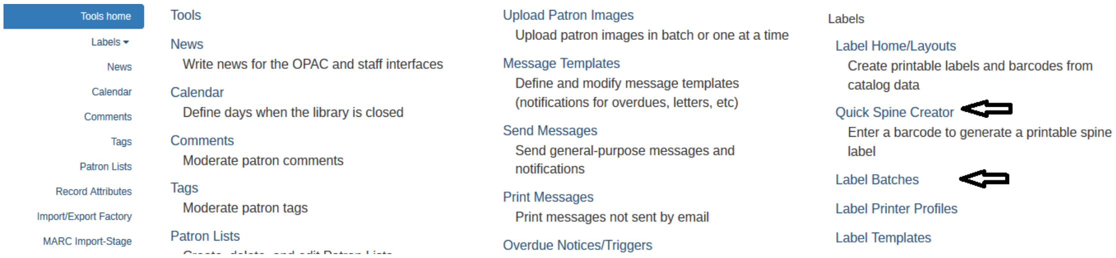
Creep:

Horizontal: 0 pt

Vertical: 0 pt

10.2 Adding Items to a Batch

Labels can be printed individually or in batch mode. Both options are available under Tools, Labels:



Tools

News
Write news for the OPAC and staff interfaces

Calendar
Define days when the library is closed

Comments
Moderate patron comments

Tags
Moderate patron tags

Patron Lists

Upload Patron Images
Upload patron images in batch or one at a time

Message Templates
Define and modify message templates (notifications for overdues, letters, etc)

Send Messages
Send general-purpose messages and notifications

Print Messages
Print messages not sent by email

Overdue Notices/Triggers

Labels

Label Home/Layouts
Create printable labels and barcodes from catalog data

Quick Spine Creator
Enter a barcode to generate a printable spine label

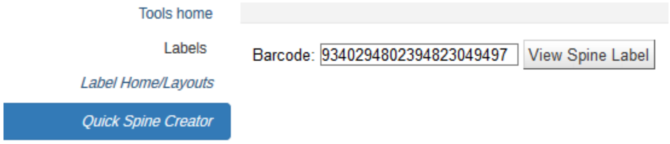
Label Batches

Label Printer Profiles

Label Templates

10.2.1 Quick Spine Label

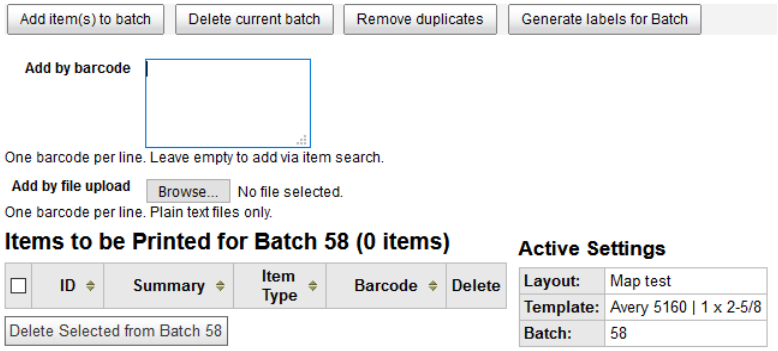
If enabled, the Quick Spine Label Creator allows entry of a barcode to generate one label, based on configuration from system preferences.



Barcode: 9340294802394823049497

10.2.2 Label Batch – Searching for Items

You have three options for adding items to a label batch. The first two are at the top of the Add Items to Batch screen:



One barcode per line. Leave empty to add via item search.

No file selected.

One barcode per line. Plain text files only.

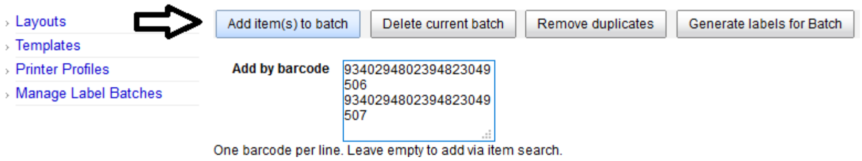
Items to be Printed for Batch 58 (0 items)

☐	ID	Summary	Item Type	Barcode	Delete

Active Settings

Layout:	Map test
Template:	Avery 5160 | 1 x 2-5/8
Batch:	58

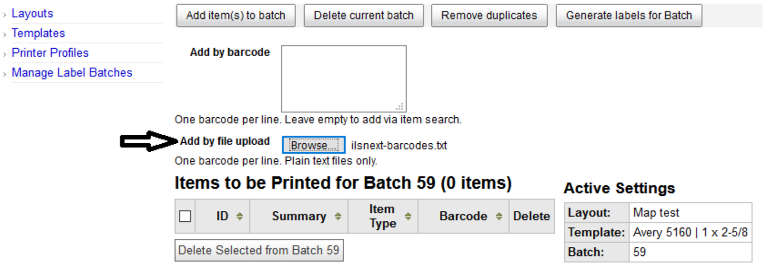
You can enter barcodes individually in the text box. When you are finished, click the Add Item(s) to Batch button to add those items into a new or existing batch:



9340294802394823049
506
9340294802394823049
507

One barcode per line. Leave empty to add via item search.

You can also upload a file of barcodes. Click the Browse button and locate your file:



One barcode per line. Leave empty to add via item search.

ilsnext-barcodes.txt

One barcode per line. Plain text files only.

Items to be Printed for Batch 59 (0 items)

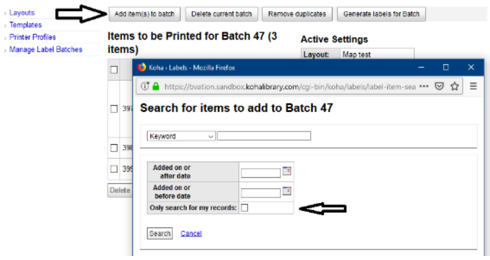
☐	ID	Summary	Item Type	Barcode	Delete

Active Settings

Layout:	Map test
Template:	Avery 5160 | 1 x 2-5/8
Batch:	59

Again, be sure to click the Add Item(s) to Batch button to actually put these items into the current batch.

The third option is to search for items. Click the Add item(s) to Batch button to do so. The pulldown allows you to select the type of search (title, call number, subject, barcode, etc.). The system will remember the type of search you last used.



Items to be Printed for Batch 47 (3 items)

Active Settings

Layout: Map test

https://bvation.sandbox.kohalibrary.com/cgi-bin/koha/labels/label-item-sea

Search for items to add to Batch 47

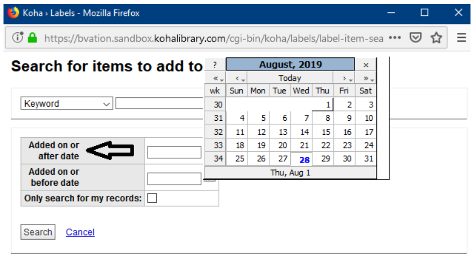
Added on or after date

Added on or before date

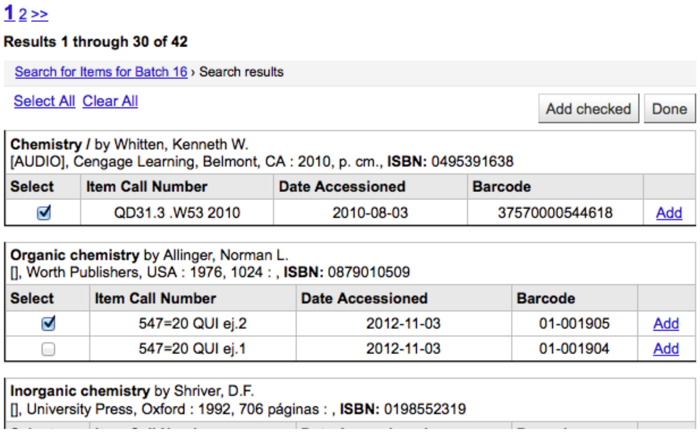
Only search for my records: ☐

The option “Only Search for My Records” allows you to find bib records (not item records) created by you. Select your index and enter your search term.

Alternatively, date ranges can be used to find all items cataloged during a specified period:



After retrieving a set of results, manually check each item from your results, or click the Select All option to select items to add to your batch. Then click Add Checked and Done buttons to close the search window:



Results 1 through 30 of 42

Chemistry / by Whitten, Kenneth W.
[AUDIO], Cengage Learning, Belmont, CA : 2010, p. cm., **ISBN:** 0495391638

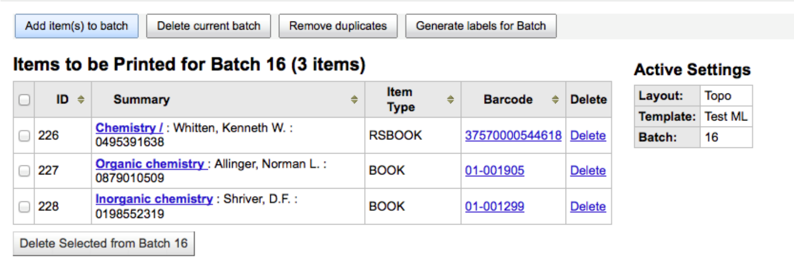
Select	Item Call Number	Date Accessioned	Barcode	
☑	QD31.3 .W53 2010	2010-08-03	37570000544618	Add

Organic chemistry by Allinger, Norman L.
[], Worth Publishers, USA : 1976, 1024 : , **ISBN:** 0879010509

Select	Item Call Number	Date Accessioned	Barcode	
☑	547=20 QUI ej.2	2012-11-03	01-001905	Add
☐	547=20 QUI ej.1	2012-11-03	01-001904	Add

Inorganic chemistry by Shriver, D.F.
[], University Press, Oxford : 1992, 706 páginas : , **ISBN:** 0198552319

Your batch should appear similar to the one below:



Items to be Printed for Batch 16 (3 items)

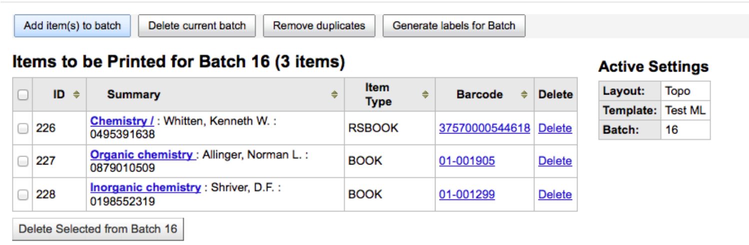
☐	ID	Summary	Item Type	Barcode	Delete
☐	226	Chemistry / : Whitten, Kenneth W. : 0495391638	RSBOOK	37570000544618	Delete
☐	227	Organic chemistry : Allinger, Norman L. : 0879010509	BOOK	01-001905	Delete
☐	228	Inorganic chemistry : Shriver, D.F. : 0198552319	BOOK	01-001299	Delete

Active Settings

Layout:	Topo
Template:	Test ML
Batch:	16

10.3 Label Printing

Click the Generate Labels for Batch button to print your batch. The system will print the labels in a format that is specified as Active in the Layout and Template settings. You can see the Active Settings on the right of the Items to be Printed for Batch results. As noted above, the system will remember your settings from earlier sessions.



Items to be Printed for Batch 16 (3 items)

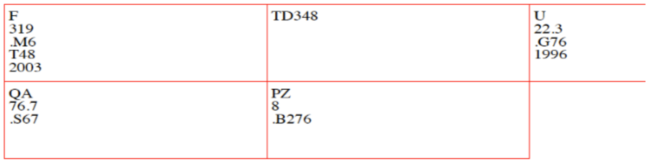
☐	ID	Summary	Item Type	Barcode	Delete
☐	226	Chemistry / : Whitten, Kenneth W. : 0495391638	RSBOOK	37570000544618	Delete
☐	227	Organic chemistry : Allinger, Norman L. : 0879010509	BOOK	01-001905	Delete
☐	228	Inorganic chemistry : Shriver, D.F. : 0198552319	BOOK	01-001299	Delete

Active Settings

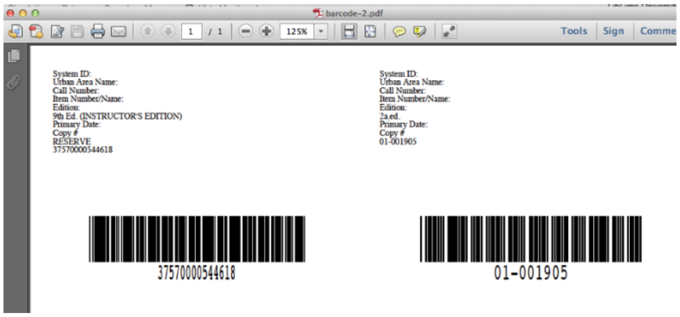
Layout:	Topo
Template:	Test ML
Batch:	16

If you need to change the Active Settings, click Templates or Layouts and set Active Template or Layout, then return to the batch.

When the Generate labels for Batch button is clicked, the system will export as a .pdf file, which can then be printed from a printer of your choice. Here is how a file might look:



F 319 .M6 T48 2003	TD348	U 22.3 .G76 1996
QA 76.7 .S67	PZ 8 .B276	



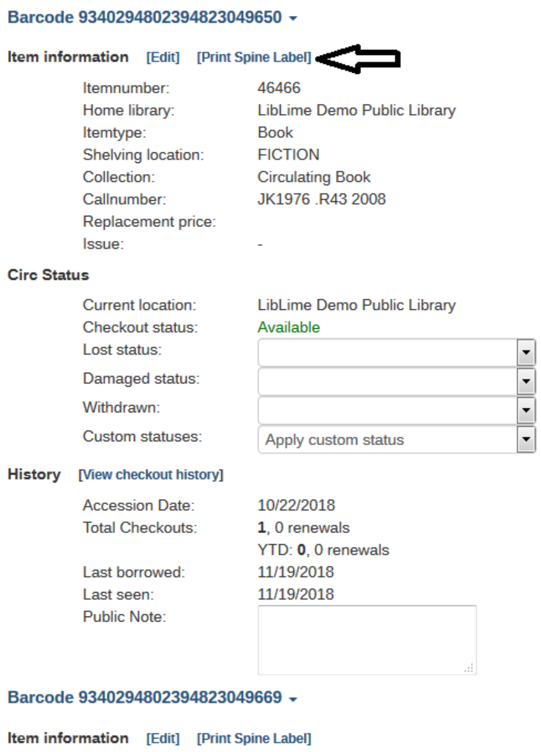
System ID:
Urban Area Name:
Call Number:
Item Number/Name:
Edition:
9th Ed. (INSTRUCTOR'S EDITION)
Primary Date:
Copy #
RESERVE
37570000544618

System ID:
Urban Area Name:
Call Number:
Item Number/Name:
Edition:
2a.ed.
Primary Date:
Copy #
01-001905

10.4 Quick Spine Label

If the syspref SpineLabelAutoPrint is turned on, staff can print spine labels directly from the bib record's item status tab. [NOTE: This is a change from earlier versions, where the link appeared in the item holdings table.]

In the item status tab, click the Print Spine Label link next to the item you want:



Barcode 9340294802394823049650

Item information [Edit] [Print Spine Label]

Itemnumber: 46466
Home library: LibLime Demo Public Library
Itemtype: Book
Shelving location: FICTION
Collection: Circulating Book
Callnumber: JK1976 .R43 2008
Replacement price:
Issue: -

Circ Status

Current location: LibLime Demo Public Library
Checkout status: Available
Lost status:
Damaged status:
Withdrawn:
Custom statuses: Apply custom status

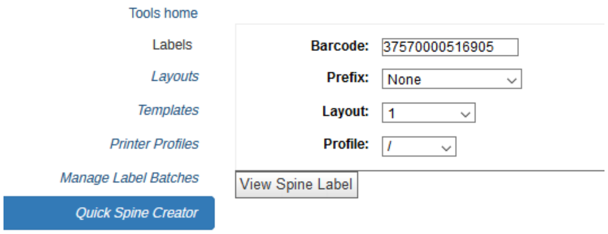
History [View checkout history]

Accession Date: 10/22/2018
Total Checkouts: **1**, 0 renewals
YTD: **0**, 0 renewals
Last borrowed: 11/19/2018
Last seen: 11/19/2018
Public Note:

Barcode 9340294802394823049669

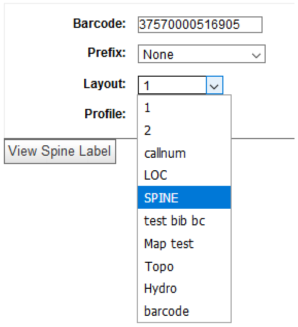
Item information [Edit] [Print Spine Label]

That opens a separate browser window with some limited formatting options:



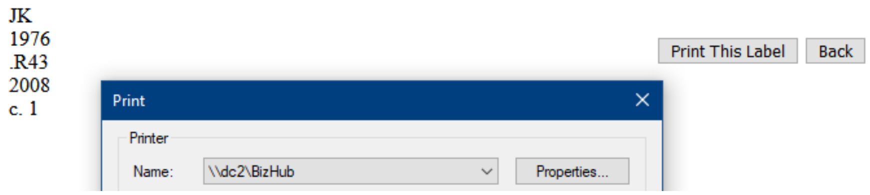
Barcode: 37570000516905
Prefix: None
Layout: 1
Profile: /

You would primarily use this to specify the layout you want to use, such as your spine label layout:



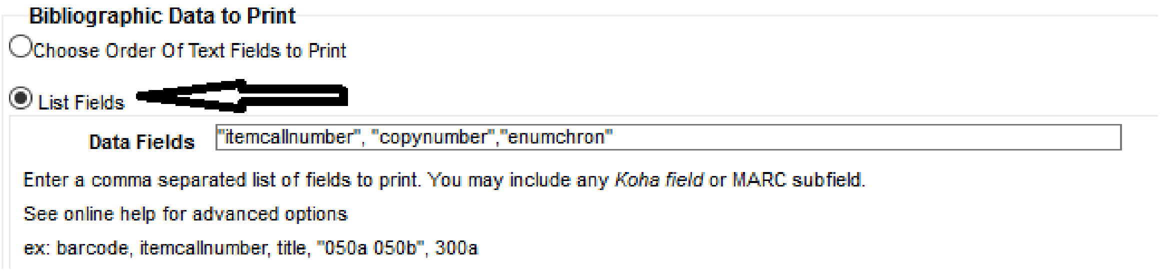
Barcode: 37570000516905
Prefix: None
Layout: 1
Profile:

Then click View Spine label. You will get a new window with a label formatted according to the specified label layout:


JK
1976
.R43
2008
c. 1

The label can be printed and applied to the item; be sure to close this window when done.

Note that the label layout being used needs to be configured with the List Fields option (rather than the Choose Order Of Text Fields to Print option):


Bibliographic Data to Print

○ Choose Order Of Text Fields to Print

● List Fields

Data Fields "itemcallnumber", "copynumber","enumchron"

Enter a comma separated list of fields to print. You may include any *Koha field* or MARC subfield.

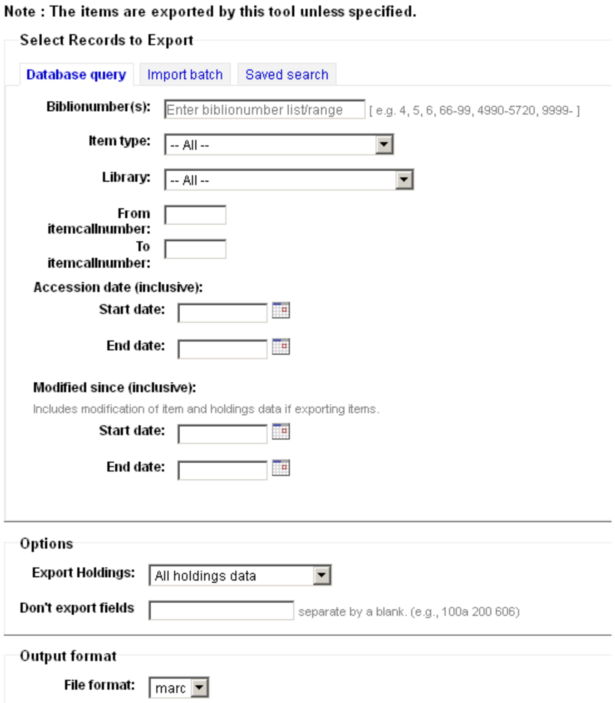
See online help for advanced options

ex: barcode, itemcallnumber, title, "050a 050b", 300a

You can print a quick spine label for items without barcodes if needed.

11. Exporting Bibs and Items

Staff with permissions can export some or all bibliographic records. (For large catalogs, this may need to be done in groups to avoid browser timeout.) Under Tools, select Export Bibliographic/Holdings.


Note : The items are exported by this tool unless specified.

Select Records to Export

Database query | Import batch | Saved search

Biblionumber(s): Enter biblionumber list/range [e.g. 4, 5, 6, 66-99, 4990-5720, 9999-]

Item type: -- All --

Library: -- All --

From itemcallnumber:

To itemcallnumber:

Accession date (inclusive):

Start date:

End date:

Modified since (inclusive):

Includes modification of item and holdings data if exporting items.

Start date:

End date:

Options

Export Holdings: All holdings data

Don't export fields separate by a blank. (e.g., 100a 200 606)

Output format

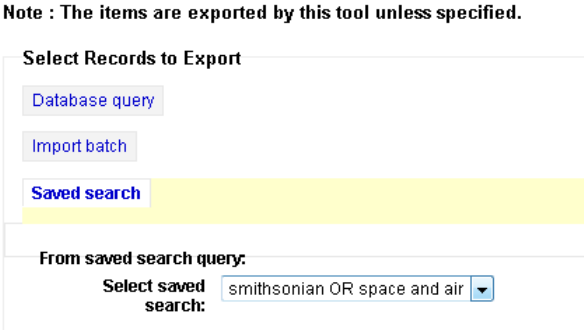
File format: marc

On the setup screen, there are three tabs with options. On the first tab, you can limit your export by biblionumber or range, branch, item type, call number range, accession date. You can also choose not to export item records or certain fields. Your file format options are MARC, XML, or Dublin Core. Make your selections and click Export, then save the output file to your computer.

The other two tabs are import batch and saved search. You can look in MARC Import-Manage Staged to get the batch number of a record set imported in the past. You can then export that batch. A new option allows exporting a batch that was staged but not imported; **that will only work for batches staged after the version (6.0) where that option was added**.

You can also use a saved bibliographic record search (see Saved Searches under the Searching section above).

For example, to export from a saved search:


Note : The items are exported by this tool unless specified.

Select Records to Export

Database query

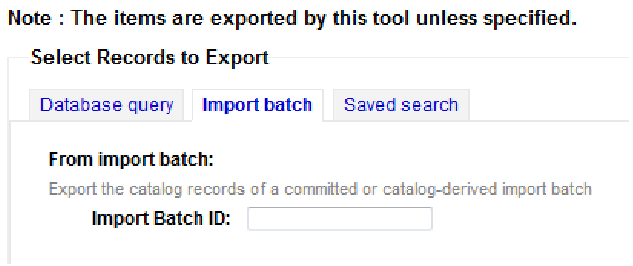
Import batch

Saved search

From saved search query:

Select saved search: smithsonian OR space and air

From a batch import:



Note : The items are exported by this tool unless specified.

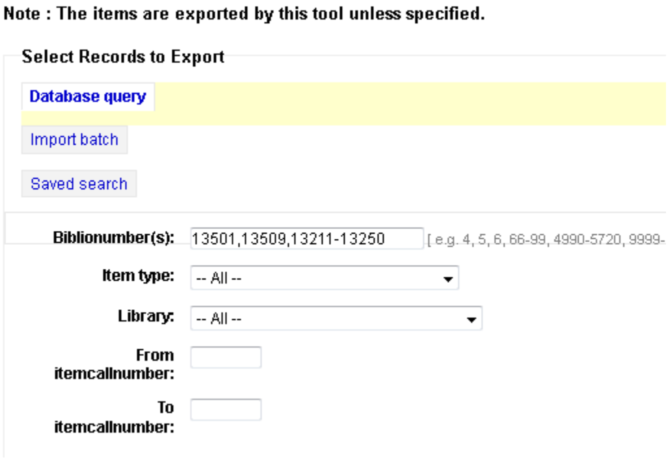
Select Records to Export

From import batch:

Export the catalog records of a committed or catalog-derived import batch

Import Batch ID:

From multiple specified biblionumbers:



Note : The items are exported by this tool unless specified.

Select Records to Export

Biblionumber(s): 13501,13509,13211-13250 [e.g. 4, 5, 6, 66-99, 4990-5720, 9999-

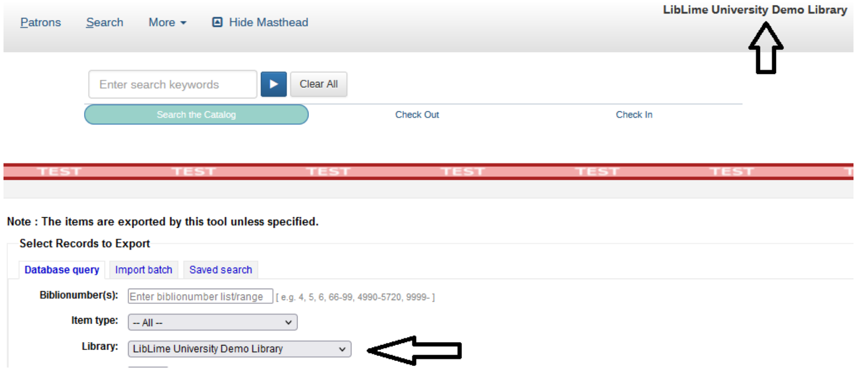
Item type: -- All --

Library: -- All --

From itemcallnumber:

To itemcallnumber:

NOTE: If you choose to limit the export to only one library's holdings, your branch login must match the library you select from the dropdown. Use Set Location to change your branch setting if necessary to match the branch you want to export.



Note : The items are exported by this tool unless specified.

Select Records to Export

Biblionumber(s): Enter biblionumber list/range [e.g. 4, 5, 6, 66-99, 4990-5720, 9999-]

Item type: -- All --

Library: LibLime University Demo Library

12. Digital Object Handling (Bibliovation Systems Only)

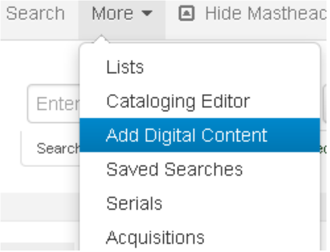
For sites using the full Bibliovation system, digital objects can be uploaded as well as MARC records. Records can be uploaded as new titles, or attached to existing titles. **Note: The system will record the borrowernumber of the user who added a digital object in the 856$x of the stub MARC record**

created at ingest. (This is a change from earlier versions which placed the borrowernumber in a 598 field. Older data will not be updated but new loads will use the 856$x.)

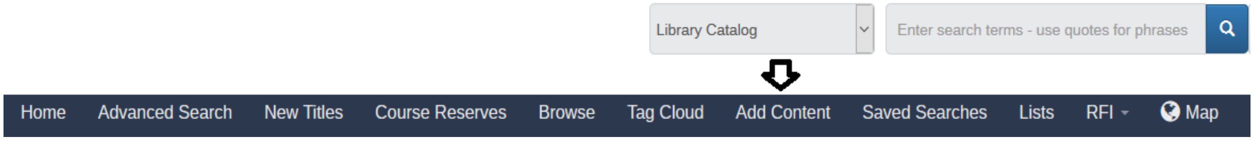
12.1 Uploading as New Titles

12.1.1 Uploading (Staging)

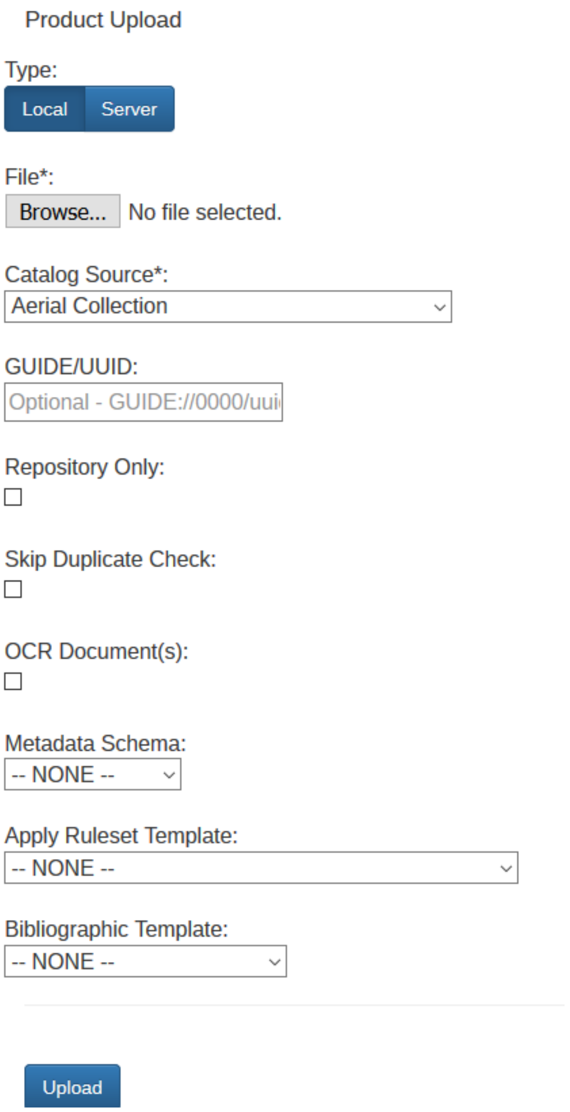
In staff mode, digital objects are uploaded through More, Add Digital Content:



You can also allow your users to upload digital objects from the Discovery Layer. The easiest way is to assign the DLSO permissions to the Role record associated with that patron category (see the Roles and Granular Permissions sections above). Then, in the Discovery Layer, to add a digital object, click on Add Content from the masthead.



Either the staff or patron link opens a screen with options:



Product Upload

Type: Local | Server

File*: No file selected.

Catalog Source*: Aerial Collection

GUIDE/UUID: Optional - GUIDE://0000/uui

Repository Only: ☐

Skip Duplicate Check: ☐

OCR Document(s): ☐

Metadata Schema: -- NONE --

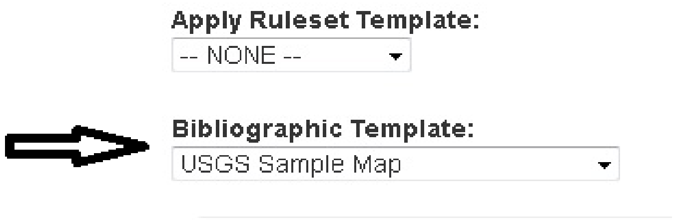
Apply Ruleset Template: -- NONE --

Bibliographic Template: -- NONE --

If your site is using cataloging access control, the user must select a cataloging source from the pulldown. The user will only see entries for which he has permission (see the section on granular permissions earlier in the User Manual). If access control is not being used, that field will not show.

Select Local and use the Choose File option to navigate to the object file. (Server is only used for specialized cases where files have been uploaded separately to a holding directory on the server and the user wants to import them and create a bib record.) If your site uses the catalog source access control feature, select the collection from that pulldown. You will only see the collections for which you have permissions.

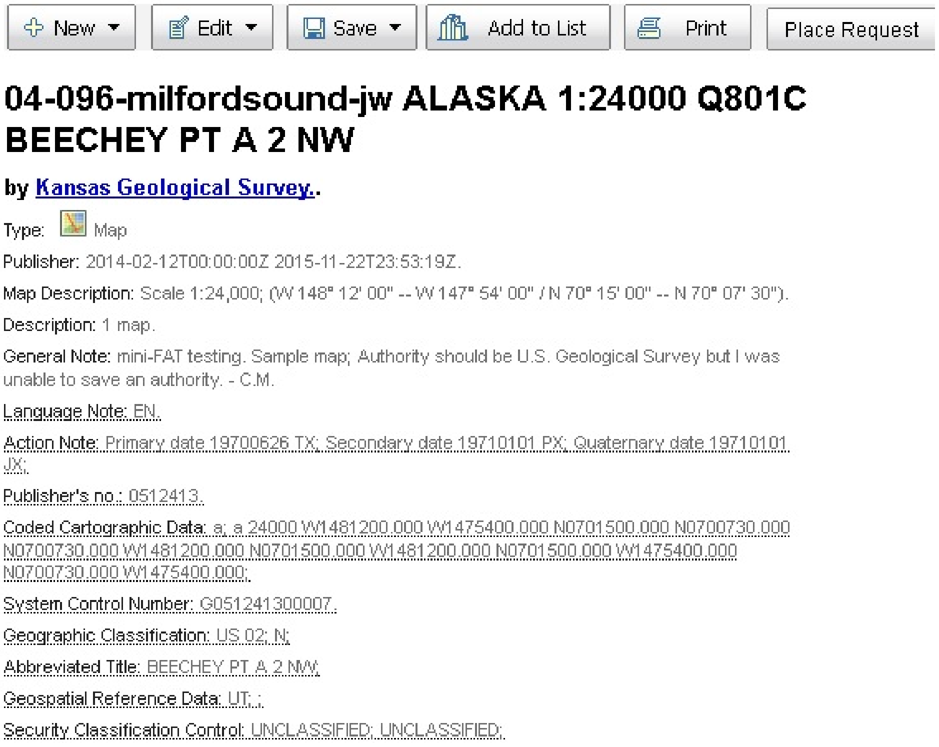
You can apply a particular bibliographic template to the import, so that the skeleton record created for your digital object has certain predefined fields:



Apply Ruleset Template: -- NONE --

Bibliographic Template: USGS Sample Map

Whatever is defined as a default field in the template will be added when the object is loaded:



04-096-milfordsound-jw ALASKA 1:24000 Q801C BEECHEY PT A 2 NW

by Kansas Geological Survey..

Type: Map

Publisher: 2014-02-12T00:00:00Z 2015-11-22T23:53:19Z.

Map Description: Scale 1:24,000; (W 148° 12' 00" -- W 147° 54' 00" / N 70° 15' 00" -- N 70° 07' 30").

Description: 1 map.

General Note: mini-FAT testing. Sample map; Authority should be U.S. Geological Survey but I was unable to save an authority. - C.M.

Language Note: EN.

Action Note: Primary date 19700626 TX; Secondary date 19710101 PX; Quaternary date 19710101 JX;

Publisher's no.: 0512413.

Coded Cartographic Data: a; a 24000 W1481200.000 W1475400.000 N0701500.000 N0700730.000 N0700730.000 W1481200.000 N0701500.000 W1481200.000 N0701500.000 W1475400.000 N0700730.000 W1475400.000;

System Control Number: G051241300007.

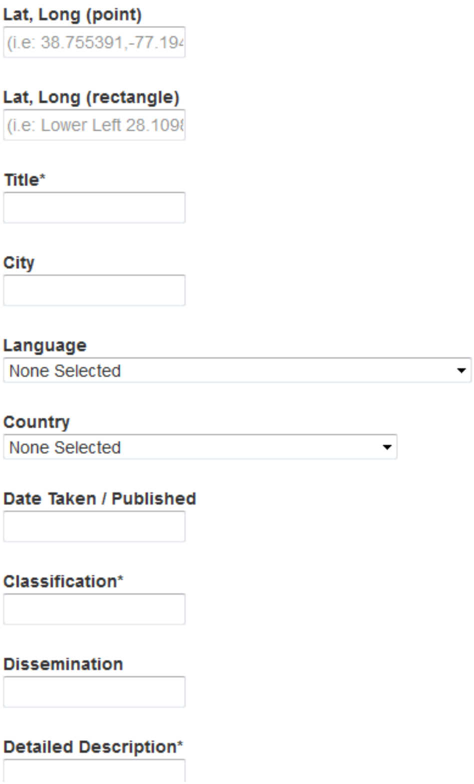
Geographic Classification: US 02; N;

Abbreviated Title: BEECHEY PT A 2 NW;

Geospatial Reference Data: UT; ;

Security Classification Control: UNCLASSIFIED; UNCLASSIFIED;

If desired (this can be site-specific), choose the desired Metadata Schema from the list provided in the drop down menu. If you choose a Metadata Scheme, fill out additional information required:



Lat, Long (point)
(i.e: 38.755391,-77.194

Lat, Long (rectangle)
(i.e: Lower Left 28.1098

Title*

City

Language
None Selected

Country
None Selected

Date Taken / Published

Classification*

Dissemination

Detailed Description*

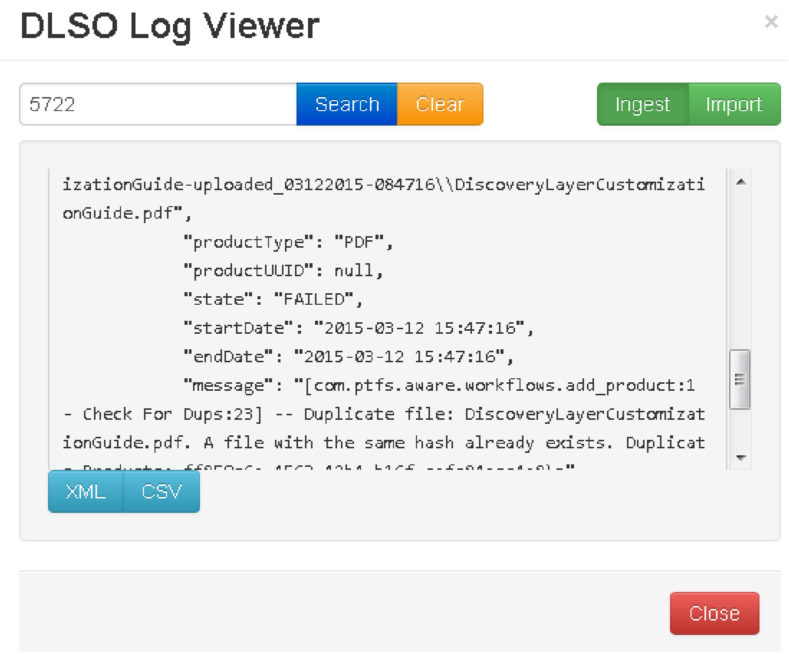
For some fields, you can add more than one entry; click the + sign to display an additional data entry field.

By default, the system will check to see if you are uploading a file that is a duplicate of an existing one; these uploads will be blocked. Uncheck that box if you need to upload the same file again.

When you have finished, click the Upload button. You will ordinarily see a success popup; if there is a problem (such as a duplicate file), the popup will indicate that no file was uploaded:

1 File(s) found.0 File(s) added.View Log 5722

You can click on the View Log link in the popup to check the problem:

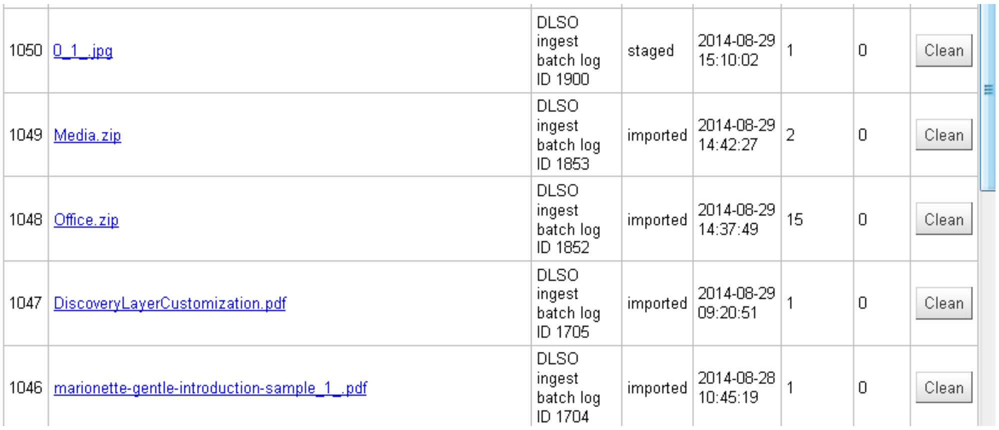


```
izationGuide-uploaded_03122015-084716\\DiscoveryLayerCustomizati
onGuide.pdf",
            "productType": "PDF",
            "productUUID": null,
            "state": "FAILED",
            "startDate": "2015-03-12 15:47:16",
            "endDate": "2015-03-12 15:47:16",
            "message": "[com.ptfs.aware.workflows.add_product:1
- Check For Dups:23] -- Duplicate file: DiscoveryLayerCustomizat
ionGuide.pdf. A file with the same hash already exists. Duplicat
```

The log is also available through Tools, DLSO Log Viewer; you will need the log number of your upload. This is added as a note in the staged record entry, such as “DLSO ingest batch log ID 5721.”

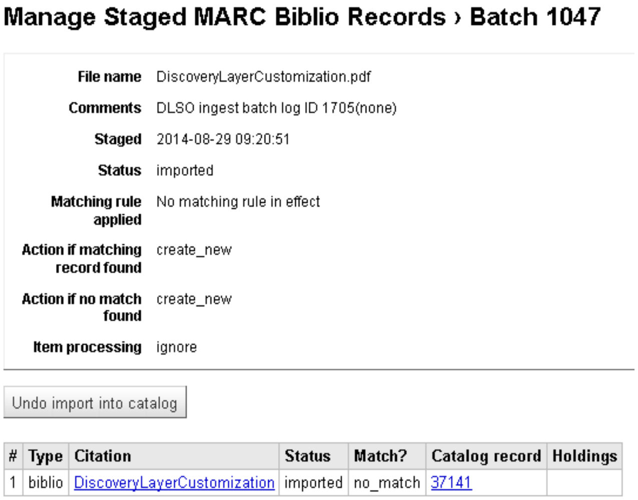
12.1.2 Importing

Patrons may be permitted to upload digital objects, but only library staff users can complete the import. The digital object is visible and manageable from the Manage Staged MARC Records area (under Tools) and can be imported into the system from there.



1050	0_1_.jpg	DLSO ingest batch log ID 1900	staged	2014-08-29 15:10:02	1	0	Clean
1049	Media.zip	DLSO ingest batch log ID 1853	imported	2014-08-29 14:42:27	2	0	Clean
1048	Office.zip	DLSO ingest batch log ID 1852	imported	2014-08-29 14:37:49	15	0	Clean
1047	DiscoveryLayerCustomization.pdf	DLSO ingest batch log ID 1705	imported	2014-08-29 09:20:51	1	0	Clean
1046	marionette-gentle-introduction-sample_1_.pdf	DLSO ingest batch log ID 1704	imported	2014-08-28 10:45:19	1	0	Clean

Click on the batch/filename to open the batch. You can then complete the import:

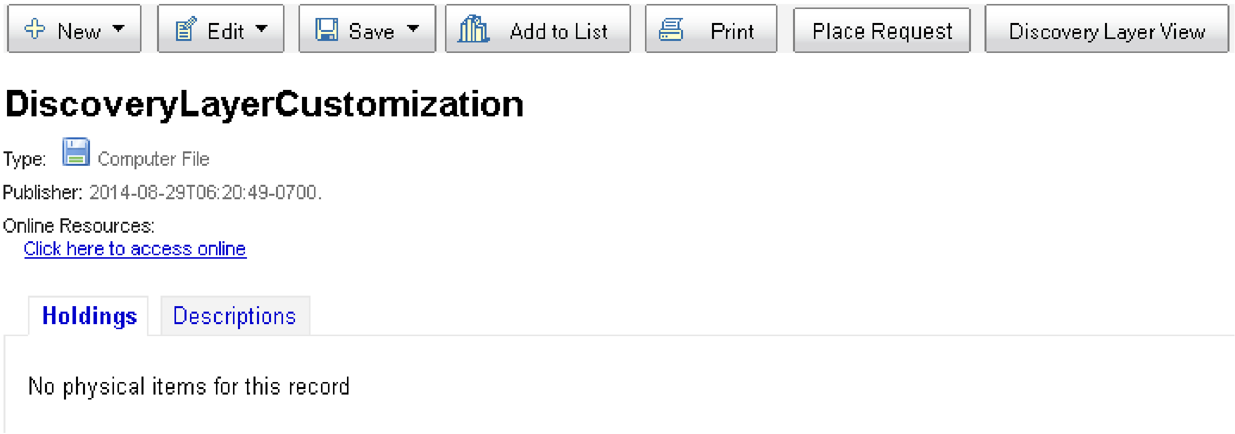


Manage Staged MARC Biblio Records › Batch 1047

File name: DiscoveryLayerCustomization.pdf
Comments: DLSO ingest batch log ID 1705(none)
Staged: 2014-08-29 09:20:51
Status: imported
Matching rule applied: No matching rule in effect
Action if matching record found: create_new
Action if no match found: create_new
Item processing: ignore

#	Type	Citation	Status	Match?	Catalog record	Holdings
1	biblio	DiscoveryLayerCustomization	imported	no_match	37141	

The system will load the object and will create a minimal MARC record with the title being the object's filename. Staff can then edit that record to something more appropriate.



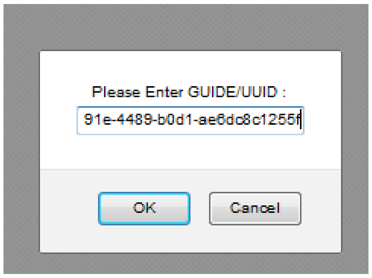
DiscoveryLayerCustomization

Type: Computer File
Publisher: 2014-08-29T06:20:49-0700.
Online Resources:
Click here to access online

No physical items for this record

12.1.3 Viewing Objects by UUID

If a user knows the UUID but can't find a MARC record with that digital object attached, the UUID Lookup tool can pull up the digital object. This may be helpful in finding the original document if the import rejects an upload as a duplicate. Under Tools, UUID Lookup, enter the UUID (stored in the 856$b):

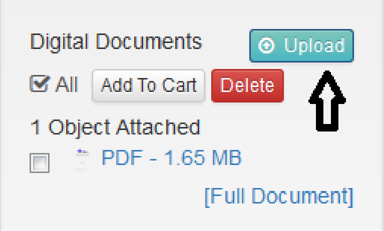


Please Enter GUIDE/UUID :
91e-4489-b0d1-ae6dc8c1255f

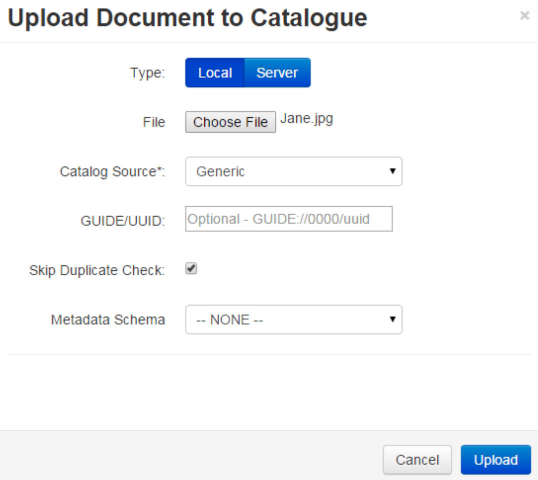
That opens a new window with the same view as the user would see in the DLSO object viewer from the Discovery Layer. If the object is attached to a MARC record, the MARC tab will show the bibliographic data.

12.2 Attaching to Existing Title in Discovery Layer View

With appropriate permissions (see the section on permissions required for digital objects), users can attach a new digital object to an existing title. If the option is available, the Discovery Layer view will show an Upload button in the digital objects section of the title display screen:

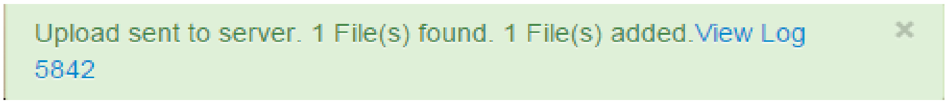


Click that button and you will get a similar upload popup screen to that used in new title importing. Select your file and other options, and click Upload:

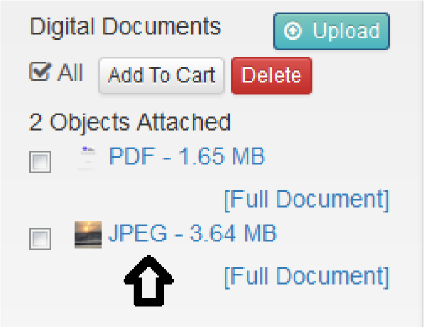

Upload Document to Catalogue

Type: Local Server
File: Choose File Jane.jpg
Catalog Source*: Generic
GUIDE/UUID: Optional - GUIDE://0000/uuid
Skip Duplicate Check: ☑
Metadata Schema: -- NONE --

If the upload was successful, you will get a popup message with a link to the log file:


Upload sent to server. 1 File(s) found. 1 File(s) added.View Log 5842

The new digital object will be available on the title record almost immediately (it may take a few moments for the thumbnail image to be generated):



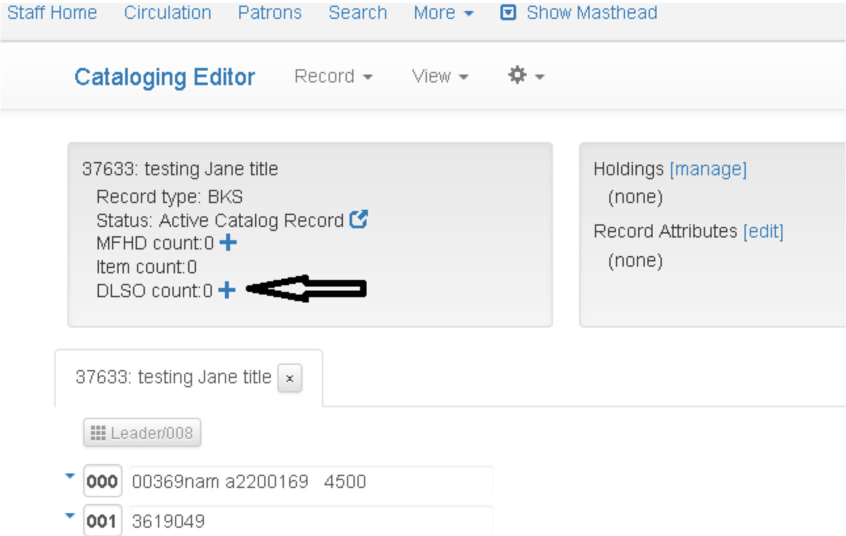
2 Objects Attached

☐ PDF - 1.65 MB [Full Document]

☐ JPEG - 3.64 MB [Full Document]

12.3 Attaching to an Existing Record in the Cataloging Editor

Digital objects can now be attached to titles as they are being worked on in the Cataloging Editor. With the record open, click the plus sign next to the DLSO count line at the top:



37633: testing Jane title
Record type: BKS
Status: Active Catalog Record
MFHD count:0 +
Item count:0
DLSO count:0 +

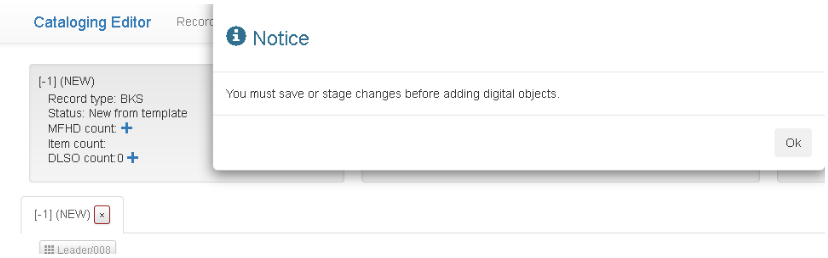
Holdings [manage]
(none)
Record Attributes [edit]
(none)

37633: testing Jane title ×

000 00369nam a2200169 4500
001 3619049

The same popup window as above allows you to select a file to attach. Click the Upload button and the digital object will be attached to the title. You must then save the title from the editor screen.

Note that you cannot attach an object to a record that hasn't been saved yet. If you do, you'll get a warning:



[-1] (NEW)
Record type: BKS
Status: New from template
MFHD count: +
Item count:
DLSO count:0 +

Notice

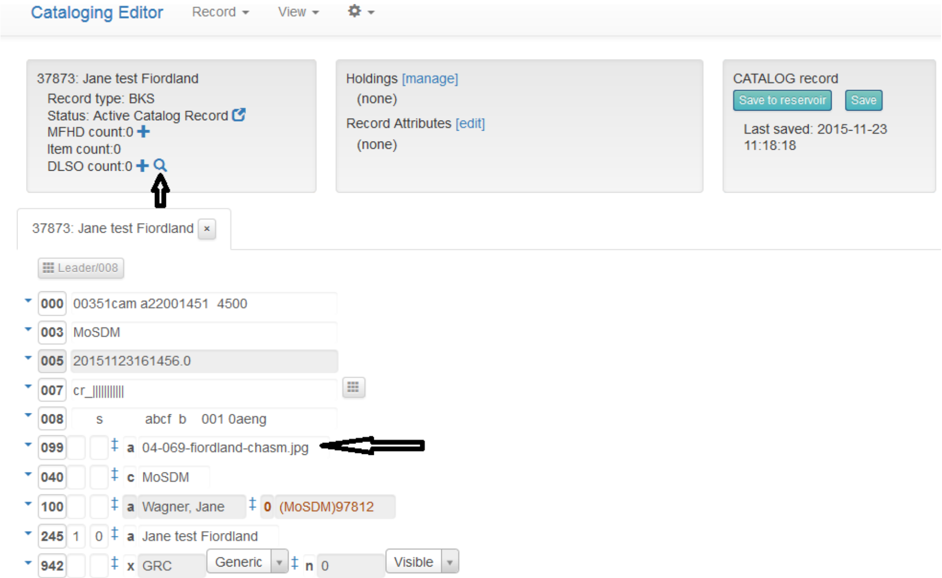
You must save or stage changes before adding digital objects.

[-1] (NEW) ×

However, you can attach digital objects to records that are staged to the reservoir.

12.4 Linking to a Digital Object Uploaded Separately

For sites processing large batches of digital objects, the most efficient workflow may be to copy the files to the server separately (outside the DLS client), creating the bib records later. A search feature has been added to the cataloging editor allowing lookup by image file name. The file name can be entered in the 099$a or typed manually. In the editor, click the magnifying glass (search) icon at the top:



37873: Jane test Fiordland
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:0
DLSO count:0

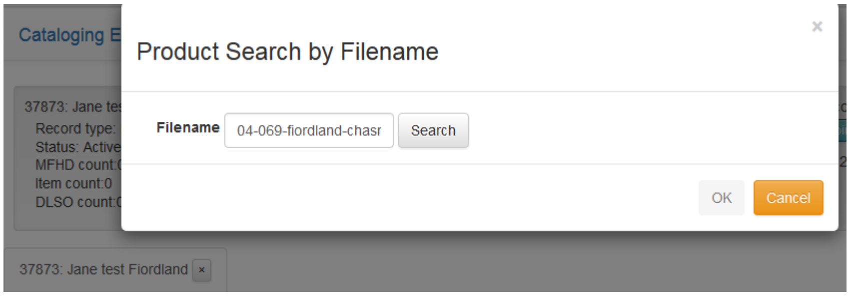
Holdings [manage]
(none)
Record Attributes [edit]
(none)

CATALOG record
Last saved: 2015-11-23 11:18:18

37873: Jane test Fiordland

000 00351cam a22001451 4500
003 MoSDM
005 20151123161456.0
007 cr_|||||||||||
008 s abcf b 001 0aeng
099 ‡ a 04-069-fiordland-chasm.jpg
040 ‡ c MoSDM
100 ‡ a Wagner, Jane ‡ 0 (MoSDM)97812
245 1 0 ‡ a Jane test Fiordland
942 ‡ x GRC Generic ‡ n 0 Visible

In this example, there is a file name in the 099$a, so the search box populates with that name:

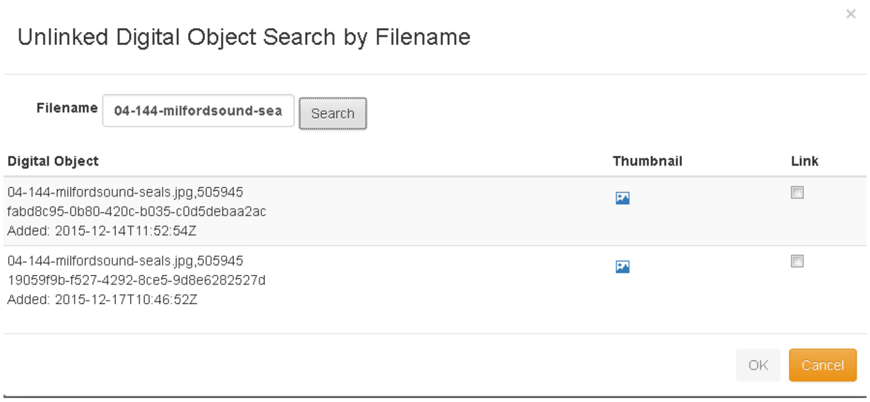


Product Search by Filename

Filename 04-069-fiordland-chasr

37873: Jane test Fiordland

Users can also type in a file name, either a complete name or the start of one – **note that the search is case-sensitive**. You must enter the full/partial file name exactly as it was created. Either way, clicking the Search button looks for the file. The search is by prefix – the file ending (.jpg, .pdf, etc.) can be omitted. If one or more matching files is found, the system comes back with a "found" message.

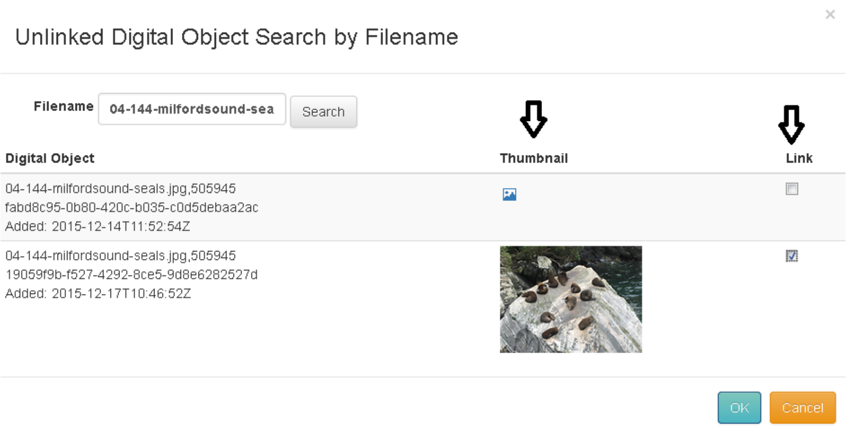


Unlinked Digital Object Search by Filename

Filename 04-144-milfordsound-sea

Digital Object	Thumbnail	Link
04-144-milfordsound-seals.jpg,505945 fabd8c95-0b80-420c-b035-c0d5debaa2ac Added: 2015-12-14T11:52:54Z		☐
04-144-milfordsound-seals.jpg,505945 19059f9b-f527-4292-8ce5-9d8e6282527d Added: 2015-12-17T10:46:52Z		☐

You can hover over the thumbnail icon to identify the desired record:



Unlinked Digital Object Search by Filename

Filename 04-144-milfordsound-sea

Digital Object	Thumbnail	Link
04-144-milfordsound-seals.jpg,505945 fabd8c95-0b80-420c-b035-c0d5debaa2ac Added: 2015-12-14T11:52:54Z		☐
04-144-milfordsound-seals.jpg,505945 19059f9b-f527-4292-8ce5-9d8e6282527d Added: 2015-12-17T10:46:52Z		☑

Check the Link box next to the desired file, and click OK to complete the process of adding the digital object to the bib record. Make sure you save the bib record when finished.

Note that if there are multiple 099$a entries, the search box will only pick up the first occurrence. You will have to manually enter other filenames in the search box.

12.5 Thumbnail View in Cataloging Editor

Titles with digital objects attached will show an icon next to the UUID (856$b) in the cataloging editor. Hovering over or clicking on that icon will pop up a thumbnail view of the object:

37524: Jane at Fox Glacier
Record type: COM
Status: Active Catalog Record
MFHD count:0
Item count:0
DLSO count:1

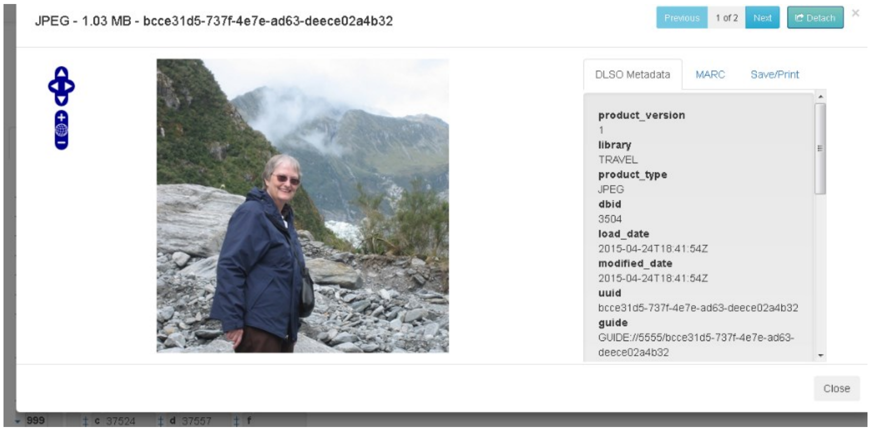
Holdings [manage]
(none)
Record Attributes [edit]
(none)

CATALOG record
Last saved: 2014-11-30 19:38:54

37524: Jane at Fox Glacier

000 00353cmm a2200109 i 4500
005 20141201003855.0
100 ‡ a Wagner, Jane ‡ 0 (MoSDM)97812
245 1 0 ‡ a Jane at Fox Glacier
260 ‡ c 2014-11-30T16:37:30Z ‡ g 2014-11-30T16:37:32Z
856 4 0 ‡ b bcce31d5-737f-4e7e-ad63-deece02a4b32 ‡ f foxglacier-jw.jpg,1029555 ‡ h 5555 ‡ q JPEG ‡ s 1029555 ‡ x
942 ‡ x TRAVEL Travel Collection ‡ n 0 Visible
999 ‡ c 37524 ‡ d 37557 ‡ f

If you click on the thumbnail, it will open the digital object in the same popup viewer window used elsewhere (from the results list or the title display).

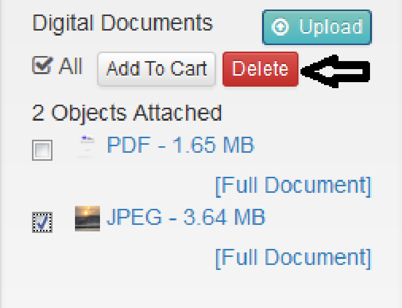


JPEG - 1.03 MB - bcce31d5-737f-4e7e-ad63-deece02a4b32

product_version
1
library
TRAVEL
product_type
JPEG
dbid
3504
load_date
2015-04-24T18:41:54Z
modified_date
2015-04-24T18:41:54Z
uuid
bcce31d5-737f-4e7e-ad63-deece02a4b32
guide
GUIDE://5555/bcce31d5-737f-4e7e-ad63-deece02a4b32

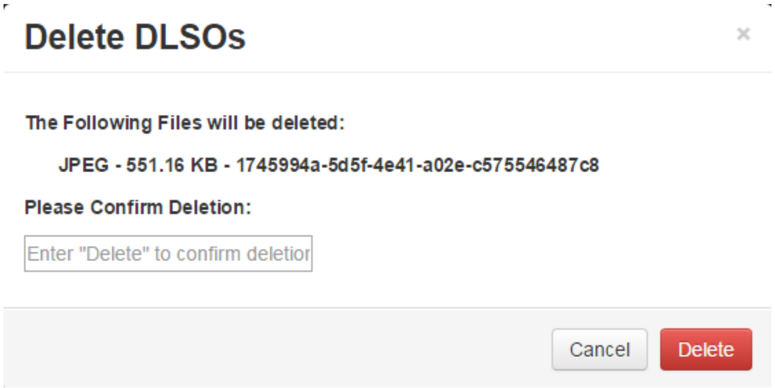
12.6 Removing a Digital Object From a Title

With the appropriate permission, a user can remove a digital object from a title. In the Discovery Layer view, a Delete button will be visible. Select the object(s) to be deleted:



Digital Documents
☑ All
2 Objects Attached
☐ PDF - 1.65 MB
[Full Document]
☑ JPEG - 3.64 MB
[Full Document]

When you click the Delete button, you'll get a confirmation popup:



Delete DLSOs

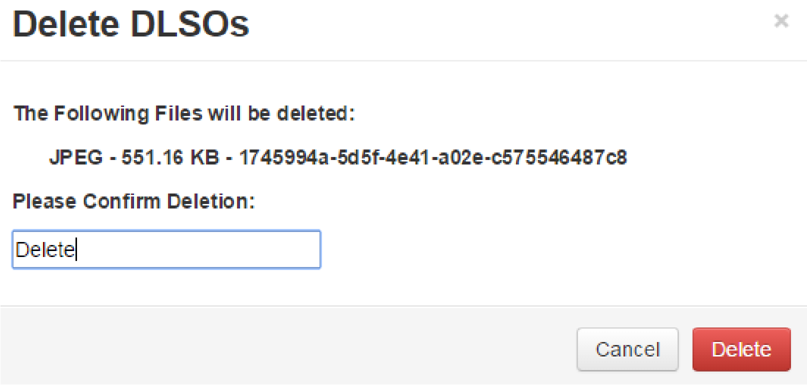
The Following Files will be deleted:

JPEG - 551.16 KB - 1745994a-5d5f-4e41-a02e-c575546487c8

Please Confirm Deletion:

Enter "Delete" to confirm deletion

Note that you must actually type the word Delete into the box, before clicking the Delete button:



Delete DLSOs

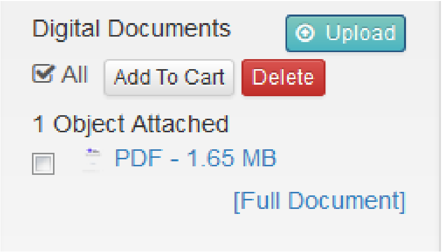
The Following Files will be deleted:

JPEG - 551.16 KB - 1745994a-5d5f-4e41-a02e-c575546487c8

Please Confirm Deletion:

Delete

After clicking the Delete button, you'll see a popup confirming the deletion, and the object will no longer be available on the title display:



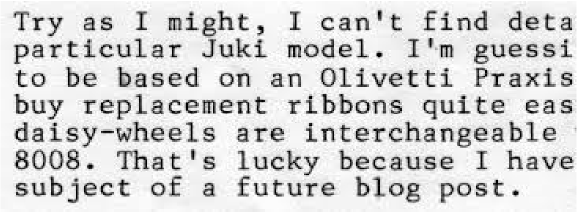
The 856 field associated with the digital object will be removed from the MARC record, and the image itself will be deleted from the database.

12.7 OCR Capability

There are two ways to OCR files that are not already full-text searchable: applying to existing digital objects and applying when the file is uploaded.

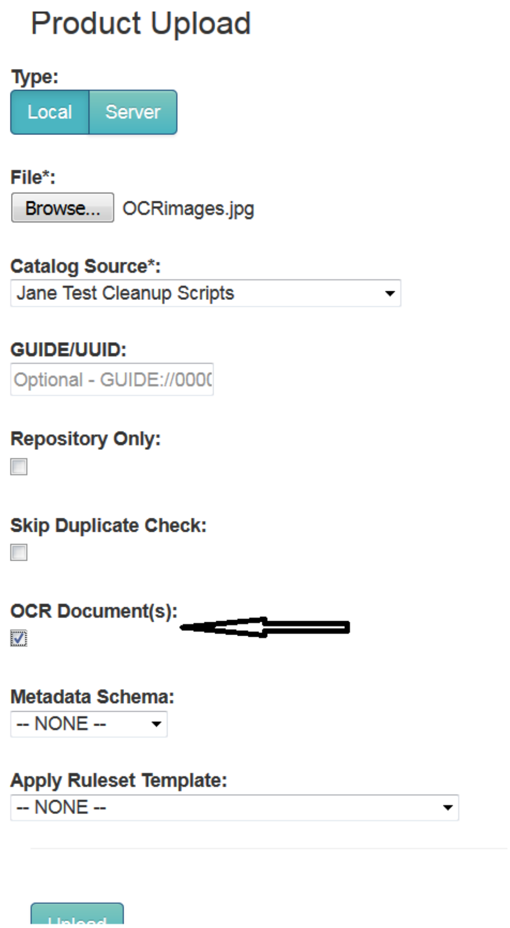
12.7.1 OCR on Ingest

Any file that has recognizable text can be OCR'd. This is not limited to text-type documents such as .pdfs – here is an example using an image file. This is a .jpg:



Try as I might, I can't find deta
particular Juki model. I'm guessi
to be based on an Olivetti Praxis
buy replacement ribbons quite eas
daisy-wheels are interchangeable
8008. That's lucky because I have
subject of a future blog post.

The file can be uploaded as any other digital object (see that section), but on the upload screen, check the new option to OCR the document:



File*: OCRimages.jpg

Catalog Source*: Jane Test Cleanup Scripts

GUIDE/UUID: Optional - GUIDE://000(

Repository Only: ☐

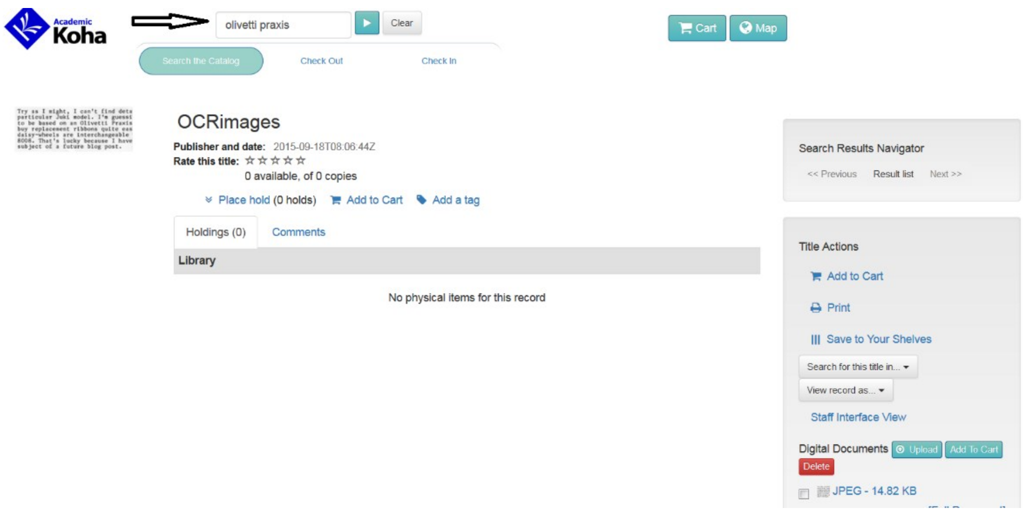
Skip Duplicate Check: ☐

OCR Document(s): ☑

Metadata Schema: -- NONE --

Apply Ruleset Template: -- NONE --

After you have imported the file in Manage Staged Imports, and it has indexed, the text string from the image will be searchable, although that text does not appear in the MARC record:



OCRimages

Publisher and date: 2015-09-18T08:06:44Z

Rate this title: ☆☆☆☆☆

0 available, of 0 copies

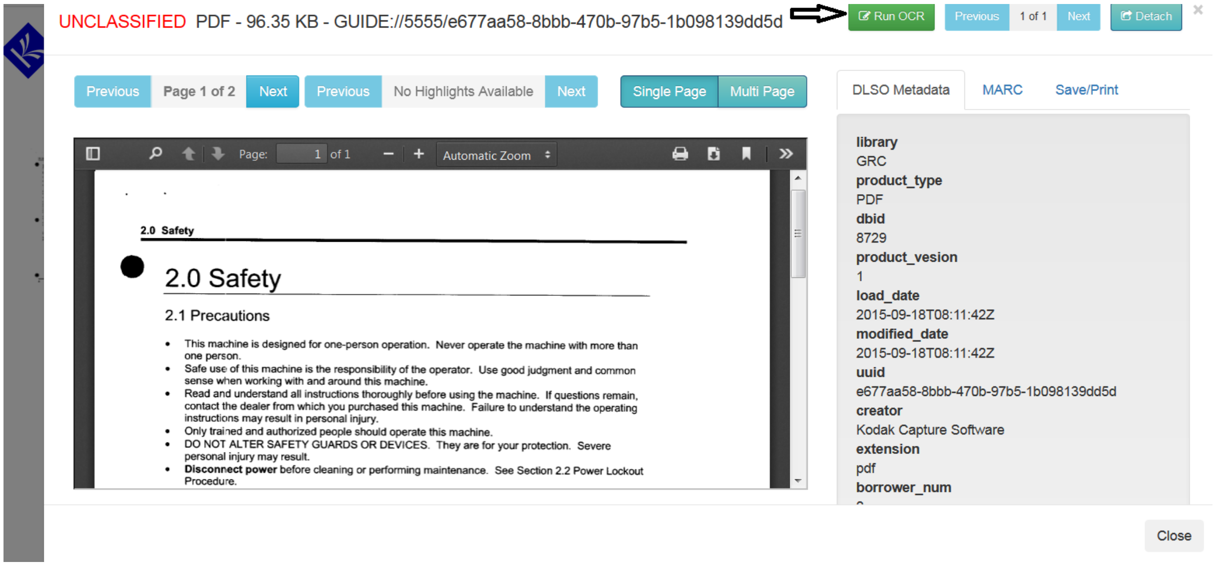
Place hold (0 holds) Add to Cart Add a tag

Holdings (0)	Comments
Library	

No physical items for this record

12.7.2 OCR Existing Digital Object

If a digital object has already been loaded and is not full-text searchable, you can apply OCR to it. In this example, a .pdf file was created without OCR, so its contents are not searchable. Open the file in the digital object viewer and click the Run OCR button at the top right:



UNCLASSIFIED PDF - 96.35 KB - GUIDE://5555/e677aa58-8bbb-470b-97b5-1b098139dd5d

2.0 Safety

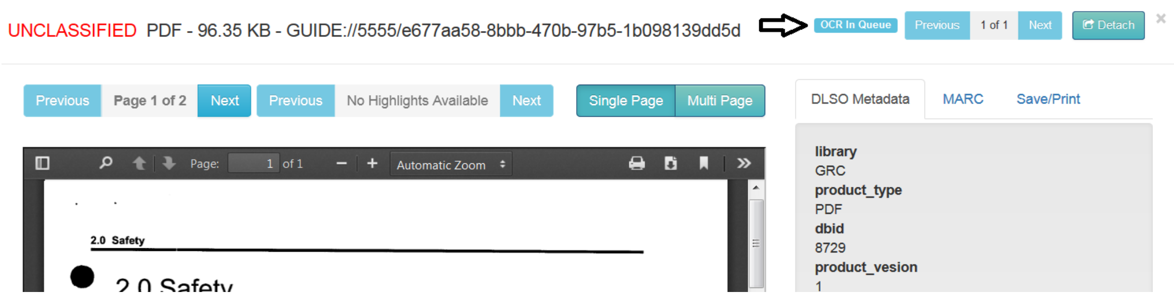
2.0 Safety

2.1 Precautions

- This machine is designed for one-person operation. Never operate the machine with more than one person.
- Safe use of this machine is the responsibility of the operator. Use good judgment and common sense when working with and around this machine.
- Read and understand all instructions thoroughly before using the machine. If questions remain, contact the dealer from which you purchased this machine. Failure to understand the operating instructions may result in personal injury.
- Only trained and authorized people should operate this machine.
- DO NOT ALTER SAFETY GUARDS OR DEVICES. They are for your protection. Severe personal injury may result.
- **Disconnect power** before cleaning or performing maintenance. See Section 2.2 Power Lockout Procedure.

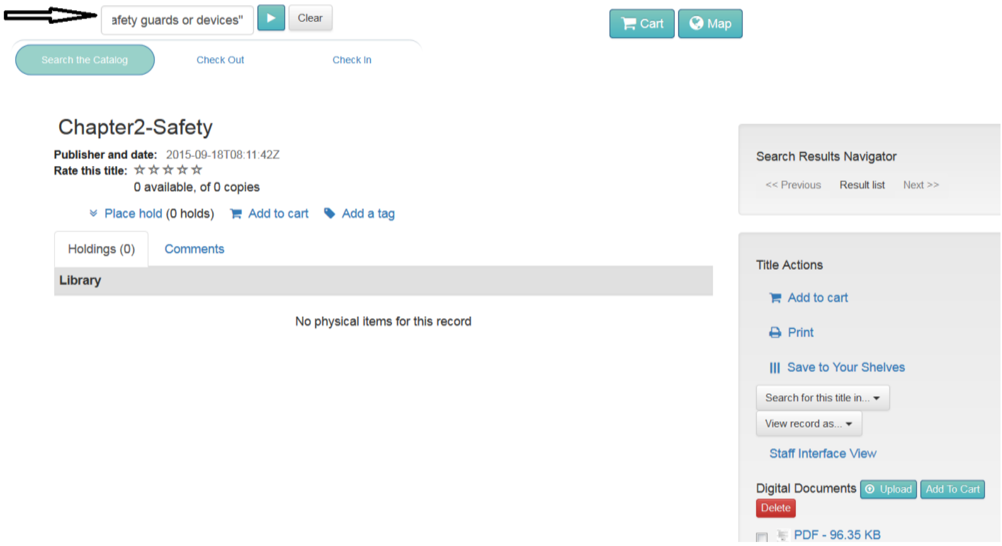
library
GRC
product_type
PDF
dbid
8729
product_vesion
1
load_date
2015-09-18T08:11:42Z
modified_date
2015-09-18T08:11:42Z
uuid
e677aa58-8bbb-470b-97b5-1b098139dd5d
creator
Kodak Capture Software
extension
pdf
borrower_num

The button changes to show that the digital object is queued up for processing:



library
GRC
product_type
PDF
dbid
8729
product_vesion
1

After it has finished processing and indexing (normally only a few minutes), text within the document becomes searchable:



Chapter2-Safety
Publisher and date: 2015-09-18T08:11:42Z
Rate this title: ☆☆☆☆☆
0 available, of 0 copies

No physical items for this record

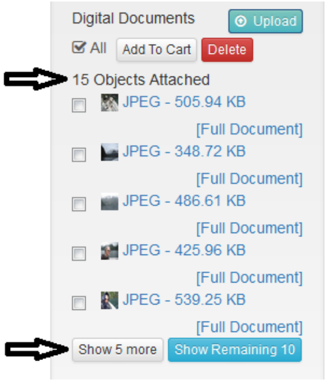
12.8 Display Text

As mentioned in the section on displaying digital objects, the Discovery Layer view shows the file type or file name. If there are multiple objects attached, and the names are lengthy, the truncated display makes it hard to tell them apart. A display name can be entered in the catalog record's 856$y. The display will show that instead of the filename:

That same entry is used as alt text for screenreader software.

12.9 Displaying Large Numbers of Digital Objects

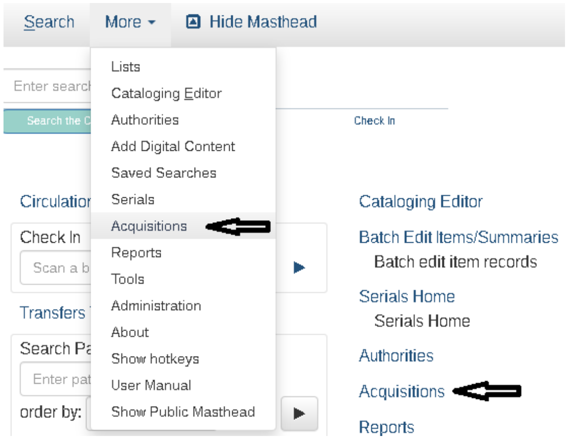
If a title has a large number of digital objects attached, the page will be very slow to load because of the need to retrieve and display information and thumbnails for each object. By default, the system will now only show the first five objects attached. The display will give a count for the total number of objects attached, with buttons to show either the next five or all the remaining items:



Users can then opt to display some/all the remaining objects.

13. Acquisitions

The Acquisitions module uses a separate database; it must be configured on your system. To use Acquisitions, select the More pull-down menu on the main screen and then select Acquisitions (or simply click Acquisitions on the main menu):



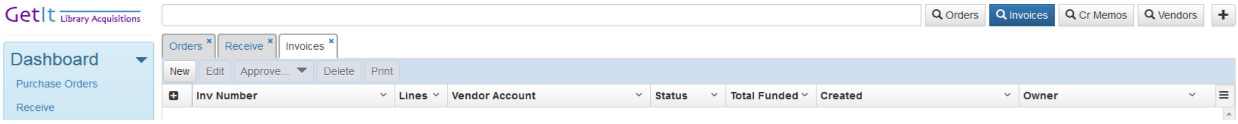
Any material that a vendor offers for sale can be ordered through Acquisitions. Each order created will consist of a Purchase Order and one or more Purchase Order Lines with one or more Copies.

Purchase Orders (also called POs) record the vendor account and purchase order number, as well as optionally the order type.

Purchase Order Lines (also called POLs) store the bibliographic record data associated with a title you are ordering.

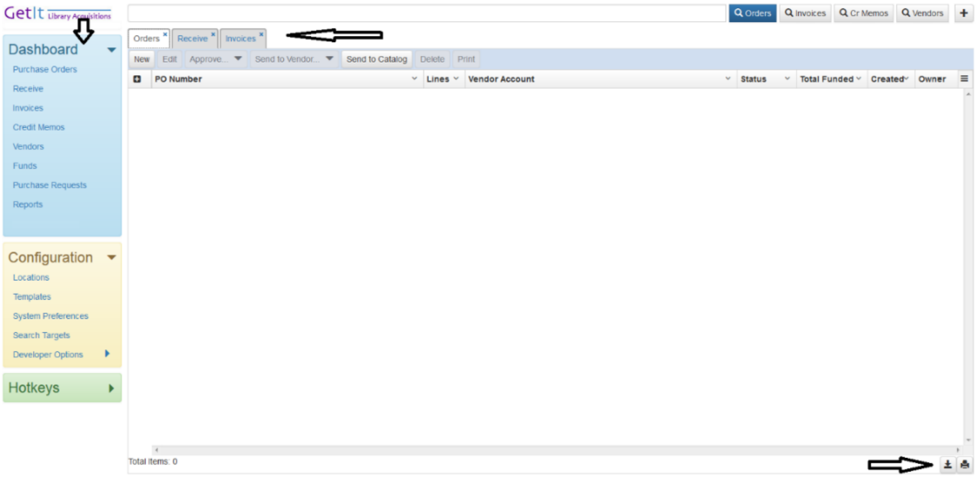
Copies store the location information and are used to **Receive** the material as well as to create an Item record in the catalog.

You will usually work with orders and invoices, but note that as you move between various options the system opens new tabs at the top:



If you find this confusing, close the tabs as you finish with them to simplify your display. Many sites find it helpful to switch between tabs as needed.

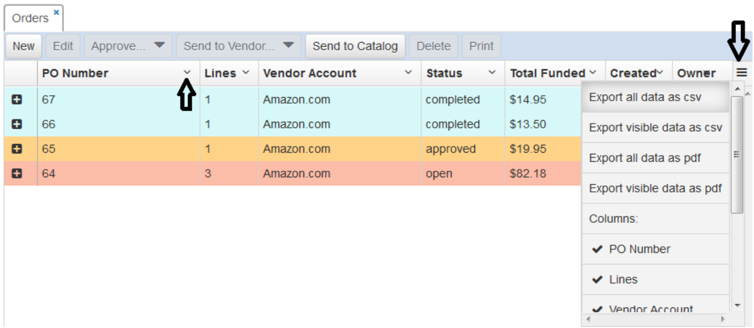
Other parts of the screen are standard throughout the various tabs. The lefthand sidebar, or Dashboard, contains the menu links. The top of the righthand side contains buttons and links appropriate to that module.



The bottom of the screen usually has download and print icons; others may show depending on what screen you're on.

TIP: To edit any particular entry, you can select it and click the Edit button on that screen, or simply double-click it. Either will open the edit screen.

Note that many screens (funds, purchase orders, etc.) give you an icon at upper right in the table where you can control the column fields displayed. At the bottom, you can print or export data from any grid display. If you see up/down arrows in the column headers, you can sort the data by that field. You can resize columns by dragging the column separator. Your screen changes should save and be in place the next time you open acquisitions.



	PO Number	Lines	Vendor Account	Status	Total Funded	Created	Owner
⊞	67	1	Amazon.com	completed	$14.95		
⊞	66	1	Amazon.com	completed	$13.50		
⊞	65	1	Amazon.com	approved	$19.95		
⊞	64	3	Amazon.com	open	$82.18		

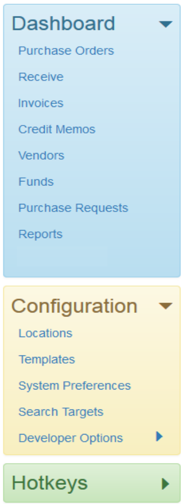
Note that many actions, such as clicking on a bib link in an order, will open a new browser window. Keep an eye on where you are and close extra windows after use to avoid confusion.

13.1 Setting up Acquisitions

The installation must be configured at the system level, and under Home, Administration, Global System Preferences, Acquisitions, the GetItAcquisitions syspref must be turned on. Permissions to acquisitions are set according to the user's Role or individual staff permissions. See that section of the User Manual for more information on creating Patrons and assigning Roles. The rest of the configuration is done within the Acquisitions module itself; go into Acquisitions and use the menu links there.

Before staff can use the acquisitions module, you should configure vendors, funds, locations (mapping for items/copies), and templates (setting up common settings for items/copies and funding). You can create some of these on the fly while you're working, but it's better to set up your most frequently-used configurations first. Use the links in the left sidebar menu.

You should also work through the options under the Configuration section of the sidebar menu to see what else you want to set as a default. Not everything visible under Configuration needs to be touched or changed; focus on the areas described in the manual.

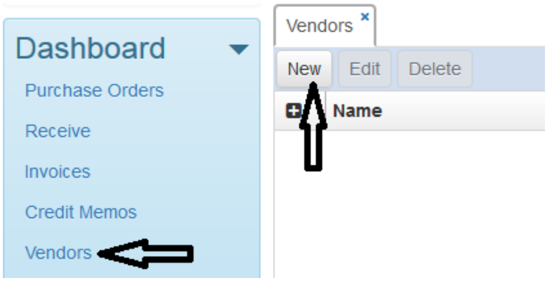


13.1.1 Setting up Vendors

Before creating Purchase Orders for the first time, you should set up vendors and funds. [Note: you can now create a new vendor from the purchase order, but it's better to have them configured in advance, so that all the needed information is available.] A vendor is a top-level parent record that contains one or more vendor accounts. A vendor account represents a business relationship between your organization and a vendor. Each vendor account has one or more addresses. Each address can be assigned one or more address uses, such as Order, Payment, Returns, Claims, or All. This specifies when in the ordering cycle the system will assign the address.

You can set up more than one vendor account per vendor. This allows you to assign different account numbers, discounts, order types and addresses depending on the vendor account. It also helps you organize your business relationships with a single vendor so you can view all accounts with a given Vendor at once. For example, you may need one account for standing orders, another for serials, and another for regular book orders.

From the left-hand menu, Click Vendors, then click New to create a new vendor:



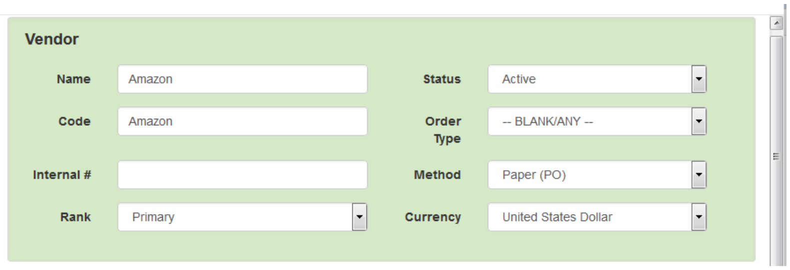
To save time, you can enter a new Vendor, Vendor Account and Address with associated uses via a single form. As a result, the form has three distinct color-coded sections: Vendor Details, Vendor Account Details, and Vendor Addresses (see sections below).

Fill out as much info as you have; email address under the address section is required to be able to send messages to the vendor.

Required fields are outlined in red, and you won't be able to save until you enter data in those fields. Be sure to click the Save button when finished.

13.1.1.1 Vendor Details

This is the top-level record.

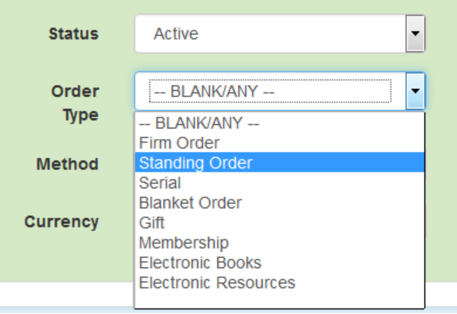


Vendor

Name: Amazon
Code: Amazon
Internal #:
Rank: Primary
Status: Active
Order Type: -- BLANK/ANY --
Method: Paper (PO)
Currency: United States Dollar

Enter the vendor name and a code for system use. Use the pulldowns to select rank, status, order type, preferred order method, and currency. Any settings here will be inherited by the rest of the vendor account setup, so make this as broad as possible, especially with regard to order type. If you set it to only allow standing orders, for example, you won't be able to use this vendor for other purchases. We recommend leaving it blank, or selecting BLANK/ANY from the pulldown.

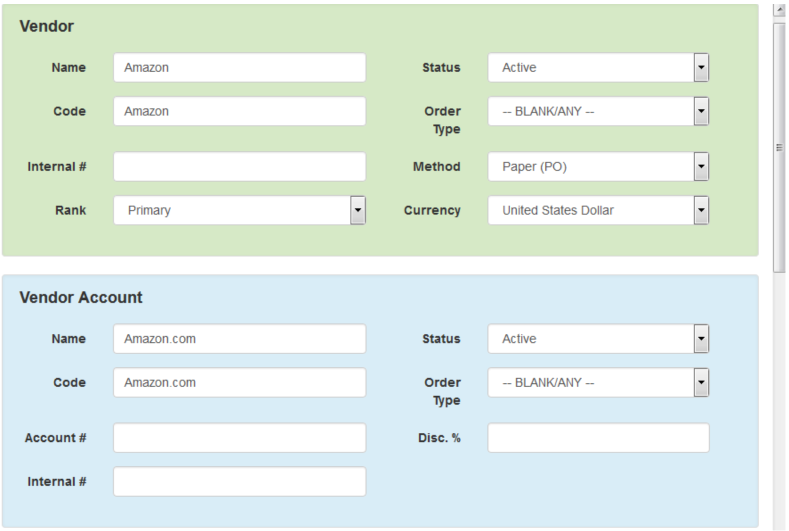
NOTE: Of the various order types in the pulldown, only Standing Order has a meaning that affects functionality (see that section later). The other order types (Firm, Gift, Membership, etc.) are provided as a means of tracking, if your site wants that level of reporting.



Status: Active
Order Type: -- BLANK/ANY --

13.1.1.2 Vendor Account Details

You can have more than one account per vendor; if you need to track different types of orders separately, create separate accounts.



Vendor

Name: Amazon
Code: Amazon
Internal #:
Rank: Primary
Status: Active
Order Type: -- BLANK/ANY --
Method: Paper (PO)
Currency: United States Dollar

Vendor Account

Name: Amazon.com
Code: Amazon.com
Account #:
Internal #:
Status: Active
Order Type: -- BLANK/ANY --
Disc. %:

The Vendor Account Name (mandatory) is the account name your vendor uses for your orders. The account name can identify accounts for standing orders, personal orders, media, books, or others. When you create a purchase order, the vendor account name is the first piece of information the system requires. When you name your accounts, be sure to make them as unique as possible. Examples: B&T Continuations, YBP Approval Plan, ALA Blanket order, etc.

The Vendor Account Code (mandatory) can be used to quickly find a vendor record when creating a new order.

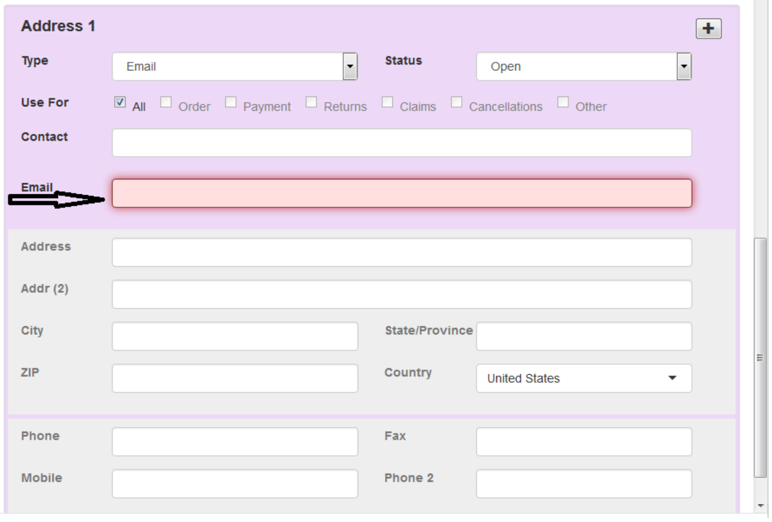
The Vendor Account Number (optional) is usually assigned by the vendor. It is not required; if you don't have one, you can leave it blank.

The Internal Account Number (optional) is the designation for this Vendor Account used in your local accounting system. It is not required; if you don't have one, you can leave it blank.

Use the pulldowns to select status and order type (you can leave blank for any type of order, or select a specific type). If you have a contracted discount with this vendor, place the Discount percentage in this field.

13.1.1.3 Vendor Address

The third section of the initial setup screen is vendor address. Fill out as much information as you need to place orders or contact the vendor. If you normally order through the vendor's own web site (as with Amazon) you may not need much detail here. You need to add an email address (it's required) even if the vendor prefers regular mail, so that the system can send messages. Be sure to tell the system whether the address type is email, postal, or phone, and what to use the address for.



Address 1

Type: Email

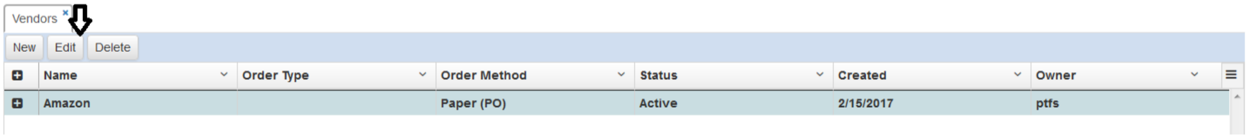
Status: Open

Use For: ☑ All ☐ Order ☐ Payment ☐ Returns ☐ Claims ☐ Cancellations ☐ Other

Country: United States

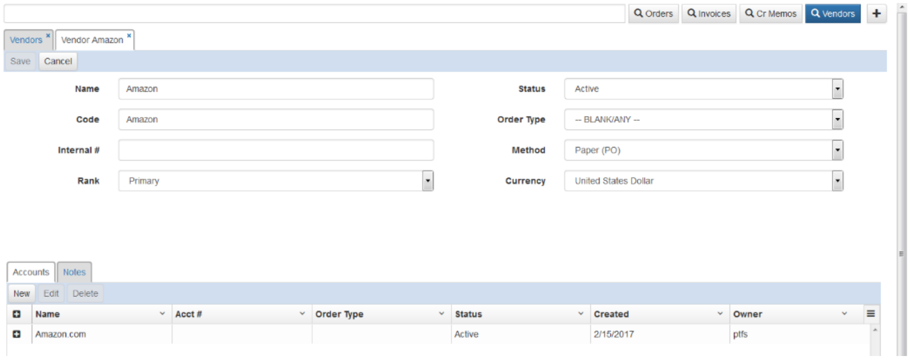
13.1.1.4 Editing Vendor/Adding New Account

Once you have created a vendor, you can edit it by clicking on the vendor to select it from the list, and clicking the Edit button:



Name	Order Type	Order Method	Status	Created	Owner
Amazon		Paper (PO)	Active	2/15/2017	ptfs

You can change top-level vendor details, edit an account, or add another account:



Name: Amazon

Code: Amazon

Internal #:

Rank: Primary

Status: Active

Order Type: -- BLANK/ANY --

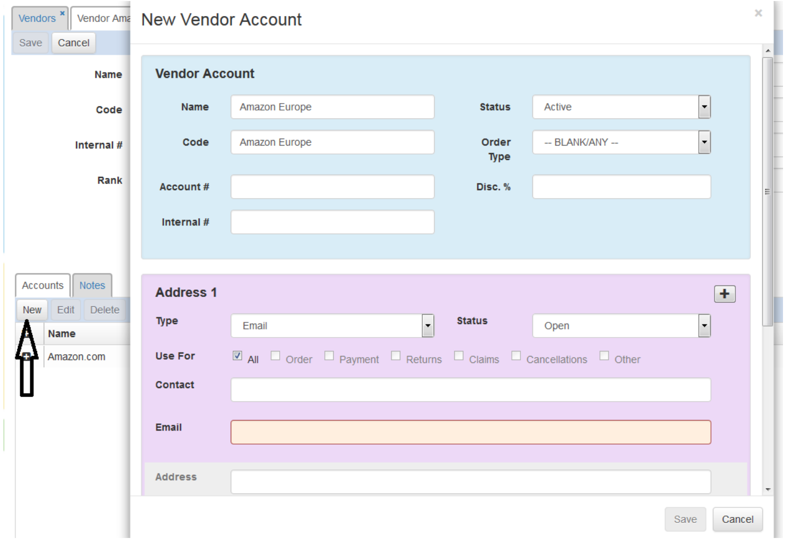
Method: Paper (PO)

Currency: United States Dollar

Name	Acct #	Order Type	Status	Created	Owner
Amazon.com			Active	2/15/2017	ptfs

NOTE: There are now search options at the top, to find all the orders etc. associated with this vendor.

Adding a new account is easy; click the New button under the Accounts section, and fill in the new information:



Name: Amazon Europe

Code: Amazon Europe

Account #:

Internal #:

Status: Active

Order Type: -- BLANK/ANY --

Disc. %:

Type: Email

Status: Open

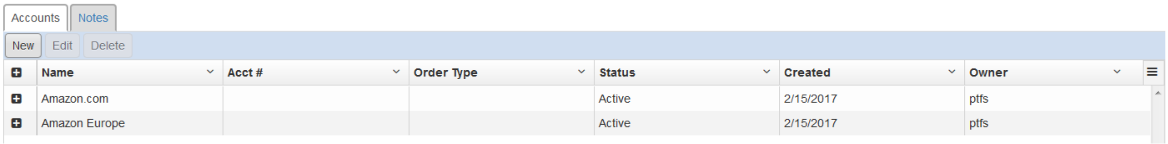
Use For: ☑ All ☐ Order ☐ Payment ☐ Returns ☐ Claims ☐ Cancellations ☐ Other

Contact:

Email:

Address:

Save it, and both accounts are then available for use:

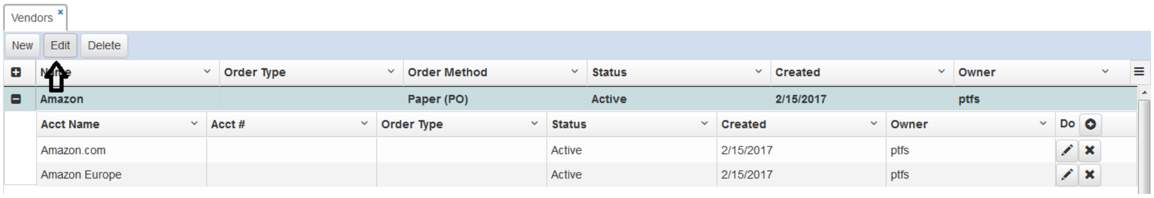


Name	Acct #	Order Type	Status	Created	Owner
Amazon.com			Active	2/15/2017	ptfs
Amazon Europe			Active	2/15/2017	ptfs

13.1.1.5 Setting Up EDI

[NOTE: EDI setup has been moved from a separate menu configuration entry in earlier versions to under the vendor account section.]

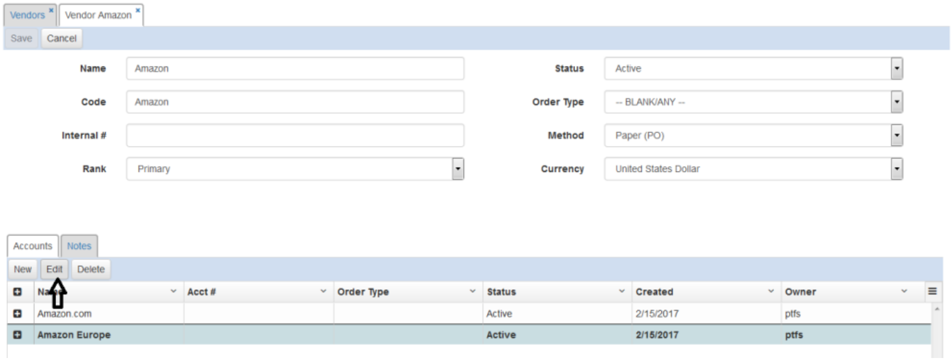
EDI (electronic transmission of order data) is enabled on new installations. However, there is a cron job that must be enabled at system level, so open a Support Center ticket if you want to start using EDI. You will need to get setup information from your vendor. Then, to configure a vendor for EDI, edit a vendor:



Name	Order Type	Order Method	Status	Created	Owner
Amazon		Paper (PO)	Active	2/15/2017	ptfs

Acct Name	Acct #	Order Type	Status	Created	Owner
Amazon.com			Active	2/15/2017	ptfs
Amazon Europe			Active	2/15/2017	ptfs

Then select and edit a particular vendor account:



Name: Amazon

Code: Amazon

Internal #:

Rank: Primary

Status: Active

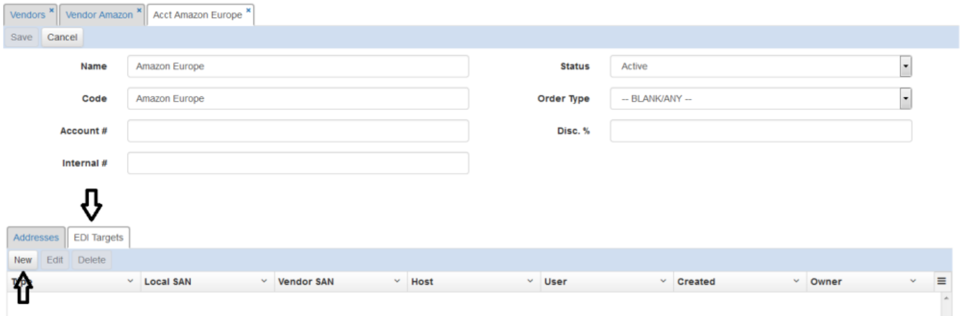
Order Type: -- BLANK/ANY --

Method: Paper (PO)

Currency: United States Dollar

Name	Acct #	Order Type	Status	Created	Owner
Amazon.com			Active	2/15/2017	ptfs
Amazon Europe			Active	2/15/2017	ptfs

Under that account, select the EDI Targets tab, and the click New to create a target:



Name: Amazon Europe

Code: Amazon Europe

Account #:

Internal #:

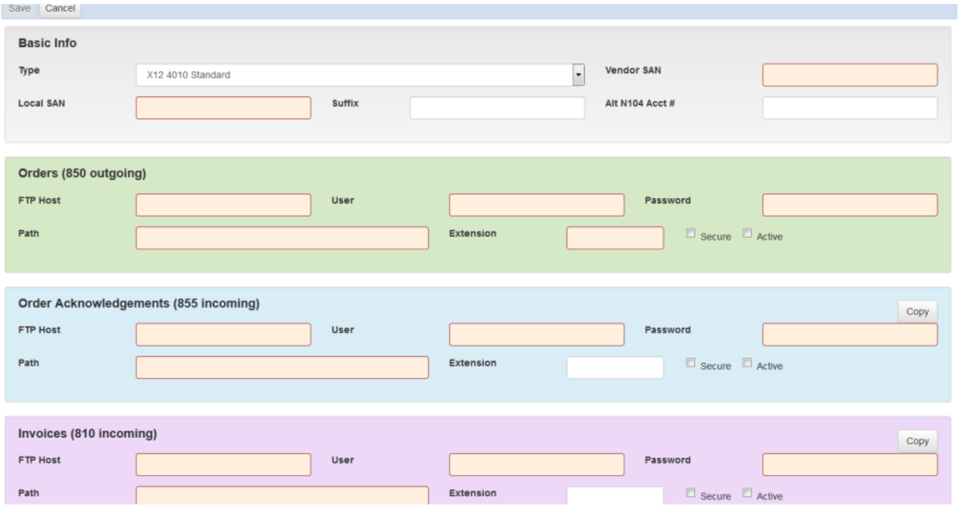
Status: Active

Order Type: -- BLANK/ANY --

Disc. %:

	Local SAN	Vendor SAN	Host	User	Created	Owner

On the popup window, enter the information you get from your vendor. Fields outlined in red are required:



Type: X12 4010 Standard

The form fields are:

- **EDI Target Type –** this should be set to X12 4010 Standard (or X12 4010 with Enhanced Ordering for enriched EDI).

- **Vendor SAN –** the vendor's SAN

- **Local SAN –** This is the library's SAN (or a vendor-assigned SAN which is used for testing)

- **Local SAN suffix –** the SAN suffix, if assigned

- **Alt N104 Customer No –** Most vendors require the purchaser's SAN in the N104 field of an N1 record in purchase orders. These are identified with a '15' in the N103 (identification code qualifier). Other vendors, however, request an alternative customer number in the N104, qualified with a '91' in the N103. Fill in this field to enable this alternative behavior.

- **Orders FTP Details** – the authentication and related configuration for outgoing orders (type 850 documents), including

    - FTP Host – the FTP hostname

    - Username, Password – authentication information

    - Path – the directory where outgoing orders are to be placed

    - File Extension – the extension to be used on order files. Some vendors have specific requirements for file extensions

    - Secure – Secure FTP ordering is currently unimplemented

- **Order Acknowledgments FTP Details** – configuration pertaining to incoming acknowledgments (type 855 documents).

- **Invoices FTP Details** – invoices config. Most vendors place acknowledgments and invoices in the same location, often in the same documents. In this case, this section and the previous one will be identical. There is a Copy button to copy data between sections.

NOTE: The **Alt N104 Customer No** field should be left completely blank if the vendor wants a standard '15' qualifier in the N1 (i.e., most vendors).

Ingram: Ingram shipto account number goes in the **Alt N104 Account Number** field

13.1.1.6 Enriched EDI

Enriched EDI is set by choosing X12 4010 with Enhanced Ordering in Target Type. To create the appropriate 850 file for **enriched** orders, the system will need to process the following information from a user-uploaded MARC file that is brought in via the upload function on creating a PO:

Midwest:

953 $D quantity
953 $E Fund.Ledger
953 $g price (no dollar sign) -- should be discounted price; list price is in 020 $c
953 $H vendor notes
953 $J GetIt Location code
953 $x staff notes

Baker & Taylor:

954 $d quantity
954 $e Fund.Ledger
954 $g price (no dollar sign) -- should be discount price; list price is in 020 $c
954 $h vendor notes
954 $j GetIt location code
954 $x staff notes

Ingram Content Services:

Use either 953 or 954; same subfields as above, and the files will be transferred to 952

Explanation:

954 if library uses CLS (Customized Library Services)

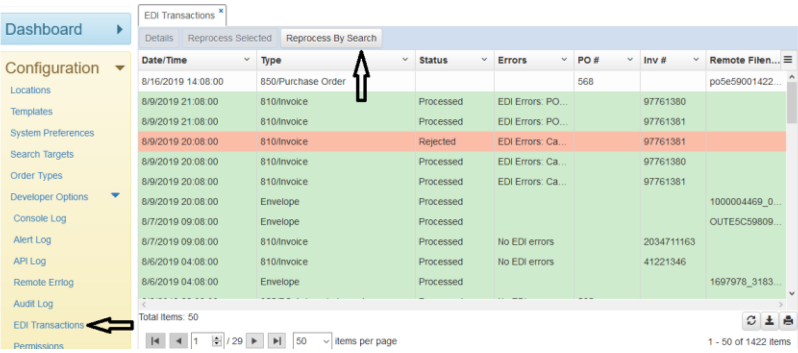
Acquisitions will receive **953/954** records and convert those into 952 records (this is an oversimplification; acquisitions communicates with the catalog using its own special XML format to create items, but they wind up being 952 tags in the MARC data that gets built).

A **952** is meant to represent a single item. Using it to represent multiple items (such as three books going to the same branch) means that someone could accidentally create item records that don't make any sense. The catalog will still see and use 952 tags, just as before; and when acquisitions sends a PO to the catalog, the catalog will construct 952s from its own item-level (i.e., PO line copy level) detail. List price will map to catalog $v replacement price, and discounted price to $g normal purchase price.

The 953 records are used by acquisitions to initially populate a PO with copies. If 953 $E contains just Fund (ie, not Fund.Ledger), then acquisitions will process it as the current Ledger. Fund names should NOT include year, since year is in Ledger. Fund name should be something like "DVD" not "DVD.2012".

13.1.1.7 Reprocess EDI Orders

A new entry (EDI Transactions) under Developer Options will show all EDI orders. Orders which have been rejected can be reprocessed with the Reprocess by Search button. This will show the user exactly what went wrong with a rejected EDI doc. Reprocessing an already processed document is harmless.



Date/Time	Type	Status	Errors	PO #	Inv #	Remote Filen...
8/16/2019 14:08:00	850/Purchase Order			568		po5e59001422...
8/9/2019 21:08:00	810/Invoice	Processed	EDI Errors: PO...		97761380	
8/9/2019 21:08:00	810/Invoice	Processed	EDI Errors: PO...		97761381	
8/9/2019 20:08:00	810/Invoice	Rejected	EDI Errors: Ca...		97761381	
8/9/2019 20:08:00	810/Invoice	Processed	EDI Errors: Ca...		97761380	
8/9/2019 20:08:00	810/Invoice	Processed	EDI Errors: Ca...		97761381	
8/9/2019 20:08:00	Envelope	Processed				1000004469_0...
8/7/2019 09:08:00	Envelope	Processed				OUTE5C59809...
8/7/2019 09:08:00	810/Invoice	Processed	No EDI errors		2034711163	
8/6/2019 04:08:00	810/Invoice	Processed	No EDI errors		41221346	
8/6/2019 04:08:00	Envelope	Processed				1697978_3183...

Total Items: 50

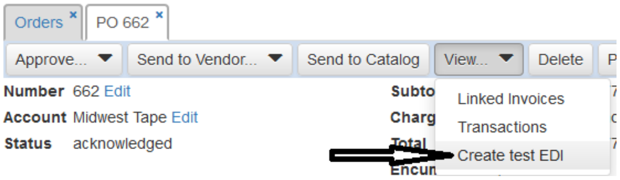
1 / 29 50 items per page

1 - 50 of 1422 items

You can also reprocess an order from any EDI tab (under Purchase Orders, Invoices, Vendor Accounts, or EDI Targets). Select the EDI doc(s) to update, and click the Reprocess Selected button.

13.1.1.8 Creating a Test EDI Message

When viewing or editing a PO, there is a new View, Create Test EDI option that will create, but not send, an EDI transaction:

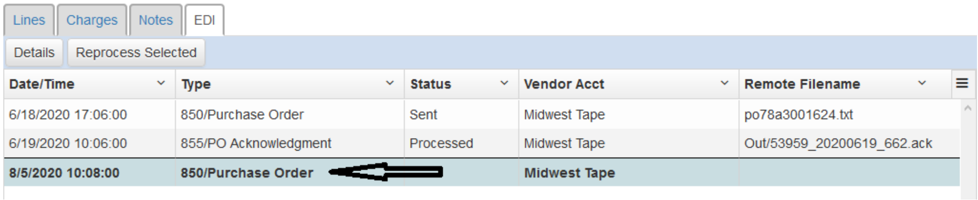


Number 662 Edit
Account Midwest Tape Edit
Status acknowledged

Choosing that option will give a popup:

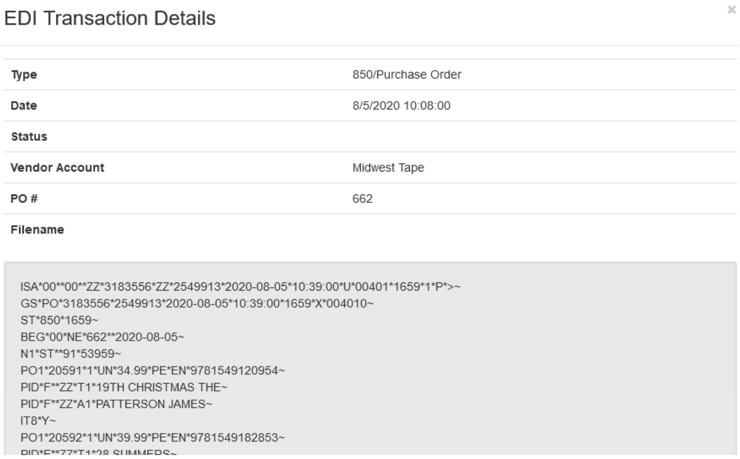
Generated 1 / 1 PO EDI records

That test message will show on the EDI tab at the bottom of the PO screen:



Date/Time	Type	Status	Vendor Acct	Remote Filename
6/18/2020 17:06:00	850/Purchase Order	Sent	Midwest Tape	po78a3001624.txt
6/19/2020 10:06:00	855/PO Acknowledgment	Processed	Midwest Tape	Out/53959_20200619_662.ack
8/5/2020 10:08:00	**850/Purchase Order**		**Midwest Tape**	

Double-clicking that line (or clicking the Details button) will show the test message:



EDI Transaction Details

Type	850/Purchase Order
Date	8/5/2020 10:08:00
Status	
Vendor Account	Midwest Tape
PO #	662
Filename	

```
ISA*00**00**ZZ*3183556*ZZ*2549913*2020-08-05*10:39:00*U*00401*1659*1*P*>~
GS*PO*3183556*2549913*2020-08-05*10:39:00*1659*X*004010~
ST*850*1659~
BEG*00*NE*662**2020-08-05~
N1*ST**91*53959~
PO1*20591*1*UN*34.99*PE*EN*9781549120954~
PID*F**ZZ*T1*19TH CHRISTMAS THE~
PID*F**ZZ*A1*PATTERSON JAMES~
IT8*Y~
PO1*20592*1*UN*39.99*PE*EN*9781549182853~
PID*F**ZZ*T1*28 SUMMERS~
```

The purpose of creating the test message is to examine the data string. This can be useful in troubleshooting problems; it isn't something to be done under normal circumstances. Do NOT click the Reprocess button from the EDI tab unless you want to send the message to the vendor for examination. You can copy the message text out of the popup and email that to the vendor rather than triggering their order process by sending the message.

13.1.2 Setting up Funds

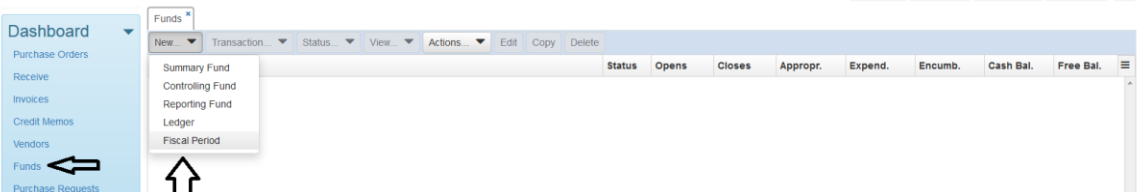
The fund hierarchy can be as simple or as complex as you need. First think about your reporting requirements. Do you need to track all money spent by a certain department? All money spent on certain types of materials? How granular do you need your reports to be? Then structure your hierarchy accordingly.

TIP: It might be a helpful to map the fund hierarchy out on a piece of paper prior to entering them into the system.

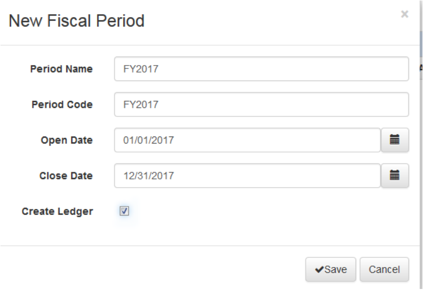
TIP: Make sure to create separate fund for vendor processing (shipping, vas, and tax) costs so material costs are reflected accurately.

13.1.2.1 Fiscal Period

The highest level of the hierarchy is the fiscal period. This is the tracking period, usually the fiscal year for your organization (e.g., Jan 1-Dec 31, July 1-June 30, or Oct 1-Sept 30). To create it, select Funds and then click New:



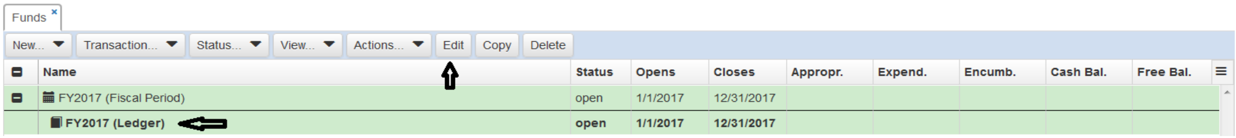
Select fiscal period first, and in the popup window enter a name and date range. Each fiscal period must have at least one ledger under it, so check the box to create an initial ledger. Click Save when finished.



Period Name: FY2017
Period Code: FY2017
Open Date: 01/01/2017
Close Date: 12/31/2017
Create Ledger: ☑

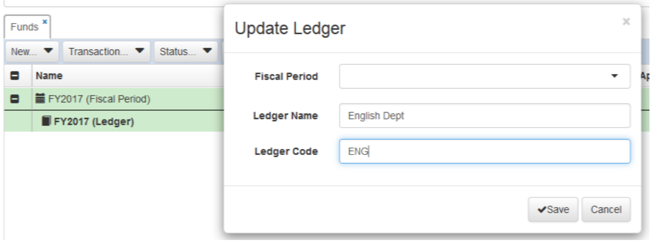
13.1.2.2 Ledgers

It creates a default ledger with the same name as the fiscal period; click on the ledger name and then click the Edit button to change it.



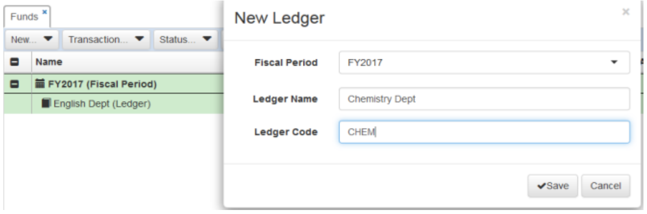
Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
FY2017 (Ledger)	**open**	**1/1/2017**	**12/31/2017**					

For this example, I am planning to group my expenditures by academic department, so the first ledger is for the English department. Once you save from this screen, you can either create another fiscal period if needed, or create more ledgers.



Fiscal Period:
Ledger Name: English Dept
Ledger Code: ENG

Click the Fiscal Period line and then New, Ledger:



Fiscal Period: FY2017
Ledger Name: Chemistry Dept
Ledger Code: CHEM

You can add more ledgers later as needed. The ledger is the parent, or “checkbook” level.

13.1.2.3 Summary, Controlling, Reporting Funds

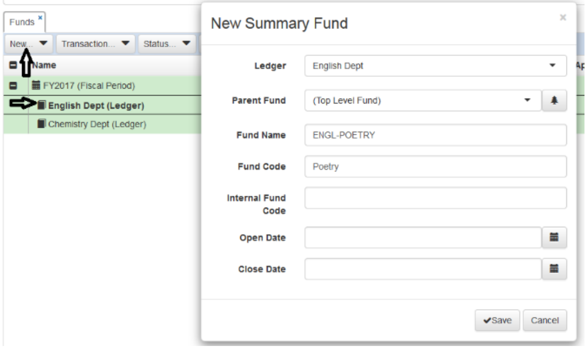
Under each ledger you need to create funds, which are where the money is actually allocated. There are three fund types:

Summary Funds summarize the balances of all Controlling funds lower in the hierarchy. Summary is the top level. It is recommended that you only have one top-level root Summary Fund, though you may have as many subsidiary Summary Funds under it as needed.

Controlling Funds reflect actual appropriations. The encumbered, expended and available balances of a Controlling fund will be calculated using all transactions that use a Controlling fund or any Reporting funds lower in the hierarchy.

Reporting Funds are used when there is a need to track the expenditure of a Controlling Fund account at a more detailed level (for example, breaking out books or CDs within a general purchase fund). Reporting Fund accounts can not have funds allocated to them, but since they are linked to the Controlling Fund account which can accept the allocation, Reporting Fund accounts can be used when funding copy lines on a Purchase Order. When a Reporting Fund account is used on the 'Fund' line at the copy item level of a Purchase Order, the Controlling Fund account to which that Reporting Fund account is linked is encumbered for the cost of the copy. When reporting on the use of funds from the Controlling Fund account, if a Reporting Fund account was utilized, the report will show how detailed the Controlling Funds were used. They are not required, and not all sites use them.

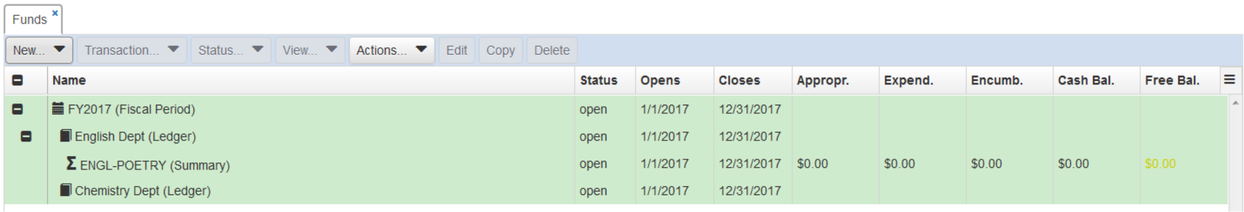
To create a new summary fund, click on the ledger name and then New, Summary Fund. Enter a descriptive name and code; make sure you use unique names that are easy to identify when you are working with purchase orders.



Ledger: English Dept
Parent Fund: (Top Level Fund)
Fund Name: ENGL-POETRY
Fund Code: Poetry

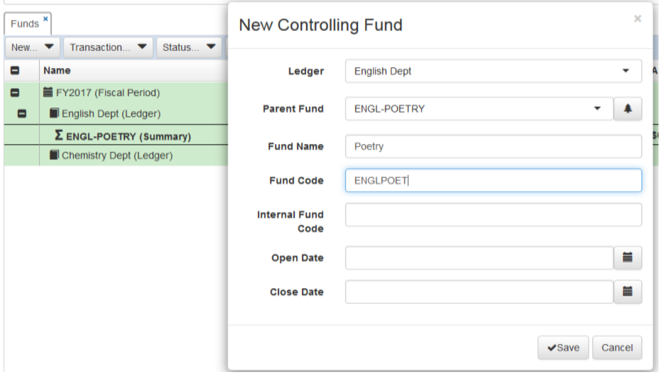
Some sites require an internal identifying code; if you don't, you can leave that field blank. The dates will pick up the date range from the top-level fiscal period. You can enter a different date range if this fund will only be active for a short time.

As you create summary funds, you will see that they show financial data fields with a zero balance:



Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

The actual money is allocated at the controlling fund level. First, select one of your summary funds, and click New, Controlling Fund. Initial setup is similar to the summary fund:

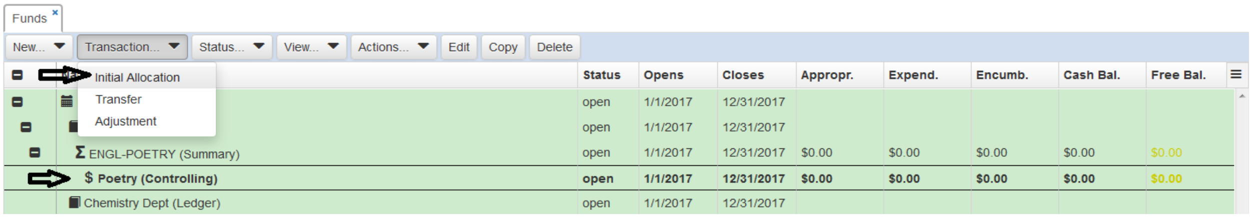


New Controlling Fund

Ledger: English Dept
Parent Fund: ENGL-POETRY
Fund Name: Poetry
Fund Code: ENGLPOET
Internal Fund Code:
Open Date:
Close Date:

13.1.2.4 Allocating Money

Create as many controlling funds as needed. Then, add money to the fund using a fund transaction. Fund transactions can add an initial allocation, adjust fund balances or transfer funds between controlling funds.



	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
	open	1/1/2017	12/31/2017					
	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
$ Poetry (Controlling)	**open**	**1/1/2017**	**12/31/2017**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

Initial Allocation--used to assign initial funds to a Controlling Fund.

Transfer--used to transfer funds from one Controlling Fund to another

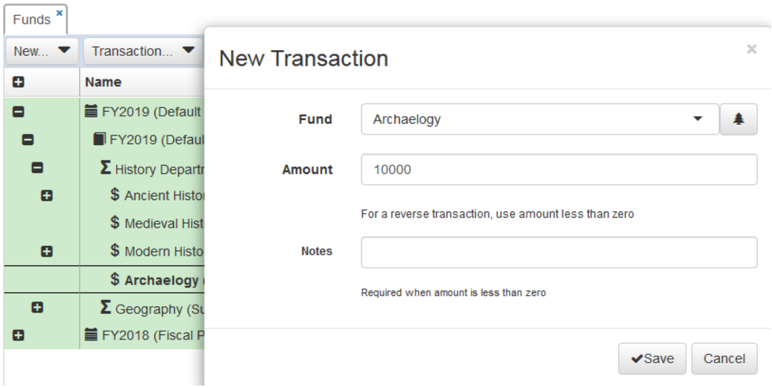
Fund Adjustment--used to adjust the allocation fund balance of a given Controlling Fund.

WARNING: Once money is allocated to a fund, that fund cannot be deleted. The money could be transferred to another fund, but the original one must remain.

NOTE: A new notes field has been added to all the transaction screens, so you can enter any additional information desired about the transaction. If you try to remove money from an account (a negative entry), the notes field is required.

13.1.2.4.1 Initial Allocation

For this example, I will give the Archaeology fund an initial allocation of $10,000.



New Transaction

Fund Archaelogy

Amount 10000

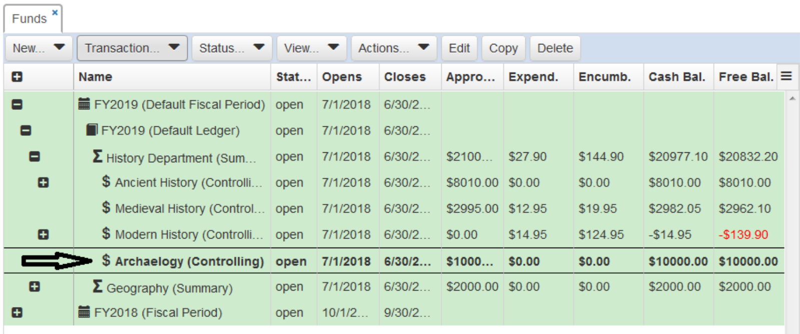
For a reverse transaction, use amount less than zero

Notes

Required when amount is less than zero

Do **NOT** use commas or dollar signs. The only thing other than the actual figures should be a decimal sign, if needed (i.e., 100000.50). If you enter a comma in the string, like 100,000, the system will interpret that as $100.

Once the allocation is saved, the fund shows as having $100,000 in the Appropriation and Cash Balance columns. As you place orders and encumber funds, and receive items and pay for them, the balances in the various fields will change accordingly.



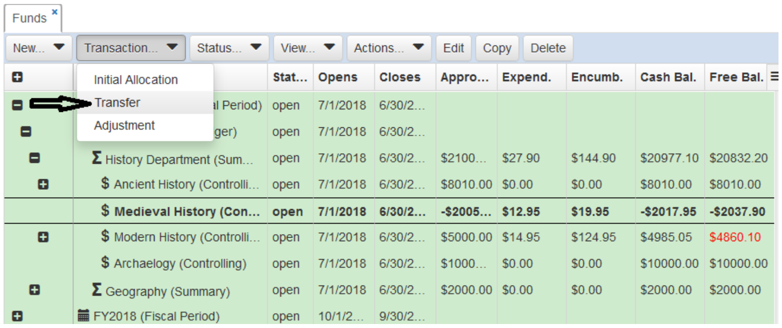
Name	Stat...	Opens	Closes	Appro...	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2019 (Default Fiscal Period)	open	7/1/2018	6/30/2...					
FY2019 (Default Ledger)	open	7/1/2018	6/30/2...					
Σ History Department (Sum...	open	7/1/2018	6/30/2...	$2100...	$27.90	$144.90	$20977.10	$20832.20
$ Ancient History (Controlli...	open	7/1/2018	6/30/2...	$8010.00	$0.00	$0.00	$8010.00	$8010.00
$ Medieval History (Control...	open	7/1/2018	6/30/2...	$2995.00	$12.95	$19.95	$2982.05	$2962.10
$ Modern History (Controlli...	open	7/1/2018	6/30/2...	$0.00	$14.95	$124.95	-$14.95	-$139.90
$ Archaelogy (Controlling)	**open**	**7/1/2018**	**6/30/2...**	**$1000...**	**$0.00**	**$0.00**	**$10000.00**	**$10000.00**
Σ Geography (Summary)	open	7/1/2018	6/30/2...	$2000.00	$0.00	$0.00	$2000.00	$2000.00
FY2018 (Fiscal Period)	open	10/1/2...	9/30/2...					

Here is a sample fund hierarchy that has all three fund types. Remember that a Reporting fund must be under a Controlling fund, which must be under a Summary fund, which must be under a Ledger. Note that you can place multiple Controlling funds under the same Summary fund, or use separate Summary funds if desired.

Name	Status	Opens	Closes
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017
English Dept (Ledger)	open	1/1/2017	12/31/2017
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017
$ Poetry (Controlling)	open	1/1/2017	12/31/2017
Report-Poetry (Reporting)	open	1/1/2017	12/31/2017
Σ Printed Materials (Summary)	open	1/1/2017	12/31/2017
$ Print Materials (Controlling)	open	1/1/2017	12/31/2017
$ Journals (Controlling)	open	1/1/2017	12/31/2017
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017

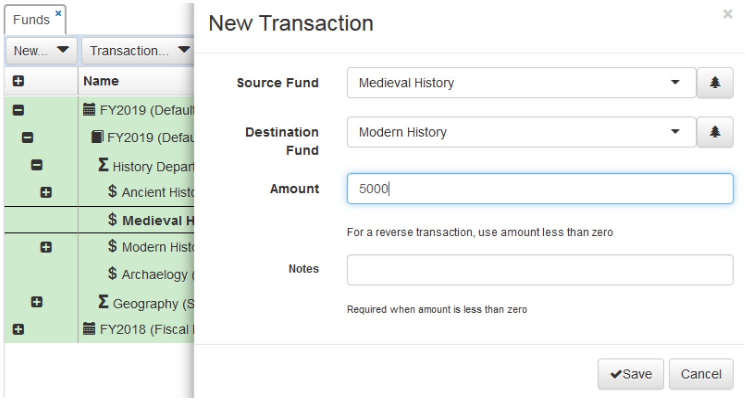
13.1.2.4.2 Transfer

When you want to move dollars from one fund to another, use the Transfer option. It's advisable to display your funds to see which fund will be the source for the transfer. Click on your source fund, then click Transaction, Transfer.



	Stat...	Opens	Closes	Appro...	Expend.	Encumb.	Cash Bal.	Free Bal.
l Period)	open	7/1/2018	6/30/2...					
ger)	open	7/1/2018	6/30/2...					
Σ History Department (Sum...	open	7/1/2018	6/30/2...	$2100...	$27.90	$144.90	$20977.10	$20832.20
$ Ancient History (Controlli...	open	7/1/2018	6/30/2...	$8010.00	$0.00	$0.00	$8010.00	$8010.00
$ Medieval History (Con...	**open**	**7/1/2018**	**6/30/2...**	**-$2005...**	**$12.95**	**$19.95**	**-$2017.95**	**-$2037.90**
$ Modern History (Controlli...	open	7/1/2018	6/30/2...	$5000.00	$14.95	$124.95	$4985.05	$4860.10
$ Archaelogy (Controlling)	open	7/1/2018	6/30/2...	$1000...	$0.00	$0.00	$10000.00	$10000.00
Σ Geography (Summary)	open	7/1/2018	6/30/2...	$2000.00	$0.00	$0.00	$2000.00	$2000.00
FY2018 (Fiscal Period)	open	10/1/2...	9/30/2...					

The popup shows the source fund you started from. Click on the Destination Fund dropdown to select your target fund. You can also click on the tree icon to bring up a separate window, if you want to navigate through several layers of fund display to be sure you have the correct one. Select the fund you want and the system will use it as the target. Then fill in the amount you want to transfer:



New Transaction

Source Fund: Medieval History

Destination Fund: Modern History

Amount: 5000

For a reverse transaction, use amount less than zero

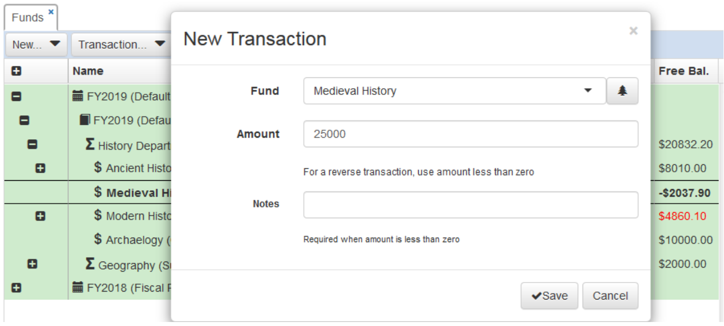
Notes:

Required when amount is less than zero

After the transaction is completed, the Funds grid will automatically refresh. The totals for the source fund and the destination fund will be changed by the amount you entered.

13.1.2.4.3 Adjustment

There may be times when you need to add money to a fund during the year – you've received extra funding, for example. You will use the Transaction, Adjustment option to make these changes. Enter the dollar amount as a whole number. This will add money to the controlling fund. In this example, I'm adding $25,000 to the fund:



Fund Medieval History

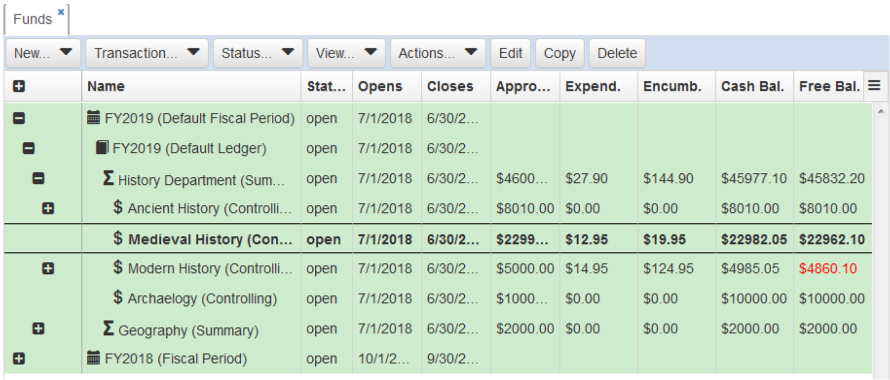
Amount 25000

For a reverse transaction, use amount less than zero

Notes

Required when amount is less than zero

After the changes, the summary funds show the new totals:

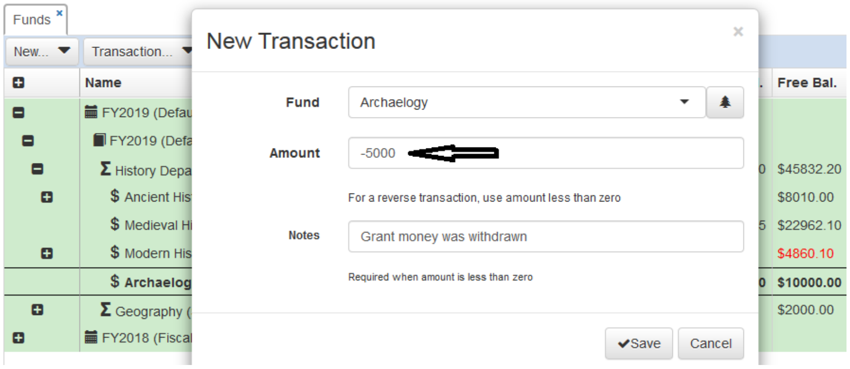


⊞	Name	Stat...	Opens	Closes	Appro...	Expend.	Encumb.	Cash Bal.	Free Bal.
⊟	FY2019 (Default Fiscal Period)	open	7/1/2018	6/30/2...					
⊟	FY2019 (Default Ledger)	open	7/1/2018	6/30/2...					
⊟	Σ History Department (Sum...	open	7/1/2018	6/30/2...	$4600...	$27.90	$144.90	$45977.10	$45832.20
⊞	$ Ancient History (Controlli...	open	7/1/2018	6/30/2...	$8010.00	$0.00	$0.00	$8010.00	$8010.00
	$ Medieval History (Con...	**open**	**7/1/2018**	**6/30/2...**	**$2299...**	**$12.95**	**$19.95**	**$22982.05**	**$22962.10**
⊞	$ Modern History (Controlli...	open	7/1/2018	6/30/2...	$5000.00	$14.95	$124.95	$4985.05	$4860.10
	$ Archaelogy (Controlling)	open	7/1/2018	6/30/2...	$1000...	$0.00	$0.00	$10000.00	$10000.00
⊞	Σ Geography (Summary)	open	7/1/2018	6/30/2...	$2000.00	$0.00	$0.00	$2000.00	$2000.00
⊞	FY2018 (Fiscal Period)	open	10/1/2...	9/30/2...					

If the screen doesn't update right away (it normally does), close the Funds tab and then click on Funds again from the sidebar menu, or refresh your browser.

13.1.2.4.4 Negative Allocations

Proper accounting rules do not allow you to withdraw money from a fund once it's been created. You can transfer money out of it, but you shouldn't just delete money. However, there are certain scenarios where this is necessary. You can do a negative allocation, but you will be required to enter an explanatory note. The Save button will be grayed out until a note is entered.



New Transaction

Fund Archaelogy

Amount -5000

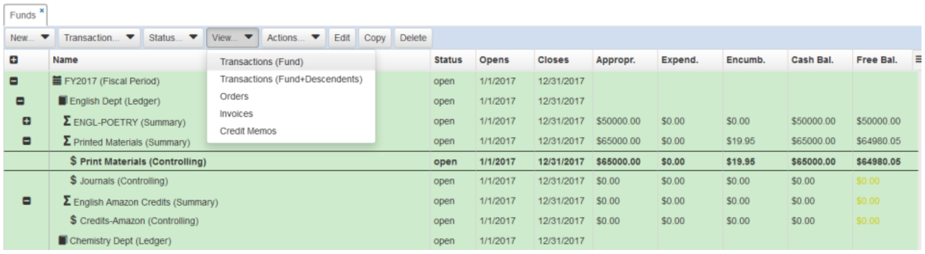
For a reverse transaction, use amount less than zero

Notes Grant money was withdrawn

Required when amount is less than zero

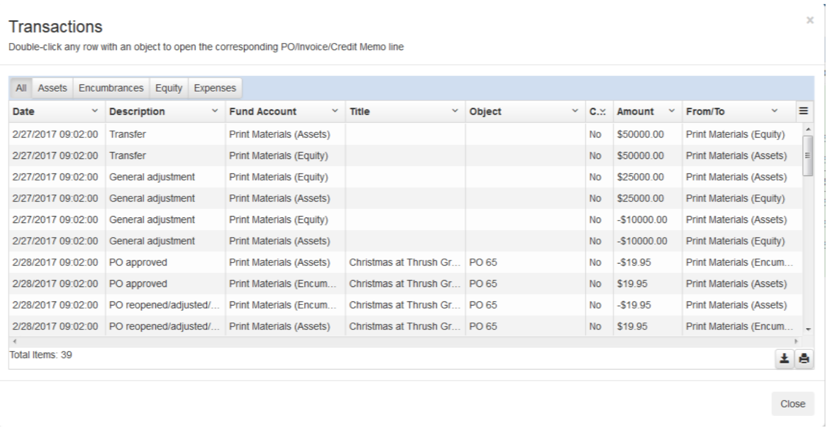
13.1.2.4.4 Viewing Transactions

For any fund, you can see individual transaction entries. Click on the fund to select it, then click View, Transactions:



Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$0.00	$50000.00	$50000.00
Σ Printed Materials (Summary)	open	1/1/2017	12/31/2017	$65000.00	$0.00	$19.95	$65000.00	$64980.05
$ Print Materials (Controlling)	**open**	**1/1/2017**	**12/31/2017**	**$65000.00**	**$0.00**	**$19.95**	**$65000.00**	**$64980.05**
$ Journals (Controlling)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
Σ English Amazon Credits (Summary)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
$ Credits-Amazon (Controlling)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

You’ll get a popup window with all transactions on that fund:



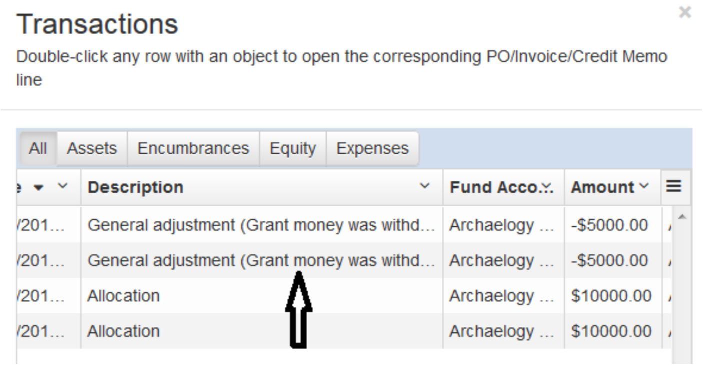
Transactions

Double-click any row with an object to open the corresponding PO/Invoice/Credit Memo line

Date	Description	Fund Account	Title	Object	C.:	Amount	From/To
2/27/2017 09:02:00	Transfer	Print Materials (Assets)			No	$50000.00	Print Materials (Equity)
2/27/2017 09:02:00	Transfer	Print Materials (Equity)			No	$50000.00	Print Materials (Assets)
2/27/2017 09:02:00	General adjustment	Print Materials (Equity)			No	$25000.00	Print Materials (Assets)
2/27/2017 09:02:00	General adjustment	Print Materials (Assets)			No	$25000.00	Print Materials (Equity)
2/27/2017 09:02:00	General adjustment	Print Materials (Equity)			No	-$10000.00	Print Materials (Assets)
2/27/2017 09:02:00	General adjustment	Print Materials (Assets)			No	-$10000.00	Print Materials (Equity)
2/28/2017 09:02:00	PO approved	Print Materials (Assets)	Christmas at Thrush Gr...	PO 65	No	-$19.95	Print Materials (Encum...
2/28/2017 09:02:00	PO approved	Print Materials (Encum...	Christmas at Thrush Gr...	PO 65	No	$19.95	Print Materials (Assets)
2/28/2017 09:02:00	PO reopened/adjusted/...	Print Materials (Encum...	Christmas at Thrush Gr...	PO 65	No	-$19.95	Print Materials (Assets)
2/28/2017 09:02:00	PO reopened/adjusted/...	Print Materials (Assets)	Christmas at Thrush Gr...	PO 65	No	$19.95	Print Materials (Encum...

Total Items: 39

Any notes entered for any transaction are visible when you view fund transactions:



Transactions

Double-click any row with an object to open the corresponding PO/Invoice/Credit Memo line

e	Description	Fund Acco…	Amount
/201…	General adjustment (Grant money was withd…	Archaelogy …	-$5000.00
/201…	General adjustment (Grant money was withd…	Archaelogy …	-$5000.00
/201…	Allocation	Archaelogy …	$10000.00
/201…	Allocation	Archaelogy …	$10000.00

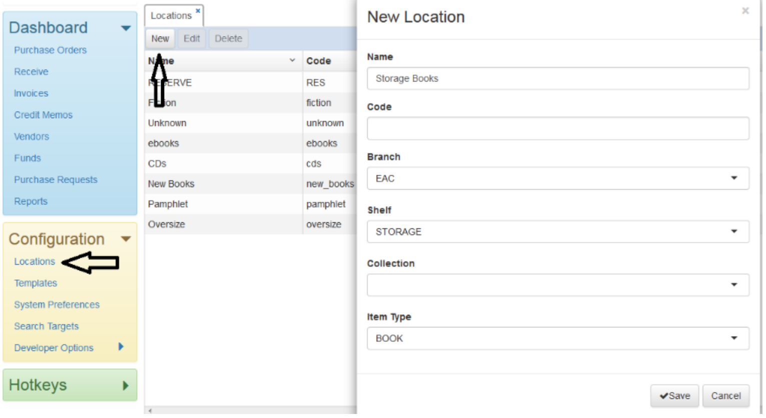
13.1.3 Setting up Locations

Locations designate where each ordered copy is expected to be housed after it has been received – the combination of branchcode, collection code, shelving location and item type. All of these come from the policies created under the main catalog Administration menu. When an item is received, these policies are entered in the new item record.

Location mappings are used because defining frequently-used settings in advance reduces the number of fields that the acquisitions staff needs to enter at creation and receipt of a copy.

For instance, you can map a single location field to a set of branch, collection, shelving location and item type fields, such as New Fiction or Biography. When a copy is received that has “Create item on receipt” enabled, the system will create an item for that copy and will use the mappings to fill default values for branch, collection, shelving location and item type fields. The defaults can be overridden, and other item data added, prior to saving the item.

The Location and Location to Copy Field sections have now been merged, and you no longer need to create policies in advance (although it’s recommended). Use the Locations link in the Configuration toolbar to open the locations grid. Then click New and a popup window allows you to map order items to various branches, item types, and locations:



Name	Code
RESERVE	RES
Fiction	fiction
Unknown	unknown
ebooks	ebooks
CDs	cds
New Books	new_books
Pamphlet	pamphlet
Oversize	oversize

New Location

Name: Storage Books

Code:

Branch: EAC

Shelf: STORAGE

Collection:

Item Type: BOOK

The lists for organization, shelving location, collection and item type fields are pulled into acquisitions from the administrative policies, so you can choose from an established list. Click New to create a new policy, then use the pulldowns in each field to select values. Select the values you want and save.

WARNING: The acquisitions module loads item policies once when you launch the application, so if you alter your item fields you must refresh your browser session to pick up the new values.

Create mappings for all your standard needs – any combination for which you buy material. Remember, you can add new mappings later when you are creating orderline copies.

13.1.4 z39.50 Search Targets

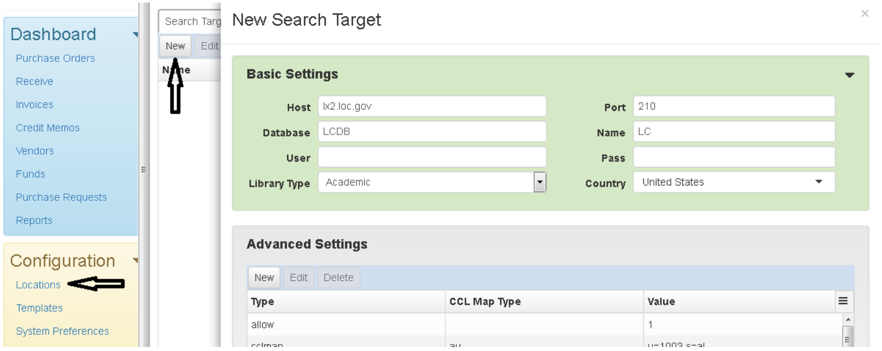
One of the ways to add purchase orders lines to a purchase order is From Search. The Search Targets area allows you to add z39.50 targets for retrieving bibliographic records to attach to purchase order lines. The Search Target setup displays a grid with the host address, the port used for z39.50 searching, the database name, the library type, and the country. You can use the same targets and accounts that are set up in the main catalog Administration section, but you have to recreate them here – the main cataloging targets aren't available to the acquisitions system. **[NOTE: earlier versions of acquisitions were limited to three targets; that limitation has been removed but we recommend keeping the number of targets small since a search is sent to all defined targets simultaneously.]**

Many sites will configure their own catalog database as a target in acquisitions, so that new items can be added to an existing title record rather than creating duplicates. This requires some setup at the server level first; contact Support Center for more information.

Here's an example setup for Library of Congress:

Library of Congress
Host: lx2.loc.gov
Port: 210
Database: LCDB

Under the Configuration menu at left click on Search Targets, then New. Enter the connection information and a name (which shows in the search results list) and save:



Host: lx2.loc.gov
Port: 210
Database: LCDB
Name: LC
User:
Pass:
Library Type: Academic
Country: United States

Type	CCL Map Type	Value
allow		1

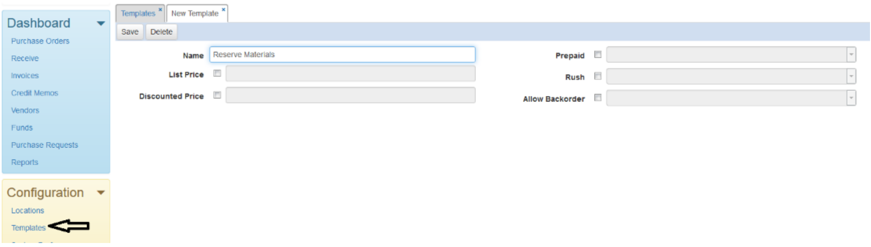
If you use a target that requires authentication, such as OCLC, enter your username and password in the Basic section.

The Advanced Settings section allows advanced users to alter the acquisitions mappings from CCL (Common Command Language) to z39.50 bib1 search parameters. It is recommended that only those familiar with CCL and z39.50 bib1 attempt to alter these settings.

13.1.5 Templates

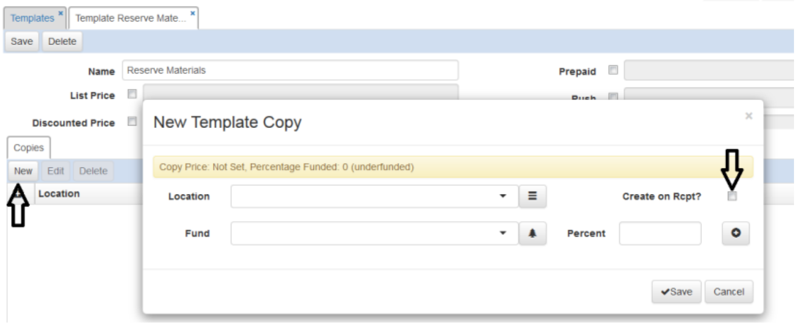
Templates let you create shortcuts for ordering, combining locations and funding. For example, if your system has four branches and you normally buy one copy of a book for each branch (paying for each branch's copy from a different fund), you can do that as a template and then apply it when creating the purchase order line. A template also lets you order multiple copies, even if they're using the same funding and settings.

From the sidebar menu, select Templates, then click the New button:



Name: Reserve Materials

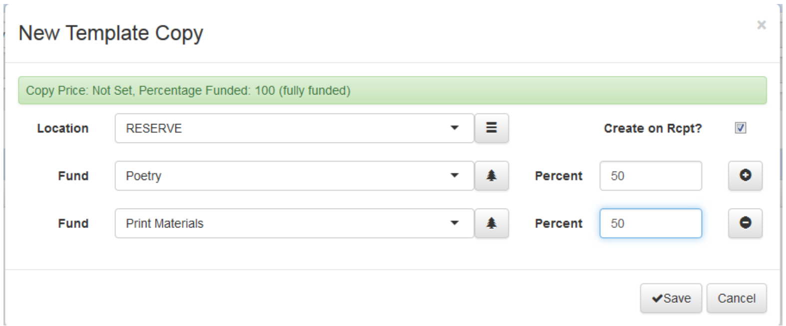
Name is the only required field, but if you frequently have the same values for other fields such as price or Rush Order you can enter them. Save the template policy, then edit it and click New to create a new copy. You want to add a new one for each location mapping you want to use; be sure to check the Create on Receipt box to have the order create item records:



Name: Reserve Materials

Copy Price: Not Set, Percentage Funded: 0 (underfunded)

Use the pulldowns to select from the Location policies you created earlier, and the default fund for this template. You can add multiple funds and allocate a percentage of the cost by clicking the plus sign next to the percent box.



New Template Copy

Copy Price: Not Set, Percentage Funded: 100 (fully funded)

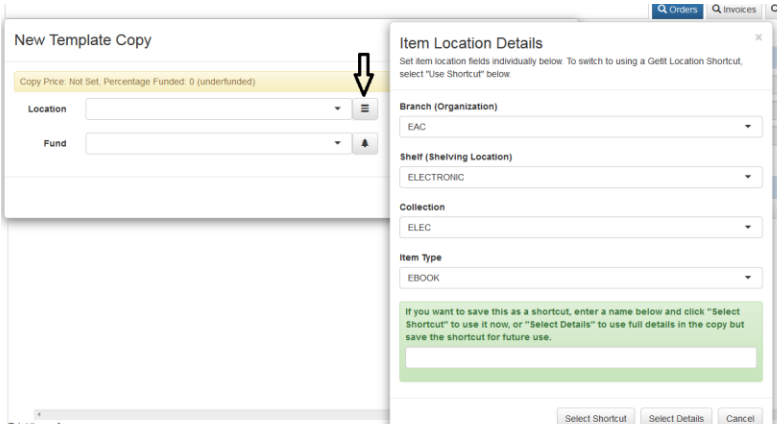
Location: RESERVE

Create on Rcpt? ☑

Fund: Poetry — Percent: 50

Fund: Print Materials — Percent: 50

If you don’t have a location policy for the settings you need, click the icon next to the Location pulldown. Another popup window will allow you to make individual entries for item fields:



New Template Copy

Copy Price: Not Set, Percentage Funded: 0 (underfunded)

Location:

Fund:

Item Location Details

Set item location fields individually below. To switch to using a GetIt Location Shortcut, select "Use Shortcut" below.

Branch (Organization): EAC

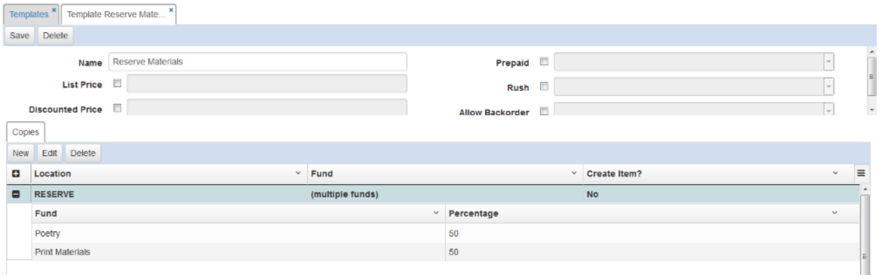
Shelf (Shelving Location): ELECTRONIC

Collection: ELEC

Item Type: EBOOK

If you want to save this as a shortcut, enter a name below and click "Select Shortcut" to use it now, or "Select Details" to use full details in the copy but save the shortcut for future use.

Be sure to save your settings.



Name: Reserve Materials

List Price ☐

Discounted Price ☐

Prepaid ☐

Rush ☐

Allow Backorder ☐

Location	Fund	Create Item?
RESERVE	(multiple funds)	No

Fund	Percentage
Poetry	50
Print Materials	50

Add new copy entries for each copy you want, with different locations and funds as appropriate. Even if locations and funds are the same, each copy must have its own line in the template.

List Price ☐

Discounted Price ☐

Rush ☐

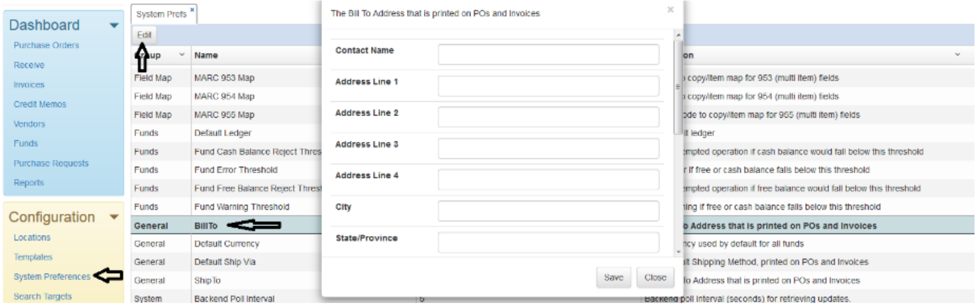
Allow Backorder ☐

Location	Fund	Create Item?
RESERVE	(multiple funds)	No
RESERVE	Poetry	No

See the section on creating orders for how to apply templates.

13.1.6 Acquisitions System Preferences

Most system preferences should be left as delivered. You should fill in the Bill To and Ship To (if different from Bill To) addresses if you will be sending purchase orders to your vendor. Select System Preferences from the lefthand menu, select Bill To (or Ship To), and the click Edit:



The Bill To Address that is printed on POs and Invoices

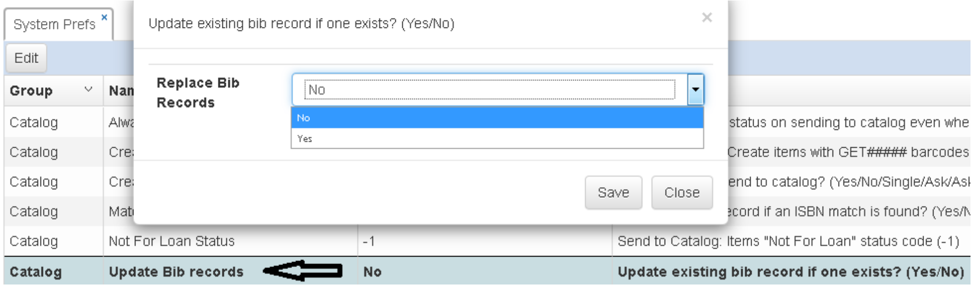
Contact Name
Address Line 1
Address Line 2
Address Line 3
Address Line 4
City
State/Province

Group	Name	Description
Field Map	MARC 953 Map	copy/item map for 953 (multi item) fields
Field Map	MARC 954 Map	copy/item map for 954 (multi item) fields
Field Map	MARC 955 Map	ode to copy/item map for 955 (multi item) fields
Funds	Default Ledger	lt ledger
Funds	Fund Cash Balance Reject Thres	mpted operation if cash balance would fall below this threshold
Funds	Fund Error Threshold	r if free or cash balance falls below this threshold
Funds	Fund Free Balance Reject Thres	mpted operation if free balance would fall below this threshold
Funds	Fund Warning Threshold	ing if free or cash balance falls below this threshold
General	**BillTo**	**o Address that is printed on POs and Invoices**
General	Default Currency	ncy used by default for all funds
General	Default Ship Via	lt Shipping Method, printed on POs and Invoices
General	ShipTo	o Address that is printed on POs and Invoices
System	Backend Poll Interval	Backend poll interval (seconds) for retrieving updates.

You also should check the Default Ship Via field (how materials should be shipped – mail, UPS, etc.).

You should look at other settings, such as Create Item Records, Update Item Records, Update Bib Record options, and Match Bib on ISBN.

Update Bib Record will overwrite an existing bib record with the new one, if the records match (usually on ISBN). Most sites do NOT want to overwrite their existing bib records; you should probably set this to No.



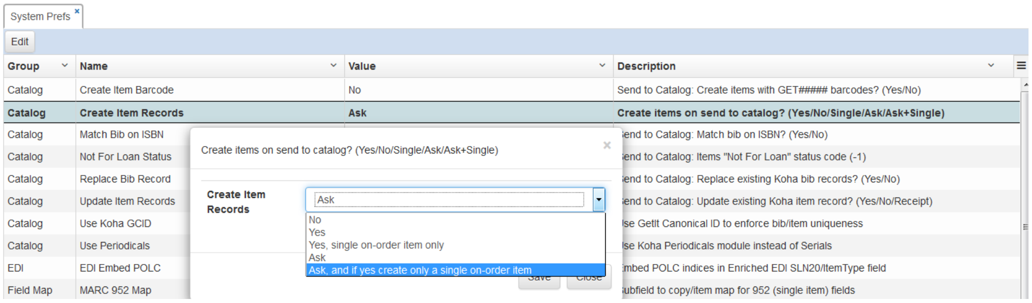
Update existing bib record if one exists? (Yes/No)

Replace Bib Records: No

No
Yes

Group	Name	Value	Description
Catalog	Alwa		status on sending to catalog even whe
Catalog	Cre		Create items with GET##### barcodes
Catalog	Cre		end to catalog? (Yes/No/Single/Ask/Ask
Catalog	Mat		ecord if an ISBN match is found? (Yes/N
Catalog	Not For Loan Status	-1	Send to Catalog: Items "Not For Loan" status code (-1)
Catalog	**Update Bib records**	**No**	**Update existing bib record if one exists? (Yes/No)**

With Create Item Records set to create a single on-order item, the system will create a dummy item record. Later, when the title is received, that dummy item will be replaced by item record(s) with the locations and item types you set. If you don't specify a single item, the system will create item records for all copies being ordered on the title. Many sites prefer this instead.



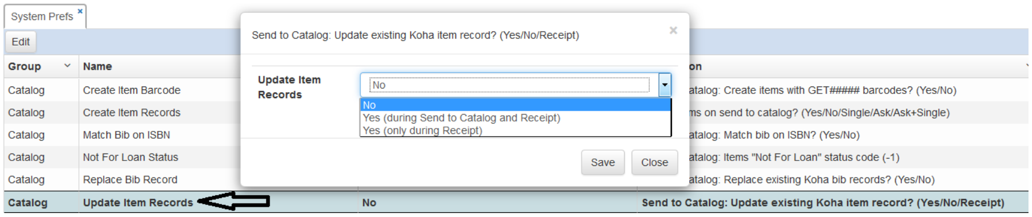
Create items on send to catalog? (Yes/No/Single/Ask/Ask+Single)

Create Item Records: Ask

No
Yes
Yes, single on-order item only
Ask
Ask, and if yes create only a single on-order item

Group	Name	Value	Description
Catalog	Create Item Barcode	No	Send to Catalog: Create items with GET##### barcodes? (Yes/No)
Catalog	**Create Item Records**	**Ask**	**Create items on send to catalog? (Yes/No/Single/Ask/Ask+Single)**
Catalog	Match Bib on ISBN		end to Catalog: Match bib on ISBN? (Yes/No)
Catalog	Not For Loan Status		end to Catalog: Items "Not For Loan" status code (-1)
Catalog	Replace Bib Record		end to Catalog: Replace existing Koha bib records? (Yes/No)
Catalog	Update Item Records		end to Catalog: Update existing Koha item record? (Yes/No/Receipt)
Catalog	Use Koha GCID		se GetIt Canonical ID to enforce bib/item uniqueness
Catalog	Use Periodicals		se Koha Periodicals module instead of Serials
EDI	EDI Embed POLC		mbed POLC indices in Enriched EDI SLN20/ItemType field
Field Map	MARC 952 Map		ubfield to copy/item map for 952 (single item) fields

Without Update Item Records on, receiving the item won't bring up a screen to allow you to edit item fields, even if you have "create item" turned on.



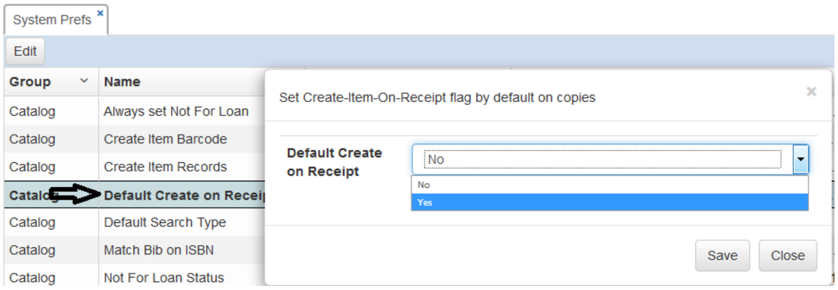
Send to Catalog: Update existing Koha item record? (Yes/No/Receipt)

Update Item Records: No

- No
- Yes (during Send to Catalog and Receipt)
- Yes (only during Receipt)

Group	Name	Value	Description
Catalog	Update Item Records	No	Send to Catalog: Update existing Koha item record? (Yes/No/Receipt)

A new system preference, Default Create on Receipt, lets you set a default for the flag to create copies when you are adding items to your order. This should probably be set to Yes.

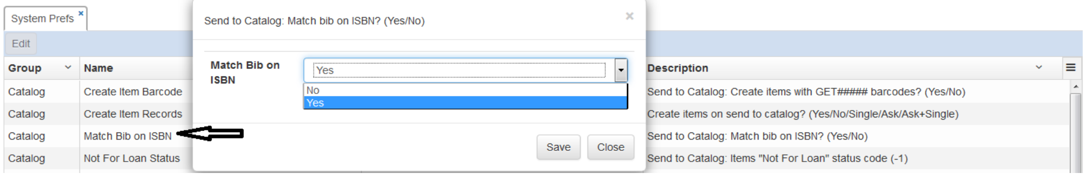


Set Create-Item-On-Receipt flag by default on copies

Default Create on Receipt: No

- No
- Yes

You probably also want to turn on Match Bib on ISBN. If it is on, any action to send the title to your catalog will check for duplicate entries on isbn, issn, ismn, ean13, and upc. Without it, acquisitions will simply create a new title record.



Send to Catalog: Match bib on ISBN? (Yes/No)

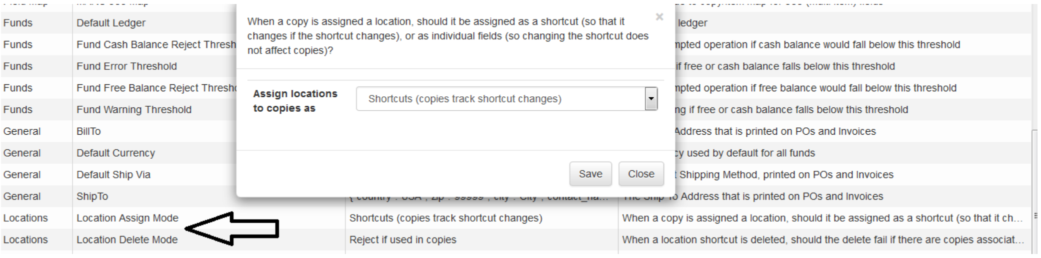
Match Bib on ISBN: Yes

- No
- Yes

Group	Name	Description
Catalog	Create Item Barcode	Send to Catalog: Create items with GET##### barcodes? (Yes/No)
Catalog	Create Item Records	Create items on send to catalog? (Yes/No/Single/Ask/Ask+Single)
Catalog	Match Bib on ISBN	Send to Catalog: Match bib on ISBN? (Yes/No)
Catalog	Not For Loan Status	Send to Catalog: Items "Not For Loan" status code (-1)

If you want to create multiple copies for a title, Create Item Barcode needs to be set to create items with a GET##### barcode (a dummy barcode that can be changed later). Otherwise, for titles with multiple copies, it will only create a single copy.

You should also check Location Assign Mode and Location Delete Mode. These sysprefs control what happens to items created with location policies if the policy is edited or deleted:

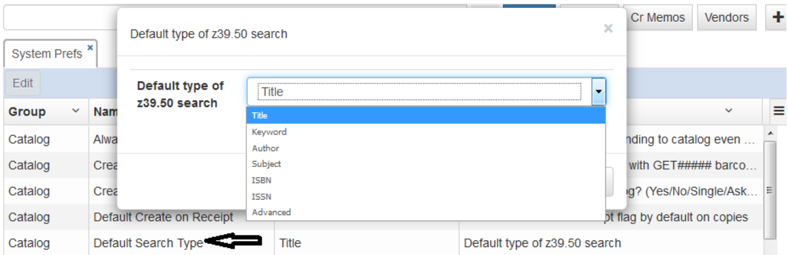


When a copy is assigned a location, should it be assigned as a shortcut (so that it changes if the shortcut changes), or as individual fields (so changing the shortcut does not affect copies)?

Assign locations to copies as: Shortcuts (copies track shortcut changes)

Group	Name	Value	Description
Locations	Location Assign Mode	Shortcuts (copies track shortcut changes)	When a copy is assigned a location, should it be assigned as a shortcut (so that it ch…
Locations	Location Delete Mode	Reject if used in copies	When a location shortcut is deleted, should the delete fail if there are copies associat…

A new system preference Default Search Type allows you to specify the default index for a z39.50 search from a Purchase Order:



Default type of z39.50 search

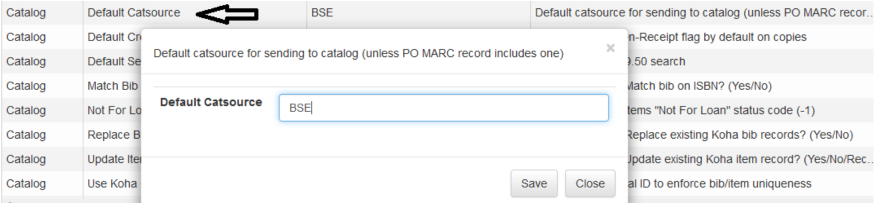
Default type of z39.50 search: Title

Catalog	Alwa		nding to catalog even …
Catalog	Crea		with GET##### barco…
Catalog	Crea		g? (Yes/No/Single/Ask…
Catalog	Default Create on Receipt		pt flag by default on copies
Catalog	Default Search Type	Title	Default type of z39.50 search

There are four sysprefs that allow you to configure warnings and errors if a fund is low. See Fund Cash Balance Reject Threshold, Fund Error Threshold, Fund Free Balance Reject Threshold, and Fund Warning Threshold. You may want to configure these so that staff are alerted before placing an order.

Funds	Default Ledger	FY2019	The default ledger
Funds	Fund Cash Balance Reject Threshold	0.00	Reject attempted operation if cash balance would fall below t…
Funds	Fund Error Threshold	0.00	Show error if free or cash balance falls below this threshold
Funds	Fund Free Balance Reject Threshold	0.00	Reject attempted operation if free balance would fall below th…
Funds	Fund Warning Threshold	0.00	Show warning if free or cash balance falls below this threshold

For sites that use catsources to control access to bib records (see the Superlibrarian Guide), there is a system preference to specify a default catsource. Enter the authval code, not the description. This is needed when sending bibs from acquisitions to the catalog. If your site doesn't use catsources, ignore this one.



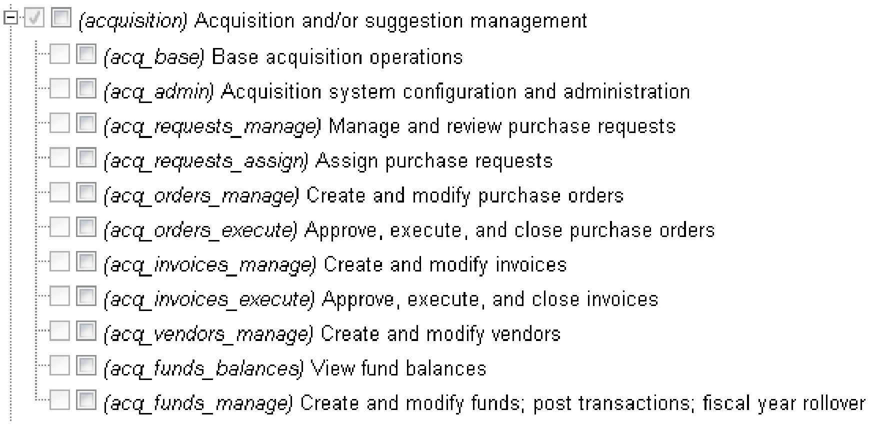
Catalog	Default Catsource	BSE	Default catsource for sending to catalog (unless PO MARC recor…
Catalog	Default Cr		n-Receipt flag by default on copies
Catalog	Default Se		.50 search
Catalog	Match Bib		Match bib on ISBN? (Yes/No)
Catalog	Not For Lo		tems "Not For Loan" status code (-1)
Catalog	Replace B		Replace existing Koha bib records? (Yes/No)
Catalog	Update Ite		Update existing Koha item record? (Yes/No/Rec…
Catalog	Use Koha		al ID to enforce bib/item uniqueness

Default catsource for sending to catalog (unless PO MARC record includes one)

Default Catsource: BSE

13.1.7 User Permissions

Access to various parts of the acquisitions system is controlled by granular permissions. These are set outside the acquisitions interface, through a Role or directly in the staff user's patron account (see those sections in the manual). Here are the permissions currently available:



- ☑ ☐ *(acquisition)* Acquisition and/or suggestion management
  - ☐ ☐ *(acq_base)* Base acquisition operations
  - ☐ ☐ *(acq_admin)* Acquisition system configuration and administration
  - ☐ ☐ *(acq_requests_manage)* Manage and review purchase requests
  - ☐ ☐ *(acq_requests_assign)* Assign purchase requests
  - ☐ ☐ *(acq_orders_manage)* Create and modify purchase orders
  - ☐ ☐ *(acq_orders_execute)* Approve, execute, and close purchase orders
  - ☐ ☐ *(acq_invoices_manage)* Create and modify invoices
  - ☐ ☐ *(acq_invoices_execute)* Approve, execute, and close invoices
  - ☐ ☐ *(acq_vendors_manage)* Create and modify vendors
  - ☐ ☐ *(acq_funds_balances)* View fund balances
  - ☐ ☐ *(acq_funds_manage)* Create and modify funds; post transactions; fiscal year rollover

The permissions are designed so that a junior staff person could create orders etc., but a senior staff person would review and approve. You will need to think about your site's needs to assign your permissions.

13.2 Searching Within Acquisitions

The acquisitions header has a resident global search area that allows quick searching of Orders, Invoices and Vendors.

You can expand the search by clicking the plus sign.

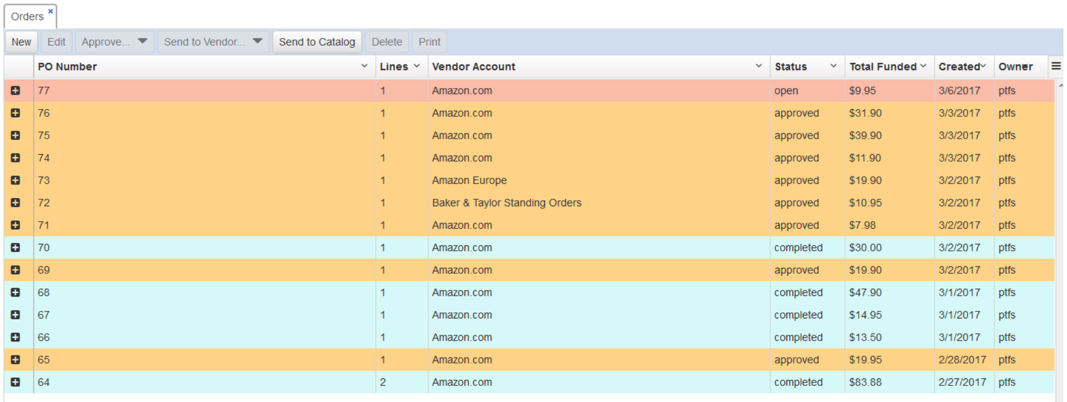
You can change the object you are searching by clicking the buttons at right. The fields listed in the advanced search panel will change depending on which area you have selected to search. To activate the search, click the appropriate button at right.

The right-hand side of the Orders and Invoices search area lets you add additional search parameters to search for specific entries.

You can initiate a search at any time and results will display in a new tab without interrupting any other modules you have open.

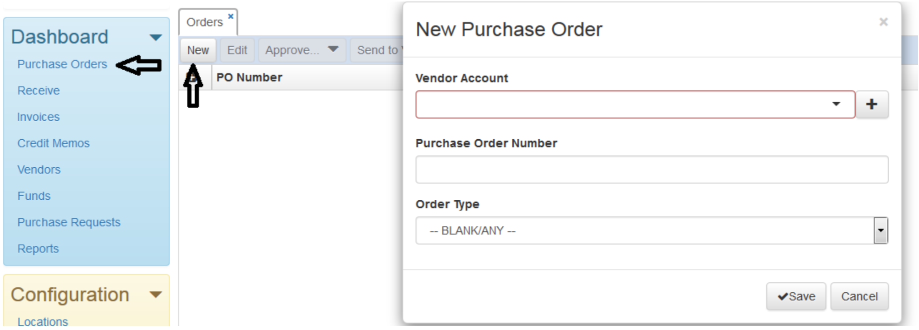
13.3 Creating a Purchase Order

Purchase orders are the first action you will generally want to take after your setup is complete. You can create a new order or edit an existing one. Orders are color-coded by status (open - red, approved - orange, completed - blue):



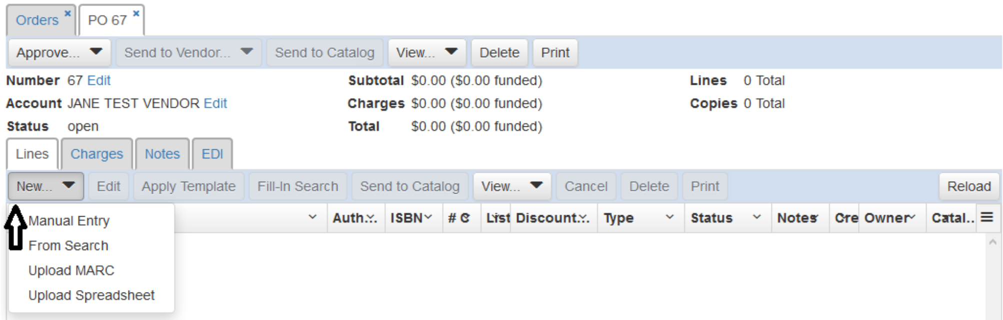
PO Number	Lines	Vendor Account	Status	Total Funded	Created	Owner
77	1	Amazon.com	open	$9.95	3/6/2017	ptfs
76	1	Amazon.com	approved	$31.90	3/3/2017	ptfs
75	1	Amazon.com	approved	$39.90	3/3/2017	ptfs
74	1	Amazon.com	approved	$11.90	3/3/2017	ptfs
73	1	Amazon Europe	approved	$19.90	3/2/2017	ptfs
72	1	Baker & Taylor Standing Orders	approved	$10.95	3/2/2017	ptfs
71	1	Amazon.com	approved	$7.98	3/2/2017	ptfs
70	1	Amazon.com	completed	$30.00	3/2/2017	ptfs
69	1	Amazon.com	approved	$19.90	3/2/2017	ptfs
68	1	Amazon.com	completed	$47.90	3/1/2017	ptfs
67	1	Amazon.com	completed	$14.95	3/1/2017	ptfs
66	1	Amazon.com	completed	$13.50	3/1/2017	ptfs
65	1	Amazon.com	approved	$19.95	2/28/2017	ptfs
64	2	Amazon.com	completed	$83.88	2/27/2017	ptfs

Click Purchase Orders at left, then New to create a new order. The first step is to select a vendor from the pulldown. [NOTE: in a change from earlier versions, you can create a new vendor at this point if needed, instead of having to exit and create one separately. Just click the plus sign, enter the vendor information, and save it. It should then be available for use here.]



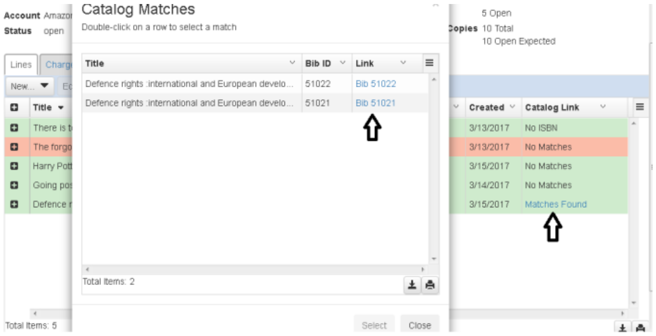
Purchase Order Number can be entered or will be auto-assigned – unless your site or vendor requires a certain numbering scheme, allow the system to assign a number.

The order is the top-level entry. Individual items are added to it by creating purchase order lines (POL). With the order open, click the New button. You can add order lines by Manual Entry, From Search of any z39.50 target, via Upload MARC, or by uploading a spreadsheet:



Number 67 Edit
Account JANE TEST VENDOR Edit
Status open
Subtotal $0.00 ($0.00 funded)
Charges $0.00 ($0.00 funded)
Total $0.00 ($0.00 funded)
Lines 0 Total
Copies 0 Total

When a title/copy is added to the purchase order, if it does not have a bibliographic record ID, the system will search the catalog for matches by ISBN or ISSN (if your system is configured for it). If matches are found for a title, a "Matches Found" link will be displayed in the Purchase Order Lines grid; clicking this link allows you to select a matching catalog record.



Catalog Matches

Double-click on a row to select a match

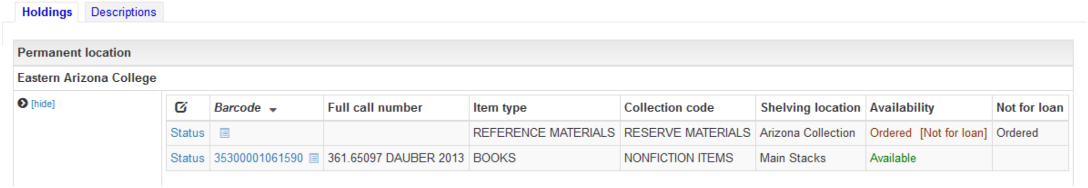
Title	Bib ID	Link
Defence rights :international and European develo...	51022	Bib 51022
Defence rights :international and European develo...	51021	Bib 51021

Total Items: 2

Click the bib number in the popup window to open a separate browser window for that title record, so you can see which one you want. Click on the line you want in the popup and then click Select to link the order to that title.

Some sites configure their own catalog as a z39.50 target; when a title is added from a search against your own catalog, it will automatically include a linking bibliographic record ID.

If you choose Send to Catalog after approving the PO, the new item will be added to the existing bib record:



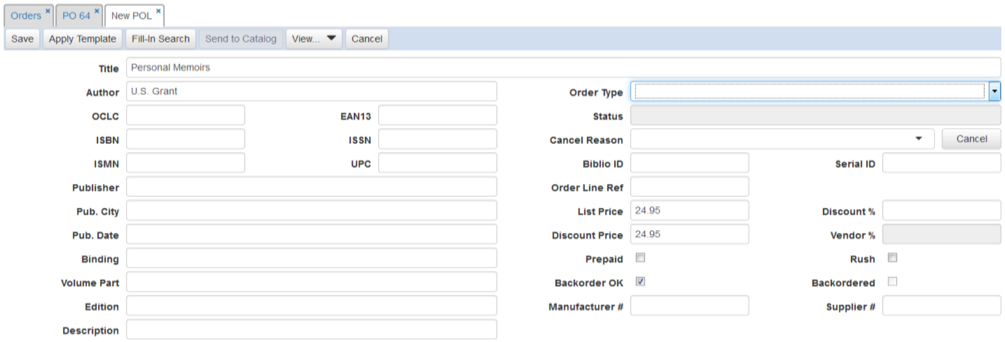
Permanent location

Eastern Arizona College

	Barcode	Full call number	Item type	Collection code	Shelving location	Availability	Not for loan
Status			REFERENCE MATERIALS	RESERVE MATERIALS	Arizona Collection	Ordered [Not for loan]	Ordered
Status	35300001061590	361.65097 DAUBER 2013	BOOKS	NONFICTION ITEMS	Main Stacks	Available	

13.3.1 Manual Entry

When you choose Manual Entry, the basic PO Line Entry Form will be displayed. Fill in as much information as you have available. The title and list price are required. If the vendor record has a standard discount, it will be applied. You could also enter a discount to apply to this item only. Any discount will be calculated and show in the discounted price field:



Title: Personal Memoirs

Author: U.S. Grant

List Price: 24.95

Discount Price: 24.95

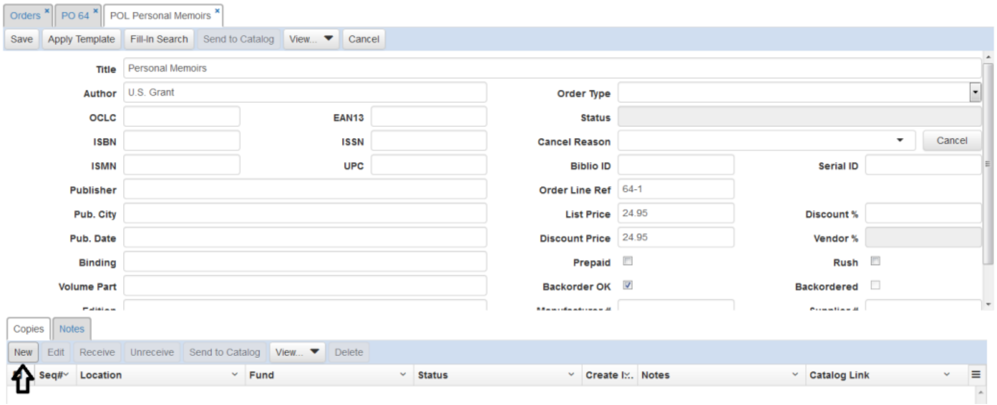
Prepaid ☐

Rush ☐

Backorder OK ☑

Backordered ☐

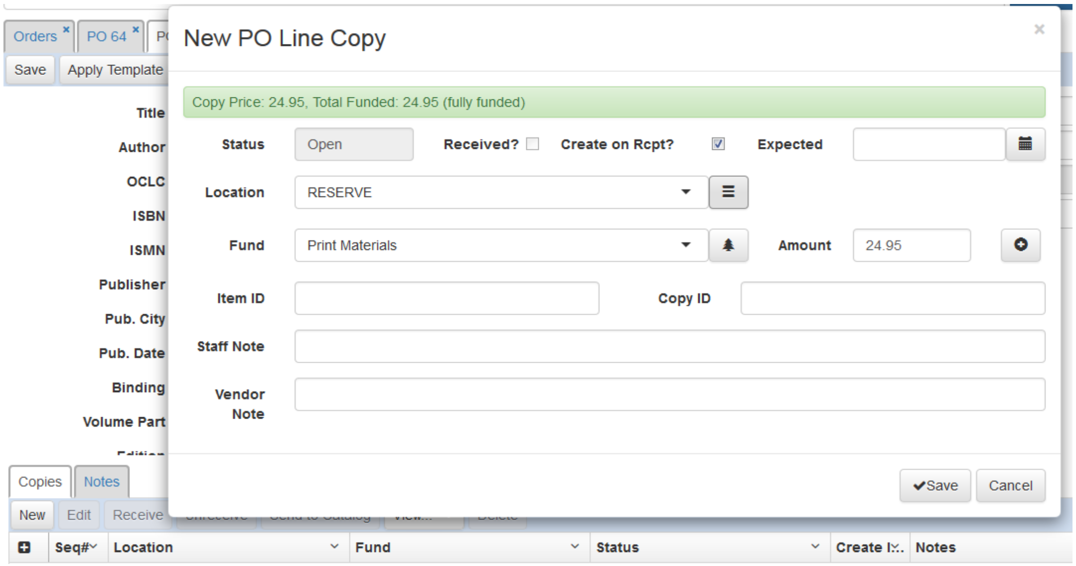
Once you save the order line, you'll get another data section to enter item information. Click New to create a purchase order line.



Title: Personal Memoirs
Author: U.S. Grant
Order Line Ref: 64-1
List Price: 24.95
Discount Price: 24.95
Backorder OK: ☑

13.3.2 Copies

Your item order is not complete until you specify how many copies, a location mapping, and the funding source:



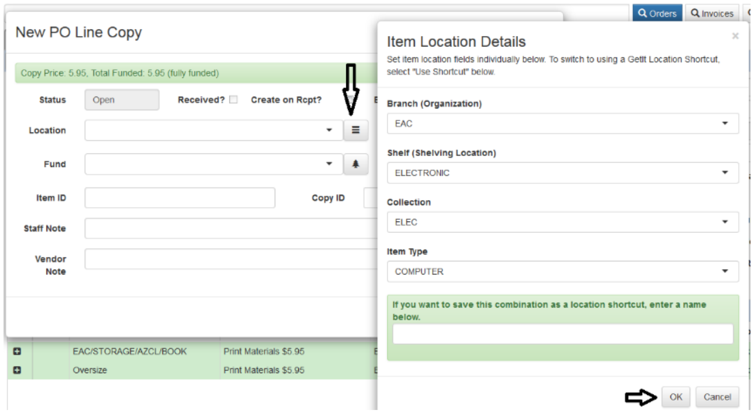
Copy Price: 24.95, Total Funded: 24.95 (fully funded)

Status: Open
Received? ☐
Create on Rcpt? ☑
Location: RESERVE
Fund: Print Materials
Amount: 24.95

Each copy you order for this purchase order line must have at least one copy entry.

Use the pulldowns to select location and fund mapping. Be sure to click the Create On Receipt field. Expected Date is primarily used with EDI connections and doesn't affect orders otherwise. If you don't fill in a value, it will be blank.

The location comes from the location mappings you created earlier. To buy more than one copy of a title, you must enter a separate order line for each one. Create separate copy lines for items going to different locations or being funded from different sources. You can use the location policies you've already created, or build a new one by clicking the icon next to the pulldown:



New PO Line Copy

Copy Price: 5.95, Total Funded: 5.95 (fully funded)

Status: Open

Received? ☐

Create on Rcpt?

Location

Fund

Item ID

Copy ID

Staff Note

Vendor Note

EAC/STORAGE/AZCL/BOOK	Print Materials $5.95
Oversize	Print Materials $5.95

Item Location Details

Set item location fields individually below. To switch to using a GetIt Location Shortcut, select "Use Shortcut" below.

Branch (Organization): EAC

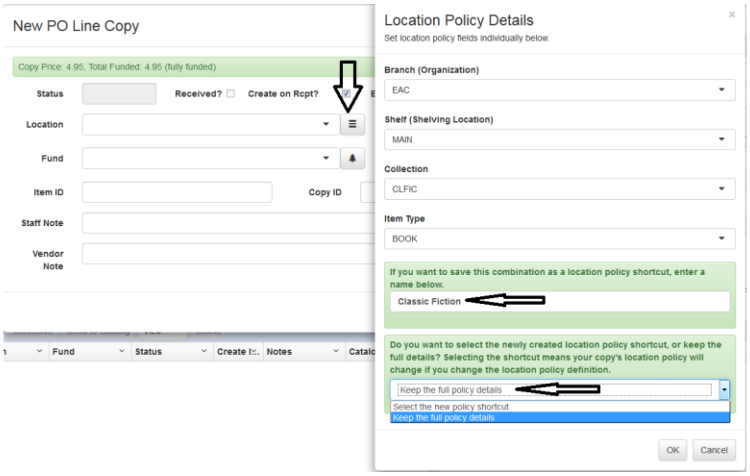
Shelf (Shelving Location): ELECTRONIC

Collection: ELEC

Item Type: COMPUTER

If you want to save this combination as a location shortcut, enter a name below.

If you don’t want to create a new policy, but just use these settings in this copy, leave the name field blank and click OK. If you do want to create a new policy, fill in the name field. That opens an additional dialog box:



New PO Line Copy

Copy Price: 4.95, Total Funded: 4.95 (fully funded)

Status

Received? ☐

Create on Rcpt? ☑

Location

Fund

Item ID

Copy ID

Staff Note

Vendor Note

Location Policy Details

Set location policy fields individually below.

Branch (Organization): EAC

Shelf (Shelving Location): MAIN

Collection: CLFIC

Item Type: BOOK

If you want to save this combination as a location policy shortcut, enter a name below.

Classic Fiction

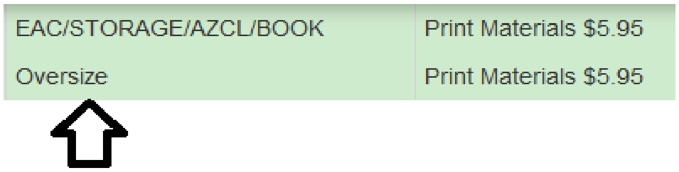
Do you want to select the newly created location policy shortcut, or keep the full details? Selecting the shortcut means your copy's location policy will change if you change the location policy definition.

Keep the full policy details

Select the new policy shortcut

Keep the full policy details

Keep the full policy details means storing the new location in the copy as the combination of branch, shelf, collection, item type. Select the new policy shortcut means to store the policy name in the copy. If you store it as the policy, the copy settings would be updated if the location policy itself is changed later.



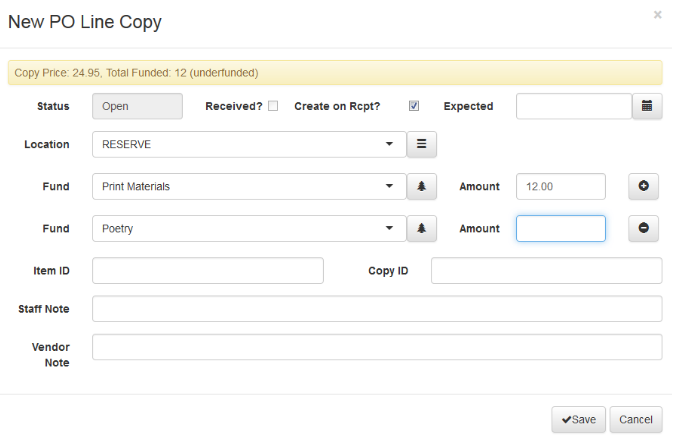
EAC/STORAGE/AZCL/BOOK	Print Materials $5.95
Oversize	Print Materials $5.95

Either way, it will save your settings as a new location policy, and they’ll be available for future use.

13.3.3 Funding non-EDI

Funding used to be a separate step; it’s now done on the copy screen. Select the appropriate fund from the pulldown (or use the tree icon to navigate to it). Then enter the amount to be charged to that fund. You can split the cost between different funds by clicking the plus sign to add a new fund line – enter the amount charged to each fund.

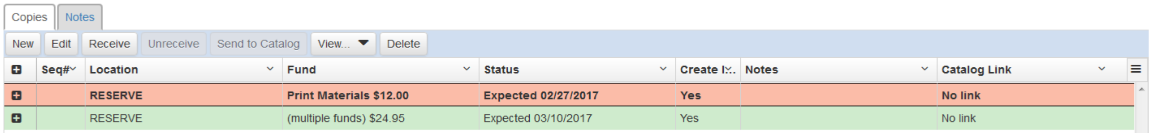
The top line of the edit screen and the orderline display are color-coded – green means the order line is fully funded, yellow or orange means you need to add the funding source:



New PO Line Copy

Copy Price: 24.95, Total Funded: 12 (underfunded)

Status: Open
Received? ☐
Create on Rcpt? ☑
Expected:
Location: RESERVE
Fund: Print Materials Amount: 12.00
Fund: Poetry Amount:
Item ID:
Copy ID:
Staff Note:
Vendor Note:



Seq#	Location	Fund	Status	Create I..	Notes	Catalog Link
	RESERVE	Print Materials $12.00	Expected 02/27/2017	Yes		No link
	RESERVE	(multiple funds) $24.95	Expected 03/10/2017	Yes		No link

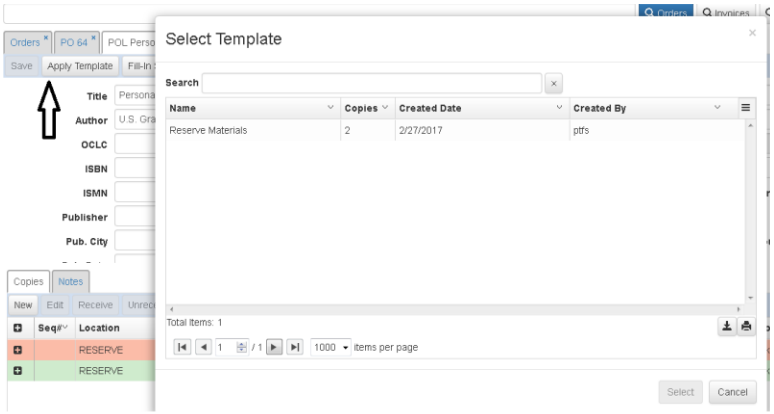
WARNING: You cannot approve the order and send to the vendor until all copies are fully funded.

13.3.4 Funding EDI

EDI orders will automatically be funded based on the mapping preferences set up within the acquisitions module and vendor's mapping settings.

13.3.5 Apply Item Template

If you have created an item template for ordering and funding multiple copies, you can apply it once you've created the order itself. After the title is entered, at the top click the Apply Item Template button:



Name	Copies	Created Date	Created By
Reserve Materials	2	2/27/2017	ptfs

From the popup, click on your template and then click the Select button. A copy for each entry from the template is created under your order, with the funding source identified in the template.

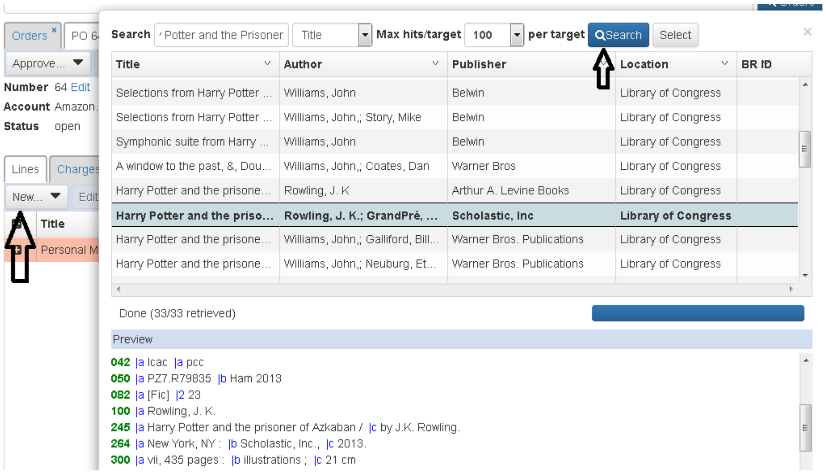
You can edit each copy to change the location or the funding source if needed.

13.3.6 From Search

You can also add titles to a purchase order via z39.50 search. With the order open, in the orderlines section click New, then From Search. This will display a z39.50 search window and allow you to search the targets you created in the Search Targets section. Note that the search will run against ALL the targets; you can't select just one.

TIP: Enclosing your search term in quotes will help to narrow down the results. For example, searching "The Good Earth" as a title will find records with that string in the title. Without the quotes, it will find records with "good" and "earth" in a title field, but not necessarily adjacent.

Enter your search term and click the Go button. The results display will indicate from which target the results were retrieved. Click on a particular entry and the MARC record will show in the bottom part of the screen:



Search ' Potter and the Prisoner | Title | Max hits/target 100 per target

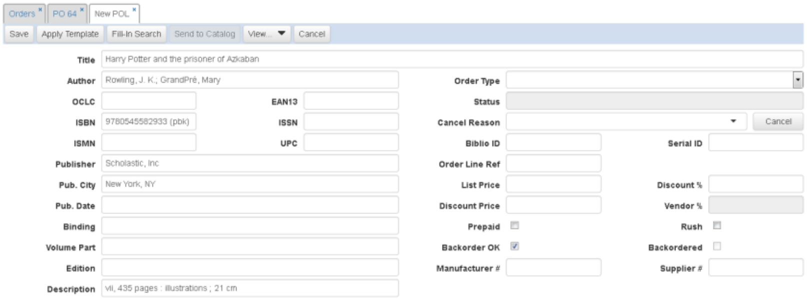
Title	Author	Publisher	Location	BR ID
Selections from Harry Potter ...	Williams, John	Belwin	Library of Congress	
Selections from Harry Potter ...	Williams, John,; Story, Mike	Belwin	Library of Congress	
Symphonic suite from Harry ...	Williams, John	Belwin	Library of Congress	
A window to the past, &, Dou...	Williams, John,; Coates, Dan	Warner Bros	Library of Congress	
Harry Potter and the prisone...	Rowling, J. K	Arthur A. Levine Books	Library of Congress	
Harry Potter and the priso...	**Rowling, J. K.; GrandPré, ...**	**Scholastic, Inc**	**Library of Congress**	
Harry Potter and the prisone...	Williams, John,; Galliford, Bill...	Warner Bros. Publications	Library of Congress	
Harry Potter and the prisone...	Williams, John,; Neuburg, Et...	Warner Bros. Publications	Library of Congress	

Done (33/33 retrieved)

```
042 |a lcac |a pcc
050 |a PZ7.R79835 |b Ham 2013
082 |a [Fic] |2 23
100 |a Rowling, J. K.
245 |a Harry Potter and the prisoner of Azkaban / |c by J.K. Rowling.
264 |a New York, NY : |b Scholastic, Inc., |c 2013.
300 |a vii, 435 pages : |b illustrations ; |c 21 cm
```

If you have configured your own catalog as a target (useful for buying new copies of existing titles and checking for duplicates), and your search finds a title that currently exists in your database, the BR ID (Bib Record Identifier) column will include the title's biblionumber.

When you find the title you want to order, click the Select button or doubleclick on the title within the results area to download the bibliographic information into a purchase order line:

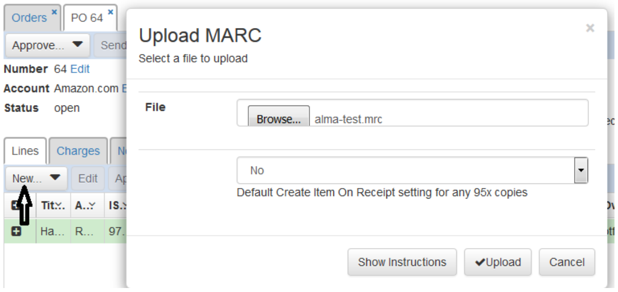


Title: Harry Potter and the prisoner of Azkaban
Author: Rowling, J. K.; GrandPré, Mary
ISBN: 9780545582933 (pbk)
Publisher: Scholastic, Inc
Pub. City: New York, NY
Description: vii, 435 pages : illustrations ; 21 cm
Backorder OK ☑

Enter any additional information you want (List Price is required), and click the Save button. Then create copy and funding entries as above.

13.3.7 Upload Records non-EDI

Some vendors provide a file of MARC records when you place an order through their site. You can upload that file to add the bib records to your catalog. Under the PO Lines screen, click New and select Upload MARC. The popup will ask you to locate your file:

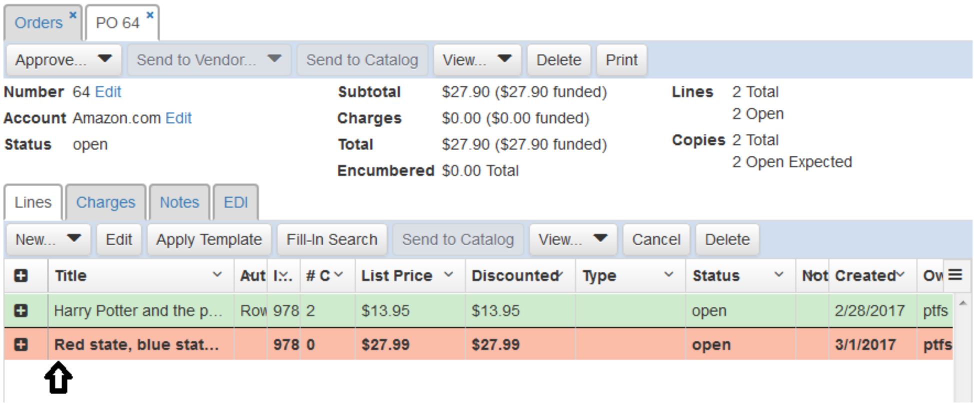


Upload MARC
Select a file to upload

File: alma-test.mrc

No
Default Create Item On Receipt setting for any 95x copies

Navigate to the location on your computer and select the file, then click Upload. The upload will add all the titles from that file to your order:



Number 64 Edit
Account Amazon.com Edit
Status open

Subtotal $27.90 ($27.90 funded)
Charges $0.00 ($0.00 funded)
Total $27.90 ($27.90 funded)
Encumbered $0.00 Total

Lines 2 Total
2 Open
Copies 2 Total
2 Open Expected

	Title	Aut	I...	# C	List Price	Discounted	Type	Status	Not	Created	Ow
⊞	Harry Potter and the p...	Row	978	2	$13.95	$13.95		open		2/28/2017	ptfs
⊞	**Red state, blue stat...**		**978**	**0**	**$27.99**	**$27.99**		**open**		**3/1/2017**	**ptfs**

For each entry in the upload, manually add the copy and funding information as above, if that data was not included in the vendor record data.

13.3.8 Upload Records EDI

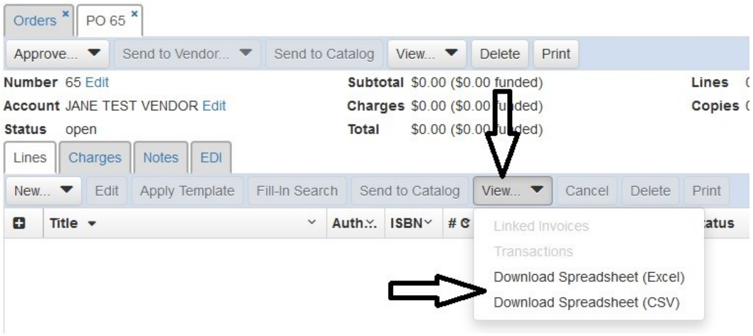
After setting up EDI, work with each of your EDI vendors to set up grid ordering on the vendor's website. The grids on the vendor's website should map to the branch codes, collection codes, discounted price, quantity, and funds to the 9XX fields. Selectors will then create carts within the vendor's online ordering system, apply the grids, download and email the marc file or transfer the completed carts to the designated ordering specialist profile within the vendor's website.

TIP: This process skips ordering through the vendor's online website entirely.

The designated ordering specialist will then download the brief MARC file into the acquisitions module, which will import and fill in the mapped data to the POL. Once this has been imported the designated ordering specialist will submit the order electronically to the vendor.

13.3.9 Upload Spreadsheet

A new option allows sites to upload bibliographic data in a spreadsheet or .csv file. Download an empty file from the PO line screen to ensure you have the correct file format. (NOTE: you can also download from a PO line screen with data; the existing PO lines will also download and you will need to remove them from the template file.)

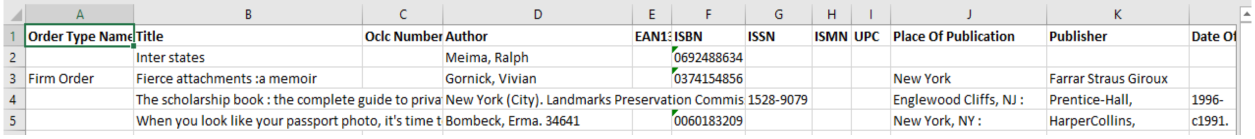


Number 65 Edit
Account JANE TEST VENDOR Edit
Status open
Subtotal $0.00 ($0.00 funded)
Charges $0.00 ($0.00 funded)
Total $0.00 ($0.00 funded)

The current file structure in .csv form will look like:

```
"Order Type Name",Title,"Oclc Number",Author,EAN13,ISBN,ISSN,ISMN,UPC,"Place Of
Publication",Publisher,"Date Of Publication",Binding,"Volume Part",Edition,"Manufacturer
Number","Supplier Number",Description,"Order Line Reference","List Price",Discount,"Discounted
Price",Prepaid,Rush,"Allow Backorder",Copies,"Copy Location","Copy Funds","Copy Identifier","Copy
Create Item On Receipt","Copy Expected Date","Copy Vendor Note","Copy Staff Note"
```

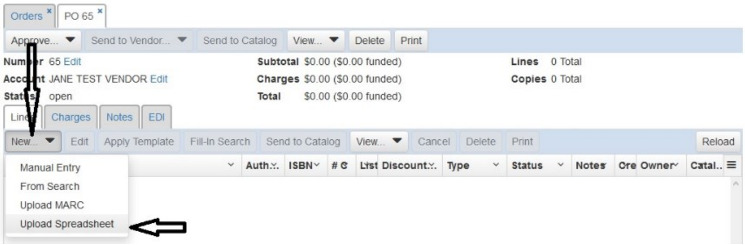
A spreadsheet with data might look like:



	A	B	C	D	E	F	G	H	I	J	K	
1	**Order Type Name**	**Title**	**Oclc Number**	**Author**	**EAN1**	**ISBN**	**ISSN**	**ISMN**	**UPC**	**Place Of Publication**	**Publisher**	**Date O**
2		Inter states		Meima, Ralph		0692488634						
3	Firm Order	Fierce attachments :a memoir		Gornick, Vivian		0374154856				New York	Farrar Straus Giroux	
4		The scholarship book : the complete guide to priva		New York (City). Landmarks Preservation Commis			1528-9079			Englewood Cliffs, NJ :	Prentice-Hall,	1996-
5		When you look like your passport photo, it's time t		Bombeck, Erma. 34641		0060183209				New York, NY :	HarperCollins,	c1991.

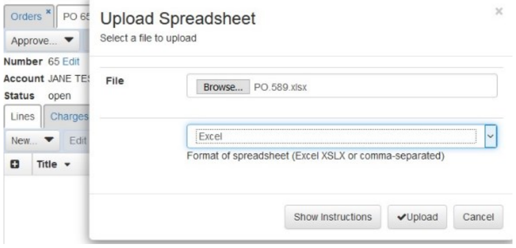
Note that copy information can be loaded via the spreadsheet, but it is not required. If used, fields like copy location must match existing acquisitions policies.

Once you have a spreadsheet with the data correctly formatted, from the PO Line screen choose New, Upload Spreadsheet.



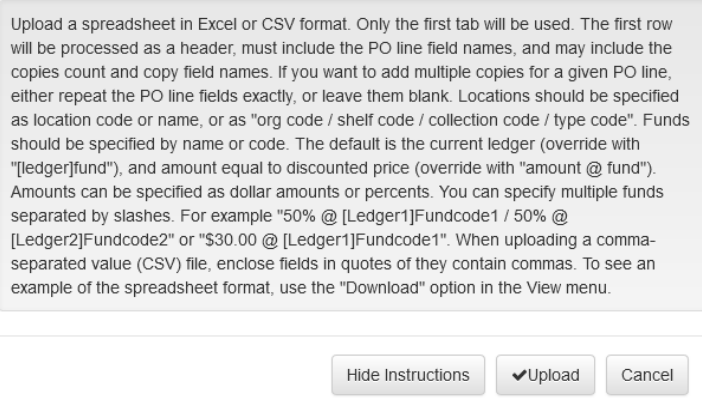
Number 65 Edit
Account JANE TEST VENDOR Edit
Status open
Subtotal $0.00 ($0.00 funded)
Charges $0.00 ($0.00 funded)
Total $0.00 ($0.00 funded)
Lines 0 Total
Copies 0 Total

In the popup window, navigate to your spreadsheet and select it. Specify whether you are uploading a spreadsheet or a .csv file.



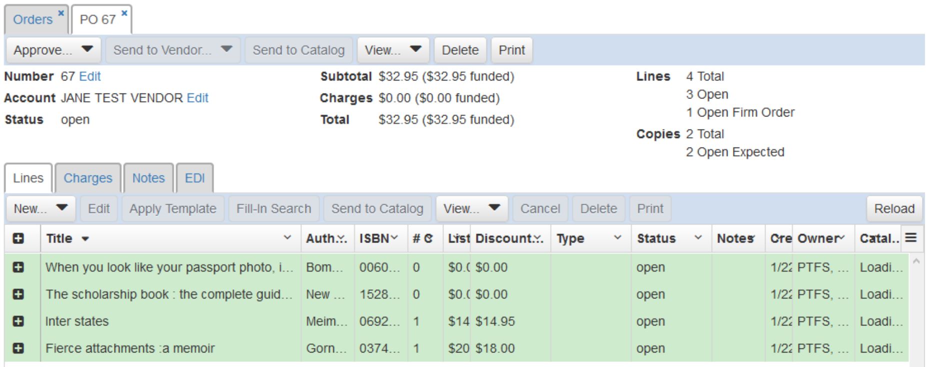
File PO.589.xlsx
Excel
Format of spreadsheet (Excel XLSX or comma-separated)

The Show Instructions button will give a brief help description:



Upload a spreadsheet in Excel or CSV format. Only the first tab will be used. The first row will be processed as a header, must include the PO line field names, and may include the copies count and copy field names. If you want to add multiple copies for a given PO line, either repeat the PO line fields exactly, or leave them blank. Locations should be specified as location code or name, or as "org code / shelf code / collection code / type code". Funds should be specified by name or code. The default is the current ledger (override with "[ledger]fund"), and amount equal to discounted price (override with "amount @ fund"). Amounts can be specified as dollar amounts or percents. You can specify multiple funds separated by slashes. For example "50% @ [Ledger1]Fundcode1 / 50% @ [Ledger2]Fundcode2" or "$30.00 @ [Ledger1]Fundcode1". When uploading a comma-separated value (CSV) file, enclose fields in quotes of they contain commas. To see an example of the spreadsheet format, use the "Download" option in the View menu.

Click the Upload button to load the file. If the data is formatted correctly, the titles will appear as PO lines:



Number 67
Account JANE TEST VENDOR
Status open

Subtotal $32.95 ($32.95 funded)
Charges $0.00 ($0.00 funded)
Total $32.95 ($32.95 funded)

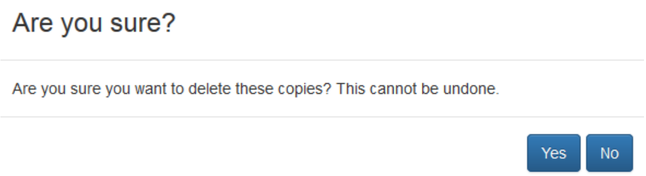
Lines 4 Total
3 Open
1 Open Firm Order
Copies 2 Total
2 Open Expected

	Title	Auth…	ISBN	# C	List	Discount…	Type	Status	Notes	Cre	Owner	Catal..
⊞	When you look like your passport photo, i…	Bom…	0060…	0	$0.(	$0.00		open		1/2:	PTFS, …	Loadi…
⊞	The scholarship book : the complete guid…	New …	1528…	0	$0.(	$0.00		open		1/2:	PTFS, …	Loadi…
⊞	Inter states	Meim…	0692…	1	$14	$14.95		open		1/2:	PTFS, …	Loadi…
⊞	Fierce attachments :a memoir	Gorn…	0374…	1	$20	$18.00		open		1/2:	PTFS, …	Loadi…

Proceed as above to create copies and fund them.

13.3.10 Deleting or Canceling Lines

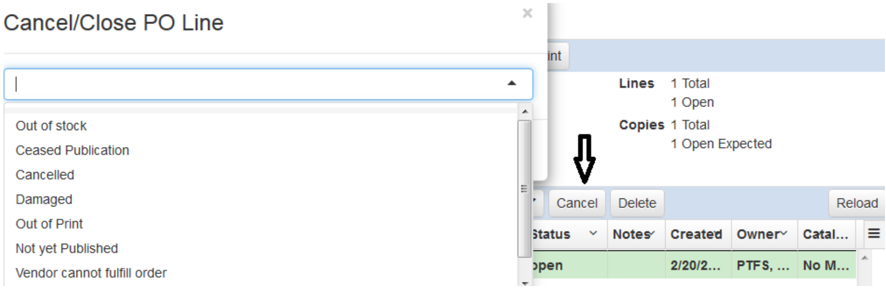
If there are no copies attached, you can delete an order line by selecting it and clicking the Delete button; you'll get a popup asking you to confirm.



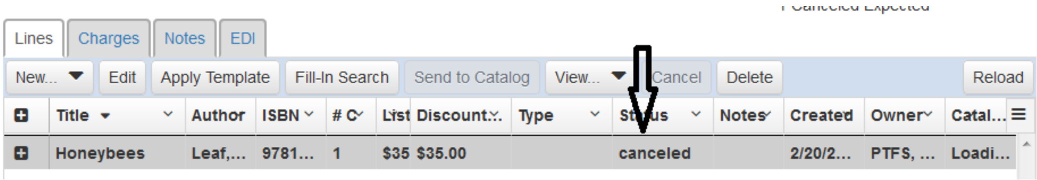
Are you sure?

Are you sure you want to delete these copies? This cannot be undone.

If there are copies attached, you will be blocked from deleting the line. However, you can cancel it – click the Cancel button instead and pick a reason:



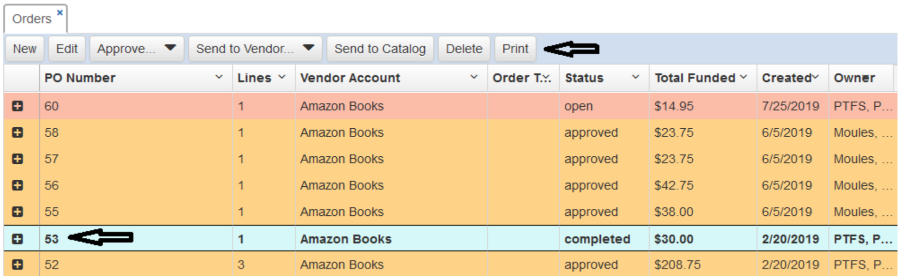
The title remains on the purchase order, but with a status of Canceled:



	Title	Author	ISBN	# C	List	Discount	Type	Status	Notes	Created	Owner	Catal...
⊞	Honeybees	Leaf,...	9781...	1	$35	$35.00		canceled		2/20/2...	PTFS, ...	Loadi...

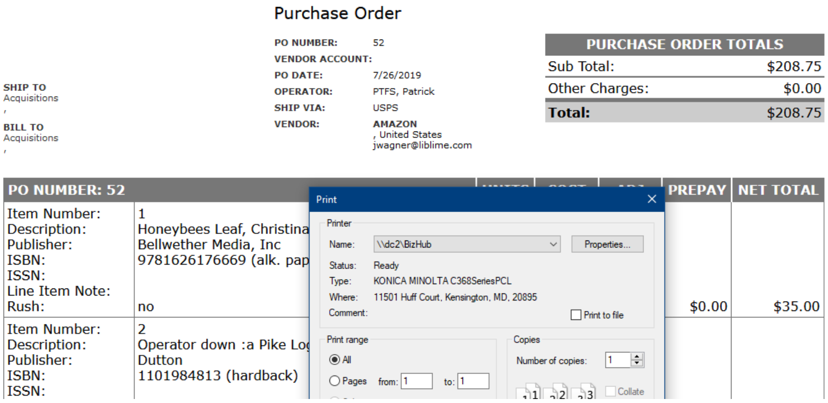
13.3.11 Printing Purchase Order Information

There are several print options. From the list of purchase orders, select one and click the top-line Print button:



	PO Number	Lines	Vendor Account	Order T...	Status	Total Funded	Created	Owner
⊞	60	1	Amazon Books		open	$14.95	7/25/2019	PTFS, P...
⊞	58	1	Amazon Books		approved	$23.75	6/5/2019	Moules, ...
⊞	57	1	Amazon Books		approved	$23.75	6/5/2019	Moules, ...
⊞	56	1	Amazon Books		approved	$42.75	6/5/2019	Moules, ...
⊞	55	1	Amazon Books		approved	$38.00	6/5/2019	Moules, ...
⊞	**53**	**1**	**Amazon Books**		**completed**	**$30.00**	**2/20/2019**	**PTFS, P...**
⊞	52	3	Amazon Books		approved	$208.75	2/20/2019	PTFS, P...

This opens a new browser window with details of that purchase order. **NOTE: If your browser is set to block popups, be sure to allow them for this site.**


Purchase Order

PO NUMBER: 52
VENDOR ACCOUNT:
PO DATE: 7/26/2019
OPERATOR: PTFS, Patrick
SHIP VIA: USPS
VENDOR: AMAZON
, United States
jwagner@liblime.com

SHIP TO
Acquisitions
,

BILL TO
Acquisitions
,

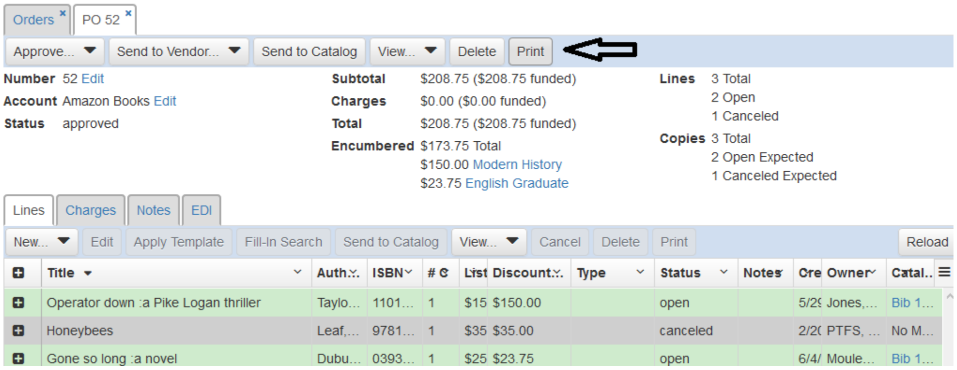
PURCHASE ORDER TOTALS	
Sub Total:	$208.75
Other Charges:	$0.00
Total:	$208.75

PO NUMBER: 52		PREPAY	NET TOTAL
Item Number: Description: Publisher: ISBN: ISSN: Line Item Note: Rush:	1 Honeybees Leaf, Christina Bellwether Media, Inc 9781626176669 (alk. pap no	$0.00	$35.00
Item Number: Description: Publisher: ISBN: ISSN:	2 Operator down :a Pike Lo Dutton 1101984813 (hardback)		

Print
Printer
Name: \\dc2\BizHub
Status: Ready
Type: KONICA MINOLTA C368SeriesPCL
Where: 11501 Huff Court, Kensington, MD, 20895
Comment:
☐ Print to file
Print range
● All
○ Pages from: 1 to: 1
Copies
Number of copies: 1
☐ Collate

This is not what you would use to print and transmit the order, though (see below) – use this option just to print a copy for your own records. It does not approve the order.

With an individual purchase order open on screen, the top-line Print button will open a new screen with the same information as above:



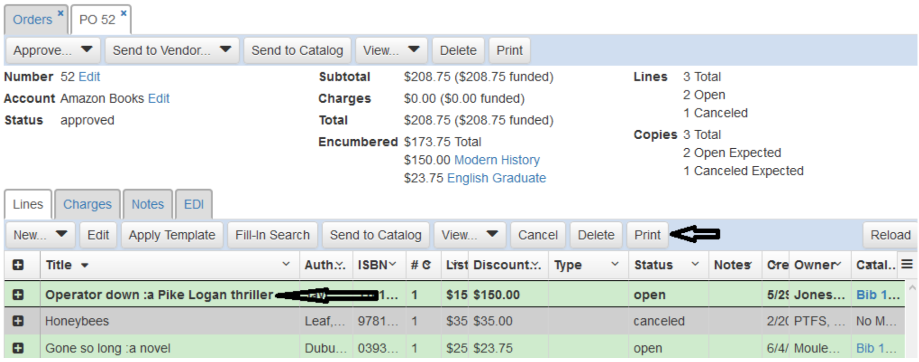
Number 52 Edit
Account Amazon Books Edit
Status approved

Subtotal $208.75 ($208.75 funded)
Charges $0.00 ($0.00 funded)
Total $208.75 ($208.75 funded)
Encumbered $173.75 Total
$150.00 Modern History
$23.75 English Graduate

Lines 3 Total
2 Open
1 Canceled
Copies 3 Total
2 Open Expected
1 Canceled Expected

Title	Auth	ISBN	# C	List	Discount	Type	Status	Notes	Ore	Owner	Catal..
Operator down :a Pike Logan thriller	Taylo…	1101…	1	$15	$150.00		open		5/2(	Jones,…	Bib 1…
Honeybees	Leaf,…	9781…	1	$35	$35.00		canceled		2/2(	PTFS, …	No M…
Gone so long :a novel	Dubu…	0393…	1	$25	$23.75		open		6/4/	Moule…	Bib 1…

Down at the bottom of the screen, clicking on an individual purchase orderline will enable a Print button in that section:



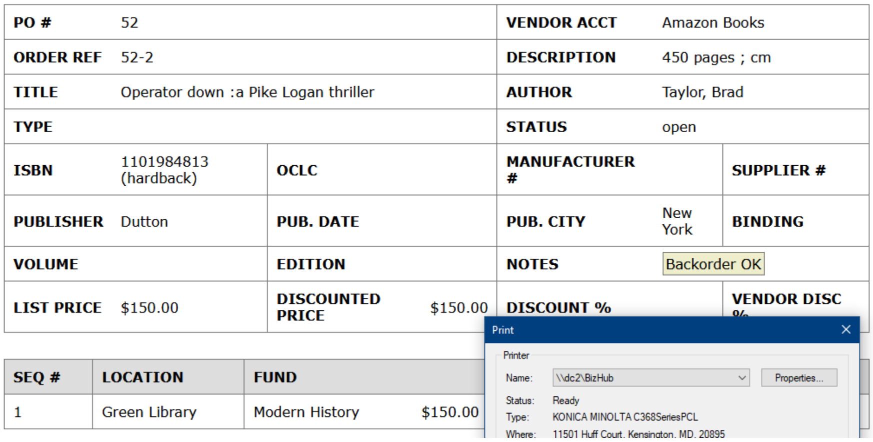
Number 52 Edit
Account Amazon Books Edit
Status approved

Subtotal $208.75 ($208.75 funded)
Charges $0.00 ($0.00 funded)
Total $208.75 ($208.75 funded)
Encumbered $173.75 Total
$150.00 Modern History
$23.75 English Graduate

Lines 3 Total
2 Open
1 Canceled
Copies 3 Total
2 Open Expected
1 Canceled Expected

Title	Auth	ISBN	# C	List	Discount	Type	Status	Notes	Ore	Owner	Catal..
Operator down :a Pike Logan thriller		**1…**	**1**	**$15**	**$150.00**		**open**		**5/2(**	**Jones…**	**Bib 1…**
Honeybees	Leaf,…	9781…	1	$35	$35.00		canceled		2/2(	PTFS, …	No M…
Gone so long :a novel	Dubu…	0393…	1	$25	$23.75		open		6/4/	Moule…	Bib 1…

That opens a new window with information on just that title:

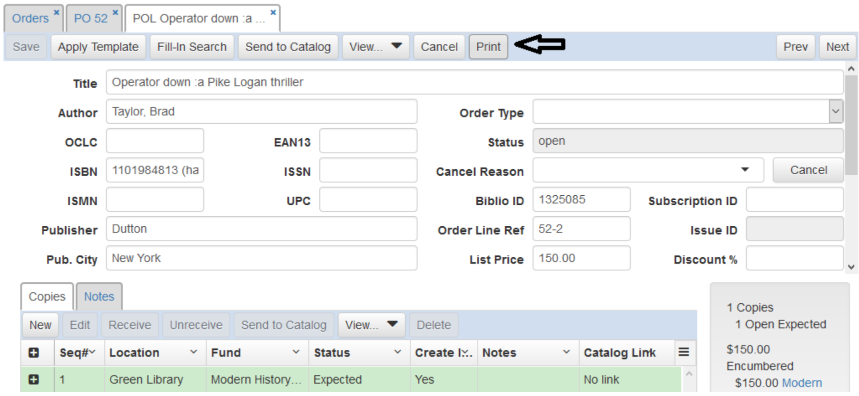


PO #	52			**VENDOR ACCT**	Amazon Books		
ORDER REF	52-2			**DESCRIPTION**	450 pages ; cm		
TITLE	Operator down :a Pike Logan thriller			**AUTHOR**	Taylor, Brad		
TYPE				**STATUS**	open		
ISBN	1101984813 (hardback)	**OCLC**		**MANUFACTURER #**		**SUPPLIER #**	
PUBLISHER	Dutton	**PUB. DATE**		**PUB. CITY**	New York	**BINDING**	
VOLUME		**EDITION**		**NOTES**	Backorder OK		
LIST PRICE	$150.00	**DISCOUNTED PRICE**	$150.00	**DISCOUNT %**		**VENDOR DISC**	

SEQ #	**LOCATION**	**FUND**	
1	Green Library	Modern History	$150.00

Name: \\dc2\BizHub
Status: Ready
Type: KONICA MINOLTA C368SeriesPCL
Where: 11501 Huff Court, Kensington, MD. 20895

The same information can be printed by opening the orderline and clicking the top-line Print button found there:



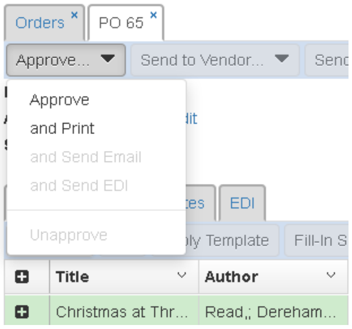
Title	Operator down :a Pike Logan thriller
Author	Taylor, Brad
OCLC	
EAN13	
ISBN	1101984813 (ha
ISSN	
ISMN	
UPC	
Publisher	Dutton
Pub. City	New York
Order Type	
Status	open
Cancel Reason	
Biblio ID	1325085
Subscription ID	
Order Line Ref	52-2
Issue ID	
List Price	150.00
Discount %	

Seq#	Location	Fund	Status	Create I:.	Notes	Catalog Link
1	Green Library	Modern History...	Expected	Yes		No link

1 Copies
1 Open Expected
$150.00
Encumbered
$150.00 Modern

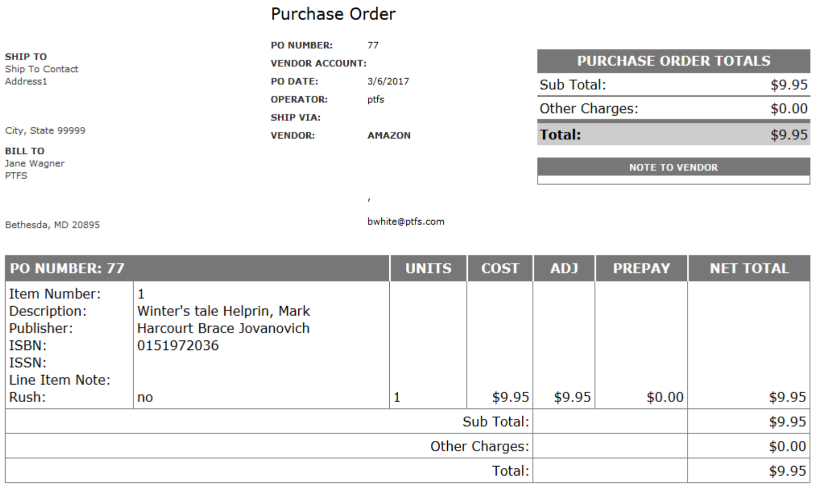
13.4 Approving and Transmitting a Purchase Order

When all titles have been attached as funded PO lines, the order is ready to send to the vendor. Sending the PO to a vendor is the action that encumbers funds. You have four options for approval:



Title	Author
Christmas at Thr...	Read,; Dereham...

Approve marks the order as approved and encumbers the funds. Approve and Print allows you print out a formatted purchase order to mail to the vendor. **NOTE: If your browser is set to block popups, be sure to allow them for this site.** This opens a new browser window with the information.



Purchase Order

SHIP TO
Ship To Contact
Address1

City, State 99999

BILL TO
Jane Wagner
PTFS

Bethesda, MD 20895

PO NUMBER: 77
VENDOR ACCOUNT:
PO DATE: 3/6/2017
OPERATOR: ptfs
SHIP VIA:
VENDOR: AMAZON

,
bwhite@ptfs.com

PURCHASE ORDER TOTALS	
Sub Total:	$9.95
Other Charges:	$0.00
Total:	$9.95

NOTE TO VENDOR

PO NUMBER: 77		UNITS	COST	ADJ	PREPAY	NET TOTAL
Item Number: Description: Publisher: ISBN: ISSN: Line Item Note: Rush:	1 Winter's tale Helprin, Mark Harcourt Brace Jovanovich 0151972036 no	1	$9.95	$9.95	$0.00	$9.95
			Sub Total:			$9.95
			Other Charges:			$0.00
			Total:			$9.95

Approve and Email sends the order to the email address in the vendor record. The email will look something like this:

Purchase Order 76

SHIP TO

Ship To Contact
Address1
City, State 99999
888-555-1212

SHIP VIA

BILL TO

Jane Wagner
PTFS
Bethesda, MD 20895
@ptfs.com

ORDER

PO Number 76
Vendor Account
PO Date 03/03/2017

ORDER LINES

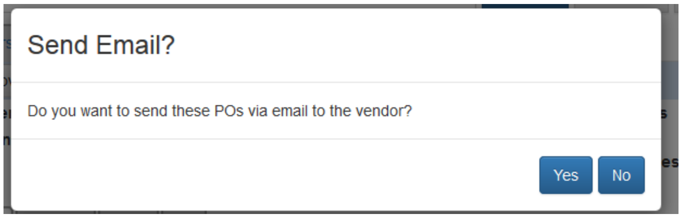
Item Description	Units	Cost	Adj	Prepay	Net
Item number: 1 Description: Autonomic computing and networking Denko, Mieso K.,; Yang, Laurence Tianruo,; Zhang, Yan ISBN: 9781441947093 (pbk.) Rush: no	2	15.95	15.95		0.00 31.90

SUB TOTAL 31.90
OTHER CHARGES 0.00
TOTAL 31.90

Both print and email pull vendor address fields from the vendor record, so make sure you have full addresses entered (even if you're using email).

Approve and Send EDI sends the order by EDI.

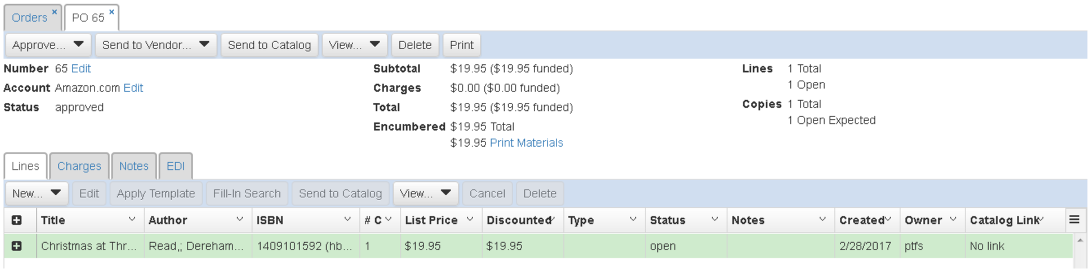
Some of the options may produce an additional popup warning:



Send Email?

Do you want to send these POs via email to the vendor?

After you approve, the purchase order status changes to Approved and the encumbered/expended amounts, the relevant funds, and how many copies are expected are displayed in the PO header:



Number 65 Edit
Account Amazon.com Edit
Status approved

Subtotal $19.95 ($19.95 funded)
Charges $0.00 ($0.00 funded)
Total $19.95 ($19.95 funded)
Encumbered $19.95 Total
$19.95 Print Materials

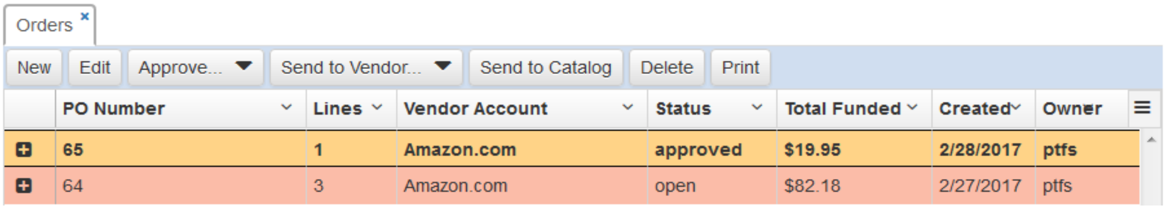
Lines 1 Total
1 Open
Copies 1 Total
1 Open Expected

Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catalog Link
Christmas at Thr...	Read,; Dereham...	1409101592 (hb...	1	$19.95	$19.95		open		2/28/2017	ptfs	No link

If you then go and look at the fund(s) you'll see the amount in the encumbered column and the other columns have adjusted their totals accordingly:

Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$0.00	$50000.00	$50000.00
Σ Printed Materials (Summary)	**open**	**1/1/2017**	**12/31/2017**	**$65000.00**	**$0.00**	**$19.95**	**$65000.00**	**$64980.05**
$ Print Materials (Controlling)	open	1/1/2017	12/31/2017	$65000.00	$0.00	$19.95	$65000.00	$64980.05
$ Journals (Controlling)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

Orders are color-coded on the screen – orange means the order has been approved and closed; pink means it is still open.

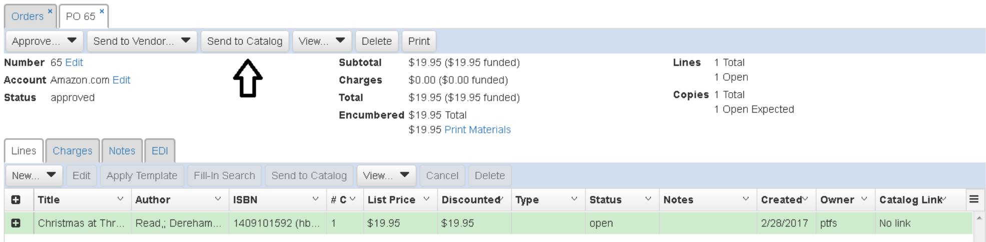


PO Number	Lines	Vendor Account	Status	Total Funded	Created	Owner
65	**1**	**Amazon.com**	**approved**	**$19.95**	**2/28/2017**	**ptfs**
64	3	Amazon.com	open	$82.18	2/27/2017	ptfs

13.5 Send to Catalog

After an order is completed, most sites want to go ahead and add the records to the catalog, with an "on order" flag in the item record so that users know the title is coming in the future. (This can also be done later, after the order is received.) Be sure to check your system preference setup (see above) for Create Item Records, Update Item Records, and Match Bib on ISBN. If those are configured properly, the system will check and match duplicate titles at this stage.

Once an order is marked as approved, the button Send to Catalog becomes active:



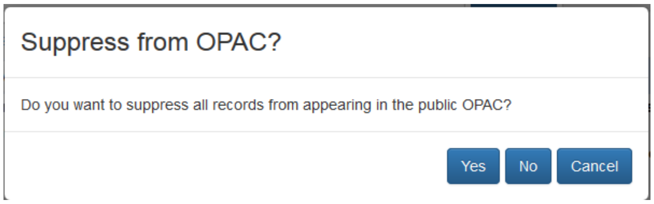
Number 65 Edit
Account Amazon.com Edit
Status approved

Subtotal $19.95 ($19.95 funded)
Charges $0.00 ($0.00 funded)
Total $19.95 ($19.95 funded)
Encumbered $19.95 Total
$19.95 Print Materials

Lines 1 Total
1 Open
Copies 1 Total
1 Open Expected

Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catalog Link
Christmas at Thr...	Read,; Dereham...	1409101592 (hb...	1	$19.95	$19.95		open		2/28/2017	ptfs	No link

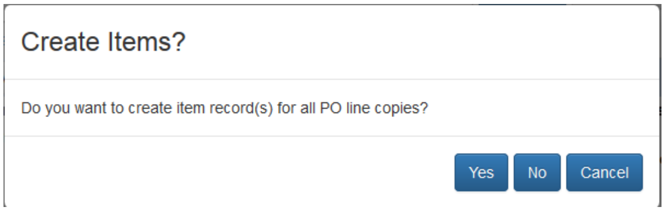
When you click it, various questions come up, depending on your system configuration. With the default configuration, the first question is whether you want to suppress records from public view:



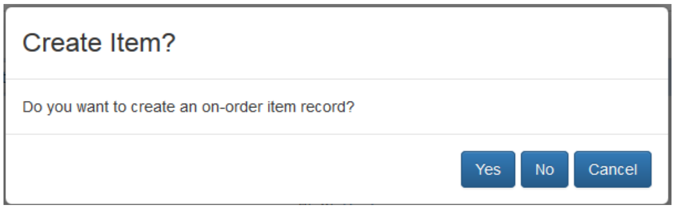
Suppress from OPAC?

Do you want to suppress all records from appearing in the public OPAC?

Usually you will want to say No; the point is to get the records visible to your users, after all. The second question is whether you want to create all item records or a single on-order copy:

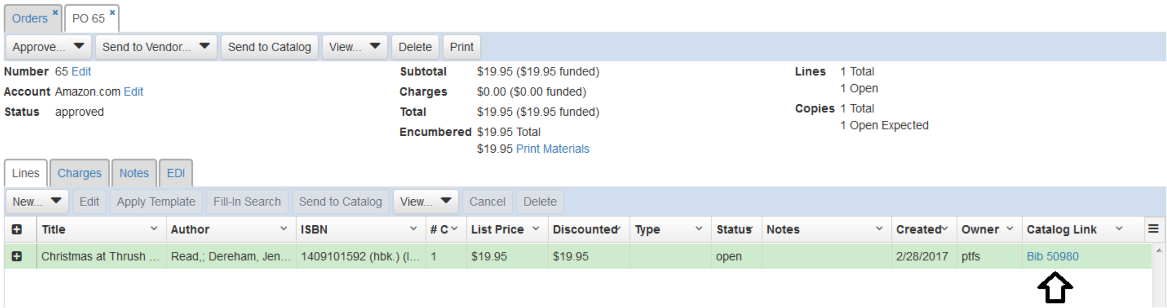


Do you want to create item record(s) for all PO line copies?



Do you want to create an on-order item record?

The popup wording will change depending on your syspref settings – if you have Create Item Records to create a single on-order copy it will only create one copy. If it's just set to Yes, all items will be created based on the location-to-copy mapping you selected on the order line. The order line entries will then have a link to the catalog record:



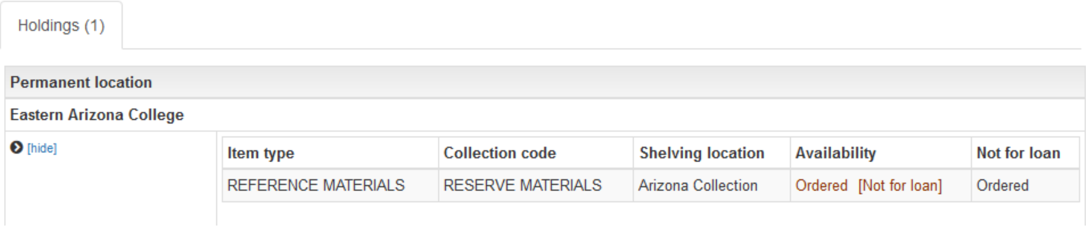
Number 65 Edit
Account Amazon.com Edit
Status approved

Subtotal $19.95 ($19.95 funded)
Charges $0.00 ($0.00 funded)
Total $19.95 ($19.95 funded)
Encumbered $19.95 Total
$19.95 Print Materials

Lines 1 Total
1 Open
Copies 1 Total
1 Open Expected

Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catalog Link
Christmas at Thrush ...	Read,; Dereham, Jen...	1409101592 (hbk.) (l...	1	$19.95	$19.95		open		2/28/2017	ptfs	Bib 50980

Depending on your system's settings, the Discovery Layer view of the record will show the item as on order:



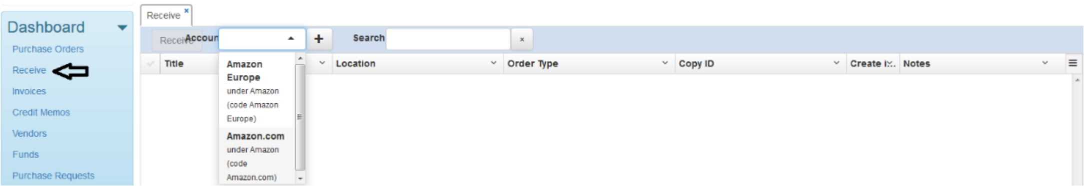
Permanent location				
Eastern Arizona College				
Item type	**Collection code**	**Shelving location**	**Availability**	**Not for loan**
REFERENCE MATERIALS	RESERVE MATERIALS	Arizona Collection	Ordered [Not for loan]	Ordered

The wording comes from the NOT_LOAN authorized value group – the authval of -1 is used for on-order copies. You could change the description from "Ordered" to "Title on Order" or whatever might suit your needs.

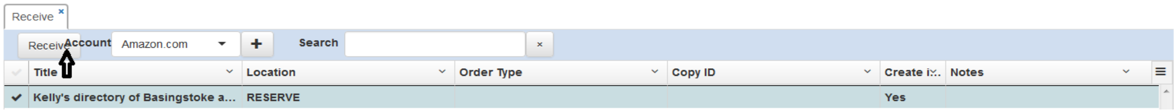
13.6 Receiving

Receiving is more of a record-keeping process; certain sites need this additional step, but unless you specifically need it, it's recommended to skip this and just use the Invoicing step. Receiving without invoicing does not leave a record of when items actually came in.

To receive (without invoice), you can click the Receive link on the Dashboard. A drop-down box lets you select the vendor, just as in the creation of a Purchase Order.



Once the vendor is selected, a list of outstanding orders for that vendor will appear; click the one(s) you want and then click the Receive button.

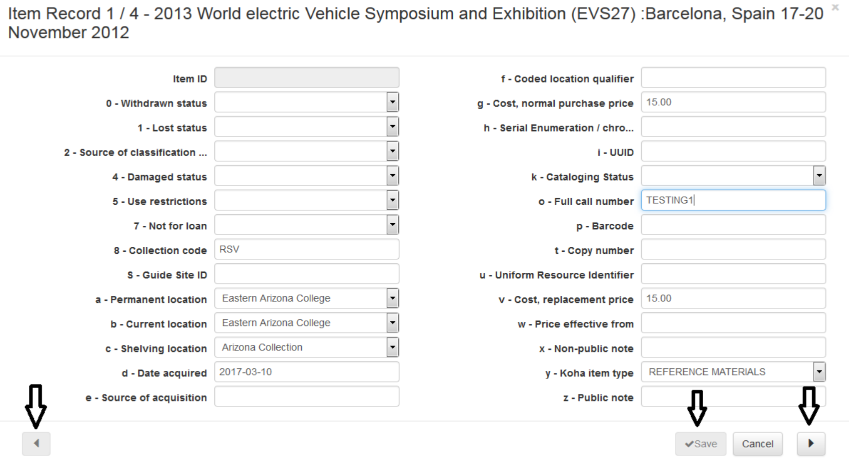


Account: Amazon.com

Title	Location	Order Type	Copy ID	Create i...	Notes
Kelly's directory of Basingstoke a...	RESERVE			Yes	

The order is marked Received and will disappear from this screen.

If the PO Line was marked with the "Create Item on Receipt" option, a popup window will appear to create an item for each item on the invoice:



Item Record 1 / 4 - 2013 World electric Vehicle Symposium and Exhibition (EVS27) :Barcelona, Spain 17-20 November 2012

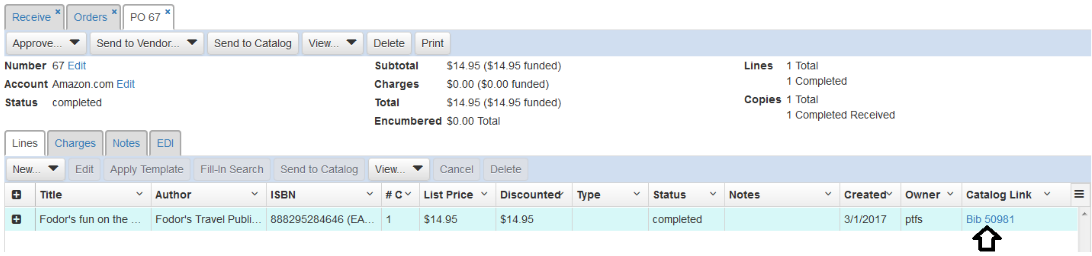
8 - Collection code: RSV
a - Permanent location: Eastern Arizona College
b - Current location: Eastern Arizona College
c - Shelving location: Arizona Collection
d - Date acquired: 2017-03-10
g - Cost, normal purchase price: 15.00
o - Full call number: TESTING1
v - Cost, replacement price: 15.00
y - Koha item type: REFERENCE MATERIALS

(If you had sent the title to catalog earlier and created an item, this step will overwrite/update that dummy item with appropriate settings from the orderline. **You will need to change/update the Not For Loan field to remove the "ordered" status.**)

Edit each item to add call number, barcode, and any other needed information. You can also change the default settings for item type and other fields. If there is more than one item, use the right arrow button to move to the next item. Note that the Save button is disabled until you have moved through and edited each copy attached.

After editing the last item, use the Save button to send the item information to the catalog record. The item records will be updated and your settings will show in the Discovery Layer and in staff mode:

After receiving, the purchase order now shows a link to the newly-created bib record:



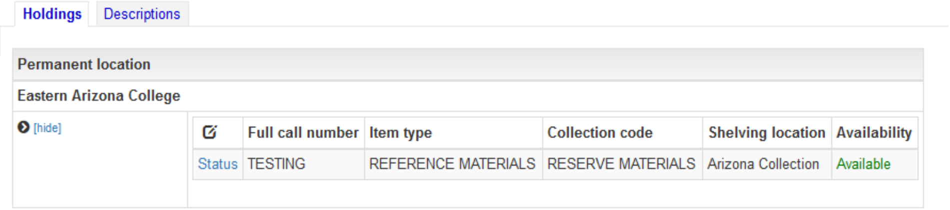
Number 67 Edit
Account Amazon.com Edit
Status completed

Subtotal $14.95 ($14.95 funded)
Charges $0.00 ($0.00 funded)
Total $14.95 ($14.95 funded)
Encumbered $0.00 Total

Lines 1 Total
1 Completed
Copies 1 Total
1 Completed Received

Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catalog Link
Fodor's fun on the ...	Fodor's Travel Publi...	888295284646 (EA...	1	$14.95	$14.95		completed		3/1/2017	ptfs	Bib 50981

If you click on that link, the bib record is displayed and its item record has the settings you entered on the item create screen:



Permanent location

Eastern Arizona College

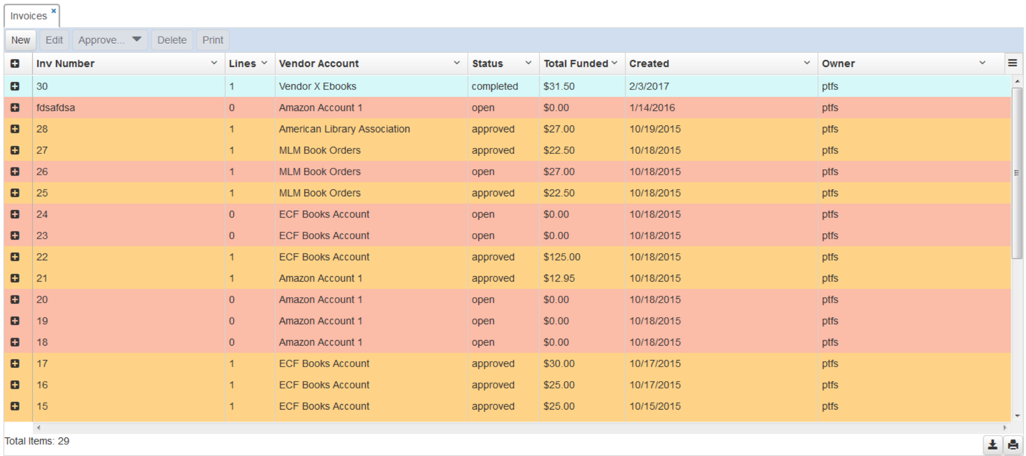
	Full call number	Item type	Collection code	Shelving location	Availability
Status	TESTING	REFERENCE MATERIALS	RESERVE MATERIALS	Arizona Collection	Available

If you don’t create items, the entries are set to Receive and the window is closed.

13.7 Invoicing

You will want to create an invoice in acquisitions to track items received and payments. The invoice will match one or more vendor invoices. These will typically detail the material that has been included in one or more shipments. Sometimes, the vendor invoice will be provided with the shipment; other times it will precede or follow the shipment. The system provides for all three of these possibilities.

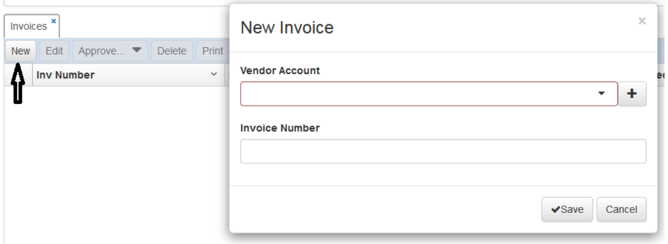
Click on Invoices in the navigation sidebar. A list of existing Invoices will be displayed—those highlighted in red are new and those with a yellow background are approved:



Inv Number	Lines	Vendor Account	Status	Total Funded	Created	Owner
30	1	Vendor X Ebooks	completed	$31.50	2/3/2017	ptfs
fdsafdsa	0	Amazon Account 1	open	$0.00	1/14/2016	ptfs
28	1	American Library Association	approved	$27.00	10/19/2015	ptfs
27	1	MLM Book Orders	approved	$22.50	10/18/2015	ptfs
26	1	MLM Book Orders	open	$27.00	10/18/2015	ptfs
25	1	MLM Book Orders	approved	$22.50	10/18/2015	ptfs
24	0	ECF Books Account	open	$0.00	10/18/2015	ptfs
23	0	ECF Books Account	open	$0.00	10/18/2015	ptfs
22	1	ECF Books Account	approved	$125.00	10/18/2015	ptfs
21	1	Amazon Account 1	approved	$12.95	10/18/2015	ptfs
20	0	Amazon Account 1	open	$0.00	10/18/2015	ptfs
19	0	Amazon Account 1	open	$0.00	10/18/2015	ptfs
18	0	Amazon Account 1	open	$0.00	10/18/2015	ptfs
17	1	ECF Books Account	approved	$30.00	10/17/2015	ptfs
16	1	ECF Books Account	approved	$25.00	10/17/2015	ptfs
15	1	ECF Books Account	approved	$25.00	10/15/2015	ptfs

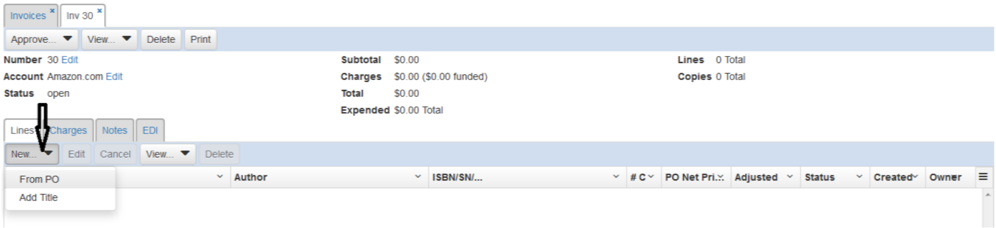
Total Items: 29

Create a new Invoice by clicking on the New button. Click on the drop-down arrow for the list of current Vendor Accounts; you can also type the first letter of Vendor Account to pop to that point in the pulldown:



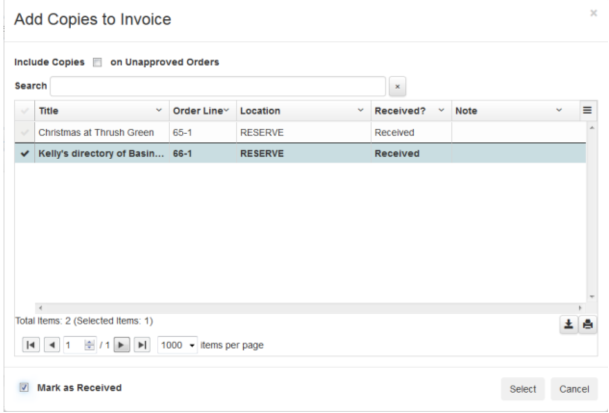
If the invoice number from Vendor is not completed, the system will auto-generate the next sequential invoice number available. You will probably want to use the invoice number on your vendor's invoice so things remain in sync.

Once you save the invoice, you need to add copies. Click New, and then select either From PO or Add Title. The latter is often used in library workflows for Standing Orders processing:



Number 30 Edit
Account Amazon.com Edit
Status open
Subtotal $0.00
Charges $0.00 ($0.00 funded)
Total $0.00
Expended $0.00 Total
Lines 0 Total
Copies 0 Total

At the first invoice screen, choose From PO to display a list of purchase order lines on order for the chosen vendor. Select the title(s) from the list. Note that titles from different orders may be paid on the same invoice. If titles had not been previously received, the Mark as Received option is available at the bottom of the Add PO Lines to this Invoice window:



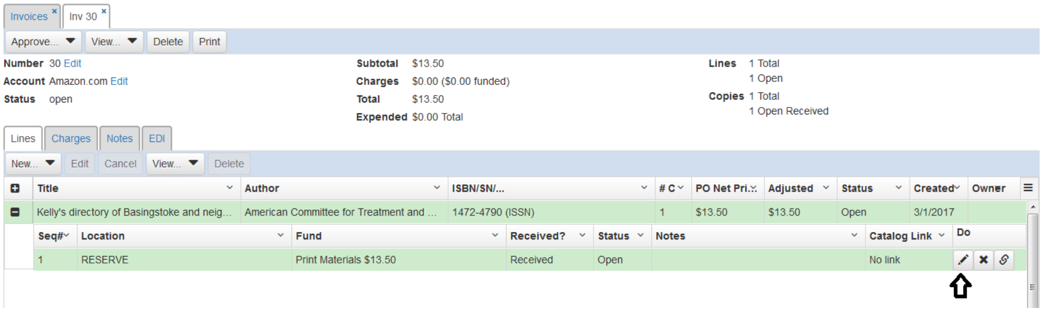
	Title	Order Line	Location	Received?	Note
	Christmas at Thrush Green	65-1	RESERVE	Received	
✓	Kelly's directory of Basin...	66-1	RESERVE	Received	

Total Items: 2 (Selected Items: 1)

☑ Mark as Received

Then click the Select button to add the order line to the invoice.

If the dollar amount on the Invoice is not the same as in the Purchase Order record, you can edit the Invoice line by clicking the pencil icon:



Number 30 Edit
Account Amazon.com Edit
Status open

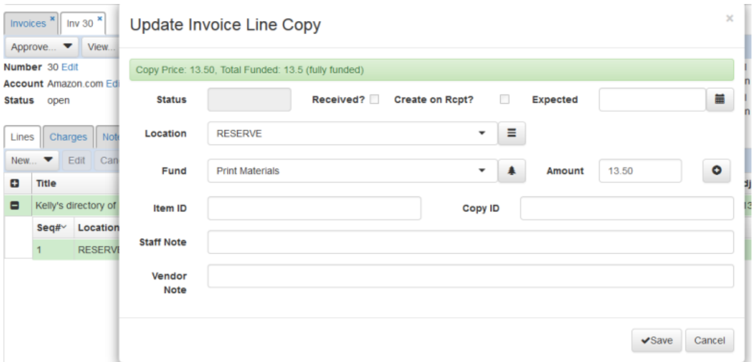
Subtotal $13.50
Charges $0.00 ($0.00 funded)
Total $13.50
Expended $0.00 Total

Lines 1 Total
1 Open
Copies 1 Total
1 Open Received

Title	Author	ISBN/SN/...	# C	PO Net Pri...	Adjusted	Status	Created	Owner
Kelly's directory of Basingstoke and neig...	American Committee for Treatment and ...	1472-4790 (ISSN)	1	$13.50	$13.50	Open	3/1/2017	

Seq#	Location	Fund	Received?	Status	Notes	Catalog Link	Do
1	RESERVE	Print Materials $13.50	Received	Open		No link	

You can also adjust the fund distribution for invoice copies; this will not affect the purchase order line copies funding.

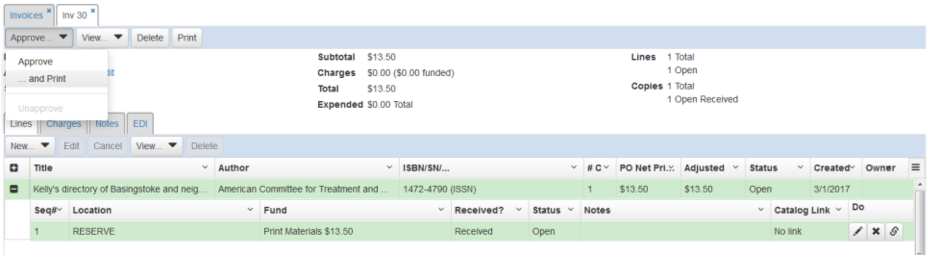


Update Invoice Line Copy

Copy Price: 13.50, Total Funded: 13.5 (fully funded)

Status
Received? ☐ **Create on Rcpt?** ☐ **Expected**
Location RESERVE
Fund Print Materials **Amount** 13.50
Item ID **Copy ID**
Staff Note
Vendor Note

The final step is to approve the invoice for payment. This also updates your funds—encumbrances will be credited and expenditures will be debited. Click the Approve button on the invoice screen.



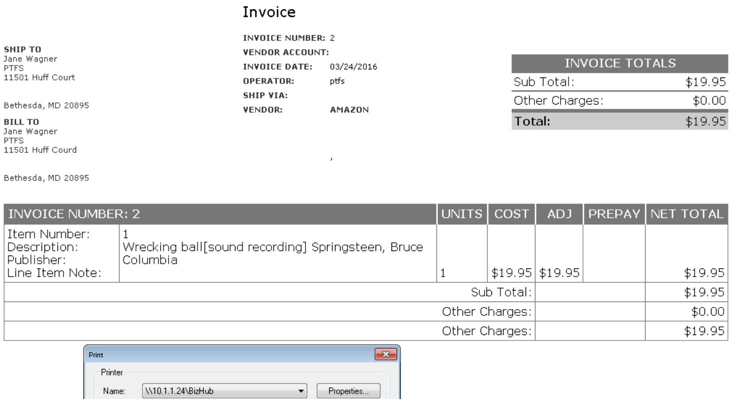
Subtotal $13.50
Charges $0.00 ($0.00 funded)
Total $13.50
Expended $0.00 Total

Lines 1 Total
1 Open
Copies 1 Total
1 Open Received

Title	Author	ISBN/SN/...	# C	PO Net Pri...	Adjusted	Status	Created	Owner
Kelly's directory of Basingstoke and neig...	American Committee for Treatment and ...	1472-4790 (ISSN)	1	$13.50	$13.50	Open	3/1/2017	

Seq#	Location	Fund	Received?	Status	Notes	Catalog Link	Do
1	RESERVE	Print Materials $13.50	Received	Open		No link	

If needed, you can also print a copy of the invoice using the Print button. It will open a new window ready to send to a printer:



Invoice

SHIP TO
Jane Wagner
PTFS
11501 Huff Court

Bethesda, MD 20895

BILL TO
Jane Wagner
PTFS
11501 Huff Courd

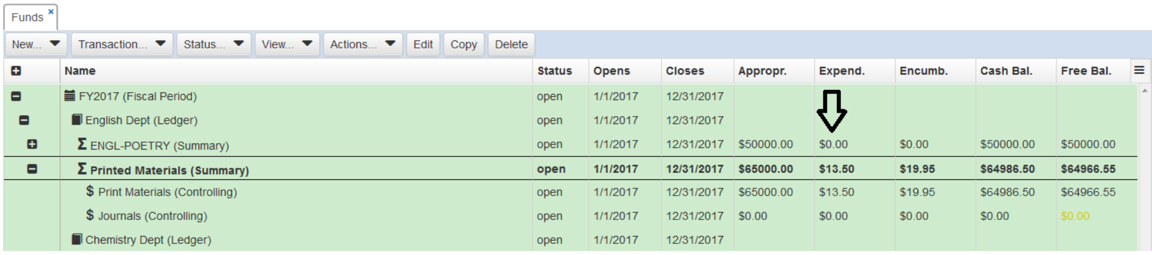
Bethesda, MD 20895

INVOICE NUMBER: 2
VENDOR ACCOUNT:
INVOICE DATE: 03/24/2016
OPERATOR: ptfs
SHIP VIA:
VENDOR: AMAZON

INVOICE TOTALS	
Sub Total:	$19.95
Other Charges:	$0.00
Total:	$19.95

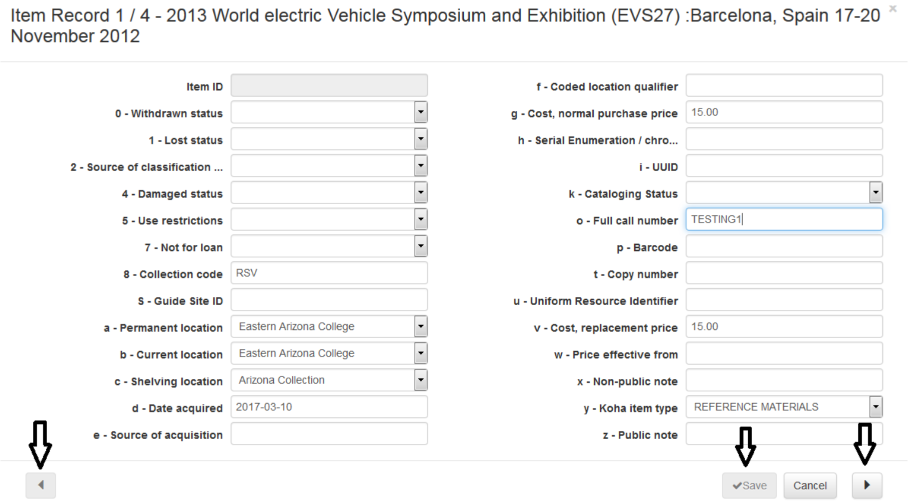
INVOICE NUMBER: 2		UNITS	COST	ADJ	PREPAY	NET TOTAL
Item Number: Description: Publisher: Line Item Note:	1 Wrecking ball[sound recording] Springsteen, Bruce Columbia	1	$19.95	$19.95		$19.95
			Sub Total:			$19.95
			Other Charges:			$0.00
			Other Charges:			$19.95

After the invoice is approved, your fund display will show the amount as Expended:



	Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
⊟	FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
⊟	English Dept (Ledger)	open	1/1/2017	12/31/2017					
⊞	Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$0.00	$50000.00	$50000.00
⊟	**Σ Printed Materials (Summary)**	**open**	**1/1/2017**	**12/31/2017**	**$65000.00**	**$13.50**	**$19.95**	**$64986.50**	**$64966.55**
	$ Print Materials (Controlling)	open	1/1/2017	12/31/2017	$65000.00	$13.50	$19.95	$64986.50	$64966.55
	$ Journals (Controlling)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
	Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

As mentioned above, your order line needs to have the Create on Receipt box checked at the order stage, to be able to create item records at the invoicing step. If it is, when you approve the invoice, you'll get an item edit popup screen for each item in the invoice:



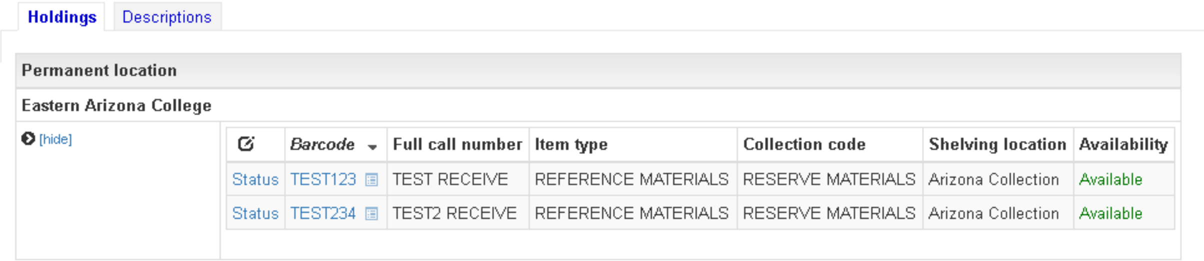
Item Record 1 / 4 - 2013 World electric Vehicle Symposium and Exhibition (EVS27) :Barcelona, Spain 17-20 November 2012

Item ID
0 - Withdrawn status
1 - Lost status
2 - Source of classification ...
4 - Damaged status
5 - Use restrictions
7 - Not for loan
8 - Collection code: RSV
S - Guide Site ID
a - Permanent location: Eastern Arizona College
b - Current location: Eastern Arizona College
c - Shelving location: Arizona Collection
d - Date acquired: 2017-03-10
e - Source of acquisition
f - Coded location qualifier
g - Cost, normal purchase price: 15.00
h - Serial Enumeration / chro...
i - UUID
k - Cataloging Status
o - Full call number: TESTING1
p - Barcode
t - Copy number
u - Uniform Resource Identifier
v - Cost, replacement price: 15.00
w - Price effective from
x - Non-public note
y - Koha item type: REFERENCE MATERIALS
z - Public note

(If you had sent the title to catalog earlier and created an item, this step will overwrite/update that dummy item with appropriate settings from the orderline. **You will need to manually change/update the Not For Loan field to remove the "ordered" status.**)

Edit each item to add call number, barcode, and any other needed information. You can also change the default settings for item type and other fields. If there is more than one item, use the right arrow button to move to the next item. Note that the Save button is disabled until you have moved through and edited each copy attached.

After editing the last item, use the Save button to send the item information to the catalog record. The item records will be updated and your settings will show in the Discovery Layer and in staff mode:



Permanent location

Eastern Arizona College

	Barcode	Full call number	Item type	Collection code	Shelving location	Availability
Status	TEST123	TEST RECEIVE	REFERENCE MATERIALS	RESERVE MATERIALS	Arizona Collection	Available
Status	TEST234	TEST2 RECEIVE	REFERENCE MATERIALS	RESERVE MATERIALS	Arizona Collection	Available

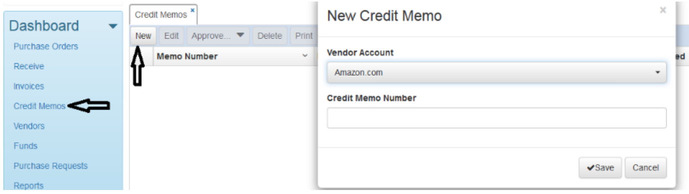
13.8 Credit Memos

A credit memo allows you to take a payment that was invoiced and credit it back. This would be used when you return an item or get a vendor credit for some reason. The assumption is that the vendor has sent you an actual check, which has been deposited back into the original fund. (See further below for how to handle an online credit balance.)

You can only apply a credit memo to an order that has been invoiced and approved. (If the order has not been approved, you would just cancel that orderline and not worry about a credit memo.)

NOTE: If the title and item have already been sent to catalog, doing a credit memo does NOT remove those records. You will need to manually delete any items and the title.

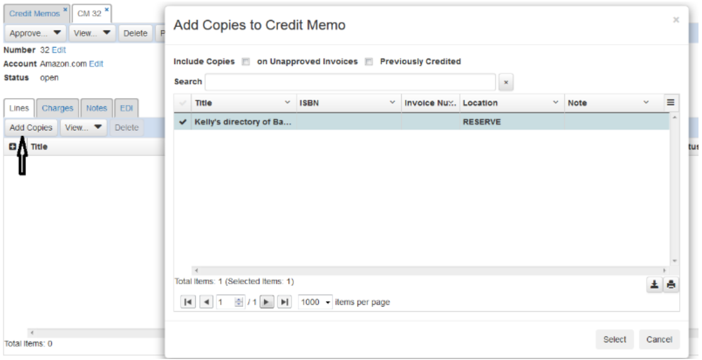
To create a credit memo, select Credit Memos from the sidebar menu, then click New and select your vendor from the pulldown:



Vendor Account Amazon.com

Credit Memo Number

Then click New in the copies section and a popup will show all invoiced copies from that vendor. Click the one(s) you want and then click Select:



Number 32 Edit
Account Amazon.com Edit
Status open

Total Items: 0

Include Copies ☐ **on Unapproved Invoices** ☐ **Previously Credited**

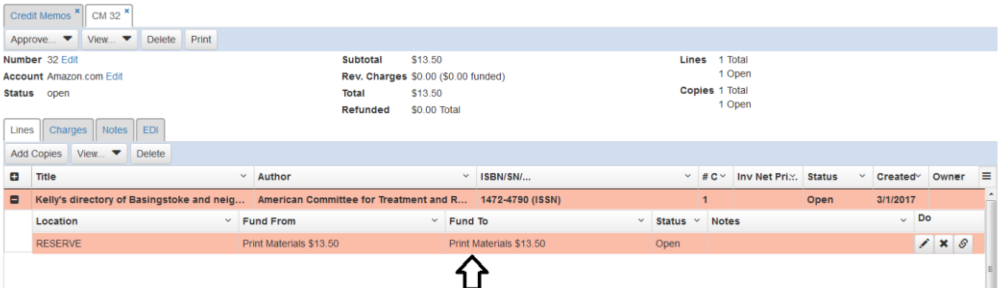
Search

	Title	ISBN	Invoice Nu...	Location	Note
✓	Kelly's directory of Ba...			RESERVE	

Total Items: 1 (Selected Items: 1)

1 / 1 1000 items per page

The selected copy is added to the credit memo. By default, the process will credit the fund that was used for the order, but you could edit the line (click the pencil icon at the end) to select a different fund. Remember, this should be the fund where the vendor's check was deposited.



Number 32 Edit
Account Amazon.com Edit
Status open

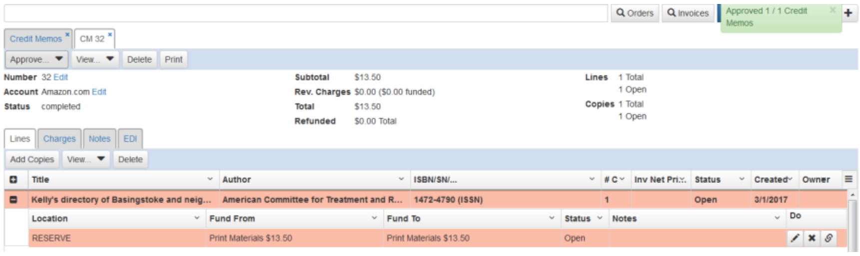
Subtotal $13.50
Rev. Charges $0.00 ($0.00 funded)
Total $13.50
Refunded $0.00 Total

Lines 1 Total
1 Open
Copies 1 Total
1 Open

Title	Author	ISBN/SN/...	# C	Inv Net Pri...	Status	Created	Owner
Kelly's directory of Basingstoke and neig...	American Committee for Treatment and R...	1472-4790 (ISSN)	1		Open	3/1/2017	

Location	Fund From	Fund To	Status	Notes	Do
RESERVE	Print Materials $13.50	Print Materials $13.50	Open		

When you have added all the needed lines, at the top of the screen click the Approve button and approve (or approve and print) the credit memo. A popup shows that it was approved, and the status at the top changes to Completed.



Number 32 Edit
Account Amazon.com Edit
Status completed

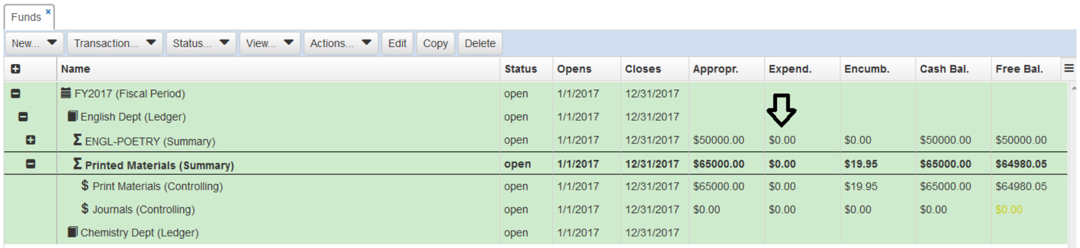
Subtotal $13.50
Rev. Charges $0.00 ($0.00 funded)
Total $13.50
Refunded $0.00 Total

Lines 1 Total
1 Open
Copies 1 Total
1 Open

Title	Author	ISBN/SN/...	# C	Inv Net Pri...	Status	Created	Owner
Kelly's directory of Basingstoke and neig...	American Committee for Treatment and R...	1472-4790 (ISSN)	1		Open	3/1/2017	

Location	Fund From	Fund To	Status	Notes	Do
RESERVE	Print Materials $13.50	Print Materials $13.50	Open		

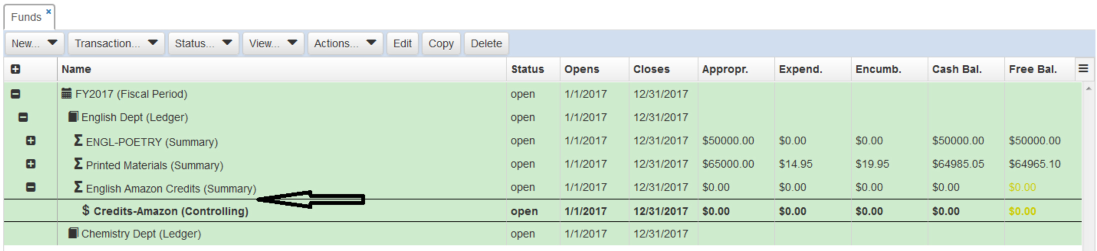
If you then look at the fund entry, you'll see that those funds are no longer expended but have been added back into the available balance:



Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$0.00	$50000.00	$50000.00
Σ Printed Materials (Summary)	**open**	**1/1/2017**	**12/31/2017**	**$65000.00**	**$0.00**	**$19.95**	**$65000.00**	**$64980.05**
$ Print Materials (Controlling)	open	1/1/2017	12/31/2017	$65000.00	$0.00	$19.95	$65000.00	$64980.05
$ Journals (Controlling)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

13.8.1 Handling Online Credits

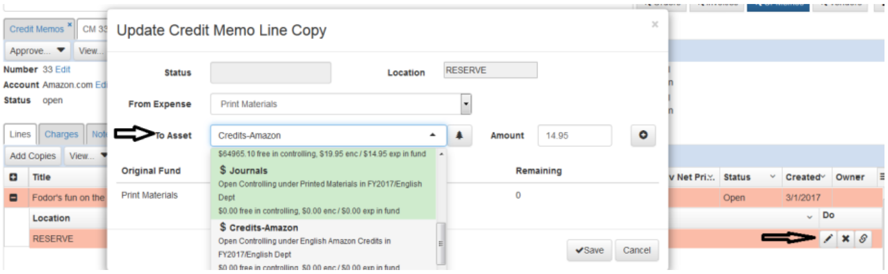
If the vendor has not sent a check but merely assigned a credit to your account, you can still use a credit memo. However, you cannot assign the money back to the original account. This is because the same account could be used for orders from multiple vendors – you can't spend a $100 credit from Baker & Taylor on an order from Amazon. You need to handle credits separately. We recommend setting up a fund for vendor credits. (If your organization applies credit memos to a general fund, you can skip setting up a vendor credit fund.) You could create a separate ledger for credits, then one controlling fund per vendor under that ledger, or (if funds need to be kept separate by department) a vendor credit controlling fund under each ledger. Here's an example of a fund designed to handle credits for the English department from Amazon:



Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$0.00	$50000.00	$50000.00
Σ Printed Materials (Summary)	open	1/1/2017	12/31/2017	$65000.00	$14.95	$19.95	$64985.05	$64965.10
Σ English Amazon Credits (Summary)	open	1/1/2017	12/31/2017	$0.00	$0.00	$0.00	$0.00	$0.00
$ Credits-Amazon (Controlling)	**open**	**1/1/2017**	**12/31/2017**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

Do not allocate any initial funds to the credit fund, unless you are starting with an existing credit from the vendor.

Having created the credit fund, you would then go in and create a credit memo as above. Once you've added copies, use the pencil icon to edit the copy, then use the pulldown next to the "To Asset" field to select your credit fund:



Update Credit Memo Line Copy

Number 33 Edit
Account Amazon.com
Status open

Status
Location RESERVE
From Expense Print Materials
To Asset Credits-Amazon
Amount 14.95

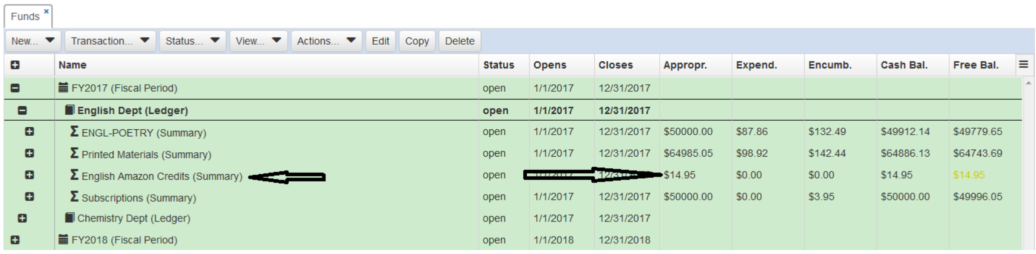
$64965.10 free in controlling, $19.95 enc / $14.95 exp in fund
$ **Journals**
Open Controlling under Printed Materials in FY2017/English Dept
$0.00 free in controlling, $0.00 enc / $0.00 exp in fund
$ **Credits-Amazon**
Open Controlling under English Amazon Credits in FY2017/English Dept
$0.00 free in controlling, $0.00 enc / $0.00 exp in fund

Original Fund	Remaining
Print Materials	0

Title	Net Pri...	Status	Created	Owner
Fodor's fun on the		Open	3/1/2017	

Location	Do
RESERVE	

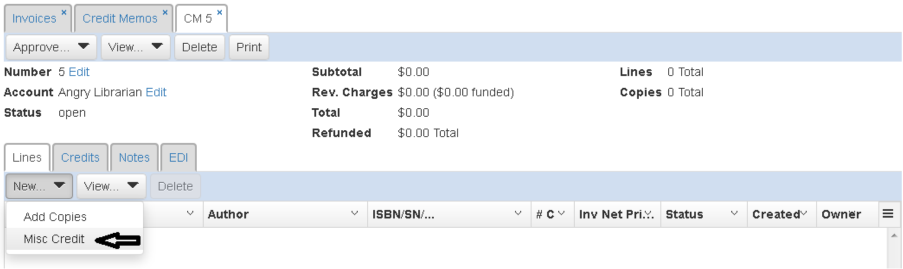
Once you approve the credit memo, you should see the balance in your credit fund. You can then spend that money on another order from that vendor.



Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	**open**	**1/1/2017**	**12/31/2017**					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50000.00	$87.86	$132.49	$49912.14	$49779.65
Σ Printed Materials (Summary)	open	1/1/2017	12/31/2017	$64985.05	$98.92	$142.44	$64886.13	$64743.69
Σ English Amazon Credits (Summary)	open	[illegible]	[illegible]	$14.95	$0.00	$0.00	$14.95	$14.95
Σ Subscriptions (Summary)	open	1/1/2017	12/31/2017	$50000.00	$0.00	$3.95	$50000.00	$49996.05
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					
FY2018 (Fiscal Period)	open	1/1/2018	12/31/2018					

13.8.2 Miscellaneous Credits

You can also enter miscellaneous credits on a credit memo. Instead of adding a line for a particular copy, select Misc Credit in the New pulldown:

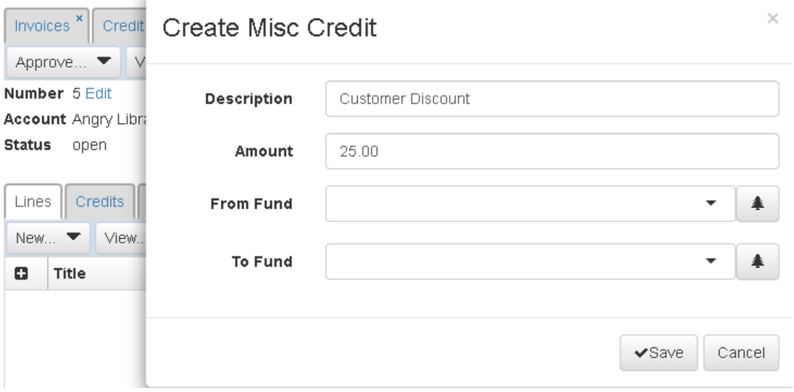


Number 5 Edit
Account Angry Librarian Edit
Status open

Subtotal $0.00
Rev. Charges $0.00 ($0.00 funded)
Total $0.00
Refunded $0.00 Total

Lines 0 Total
Copies 0 Total

That opens a popup window where you can enter details:



Number 5 Edit
Account Angry Libr
Status open

Create Misc Credit

Description Customer Discount
Amount 25.00
From Fund
To Fund

As with other credit memo entries, the money is moved from the source expense fund, into the destination asset fund, when the credit memo is approved.

Title	Author	ISBN/SN/...	# C	Inv Net Pri...	Status	Created	Owner
[Misc Credit] Custom...			1		Open	5/15/2018	

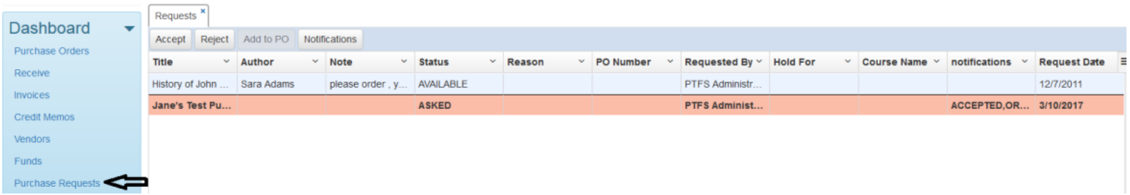
Location	Fund From	Fund To	Status	Notes	Do
(none)	Chichen Ghost $25.00	Green Ghost $25.00	Open		

Note that the first time a miscellaneous credit is applied for a particular vendor account, a new PO and invoice will be automatically created, both numbered "CM-VA####" (where "####" is the vendor account ID). These are required so that the credit memo lines have something to apply against. They are automatically maintained and should always stay in a completed state.

13.9 Purchase Requests

Purchase Requests allow patron-initiated purchase suggestions from the Discovery Layer to be managed by Acquisitions, if the system preference suggestion is turned on (see the Discovery Layer section for more details).

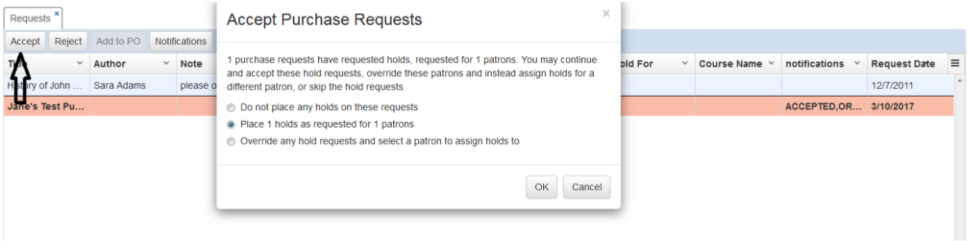
Click on Purchase Requests from the sidebar menu and you'll see a list of existing requests.



Title	Author	Note	Status	Reason	PO Number	Requested By	Hold For	Course Name	notifications	Request Date
History of John ...	Sara Adams	please order , y...	AVAILABLE			PTFS Administr...				12/7/2011
Jane's Test Pu...			ASKED			PTFS Administ...			ACCEPTED,OR...	3/10/2017

Orange entries are new ones that have not been handled yet.

Click on a suggestion and then click the Accept or Reject button at the top of the table to accept or reject the suggestion. If you accept, depending on your system's setup, you may be asked whether to place a hold:



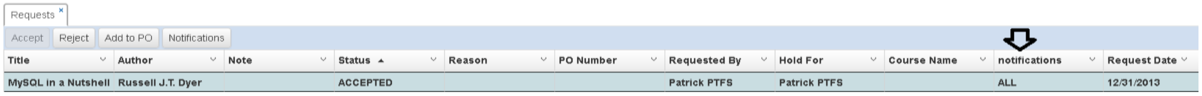
Accept Purchase Requests

1 purchase requests have requested holds, requested for 1 patrons. You may continue and accept these hold requests, override these patrons and instead assign holds for a different patron, or skip the hold requests.

○ Do not place any holds on these requests
● Place 1 holds as requested for 1 patrons
○ Override any hold requests and select a patron to assign holds to

Title	Author	Note	old For	Course Name	notifications	Request Date
History of John ...	Sara Adams	please o				12/7/2011
Jane's Test Pu...					ACCEPTED,OR...	3/10/2017

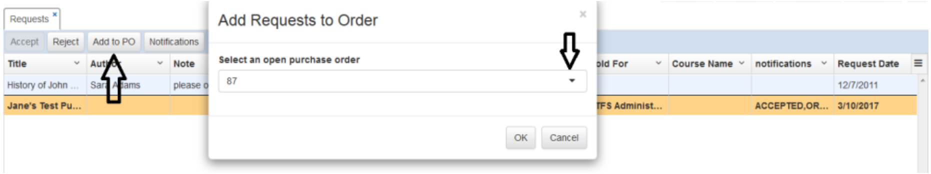
If the patron or other staff have notification messaging options set, the "Notifications" column will update:



Title	Author	Note	Status	Reason	PO Number	Requested By	Hold For	Course Name	notifications	Request Date
MySQL in a Nutshell	Russell J.T. Dyer		ACCEPTED			Patrick PTFS	Patrick PTFS		ALL	12/31/2013

The patron will see the updated status in their Discovery Layer account, under the My Purchase Suggestions tab.

Once a suggestion has been approved, you have the option to add it to a purchase order. Click the Add to PO button at top, then in the popup choose an open purchase order:



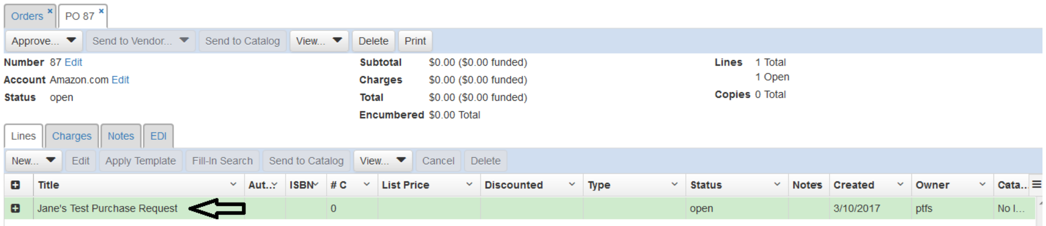
Add Requests to Order

Select an open purchase order

87

Title	Author	Note	old For	Course Name	notifications	Request Date
History of John ...	Sara Adams	please o				12/7/2011
Jane's Test Pu...			TFS Administ...		ACCEPTED,OR...	3/10/2017

If you don't want to add it to an existing order, step out and create a new purchase order before clicking the Add to PO button. If you then open that order, you'll see the line for the suggested title:



Number 87 Edit
Account Amazon.com Edit
Status open

Subtotal $0.00 ($0.00 funded)
Charges $0.00 ($0.00 funded)
Total $0.00 ($0.00 funded)
Encumbered $0.00 Total

Lines 1 Total
1 Open
Copies 0 Total

Title	Aut...	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Cata...
Jane's Test Purchase Request			0				open		3/10/2017	ptfs	No I...

You'll need to add a copy with price, location mapping, and funding data.

13.10 Standing Orders

Standing orders are orders for titles that recur with some frequency. Most are for serial subscriptions, but you can also use a standing order for monographic series, dictionaries or atlases, etc. – anything where you would regularly get a new version of the title. The orders are usually placed on titles for which it's important to ensure uninterrupted receipt of updates or new editions or part. A standing order helps simplify the acquisitions process because library staff do not need to remember to check for new editions or parts. These titles may arrive at any time, and usually are accompanied with an invoice.

You can manage standing orders either completely in acquisitions, or in conjunction with the Serials module for serial titles. Benefits of using this feature include a streamlined process that provides historical price information, new functionality that permits creating an invoice without first creating a purchase order, and the ability to create the workflow that works best for your library.

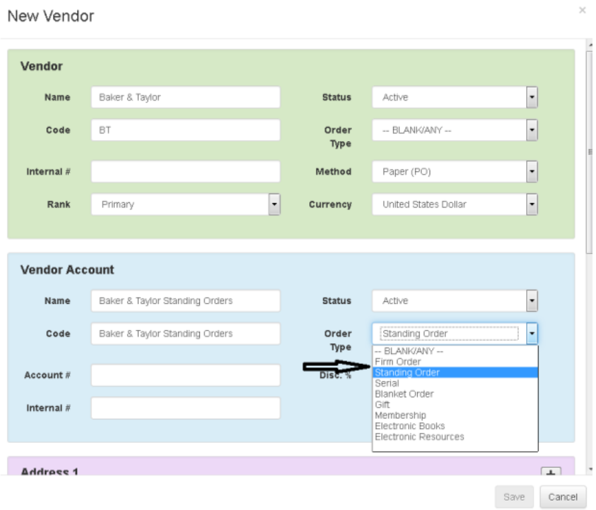
Standing orders may also be referred to as Continuations.

TIP: If you are currently using EDI or enriched EDI for ordering through preselected carts (which are pushed out to selectors or designated staff member as materials become available for pre-order), you can set up these prepopulated carts to include standing orders. Once standing order titles are added to these carts they can be ordered as monographs (making use of the grids), creating individual bibliographic records that will enable easier access for patrons (most recent cover art) in the catalog, simplifying the ordering, processing, receiving, weeding, and invoicing processes for staff. Contact your vendor(s) to set up this process.

13.10.1 Standing Orders Setup

13.10.1.1 Vendors

Review your vendor accounts to ensure that you have standing order type accounts created. You must specify that in the Account Type field.



New Vendor

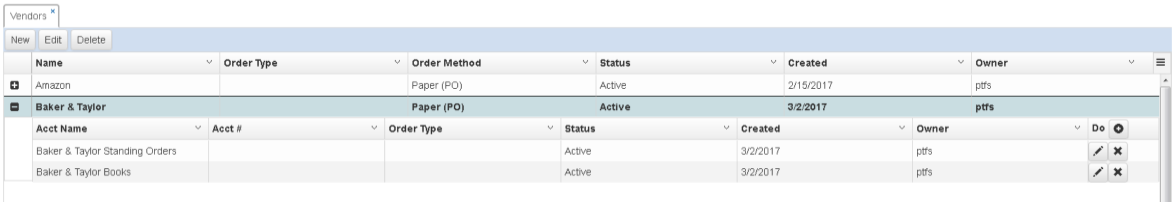
Vendor

Name: Baker & Taylor
Code: BT
Internal #:
Rank: Primary
Status: Active
Order Type: -- BLANK/ANY --
Method: Paper (PO)
Currency: United States Dollar

Vendor Account

Name: Baker & Taylor Standing Orders
Code: Baker & Taylor Standing Orders
Account #:
Internal #:
Status: Active
Order Type: Standing Order
Disc. %

Some sites create multiple accounts for a vendor, with one account specifically for standing orders.



	Name	Order Type	Order Method	Status	Created	Owner
⊞	Amazon		Paper (PO)	Active	2/15/2017	ptfs
⊟	**Baker & Taylor**		**Paper (PO)**	**Active**	**3/2/2017**	**ptfs**

Acct Name	Acct #	Order Type	Status	Created	Owner	Do
Baker & Taylor Standing Orders			Active	3/2/2017	ptfs	✎ ✖
Baker & Taylor Books			Active	3/2/2017	ptfs	✎ ✖

13.10.1.2 Order Types

You can set the order type at the vendor record level, the vendor account level, the purchase order (PO) or the purchase order line (POL). When an order type is entered at the vendor record level or the vendor account level, the order type field will be populated in the PO and the POL. If you have one account with a vendor, but want to identify the order type in the PO or the POL, leave the order type in the vendor and vendor account blank.

As mentioned in the vendor setup section, most of the order types are for reporting purposes only; they don't affect functionality. The Standing Order order type is different.

NOTE: When a PO has an order type of Standing Order, any subsequent receipt of the same title will create a new POL with the same order type.

This vendor account record shows that this specific account is set in the vendor record. Any PO or POL that uses this vendor account will automatically have the order type set to Standing Order:

Name: Baker & Taylor Standing Orders
Code: Baker & Taylor Standing Orders
Account #:
Status: Active
Order Type: Standing Order
Disc. %:

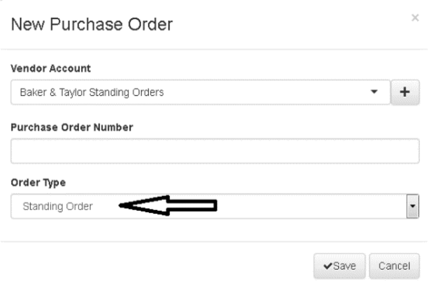
13.10.1.3 Funds

There is no specific action for funds that needs to be done before beginning to create standing order purchase orders. Some sites want to track the amount spent on subscriptions or standing orders; it may be useful to create a separate fund for them.

13.10.2 Ordering Standing Orders

Creating a standing order purchase order is essentially the same as creating one for a firm order. There are some important differences, however. Selecting the order type 'Standing Order' will place this PO in everlasting openness. When you do rollover at the end of the fiscal year, this order will be rolled into the next fiscal year (unless you actively close the order). This means, of course, that different materials should not be mixed on the same purchase order. Only add standing orders to a Standing Order type purchase order.

Create a new purchase order and choose the vendor. If the vendor account includes an order type, it will automatically be added. If the vendor account doesn't include an order type, this field will be blank, and you can select the order type from the drop-down choices. If you click Save without adding an order type, there will be one more opportunity to identify this purchase order with the Standing Order type.



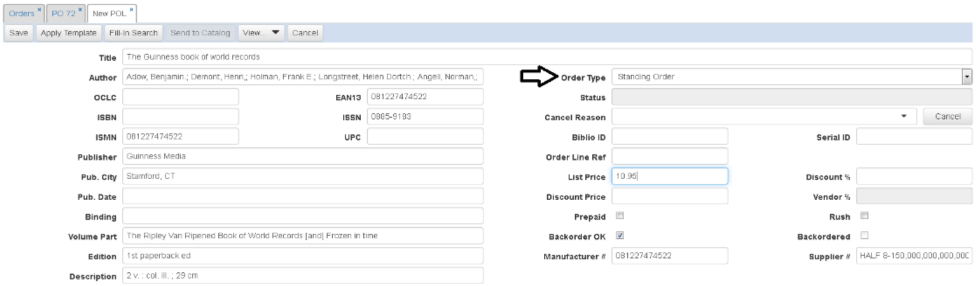
New Purchase Order

Vendor Account: Baker & Taylor Standing Orders

Purchase Order Number:

Order Type: Standing Order

Next, add a new PO line. Either key in the information manually or download from a search.



Title: The Guinness book of world records

Author: Adow, Benjamin.; Demont, Henri.; Holman, Frank E.; Longstreet, Helen Dortch.; Angell, Norman.;

OCLC:

EAN13: 081227474522

ISBN:

ISSN: 0885-9183

ISMN: 081227474522

UPC:

Publisher: Guinness Media

Pub. City: Stamford, CT

Pub. Date:

Binding:

Volume Part: The Ripley Van Ripened Book of World Records [and] Frozen in time

Edition: 1st paperback ed

Description: 2 v. : col. ill. ; 29 cm

Order Type: Standing Order

Status:

Cancel Reason:

Biblio ID:

Serial ID:

Order Line Ref:

List Price: 10.95

Discount %:

Discount Price:

Vendor %:

Prepaid ☐

Rush ☐

Backorder OK ☑

Backordered ☐

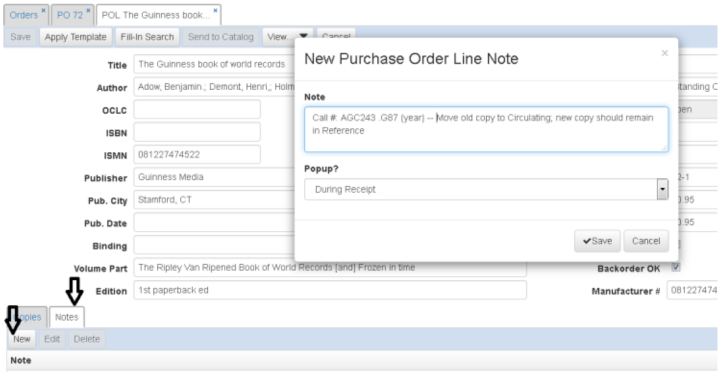
Manufacturer #: 081227474522

Supplier #: HALF 8-150,000,000,000,000

The List Price field is required; adding the List Price will automatically fill the Discounted Price if your vendor has a discount set. **NOTE: The price should be the cost for an individual issue or copy, not the full subscription cost.**

Save the order and add a copy and assign a fund, as with a regular order.

You can also add receiving notes to a POL that will display while receiving the item. The POL has a Notes button in the toolbar. These notes will appear on the PO line grid, the Receiving grid and the Invoicing 'POLC Finder' windows. You can enter a long note; be aware that the display area in the three windows may not display your entire note. For standing orders, it may be useful to include the call number, location and handling instructions.



New Purchase Order Line Note

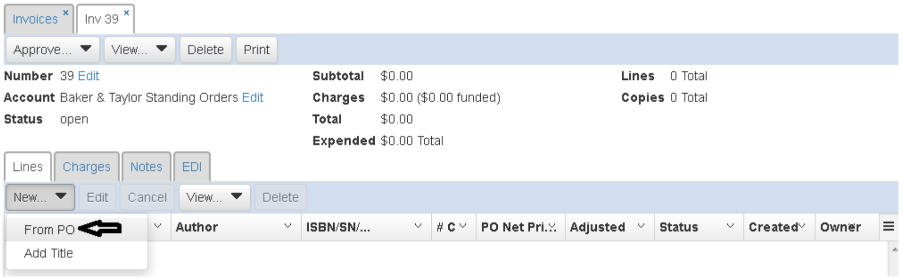
Note: Call #: AGC243 .G87 (year) -- Move old copy to Circulating; new copy should remain in Reference

Popup?: During Receipt

This purchase order line is a placeholder; as you receive individual issues/copies, they are added to the order while the original order line remains in place.

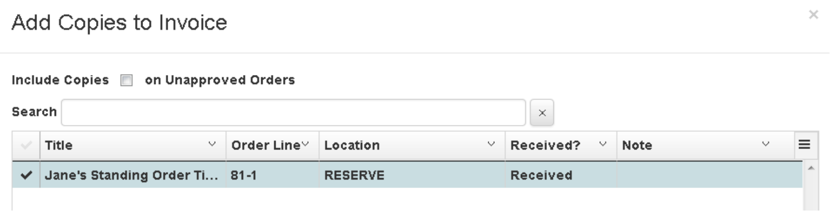
13.10.3 Receiving Standing Orders

As with regular orders, you can either use the Receive function to receive copies, or the Invoice function to both receive and add to an invoice (recommended – see those sections above). You can either create a new invoice for this order, or add it to any existing invoice from the vendor.



Number 39 Edit
Account Baker & Taylor Standing Orders Edit
Status open
Subtotal $0.00
Charges $0.00 ($0.00 funded)
Total $0.00
Expended $0.00 Total
Lines 0 Total
Copies 0 Total

Then add the standing order copy to that invoice:

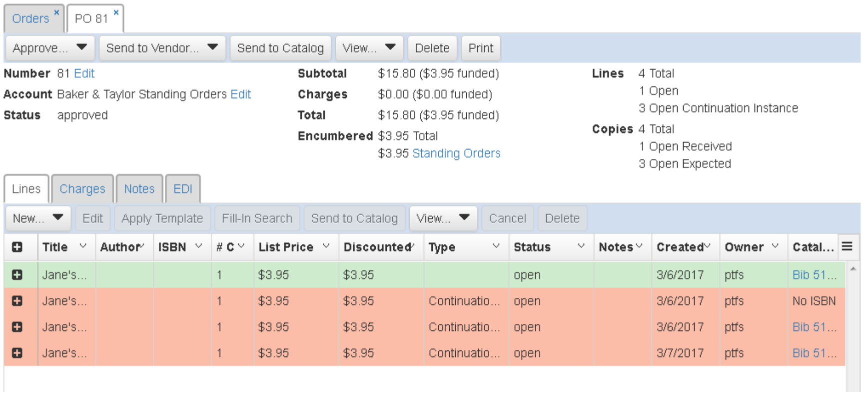

Add Copies to Invoice

Include Copies ☐ **on Unapproved Orders**

Search

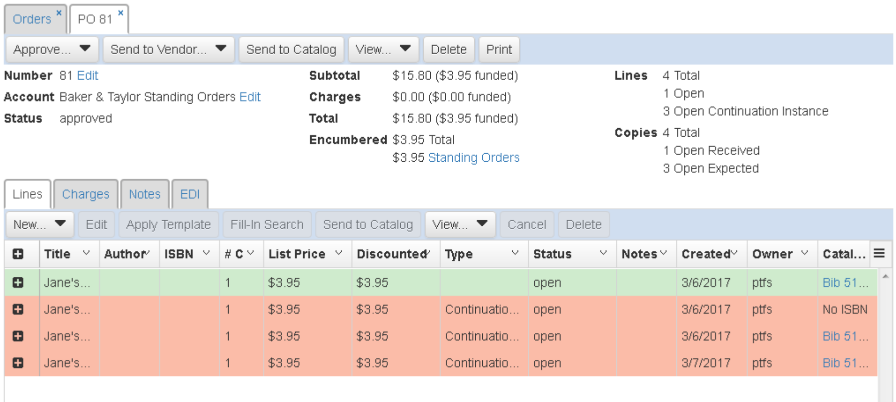
	Title	Order Line	Location	Received?	Note
✓	Jane's Standing Order Ti...	81-1	RESERVE	Received	

As you receive copies, the original order shows them. The green line is the original "dummy" line; the orange lines are the real copies that have been received.



Number 81 Edit
Account Baker & Taylor Standing Orders Edit
Status approved
Subtotal $15.80 ($3.95 funded)
Charges $0.00 ($0.00 funded)
Total $15.80 ($3.95 funded)
Encumbered $3.95 Total
$3.95 Standing Orders
Lines 4 Total
1 Open
3 Open Continuation Instance
Copies 4 Total
1 Open Received
3 Open Expected

	Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catal...
⊞	Jane's...			1	$3.95	$3.95		open		3/6/2017	ptfs	Bib 51...
⊞	Jane's...			1	$3.95	$3.95	Continuatio...	open		3/6/2017	ptfs	No ISBN
⊞	Jane's...			1	$3.95	$3.95	Continuatio...	open		3/6/2017	ptfs	Bib 51...
⊞	Jane's...			1	$3.95	$3.95	Continuatio...	open		3/7/2017	ptfs	Bib 51...



Number 81 Edit
Account Baker & Taylor Standing Orders Edit
Status approved

Subtotal $15.80 ($3.95 funded)
Charges $0.00 ($0.00 funded)
Total $15.80 ($3.95 funded)
Encumbered $3.95 Total
$3.95 Standing Orders

Lines 4 Total
1 Open
3 Open Continuation Instance
Copies 4 Total
1 Open Received
3 Open Expected

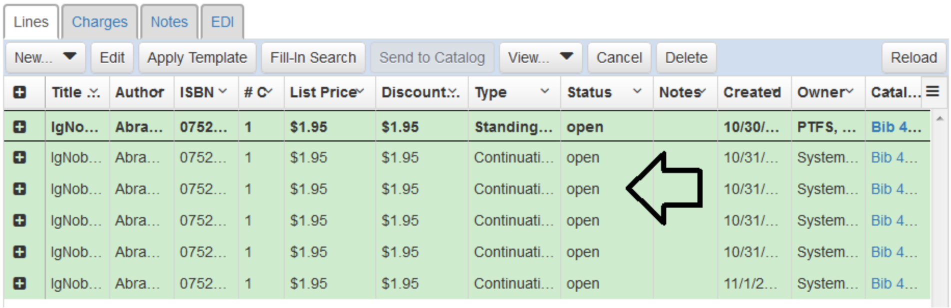
Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catal...
Jane's...			1	$3.95	$3.95		open		3/6/2017	ptfs	Bib 51...
Jane's...			1	$3.95	$3.95	Continuatio...	open		3/6/2017	ptfs	No ISBN
Jane's...			1	$3.95	$3.95	Continuatio...	open		3/6/2017	ptfs	Bib 51...
Jane's...			1	$3.95	$3.95	Continuatio...	open		3/7/2017	ptfs	Bib 51...

Depending on your settings, you may add new copies to the linked bib title each time you receive an item.

13.11 Link to Serials

Some libraries may order yearbooks, annuals, or other continuing resources from a subscription agent, and each time an issue is received, a bill for payment comes with it. Libraries that have implemented both serials and acquisitions can create a purchase order line simply by receiving the next expected issue. This will only work on POs defined as standing orders.

Subscription agencies can supply almost any publication that has a predictive publishing schedule. If you subscribe to some annuals, yearbooks, or other titles through your subscription agency, you probably already have Serial Subscription MARC records in your database. If your annual subscription invoice predicts a price for the title, a serials receipt may be all that is necessary. However, if you receive an invoice when the title is received, you can now send purchase information from the serials module to acquisitions and track the invoice and payment information. Add one copy to your title as a template, with the price and settings. Subsequent copies are created automatically when issues are checked in through serials.



Title	Author	ISBN	# C	List Price	Discount...	Type	Status	Notes	Created	Owner	Catal...
IgNo...	**Abra...**	**0752...**	**1**	**$1.95**	**$1.95**	**Standing...**	**open**		**10/30/...**	**PTFS, ...**	**Bib 4...**
IgNob...	Abra...	0752...	1	$1.95	$1.95	Continuati...	open		10/31/...	System...	Bib 4...
IgNob...	Abra...	0752...	1	$1.95	$1.95	Continuati...	open		10/31/...	System...	Bib 4...
IgNob...	Abra...	0752...	1	$1.95	$1.95	Continuati...	open		10/31/...	System...	Bib 4...
IgNob...	Abra...	0752...	1	$1.95	$1.95	Continuati...	open		10/31/...	System...	Bib 4...
IgNob...	Abra...	0752...	1	$1.95	$1.95	Continuati...	open		11/1/2...	System...	Bib 4...

The link to the purchase order is made from within the serials module; see that section for details. When a new issue is received in Serials, a new line item will be added to the purchase order automatically; you don’t have to receive the item in acquisitions. Be sure that the acquisitions orderline is NOT set to Create on Receive. If you want to create individual item records, set the serials subscription record accordingly.

NOTE: An orderline should only be linked to one serials subscription record and vice versa. If you will have multiple serials records for this title, create multiple orderlines for the same title. Then, from serials, link each subscription to a different orderline.

When you are billed by your supplier, create and approve an invoice for payment. It should pick up each copy received from the PO. Once those copies have been invoiced, they won't show up again the next time you need to create an invoice.

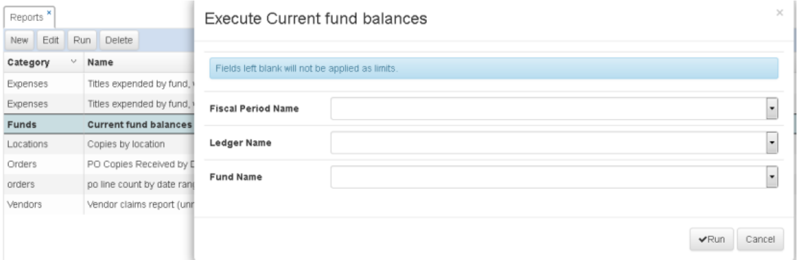
13.12 Acquisitions Reports

13.12.1 Running Reports

Certain reports are delivered with the system. You can run them by selecting Reports in the sidebar menu, clicking the report name you want, and then clicking Run.

Category	Name	Params	Colum…	Created	Owner
Expenses	Titles expended by fund, with summary funds	5	11	2/6/2017	System Gener…
Expenses	Titles expended by fund, without summary funds	5	11	2/6/2017	System Gener…
Funds	**Current fund balances**	**3**	**8**	**2/6/2017**	**System Gene…**
Locations	Copies by location	2	7	2/6/2017	System Gener…
Orders	PO Copies Received by Date Range	3	10	2/6/2017	System Gener…
orders	po line count by date range	2	8	2/6/2017	System Gener…
Schema	Table Schema	0	3	3/10/2017	System Gener…
Vendors	Vendor claims report (unreceived items)	4	12	2/6/2017	System Gener…

You may be prompted to enter several parameters, depending on the type of report. For Current Fund Balances, the user is prompted to enter the fiscal period, ledger name, and fund name. Leaving any of the fields blank will run the report against all entries.



Execute Current fund balances

Fields left blank will not be applied as limits.

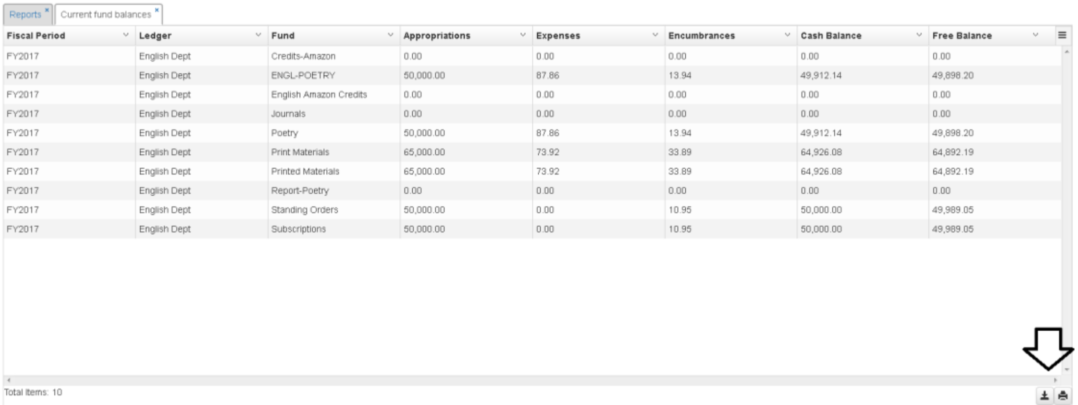
Fiscal Period Name

Ledger Name

Fund Name

NOTE: Dates should always be entered in YYYY-MM-DD format.

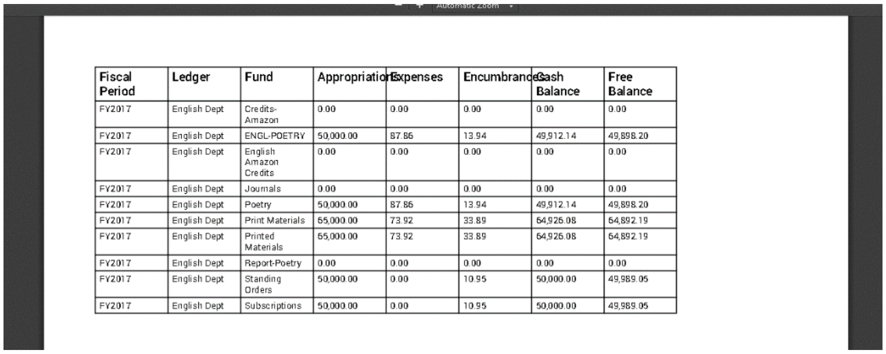
The report output will show on the screen.



Fiscal Period	Ledger	Fund	Appropriations	Expenses	Encumbrances	Cash Balance	Free Balance
FY2017	English Dept	Credits-Amazon	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	ENGL-POETRY	50,000.00	87.86	13.94	49,912.14	49,898.20
FY2017	English Dept	English Amazon Credits	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Journals	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Poetry	50,000.00	87.86	13.94	49,912.14	49,898.20
FY2017	English Dept	Print Materials	65,000.00	73.92	33.89	64,926.08	64,892.19
FY2017	English Dept	Printed Materials	65,000.00	73.92	33.89	64,926.08	64,892.19
FY2017	English Dept	Report-Poetry	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Standing Orders	50,000.00	0.00	10.95	50,000.00	49,989.05
FY2017	English Dept	Subscriptions	50,000.00	0.00	10.95	50,000.00	49,989.05

Total Items: 10

You now have two buttons at lower right which allow you to either download the output or print it. The Print button produces a .pdf in a new browser window:



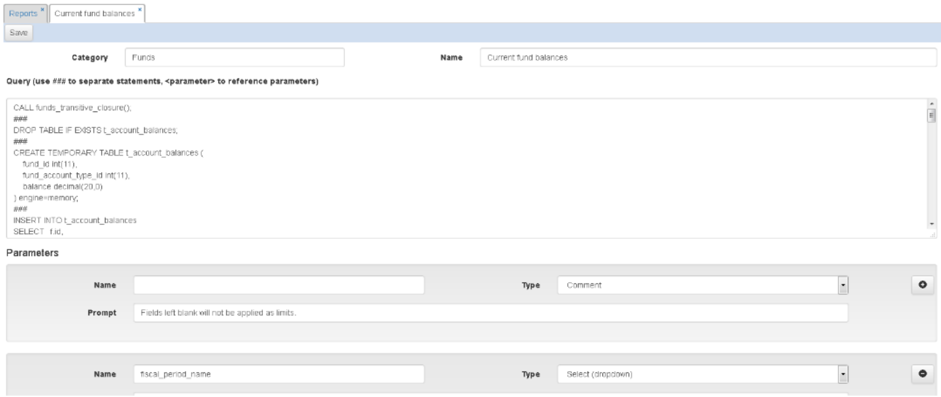
Fiscal Period	Ledger	Fund	Appropriations	Expenses	Encumbrances	Cash Balance	Free Balance
FY2017	English Dept	Credits-Amazon	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	ENGL-POETRY	50,000.00	87.86	13.94	49,912.14	49,898.20
FY2017	English Dept	English Amazon Credits	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Journals	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Poetry	50,000.00	87.86	13.94	49,912.14	49,898.20
FY2017	English Dept	Print Materials	65,000.00	73.92	33.89	64,926.08	64,892.19
FY2017	English Dept	Printed Materials	65,000.00	73.92	33.89	64,926.08	64,892.19
FY2017	English Dept	Report-Poetry	0.00	0.00	0.00	0.00	0.00
FY2017	English Dept	Standing Orders	50,000.00	0.00	10.95	50,000.00	49,989.05
FY2017	English Dept	Subscriptions	50,000.00	0.00	10.95	50,000.00	49,989.05

The Download button will save the report output as a .csv file. You can then open it in Excel and manipulate the data as desired.

13.12.2 Creating/Editing Reports

You now have the ability to create your own SQL reports, or edit existing reports. Use the buttons at the top of the Reports screen:

To edit an existing report, click on the title and then click Edit. It will open in an edit screen and you can make modifications:



Category: Funds

Name: Current fund balances

Query (use ### to separate statements, <parameter> to reference parameters)

```
CALL funds_transitive_closure();
###
DROP TABLE IF EXISTS t_account_balances;
###
CREATE TEMPORARY TABLE t_account_balances (
   fund_id int(11),
   fund_account_type_id int(11),
   balance decimal(20,0)
) engine=memory;
###
INSERT INTO t_account_balances
SELECT  f.id,
```

Name:

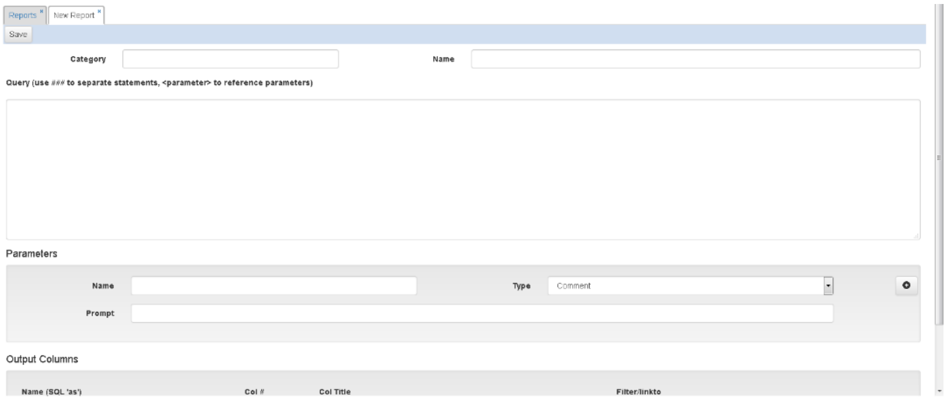
Type: Comment

Prompt: Fields left blank will not be applied as limits.

Name: fiscal_period_name

Type: Select (dropdown)

Make your changes and save. To create a new report, click the New button.



Type: Comment

The syntax is rather specialized, and the table structure is different from the regular catalog reports. Creating or editing reports will require some expert knowledge. You can get some ideas by looking at the existing reports. There is also a delivered report named Table Schema which will list the tables and fieldnames:

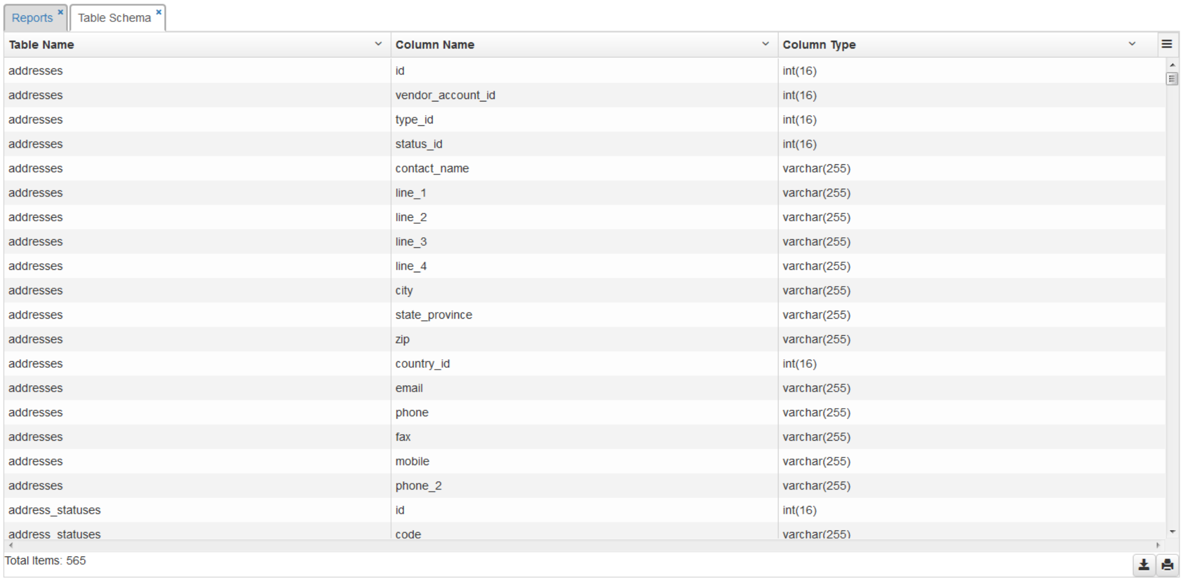


Table Name	Column Name	Column Type
addresses	id	int(16)
addresses	vendor_account_id	int(16)
addresses	type_id	int(16)
addresses	status_id	int(16)
addresses	contact_name	varchar(255)
addresses	line_1	varchar(255)
addresses	line_2	varchar(255)
addresses	line_3	varchar(255)
addresses	line_4	varchar(255)
addresses	city	varchar(255)
addresses	state_province	varchar(255)
addresses	zip	varchar(255)
addresses	country_id	int(16)
addresses	email	varchar(255)
addresses	phone	varchar(255)
addresses	fax	varchar(255)
addresses	mobile	varchar(255)
addresses	phone_2	varchar(255)
address_statuses	id	int(16)
address_statuses	code	varchar(255)

Total Items: 565

If you want to create your own reports, you'll need to understand where the data lives and the relationship between tables.

13.12.3 Deleting Reports

You can also delete reports, but we do not recommend deleting any of the delivered reports. Only delete reports you’ve created.

13.13 Hotkeys

On the sidebar menu, the Hotkeys section shows keyboard shortcuts that have been added to the system:

Navigation Tabs
alt+⇧+o - Orders Tab
alt+⇧+r - Receive Tab
alt+⇧+i - Invoices Tab
alt+⇧+m - Cr. Memos Tab
alt+⇧+v - Vendors Tab
alt+⇧+f - Funds Tab
alt+⇧+q - Pur. Req. Tab
alt+⇧+e - Reports Tab
alt+⇧+L - Locations Tab
alt+⇧+t - Templates Tab
alt+⇧+y - Sysprefs Tab
alt+⇧+g - Srch. Targ. Tab

Search Bar
C+f - Search
C+⇧+f + - Adv Search
C+⇧+f - - Basic Search
C+⇧+f o - Orders Search
C+⇧+f i - Invoices Search
C+⇧+f m - CM Search
C+⇧+f v - Vendors Search

Main Panel

Sub Panel
? - Toggle hotkey menu

You can use these as desired instead of mouse clicks.

13.14 Rollover

Rollover is the process of closing one fiscal year and beginning the next. There are a series of steps, and they must be performed in order. The procedures have changed slightly from earlier versions, so read this section carefully.

13.14.1 Audit

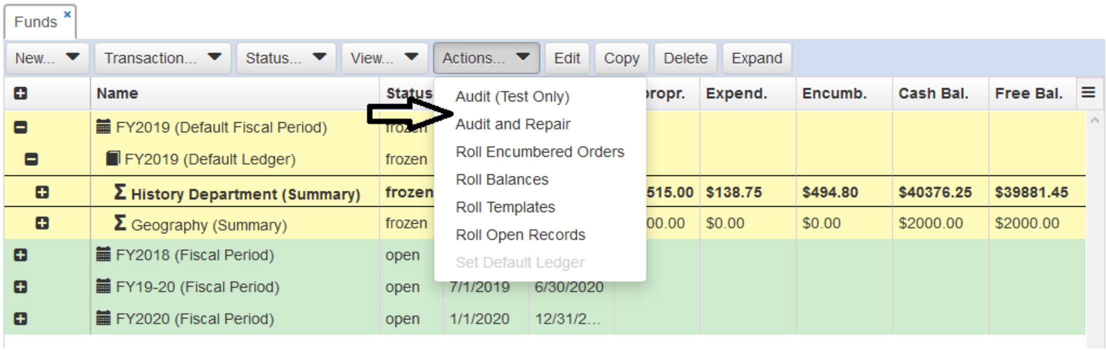
NOTE: Audit is documented as part of the rollover process, but can be run at any time.

The audit step examines current funds and makes sure they match purchase orders. An audit is no longer required for rollover, but it is **strongly recommended**. Audits used to have to be performed on request at the system level. Sites can now run audits at any time through the interface. It will not hurt anything to run an audit any time, or run it more than once. An audit can also be scheduled regularly as a cron job (contact Support Center to get that configured).

Audits may be run in either test only or repair mode. It is recommended you first run in test mode to see whether there are problems. An audit performs several phases in order. As some phases depend on the previous step completing, if an audit run in test-only mode encounters errors in a phase, the audit will terminate. Most problems can be automatically repaired. There are some problems which will necessarily require human review; if such a problem is encountered during a phase, the audit will always terminate, even when run in repair mode.

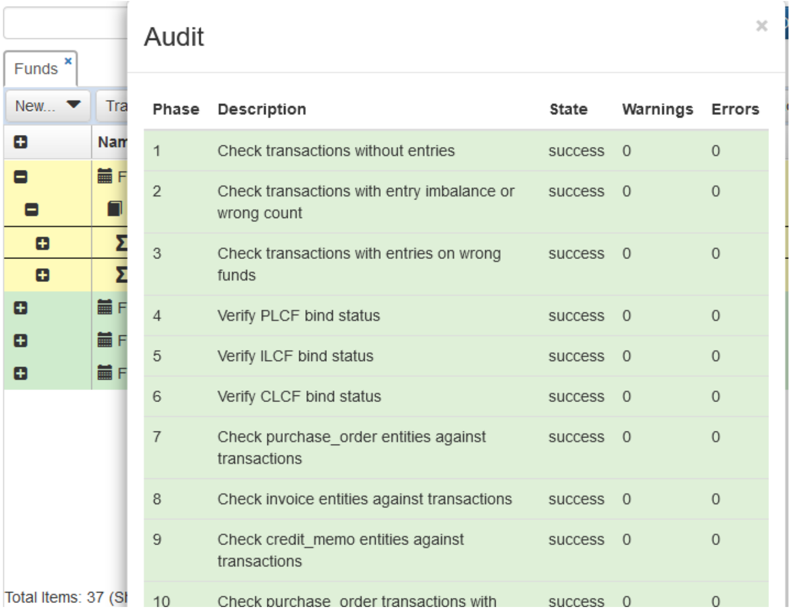
NOTE: some audit steps are time consuming on large databases. To prevent the front end from timing out, the audit backend will pause after a certain number of records are processed, and then the audit will continue where it left off.

To run in test mode, in the Funds tab, click Actions, then Audit (Test Only):



Name	Status			ropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2019 (Default Fiscal Period)	frozen							
FY2019 (Default Ledger)	frozen							
Σ History Department (Summary)	**frozen**			**515.00**	**$138.75**	**$494.80**	**$40376.25**	**$39881.45**
Σ Geography (Summary)	frozen			00.00	$0.00	$0.00	$2000.00	$2000.00
FY2018 (Fiscal Period)	open							
FY19-20 (Fiscal Period)	open	7/1/2019	6/30/2020					
FY2020 (Fiscal Period)	open	1/1/2020	12/31/2...					

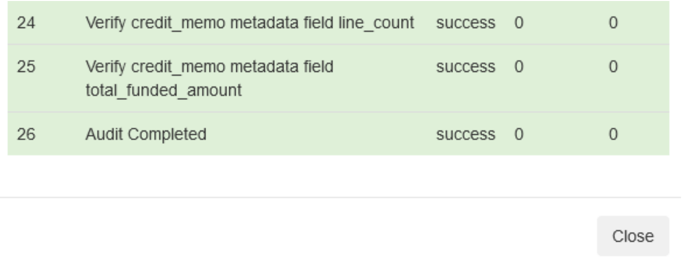
This opens a popup window that updates as each step is passed:



Audit

Phase	Description	State	Warnings	Errors
1	Check transactions without entries	success	0	0
2	Check transactions with entry imbalance or wrong count	success	0	0
3	Check transactions with entries on wrong funds	success	0	0
4	Verify PLCF bind status	success	0	0
5	Verify ILCF bind status	success	0	0
6	Verify CLCF bind status	success	0	0
7	Check purchase_order entities against transactions	success	0	0
8	Check invoice entities against transactions	success	0	0
9	Check credit_memo entities against transactions	success	0	0
10	Check purchase_order transactions with	success	0	0

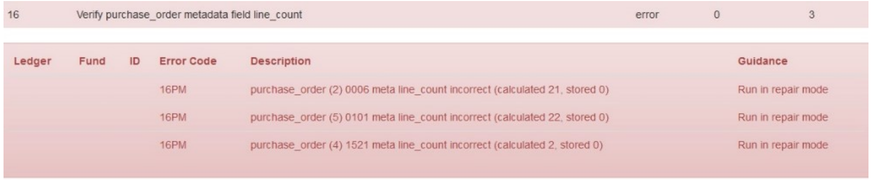
Scroll down and make sure that all the steps are successful. The last line should be "Audit Completed."



24	Verify credit_memo metadata field line_count	success	0	0
25	Verify credit_memo metadata field total_funded_amount	success	0	0
26	Audit Completed	success	0	0

If you see any problems, rerun the audit with the Audit and Repair step. As above, scroll through the popup and check the status of each step. If the process does not finish cleanly, open a Support Center ticket. Do not proceed with a rollover until the audit results are clean.

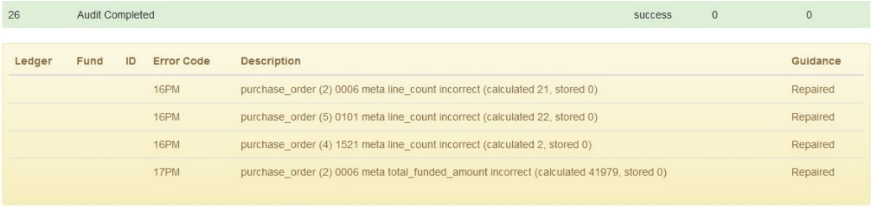
The audit can identify and repair certain problems, such as summary balances. If the audit can repair a problem, the test mode run will recommend running in repair mode:



16	Verify purchase_order metadata field line_count	error	0	3

Ledger	Fund	ID	Error Code	Description	Guidance
			16PM	purchase_order (2) 0006 meta line_count incorrect (calculated 21, stored 0)	Run in repair mode
			16PM	purchase_order (5) 0101 meta line_count incorrect (calculated 22, stored 0)	Run in repair mode
			16PM	purchase_order (4) 1521 meta line_count incorrect (calculated 2, stored 0)	Run in repair mode

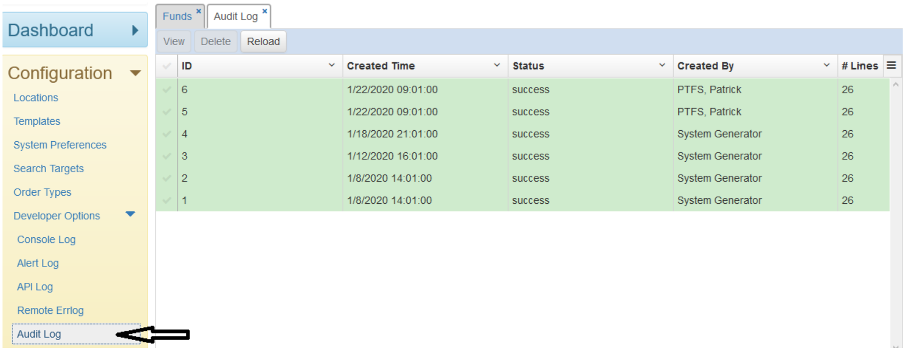
Doing that will fix the problem:



26	Audit Completed	success	0	0

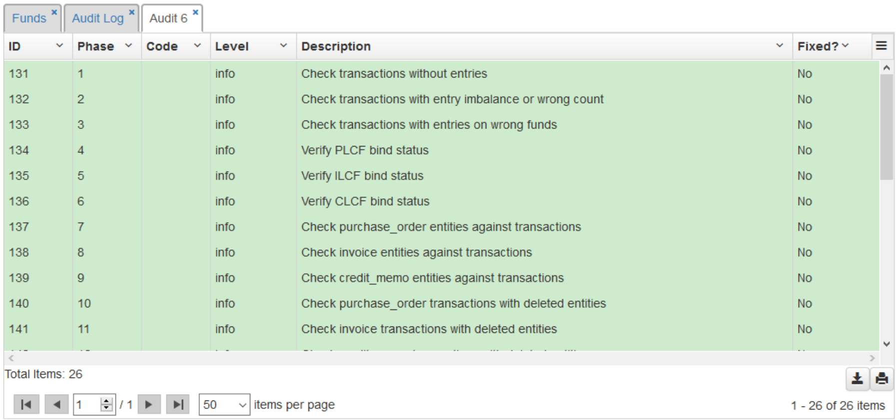
Ledger	Fund	ID	Error Code	Description	Guidance
			16PM	purchase_order (2) 0006 meta line_count incorrect (calculated 21, stored 0)	Repaired
			16PM	purchase_order (5) 0101 meta line_count incorrect (calculated 22, stored 0)	Repaired
			16PM	purchase_order (4) 1521 meta line_count incorrect (calculated 2, stored 0)	Repaired
			17PM	purchase_order (2) 0006 meta total_funded_amount incorrect (calculated 41979, stored 0)	Repaired

All audit runs and results are logged; the log is available under Configuration → Developer Options → Audit Log. Double-click on an audit or click View to see the details.



ID	Created Time	Status	Created By	# Lines
6	1/22/2020 09:01:00	success	PTFS, Patrick	26
5	1/22/2020 09:01:00	success	PTFS, Patrick	26
4	1/18/2020 21:01:00	success	System Generator	26
3	1/12/2020 16:01:00	success	System Generator	26
2	1/8/2020 14:01:00	success	System Generator	26
1	1/8/2020 14:01:00	success	System Generator	26

Each detail entry includes the phase, error code (which can be reported to developers), error level, description, and whether or not the problem was repaired. Additional data gathered, but not made available via the frontend, includes internal DB object references, as well as the SQL command(s) that were, or would be, used to repair the problem. Audit runs and detail entries are color-coded according to severity: cyan (audit run started but not completed), green (info/ok), yellow (warning/repaired), or red (error encountered, either not repaired or irreparable).



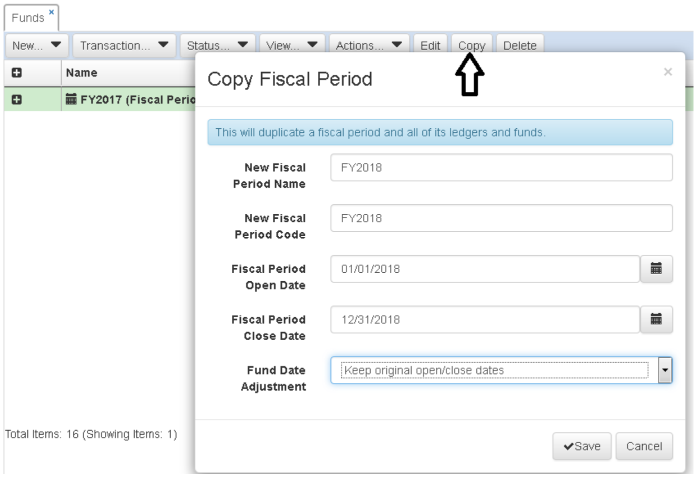
ID	Phase	Code	Level	Description	Fixed?
131	1		info	Check transactions without entries	No
132	2		info	Check transactions with entry imbalance or wrong count	No
133	3		info	Check transactions with entries on wrong funds	No
134	4		info	Verify PLCF bind status	No
135	5		info	Verify ILCF bind status	No
136	6		info	Verify CLCF bind status	No
137	7		info	Check purchase_order entities against transactions	No
138	8		info	Check invoice entities against transactions	No
139	9		info	Check credit_memo entities against transactions	No
140	10		info	Check purchase_order transactions with deleted entities	No
141	11		info	Check invoice transactions with deleted entities	No

Total Items: 26

You can delete entire audit runs (from the Audit Log tab, Delete button), but you cannot delete or modify individual audit run entries.

13.14.2 Copy Current Fiscal Period and Ledgers to New

There are two ways to create the fund setup for the new fiscal period. If you want to keep the same basic fund structures, the easiest is to copy your current fiscal period to create a new one (previously you had to create this separately). Click on your current fiscal period and then click Copy.



This will duplicate a fiscal period and all of its ledgers and funds.

New Fiscal Period Name: FY2018

New Fiscal Period Code: FY2018

Fiscal Period Open Date: 01/01/2018

Fiscal Period Close Date: 12/31/2018

Fund Date Adjustment: Keep original open/close dates

Give it a name and a date range. Fund Date Adjustment governs how the fund open and close dates are adjusted when a fund is copied from one fiscal period to another. The options are:

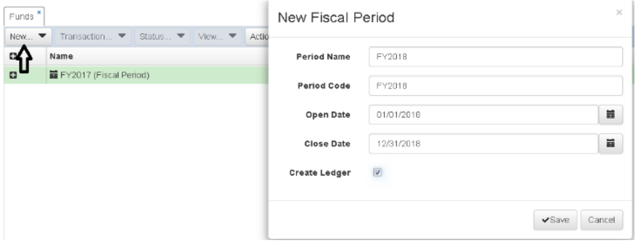
- Don't set open/close dates – will leave the open and close dates of all funds blank. You can then go through and set them yourself.
- Keep original open/close dates – will keep them as they were in the previous fiscal period. Again, you would want to go through the funds and adjust them yourself.
- Set to new fiscal period's open/close dates – means the funds will inherit the fiscal period's open and close dates. This is a good option if most or all of your funds open and close at the start and end of your fiscal year.
- Match fiscal period year, keep mo/dy – means that the month and day of a fund are the same as the fund had in the old fiscal period, but the year is updated. So for example a fund that opens June 12th, 2017 copied to a fiscal period with a start date in 2018 would then open in June 12, 2018.
- Proportional to fiscal period start date – would keep the same number of days relative to the fiscal period start. For example, if you have a Jan 1 2017-Dec 31 2017 fiscal period, and a fund starting 30 days into the fiscal year, then you copy to a fiscal period May 1 2018-April 30 2019, the new fund would start 30 days after May 1 2018.

IMPORTANT: Do NOT at this stage delete, add, or change any funds in the new fiscal period. You MUST finish the entire rollover process first. Once rollover is finished, you can delete funds as long as there is no activity on the new fund (i.e., delete now, before you place any new orders.)

13.14.3 Manually Create Fiscal Period and Copy Fund Structure

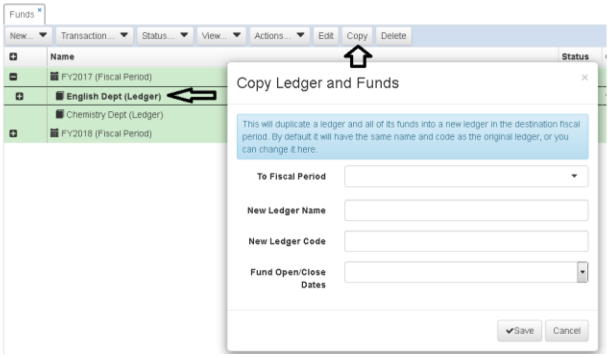
Copying everything at once (above) is easier, but you can still follow the earlier procedure of manually creating a new fiscal period and then individually copying ledgers. See sections 13.1.2.1 Fiscal Period and

13.1.2.2 Ledgers for details on how to manually create the fiscal period and the first ledger. Do not create funds under the default ledger.



Period Name: FY2018
Period Code: FY2018
Open Date: 01/01/2018
Close Date: 12/31/2018
Create Ledger: ☑

Then copy the current year’s fund structure. For each ledger, click on the ledger for the current year, then click the Copy button:



This will duplicate a ledger and all of its funds into a new ledger in the destination fiscal period. By default it will have the same name and code as the original ledger, or you can change it here.

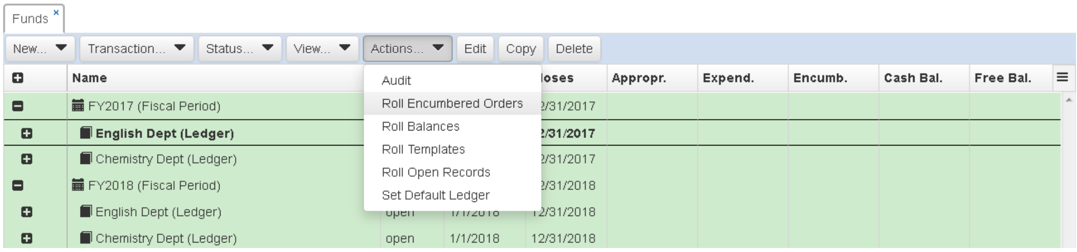
Select the new fiscal period. This step copies the entire fund structure from the current year to the new year. It does not copy any money/allocations. See above for the options under Fund Open/Close Dates.

If you have multiple ledgers, you must copy each one to the new fiscal year. If you don’t plan to use a ledger in the new year, you can omit the step of copying it.

IMPORTANT: Do NOT at this stage delete, add, or change any funds in the new fiscal period. You MUST finish the entire rollover process first. Once rollover is finished, you can delete funds as long as there is no activity on the new fund (i.e., delete now, before you place any new orders.)

13.14.4 Rollover Steps

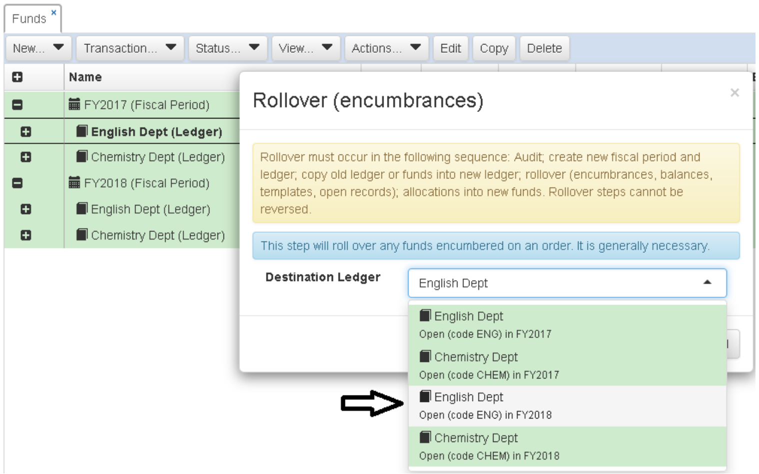
After you have your new fiscal period and ledger/fund structure in place, click on each ledger in the previous fiscal period, then click the Actions button. There are several steps and you must do them in order for each ledger. Each step will bring up one (or possibly more) confirmation screens.



You can either go through all the steps in one ledger, then proceed to the next ledger, or you can do each step for each ledger, then move on to the next step for each ledger. It doesn't matter, as long as the steps are done in order for each ledger.

13.14.4.1 Roll Encumbered Orders

The first step rolls over orders which have been approved but not yet received/invoiced. Click on your ledger name, the Actions, Roll Encumbered Orders



Rollover (encumbrances)

Rollover must occur in the following sequence: Audit; create new fiscal period and ledger; copy old ledger or funds into new ledger; rollover (encumbrances, balances, templates, open records); allocations into new funds. Rollover steps cannot be reversed.

This step will roll over any funds encumbered on an order. It is generally necessary.

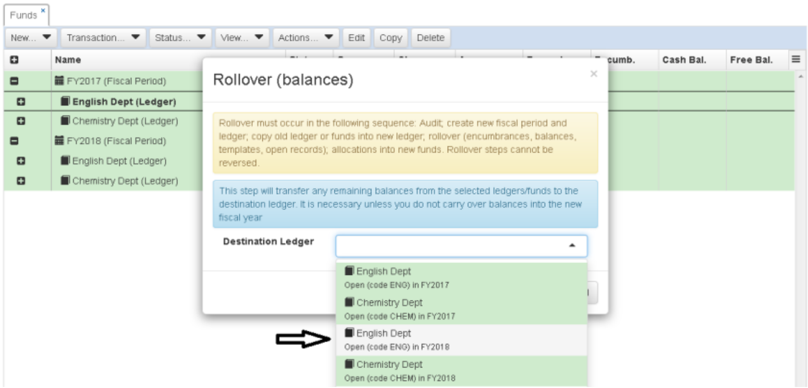
Destination Ledger English Dept

Since the ledger names are the same, be sure you select the new fiscal period as your destination.

You'll need to select the new year's ledger. The system will then change any open orders to use the new fiscal year's funds. At this point, your funds will show a negative balance because you haven't transferred the money yet.

13.14.4.2 Roll Balances

This step moves any remaining free money from the old year into the new year's funds. Again, click on each ledger from the current year in turn, then click Actions, Roll Balances.



Rollover (balances)

Rollover must occur in the following sequence: Audit; create new fiscal period and ledger; copy old ledger or funds into new ledger; rollover (encumbrances, balances, templates, open records); allocations into new funds. Rollover steps cannot be reversed.

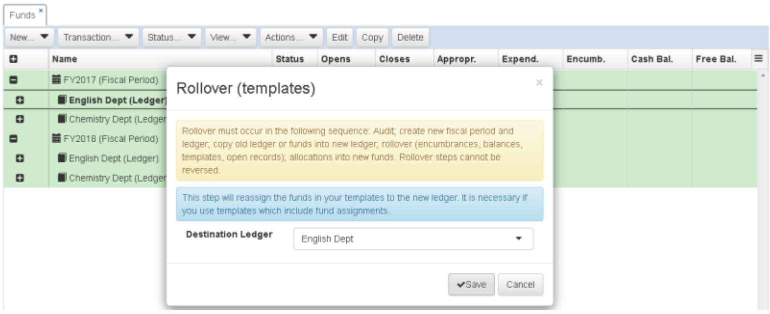
This step will transfer any remaining balances from the selected ledgers/funds to the destination ledger. It is necessary unless you do not carry over balances into the new fiscal year

Destination Ledger

Select the destination fiscal period/ledger. As above, be sure to choose the correct fiscal year since the names are the same.

13.14.4.3 Templates

If you have set up any templates (see that section under Acquisitions Setup), this step changes any fund selections to the new year’s funds. As above, click on each ledger from the current year in turn, then click Actions, Roll Templates.



Rollover must occur in the following sequence: Audit; create new fiscal period and ledger; copy old ledger or funds into new ledger; rollover (encumbrances, balances, templates, open records); allocations into new funds. Rollover steps cannot be reversed.

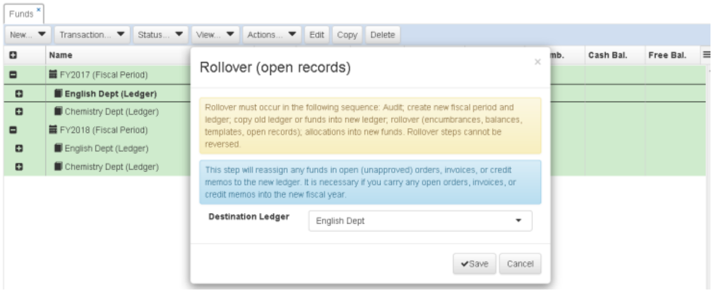
This step will reassign the funds in your templates to the new ledger. It is necessary if you use templates which include fund assignments.

Destination Ledger English Dept

Select the destination fiscal period/ledger. As above, be sure to choose the correct fiscal year since the names are the same.

13.14.5 Roll Open Records

This is a new step – it will roll over any orders which have not yet been approved. As above, click on each ledger from the current year in turn, then click Actions, Roll Open Records.



Rollover must occur in the following sequence: Audit; create new fiscal period and ledger; copy old ledger or funds into new ledger; rollover (encumbrances, balances, templates, open records); allocations into new funds. Rollover steps cannot be reversed.

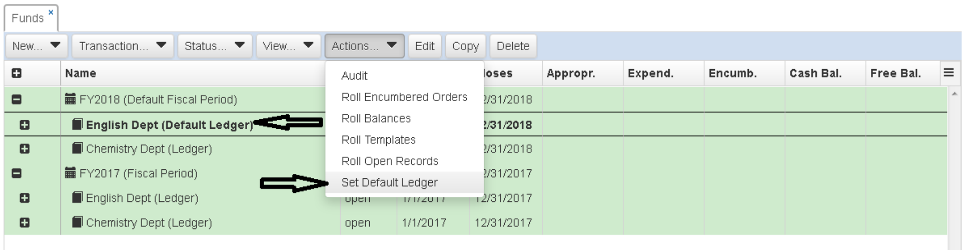
This step will reassign any funds in open (unapproved) orders, invoices, or credit memos to the new ledger. It is necessary if you carry any open orders, invoices, or credit memos into the new fiscal year.

Destination Ledger English Dept

Select the destination fiscal period/ledger. As above, be sure to choose the correct fiscal year since the names are the same.

13.14.6 Set Default Ledger

The final step is to set the default ledger for the new fiscal period. Unlike the previous steps, click on the ledger in the NEW fiscal period, then click Actions, Set Default Ledger. This step does not produce a popup – it just changes the fund display:



Name			loses	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2018 (Default Fiscal Period)			2/31/2018					
English Dept (Default Ledger)			**2/31/2018**					
Chemistry Dept (Ledger)			2/31/2018					
FY2017 (Fiscal Period)			2/31/2017					
English Dept (Ledger)			12/31/2017					
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

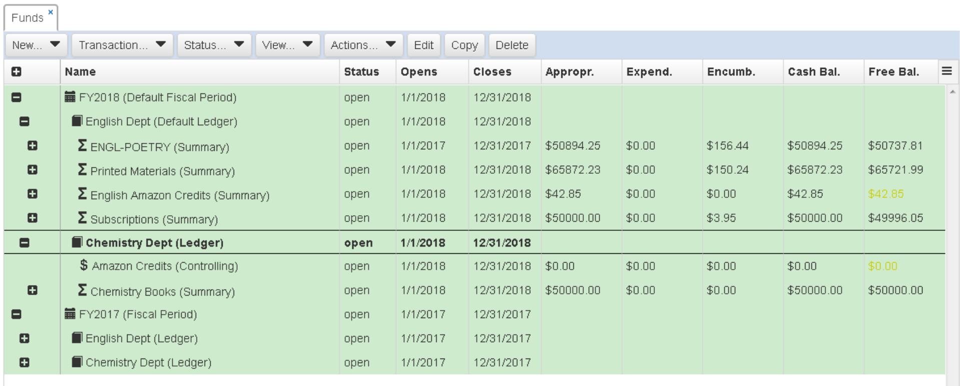
You only do this step once, to set the default for the new fiscal period. You do not repeat it for each ledger because that would change the default. Just pick the ledger you want as your default and set it.

Note that it also moves the new fiscal period to the top of the funds display. The default ledger is the first one shown in the funds table, and in a fund selection pulldown, funds from the default ledger will be shown first.

13.14.7 Allocate New Funds and Change/Delete Funds

After completing the rollover steps above, you can go into each fund. Use the Transactions, Initial Allocation function to add new money to the fund. You can also now delete any unused funds, or create new ones as desired – this MUST be done before you start placing orders in the new year.

Note that the fund starts out with any money rolled over from the previous fiscal period; add the new year's amount to that.



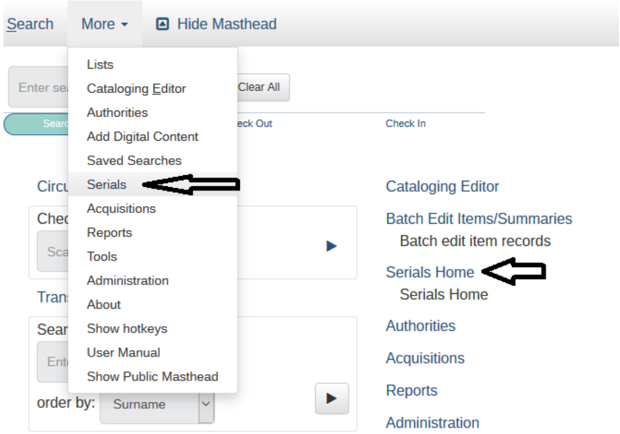
Name	Status	Opens	Closes	Appropr.	Expend.	Encumb.	Cash Bal.	Free Bal.
FY2018 (Default Fiscal Period)	open	1/1/2018	12/31/2018					
English Dept (Default Ledger)	open	1/1/2018	12/31/2018					
Σ ENGL-POETRY (Summary)	open	1/1/2017	12/31/2017	$50894.25	$0.00	$156.44	$50894.25	$50737.81
Σ Printed Materials (Summary)	open	1/1/2018	12/31/2018	$65872.23	$0.00	$150.24	$65872.23	$65721.99
Σ English Amazon Credits (Summary)	open	1/1/2018	12/31/2018	$42.85	$0.00	$0.00	$42.85	$42.85
Σ Subscriptions (Summary)	open	1/1/2018	12/31/2018	$50000.00	$0.00	$3.95	$50000.00	$49996.05
Chemistry Dept (Ledger)	**open**	**1/1/2018**	**12/31/2018**					
$ Amazon Credits (Controlling)	open	1/1/2018	12/31/2018	$0.00	$0.00	$0.00	$0.00	$0.00
Σ Chemistry Books (Summary)	open	1/1/2018	12/31/2018	$50000.00	$0.00	$0.00	$50000.00	$50000.00
FY2017 (Fiscal Period)	open	1/1/2017	12/31/2017					
English Dept (Ledger)	open	1/1/2017	12/31/2017					
Chemistry Dept (Ledger)	open	1/1/2017	12/31/2017					

14. Serials

This feature allows libraries to receive magazine/journal issues. Individual item records may be created for each issue (for circulation and holds) if desired. Staff can link serial subscriptions to a vendor record and generate claims notices to vendors for damaged issues, or issues not received.

There are new granular permissions in the serials group for working with serials: base (Create, update, or delete serials) and template (Create, update, or delete serials-related templates). Base permissions can be restricted to a particular branch if desired.

A link to the Serials module appears on the main staff menu or in the More dropdown:



In working with Serials, it is important to understand record structure. Six key pieces of functionality are equated with Serials control:

1. Bibliographic Record *
2. Publication Record *
3. Subscription Record *
4. Issue Records
5. MARC Holdings Record
6. Item Records

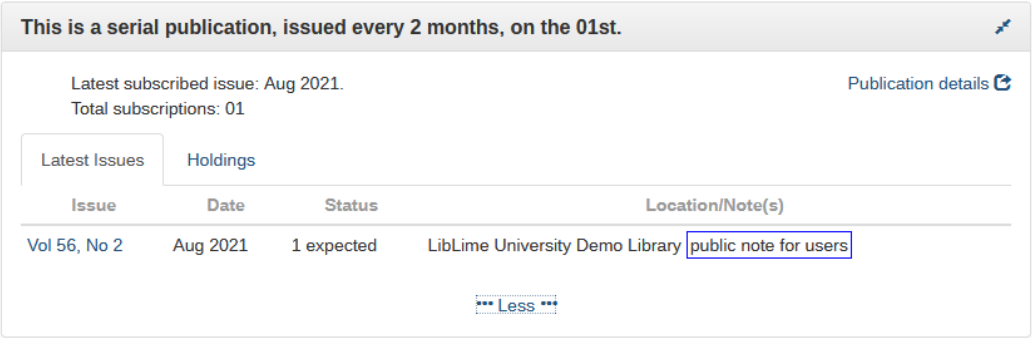
The first three are required; issue records are maintained in the serials module as issues are received, and MARC holdings and item records are optional.

A **MARC Bibliographic Record** is required prior to using Serials. It can be very brief.

The **Publication Record** is the top-level data point in the serials module. There should be only one publication record per title; multiple subscription records can be attached to this record. (This is a change from earlier modules, where individual subscriptions were the top-level records.) Publication patterns control the prediction for subscription checkin. For example, if a magazine uses volume numbers, copy numbers and is a monthly publication, the publication record will include all of this information. The system predicts future issues based on the information entered in the publication record.

The **Subscription Record** stores information about the library's subscription and the serial's publication pattern.

Issue Records reflect the individual physical issues received for each subscription. The issues are maintained in the serials module but can be displayed in the bibliographic record.

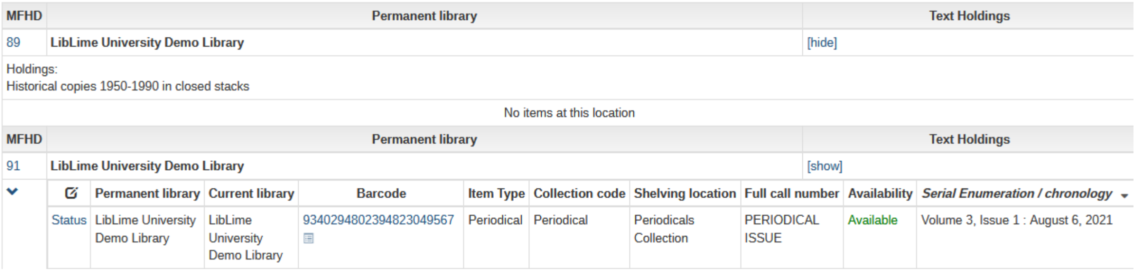


This is a serial publication, issued every 2 months, on the 01st.

Latest subscribed issue: Aug 2021.
Total subscriptions: 01

Issue	Date	Status	Location/Note(s)
Vol 56, No 2	Aug 2021	1 expected	LibLime University Demo Library public note for users

MARC Holdings Records allow the display of staff-entered free–text information in the Discovery Layer; for example, “Library retains current year only” or “Current issue on shelf. Later issues kept in basement”. If you set your subscription to create items, you can also have it automatically create a MARC Holdings Record (MFHD) – make sure the syspref SubscriptionHoldings is turned on.



MFHD	Permanent library	Text Holdings
89	LibLime University Demo Library	[hide]

Holdings:
Historical copies 1950-1990 in closed stacks

No items at this location

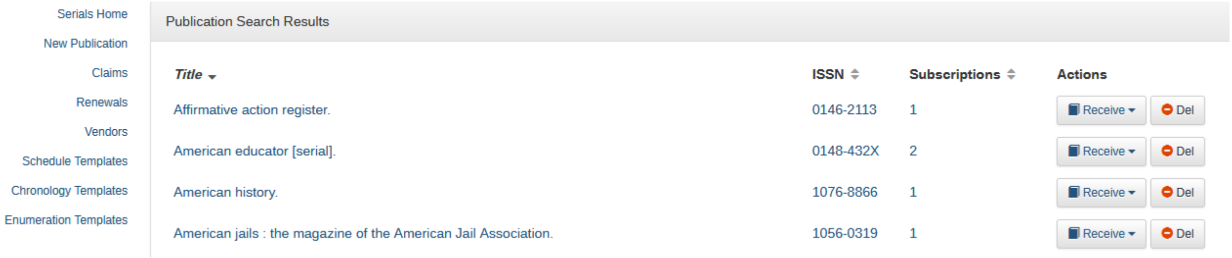
MFHD	Permanent library	Text Holdings
91	LibLime University Demo Library	[show]

	Permanent library	Current library	Barcode	Item Type	Collection code	Shelving location	Full call number	Availability	*Serial Enumeration / chronology*
Status	LibLime University Demo Library	LibLime University Demo Library	9340294802394823049567	Periodical	Periodical	Periodicals Collection	PERIODICAL ISSUE	Available	Volume 3, Issue 1 : August 6, 2021

Item Records are optional and are primarily used to circulate individual issues to patrons through the Circulation functionality. If you do not check out individual issues, you may not want to create item records. See the item in the second MARC Holdings record above for an example of a serial checkin creating an item in a MARC Holdings record.

14.1 Creating a Publication Record

The process begins with a publication record linked to a MARC bibliographic record. Go to the main serials menu:

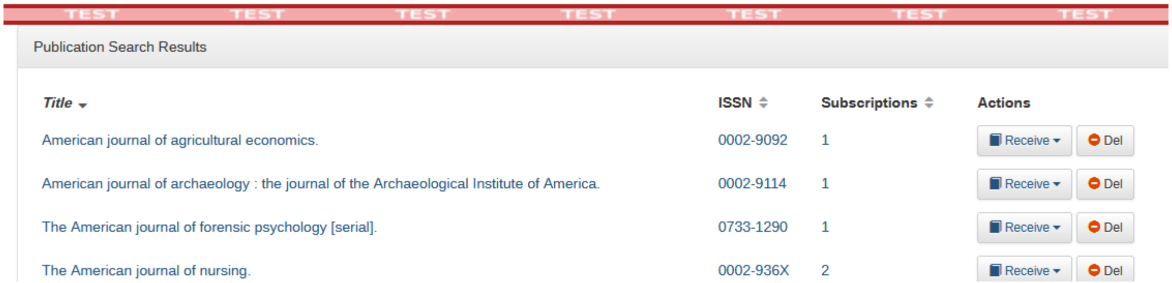


Title	ISSN	Subscriptions	Actions
Affirmative action register.	0146-2113	1	Receive Del
American educator [serial].	0148-432X	2	Receive Del
American history.	1076-8866	1	Receive Del
American jails : the magazine of the American Jail Association.	1056-0319	1	Receive Del

The home screen for serials shows all existing publication records. You can search existing publication records at the top. Clicking the right arrow next to the search box without entering a term, or clicking the

Serials Home tab again, will show all existing records. Enter a search term in the masthead to find existing publication records. The search uses the Solr title index, and the display shows subfields abnph for the 245, so that the appropriate title can be identified:

ISSN:
Title: journal

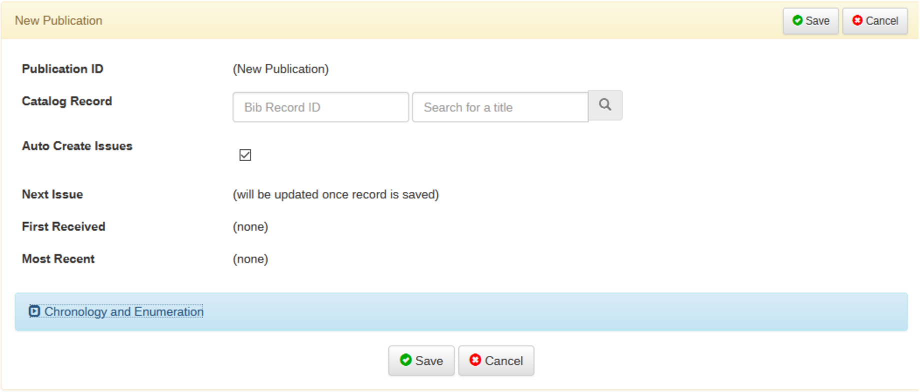


Publication Search Results

Title	ISSN	Subscriptions	Actions
American journal of agricultural economics.	0002-9092	1	Receive Del
American journal of archaeology : the journal of the Archaeological Institute of America.	0002-9114	1	Receive Del
The American journal of forensic psychology [serial].	0733-1290	1	Receive Del
The American journal of nursing.	0002-936X	2	Receive Del

From the home screen, you can also create a new publication record (the first step), manage claims, manage vendors, or manage templates for schedule, chronology, or enumeration.

Start the subscription process by going to the New Publication tab:



Publication ID (New Publication)

Catalog Record

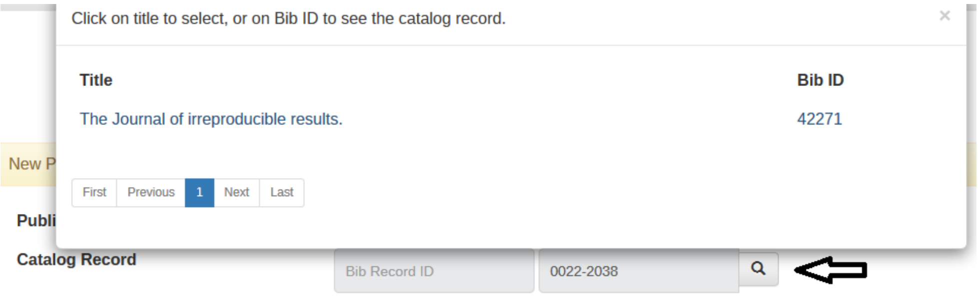
Auto Create Issues ☑

Next Issue (will be updated once record is saved)

First Received (none)

Most Recent (none)

You can search on the biblionumber (Bib Record ID field) if you know it. Otherwise, search for the record (by title, ISSN, etc.). A popup window shows search results. Click the title to select it (clicking the bib ID opens the title in a new browser window, so you can verify that it's the one you want).



Click on title to select, or on Bib ID to see the catalog record.

Title	Bib ID
The Journal of irreproducible results.	42271

Catalog Record 0022-2038

Once you've linked to the title, you will probably want to enable Auto Create Issues:

Auto Create Issues ☑

This means the system will automatically generate predicted issues at their expected dates (a system cron job named periodicals.pl runs overnight to create the new issues scheduled for that day). A system preference named SerialIssueAdvanceDays allows sites to specify that issue records should be created X days before their expected date; some periodicals arrive earlier than scheduled.

14.1.1 Chronology and Enumeration (Prediction Pattern)

Next, open the Chronology and Enumeration section. There are three parts here: the schedule pattern for this title, a section where you can manually adjust counters for titles with odd patterns, and the predicted issues based on your entries.

Catalog Record: 42271 The Journal of irreproducible

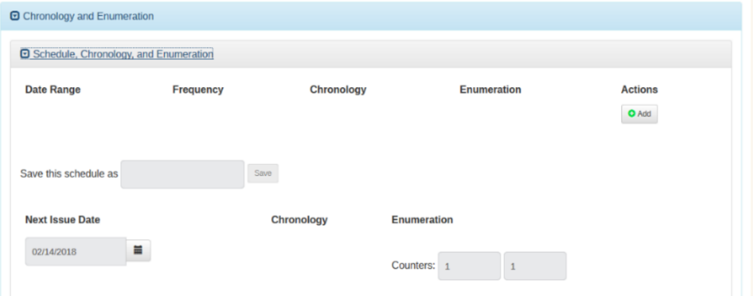
Auto Create Issues: Yes

Next Issue: (will be updated once record is saved)

First Received: (none)

Most Recent: (none)

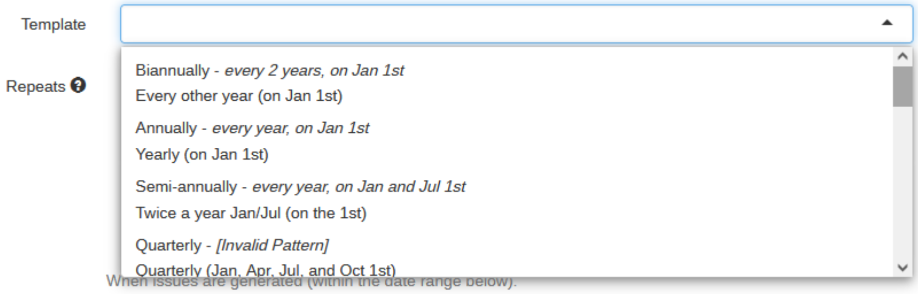
In the Schedule section, click Add to add a new pattern.



Next Issue Date: 02/14/2018

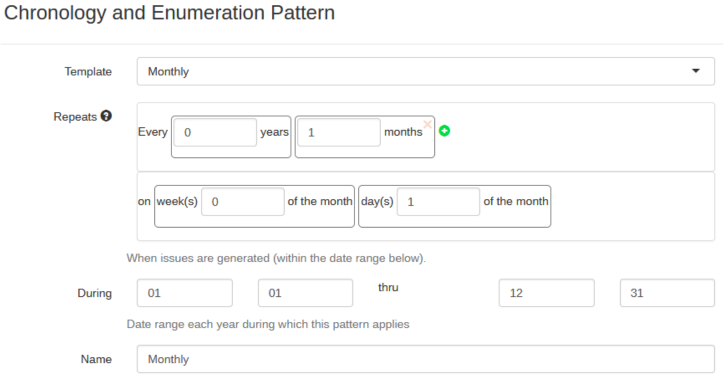
Counters: 1 1

This opens a popup window where you can choose from a number of predefined patterns, or create a new one. On the various edit screens throughout serials, a question mark icon will open a popup help screen for that entry.



Templates have been created for most standard patterns; choose one that matches your need, such as Monthly or Weekly. Then check the entries to make sure it's what you want. **NOTE: the first section,**

referring to date (such as every Monday, or the first day of the month), is the date the issue is published – the date that shows on the cover. It is NOT the date that you expect to receive the issue. Use the SerialIssueAdvanceDays syspref to create the expected issue based on when you expect to receive it.



Chronology and Enumeration Pattern

Template: Monthly

Repeats: Every 0 years 1 months

on week(s) 0 of the month day(s) 1 of the month

When issues are generated (within the date range below).

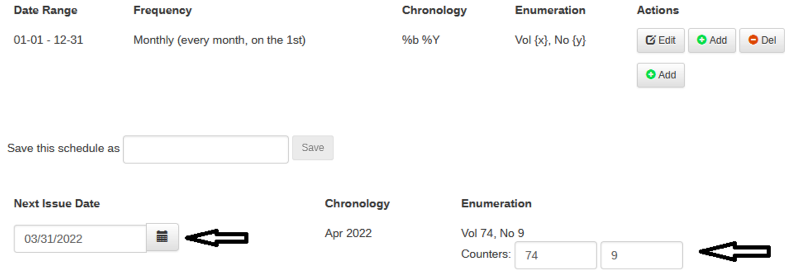
During: 01 01 thru 12 31

Date range each year during which this pattern applies

Name: Monthly

For example, you may need to change the expected date from the first of the month to the 15th of the month. You can also set up your own pattern for unusual titles – give it a title in the Save As field to save it for future use. Save the pattern when you're finished. **Note that "During" on this screen means that the pattern will apply during that period in the calendar – January to December, or January to June, or whatever. It is unrelated to the time range of your subscription**.

After saving, be sure to enter the next expected date and enumeration. This should be the next issue you expect to receive or check in:



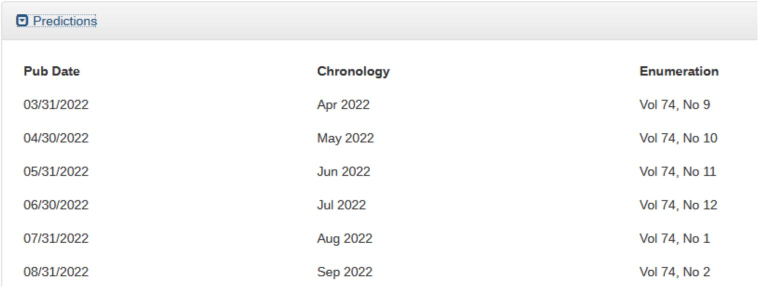
Date Range	Frequency	Chronology	Enumeration	Actions
01-01 - 12-31	Monthly (every month, on the 1st)	%b %Y	Vol {x}, No {y}	Edit Add Del Add

Save this schedule as: Save

Next Issue Date	Chronology	Enumeration
03/31/2022	Apr 2022	Vol 74, No 9 Counters: 74 9

14.1.2 Predictions

After saving your schedule, open the Predictions section (the third section) and you'll see the next several expected issues and numbering. Scroll down the list to check the pattern change when the year rolls over. Use this to check your pattern. Edit the pattern and adjust as needed. If your changes don't appear in the predictions, try refreshing by closing and opening that section of the screen.

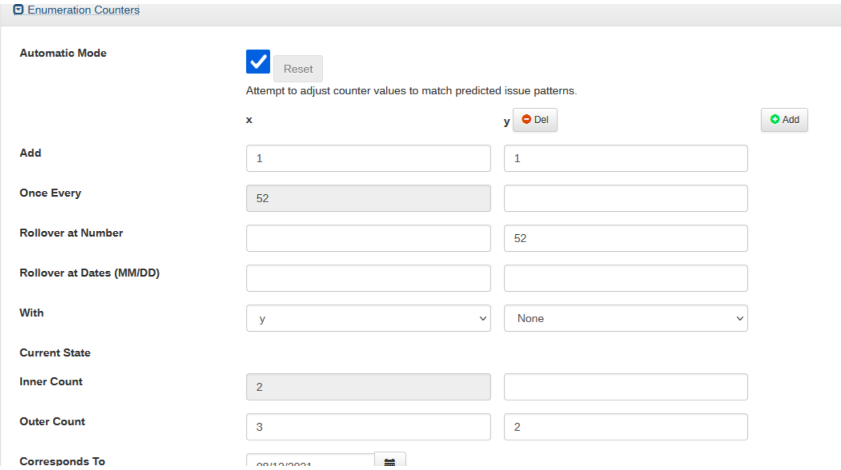


Predictions

Pub Date	Chronology	Enumeration
03/31/2022	Apr 2022	Vol 74, No 9
04/30/2022	May 2022	Vol 74, No 10
05/31/2022	Jun 2022	Vol 74, No 11
06/30/2022	Jul 2022	Vol 74, No 12
07/31/2022	Aug 2022	Vol 74, No 1
08/31/2022	Sep 2022	Vol 74, No 2

14.1.3 Enumeration Counters

The center section (Enumeration Counters) should be left alone for almost all of your publications. It should **only** be changed if you have a serial with a very unusual pattern; for example, one that doesn't roll over to a new volume or issue each year, or that rolls over in mid-year instead of in January.



Enumeration Counters

Automatic Mode ☑ Reset

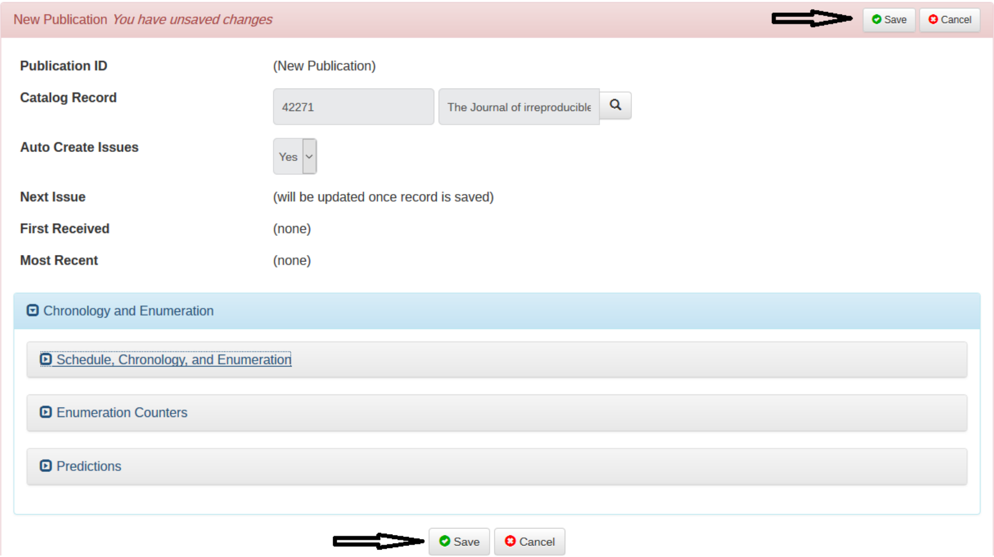
Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every	52	
Rollover at Number		52
Rollover at Dates (MM/DD)		
With	y	None
Current State		
Inner Count	2	
Outer Count	3	2
Corresponds To		

The default of "Automatic Mode" means the system will adjust the counters based on your pattern. This should be fine for most patterns – don't uncheck it. There are some examples below for particularly odd patterns (see section Editing the Enumeration Counters for Special Patterns).

14.1.4 Saving the Publication Record

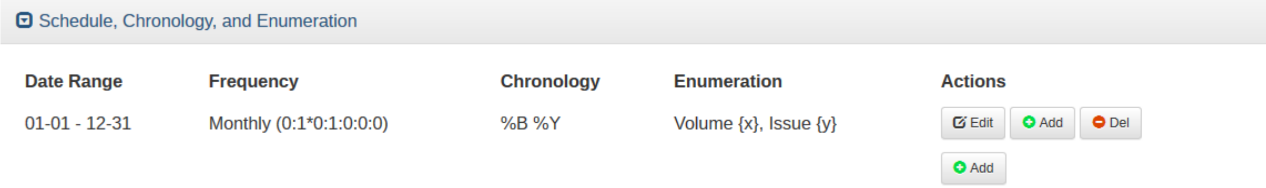
Be sure to save your publication record after you have everything configured. The screen will warn you that there are unsaved changes:


New Publication *You have unsaved changes*

Publication ID	(New Publication)
Catalog Record	42271 The Journal of irreproducible
Auto Create Issues	Yes
Next Issue	(will be updated once record is saved)
First Received	(none)
Most Recent	(none)

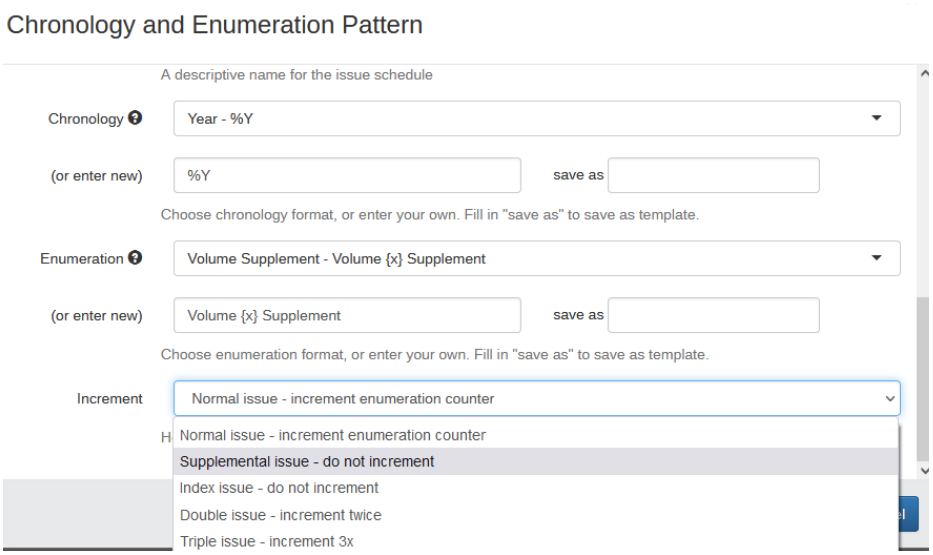
14.1.5 Setting up a Supplement

Frequently serials titles may have a regular subscription pattern, but also will issue occasional supplements. For titles where this is a scheduled issue, you can add a new schedule to your pattern. For example, this journal is set up as a monthly, but a supplement is expected in July. You can add a schedule for the supplement, but it must have the same start and end dates.


Schedule, Chronology, and Enumeration

Date Range	Frequency	Chronology	Enumeration	Actions
01-01 - 12-31	Monthly (0:1*0:1:0:0:0)	%B %Y	Volume {x}, Issue {y}	Edit Add Del
				Add

Click Add to add a new schedule, and set it up as a yearly to arrive in July. Use Supplement as the enumeration and chronology.



Chronology and Enumeration Pattern

A descriptive name for the issue schedule

Chronology: Year - %Y

(or enter new): %Y save as

Choose chronology format, or enter your own. Fill in "save as" to save as template.

Enumeration: Volume Supplement - Volume {x} Supplement

(or enter new): Volume {x} Supplement save as

Choose enumeration format, or enter your own. Fill in "save as" to save as template.

Increment: Normal issue - increment enumeration counter

- Normal issue - increment enumeration counter
- Supplemental issue - do not increment
- Index issue - do not increment
- Double issue - increment twice
- Triple issue - increment 3x

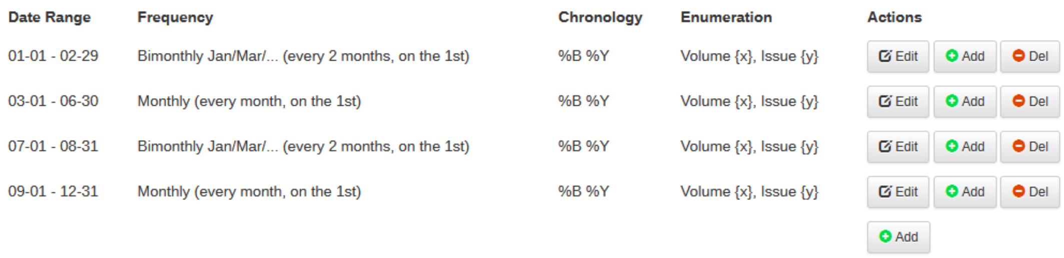
If the supplement should not increment the numbering, use the pulldown to select that option. When you save the pattern, the supplement will show in the list of predictions.

Pub Date	Chronology	Enumeration
03/31/2022	Apr 2022	Vol 74, No 9
04/30/2022	May 2022	Vol 74, No 10
05/31/2022	Jun 2022	Vol 74, No 11
06/30/2022	Jul 2022	Vol 74, No 12
06/30/2022	2022	Volume 75 Supplement
07/31/2022	Aug 2022	Vol 75, No 1

See under Receive section below for creating unexpected Supplement records when they arrive.

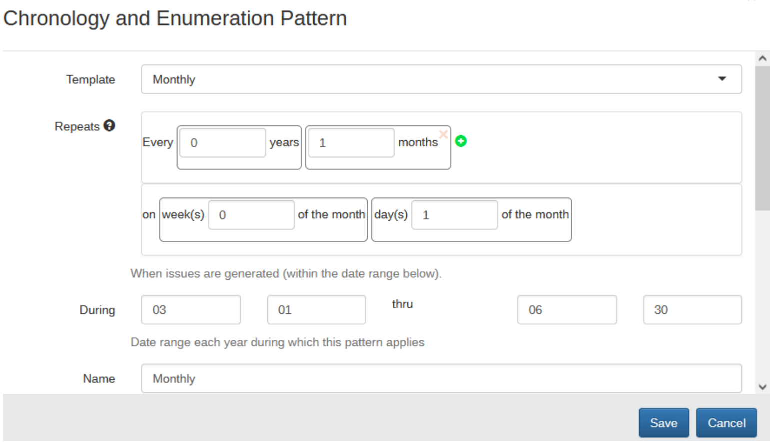
14.1.6 Irregular Patterns

A lot of serials have no regular pattern, or a pattern which doesn't fall neatly into the monthly or weekly schedule. These can be managed by creating several sets of schedules. For example, here is a serial which has 10 issues per year, with January/February and July/August combined. There are schedule entries for the two spans where one issue per month is expected, with those date ranges. Then there are entries for the two months where a combined issue is expected, set up as Bimonthly. Remember, the "During" date range is when this schedule should be applied during the year.



Date Range	Frequency	Chronology	Enumeration	Actions
01-01 - 02-29	Bimonthly Jan/Mar/... (every 2 months, on the 1st)	%B %Y	Volume {x}, Issue {y}	Edit Add Del
03-01 - 06-30	Monthly (every month, on the 1st)	%B %Y	Volume {x}, Issue {y}	Edit Add Del
07-01 - 08-31	Bimonthly Jan/Mar/... (every 2 months, on the 1st)	%B %Y	Volume {x}, Issue {y}	Edit Add Del
09-01 - 12-31	Monthly (every month, on the 1st)	%B %Y	Volume {x}, Issue {y}	Edit Add Del
				Add

The schedule for the Monthly sets looks like this:



Chronology and Enumeration Pattern

Template: Monthly

Repeats: Every 0 years 1 months

on week(s) 0 of the month day(s) 1 of the month

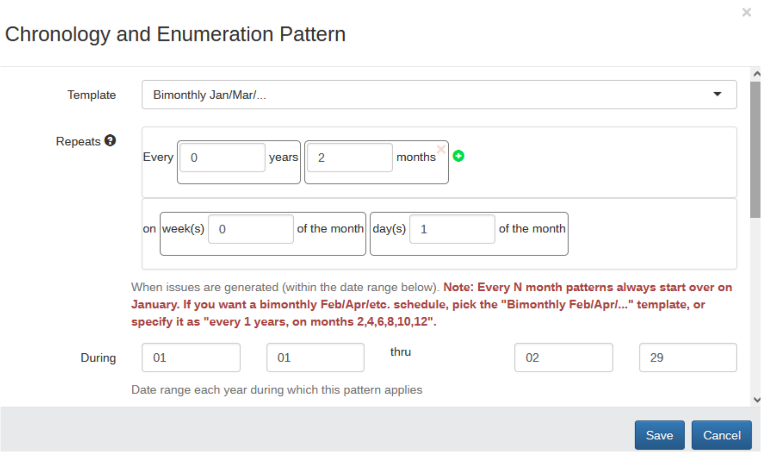
When issues are generated (within the date range below).

During: 03 01 thru 06 30

Date range each year during which this pattern applies

Name: Monthly

For the Bimonthly sets, it looks like this:



Chronology and Enumeration Pattern

Template: Bimonthly Jan/Mar/...

Repeats: Every 0 years 2 months

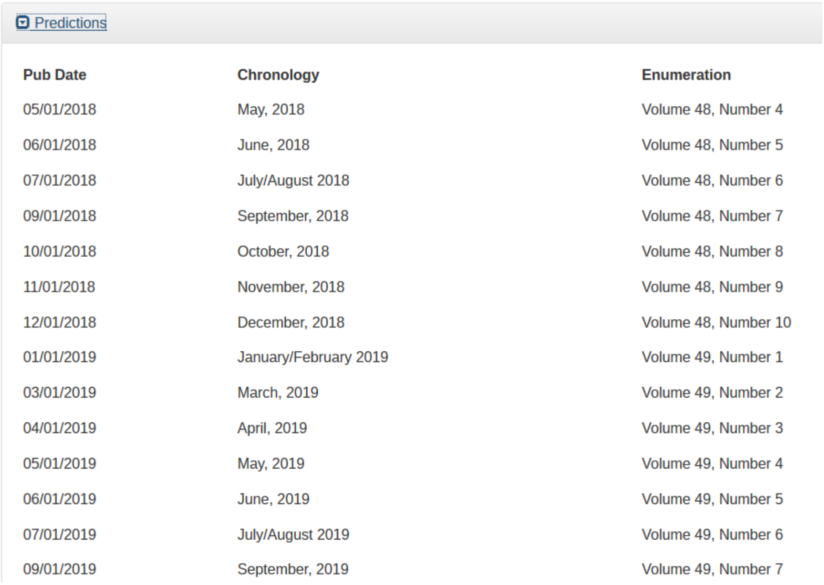
on week(s) 0 of the month day(s) 1 of the month

When issues are generated (within the date range below). **Note: Every N month patterns always start over on January. If you want a bimonthly Feb/Apr/etc. schedule, pick the "Bimonthly Feb/Apr/..." template, or specify it as "every 1 years, on months 2,4,6,8,10,12".**

During: 01 01 thru 02 29

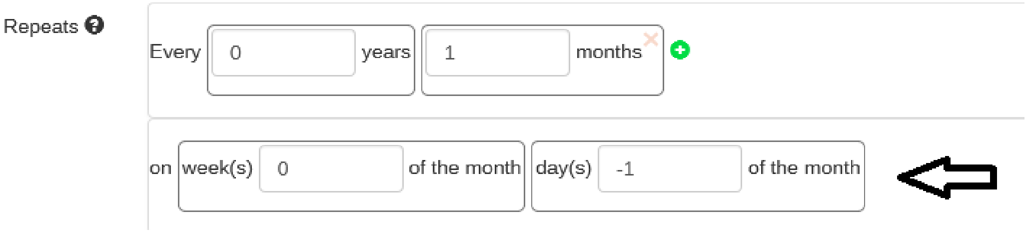
Date range each year during which this pattern applies

The resulting list of predictions has the monthly and bimonthly issues falling in their proper places and with the proper numbering:


Predictions

Pub Date	Chronology	Enumeration
05/01/2018	May, 2018	Volume 48, Number 4
06/01/2018	June, 2018	Volume 48, Number 5
07/01/2018	July/August 2018	Volume 48, Number 6
09/01/2018	September, 2018	Volume 48, Number 7
10/01/2018	October, 2018	Volume 48, Number 8
11/01/2018	November, 2018	Volume 48, Number 9
12/01/2018	December, 2018	Volume 48, Number 10
01/01/2019	January/February 2019	Volume 49, Number 1
03/01/2019	March, 2019	Volume 49, Number 2
04/01/2019	April, 2019	Volume 49, Number 3
05/01/2019	May, 2019	Volume 49, Number 4
06/01/2019	June, 2019	Volume 49, Number 5
07/01/2019	July/August 2019	Volume 49, Number 6
09/01/2019	September, 2019	Volume 49, Number 7

Here's another trick: If you have issues that always arrive on the last day of the month, instead of setting up separate entries to specify January 31, February 28, etc. you can do a monthly and use -1 for the day:


Repeats

Every 0 years 1 months

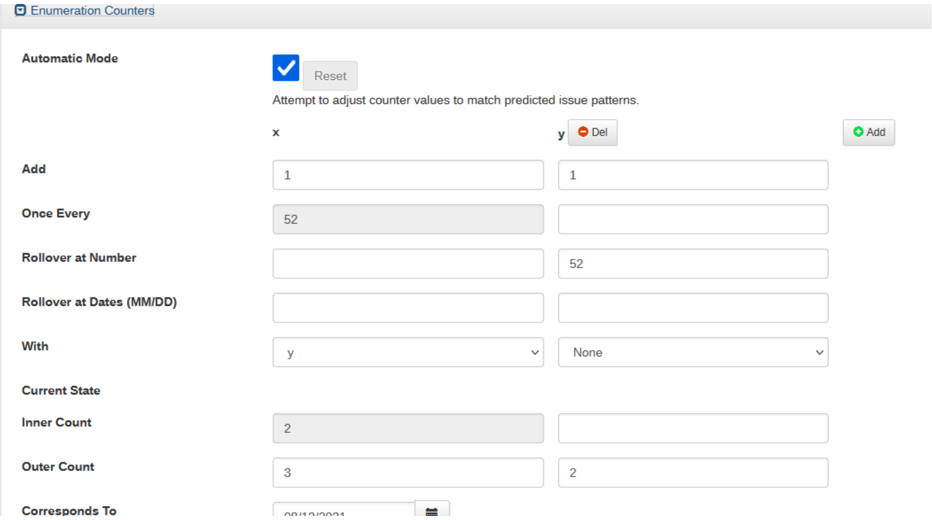
on week(s) 0 of the month day(s) -1 of the month

You could use -2 for two days before the end of the month, etc.

14.1.7 Editing the Enumeration Counters for Special Patterns

For most subscription patterns, altering the schedule can accommodate pattern irregularities. However, there are some genuinely odd patterns where staff will need to manually edit the enumeration counters. This is not recommended unless there is no other way to get the pattern right. Here are some examples – you should test on sandbox first before editing production enumeration counters, since it can be hard to return to the default settings.

NOTE: The Reset button will attempt to return to default settings but it may not clear all custom entries. (Not all of the screenshots below have been updated to show that button.)



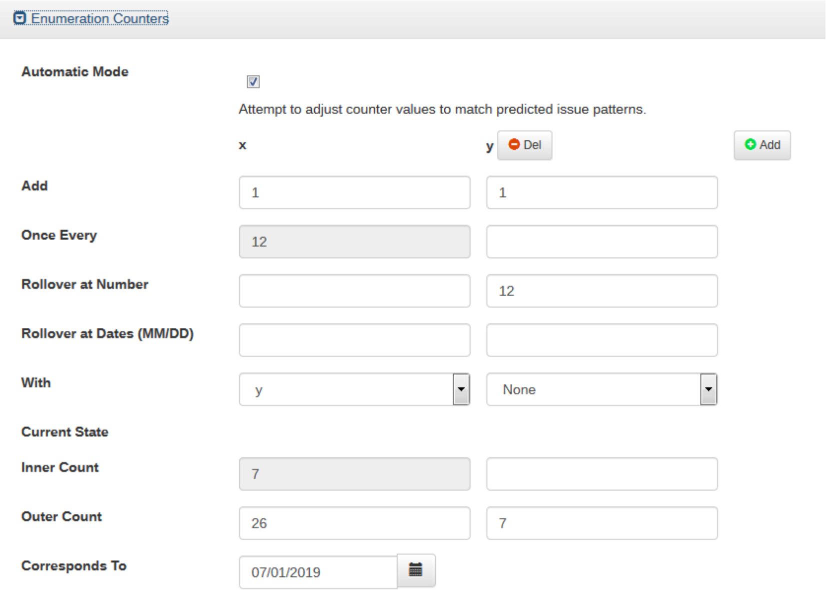
Automatic Mode ☑

Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every	52	
Rollover at Number		52
Rollover at Dates (MM/DD)		
With	y	None
Current State		
Inner Count	2	
Outer Count	3	2
Corresponds To		

14.1.7.1 Continuous Issue Numbering

There are certain publications where the volume rolls over each year, but the issue numbering is continuous. A normal setup for a monthly publication looks like this:



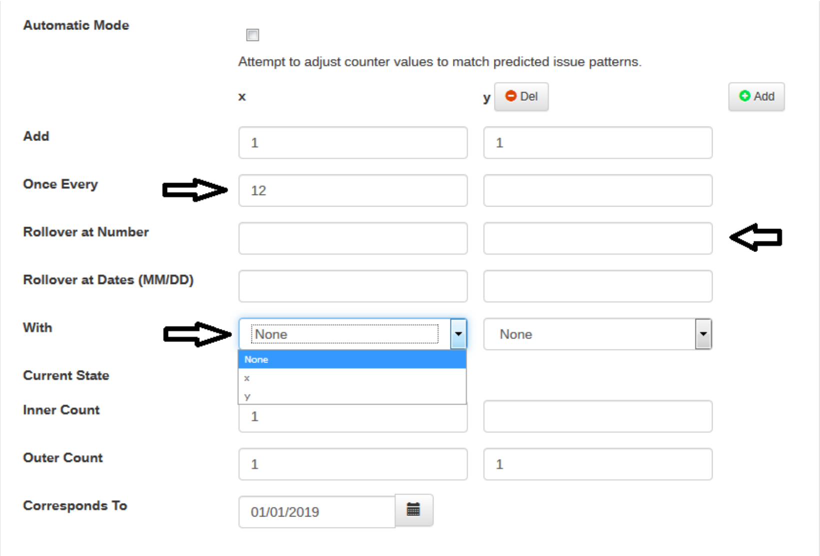
Automatic Mode ☑

Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every	12	
Rollover at Number		12
Rollover at Dates (MM/DD)		
With	y	None
Current State		
Inner Count	7	
Outer Count	26	7
Corresponds To	07/01/2019	

The X column refers to the volume numbering; the Y column refers to the issue numbering.

To get continuous numbering, in the enumeration counters section, first uncheck the Automatic Mode box (which keeps the enumeration synchronized with the schedule). Remove the Rollover at Number entry from the Y column (the issues). Then unlink the X and Y counters by going to the With field and changing the X column choice to None:



Automatic Mode ☐ Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every	12	
Rollover at Number		
Rollover at Dates (MM/DD)		
With	None	None
Current State		
Inner Count	1	
Outer Count	1	1
Corresponds To	01/01/2019	

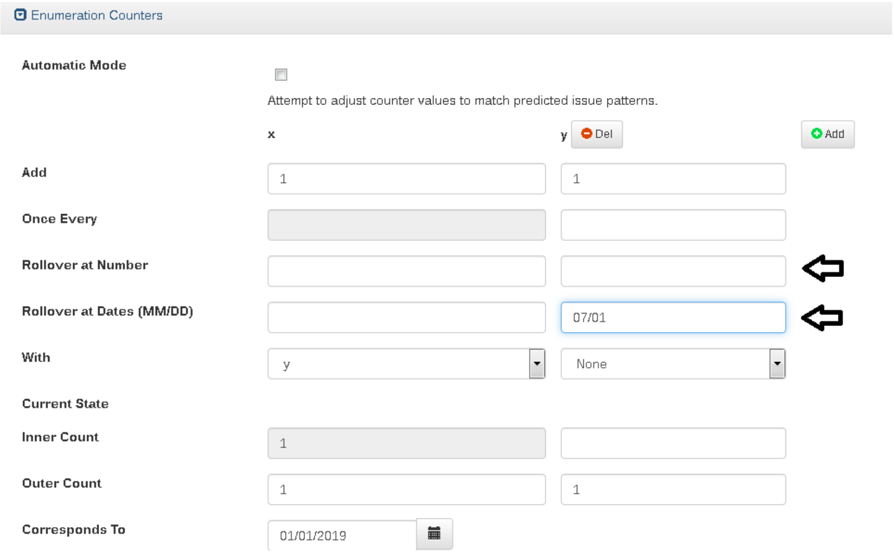
You will probably have to re-enter the "Once Every" setting of 12 in the X column after unlinking the two columns. That will make the volume number (the X column) roll over at the end of each year. Having that field blank in the issue number (the Y column) will mean that the issue numbers keep going up every time. The predictions for this publication now look like:

10/01/2019	October 2019	Volume 1, Issue 10
11/01/2019	November 2019	Volume 1, Issue 11
12/01/2019	December 2019	Volume 1, Issue 12
01/01/2020	January 2020	Volume 2, Issue 13
02/01/2020	February 2020	Volume 2, Issue 14

14.1.7.2 Roll Over on Date

Another special problem is that of serials that roll over on a specified date (like July 1) rather than by count of issues. To achieve this, as above open the enumeration counters section and uncheck the Automatic Mode box.

Then, in the Y column, remove the entry in the Rollover at Number field, and set the Rollover at Dates field with the month and year for the rollover. Enter it with four digits, like 07/01. **NOTE: The leading zero is required on single-digit months and days (01/01 instead of 1/1). You MUST use a slash separator**, or the system will not pick up the desired date.



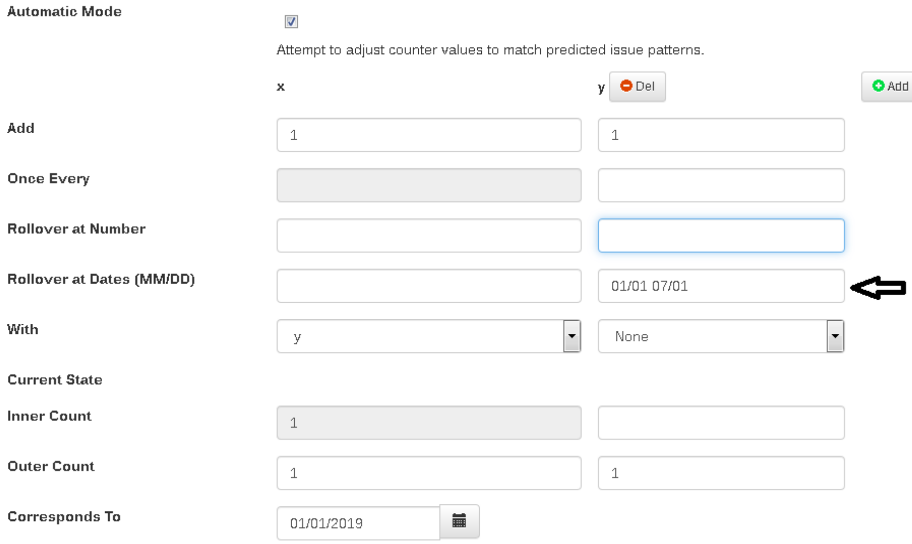
Automatic Mode ☐
Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every		
Rollover at Number		
Rollover at Dates (MM/DD)		07/01
With	y	None
Current State		
Inner Count	1	
Outer Count	1	1
Corresponds To	01/01/2019	

This example is a bimonthly, so the predictions show six issues a year, rolling over with the July issue:

05/01/2019	May 2019	Volume 1, Issue 5
06/01/2019	June 2019	Volume 1, Issue 6
07/01/2019	July 2019	Volume 2, Issue 1
08/01/2019	August 2019	Volume 2, Issue 2
09/01/2019	September 2019	Volume 2, Issue 3

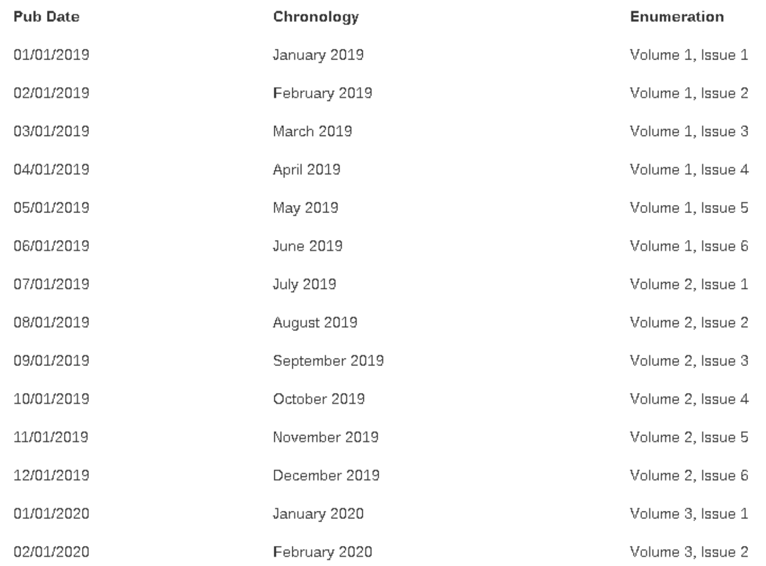
You can enter more than one date – use a space to separate (like “01/01 07/01”). For example, this setting would roll over the volume in both January and July:



Automatic Mode ☑
Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every		
Rollover at Number		
Rollover at Dates (MM/DD)		01/01 07/01
With	y	None
Current State		
Inner Count	1	
Outer Count	1	1
Corresponds To	01/01/2019	

The predictions look like:

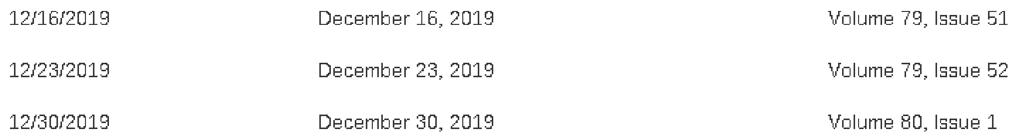


Pub Date	Chronology	Enumeration
01/01/2019	January 2019	Volume 1, Issue 1
02/01/2019	February 2019	Volume 1, Issue 2
03/01/2019	March 2019	Volume 1, Issue 3
04/01/2019	April 2019	Volume 1, Issue 4
05/01/2019	May 2019	Volume 1, Issue 5
06/01/2019	June 2019	Volume 1, Issue 6
07/01/2019	July 2019	Volume 2, Issue 1
08/01/2019	August 2019	Volume 2, Issue 2
09/01/2019	September 2019	Volume 2, Issue 3
10/01/2019	October 2019	Volume 2, Issue 4
11/01/2019	November 2019	Volume 2, Issue 5
12/01/2019	December 2019	Volume 2, Issue 6
01/01/2020	January 2020	Volume 3, Issue 1
02/01/2020	February 2020	Volume 3, Issue 2

Again, working with manual enumeration counters is not recommended. Only try these settings if you can't accomplish what you need with a delivered pattern or schedule.

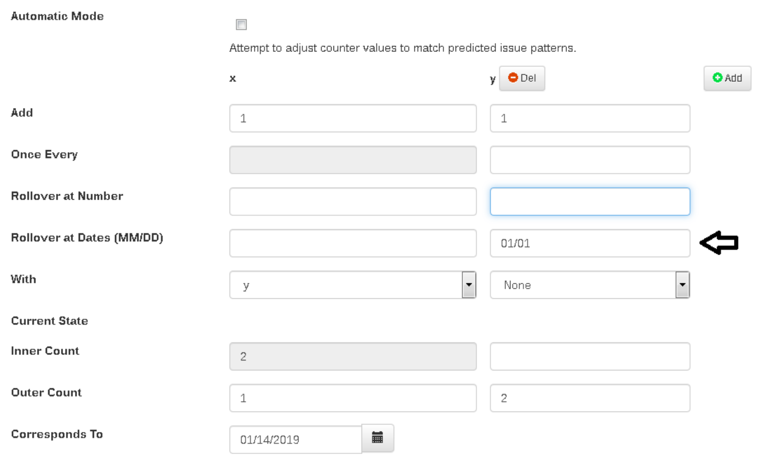
14.1.7.3 Rolling Over Weekly Schedules By Date

The default template for weeklies can be problematic – it assumes 52 issues per year. Depending on what day of the week is expected, this probably won't coincide with the calendar year. For example, in 2019, December 30 is a Monday. However, if the issue count has already reached 52, the system will assume that week should start a new volume:



12/16/2019	December 16, 2019	Volume 79, Issue 51
12/23/2019	December 23, 2019	Volume 79, Issue 52
12/30/2019	December 30, 2019	Volume 80, Issue 1

If a weekly publication should always start a new volume only with the new calendar year, you'll need to set a Rollover at Date (as above), but use 01/01 instead of the mid-year example:

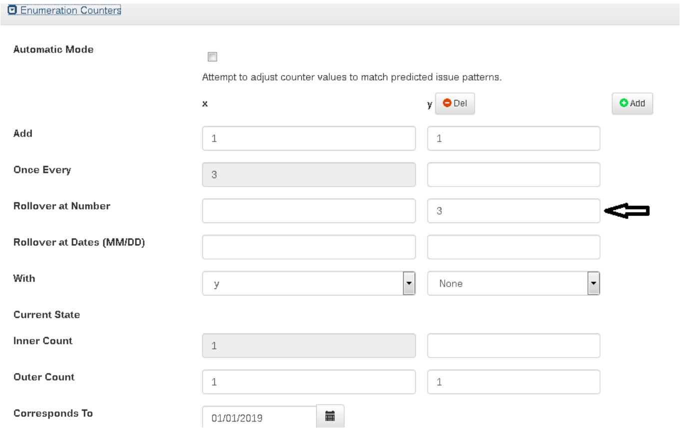


Automatic Mode ☐
Attempt to adjust counter values to match predicted issue patterns.

	x	y
Add	1	1
Once Every		
Rollover at Number		
Rollover at Dates (MM/DD)		01/01
With	y	None
Current State		
Inner Count	2	
Outer Count	1	2
Corresponds To	01/14/2019	

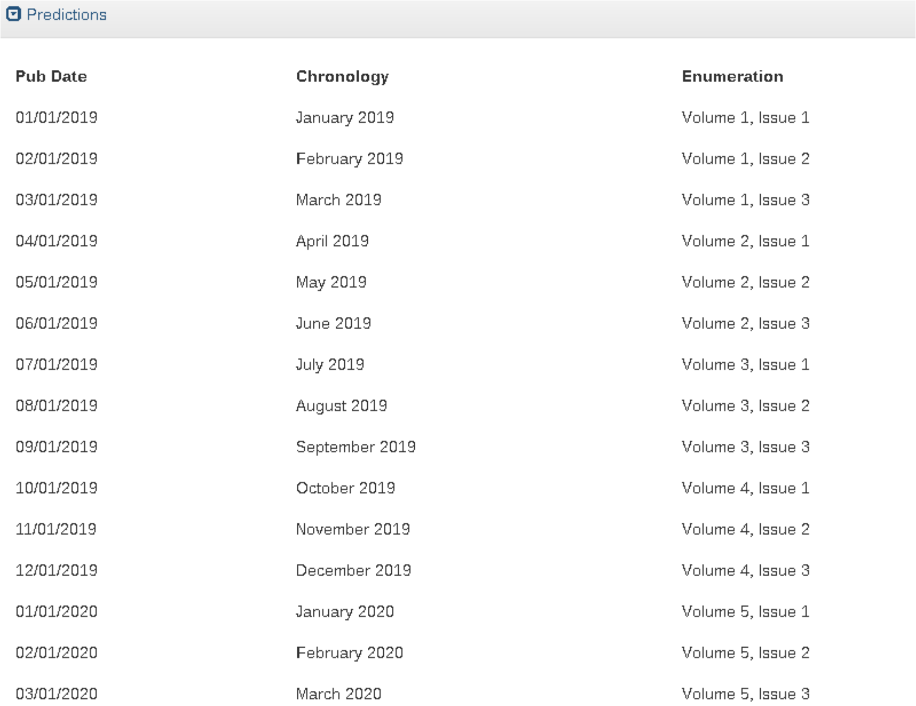
14.1.7.4 Multiple Volumes Per Year

Some publications have multiple volumes in a calendar year. For example, Volume 1 (January-March, Volume 2 (April-June), Volume 3 (July-September), and Volume 4 (October-December). Then the schedule rolls over again for January. In this case, the schedule would be set up as a monthly, but you would need to edit the Enumeration Counters field. Uncheck the Automatic Mode box, then change the Rollover at Number entry in the Y column to 3 (instead of 12).



Automatic Mode	☐ Attempt to adjust counter values to match predicted issue patterns.	
	x	y
Add	1	1
Once Every	3	
Rollover at Number		3
Rollover at Dates (MM/DD)		
With	y	None
Current State		
Inner Count	1	
Outer Count	1	1
Corresponds To	01/01/2019	

The predictions for this pattern look like



Pub Date	Chronology	Enumeration
01/01/2019	January 2019	Volume 1, Issue 1
02/01/2019	February 2019	Volume 1, Issue 2
03/01/2019	March 2019	Volume 1, Issue 3
04/01/2019	April 2019	Volume 2, Issue 1
05/01/2019	May 2019	Volume 2, Issue 2
06/01/2019	June 2019	Volume 2, Issue 3
07/01/2019	July 2019	Volume 3, Issue 1
08/01/2019	August 2019	Volume 3, Issue 2
09/01/2019	September 2019	Volume 3, Issue 3
10/01/2019	October 2019	Volume 4, Issue 1
11/01/2019	November 2019	Volume 4, Issue 2
12/01/2019	December 2019	Volume 4, Issue 3
01/01/2020	January 2020	Volume 5, Issue 1
02/01/2020	February 2020	Volume 5, Issue 2
03/01/2020	March 2020	Volume 5, Issue 3

14.1.7.5 Accounting for Leap Year

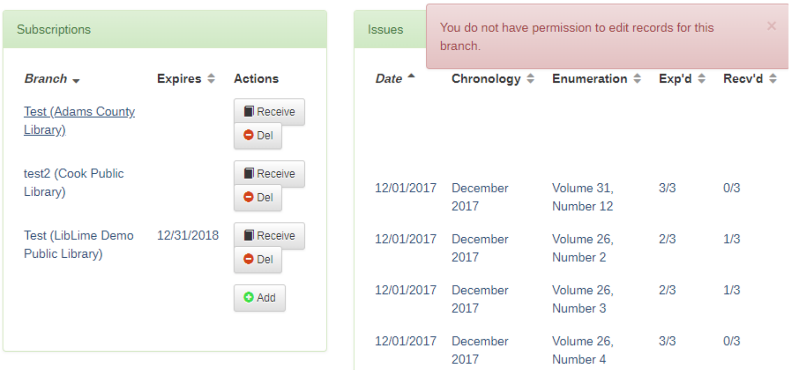
Leap years can be problematic when setting up patterns. If you have a pattern that needs one piece to end in February, with the next section beginning in March, always enter the ending date for February as 2/29 (leap day). The system will convert that to 2/28 for non-leap years.

14.1.8 Note on Indexing

When you create a new publication record or subscription record, the system will update the indexes so that new records are visible and searchable within the serials module. However, if you merely edit an existing publication record, there is usually nothing requiring reindexing, and so the record is not queued for reindexing. This should not be an issue for any normal usage, but can show up in specialized testing.

14.2 Creating a Subscription Record

NOTE: If your site restricts create/update/delete permissions on subscription records, you will be able to see subscription records belonging to other branches in the list. However, if you attempt to edit or delete them, or receive issues, you will be blocked.



Branch	Expires	Actions
Test (Adams County Library)		Receive Del
test2 (Cook Public Library)		Receive Del
Test (LibLime Demo Public Library)	12/31/2018	Receive Del
		Add

You do not have permission to edit records for this branch.

Date	Chronology	Enumeration	Exp'd	Recv'd
12/01/2017	December 2017	Volume 31, Number 12	3/3	0/3
12/01/2017	December 2017	Volume 26, Number 2	2/3	1/3
12/01/2017	December 2017	Volume 26, Number 3	2/3	1/3
12/01/2017	December 2017	Volume 26, Number 4	3/3	0/3

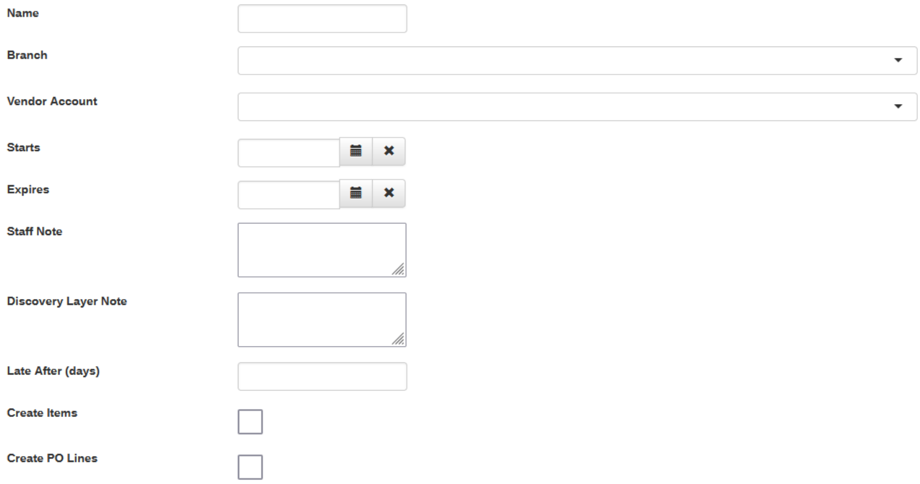
After you have saved the publication record, you will be able to create subscription records. For multi-library systems, create separate subscriptions for each branch. You will also create separate subscriptions if you receive multiple copies for different departments in the same branch.

At the lower left of the publication record display, click Add under Subscriptions to create a new one:

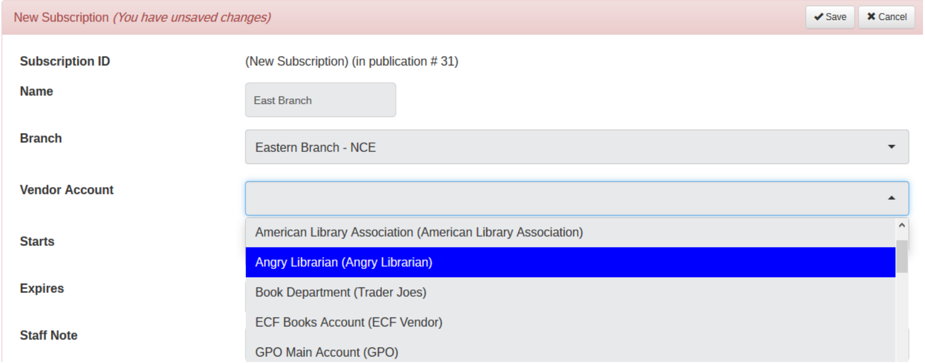
The Journal of irreproducible results.

Publication ID	31
Catalog Record	42271 (The Journal of irreproducible results.)
Auto Create Issues	Yes
Next Issue	March 2018 - Volume 15, Issue 3
First Received	(none)
Most Recent	(none)

The subscription record has details about each individual subscription – vendor, dates, etc.



You need to complete the fields in order, as the later entries depend on data from the earlier ones. Give it a descriptive name so that it's easily recognizable from a summary list – something like Main Branch or Administration Dept. Then select the library branch from the pulldown. If you need to create serials claims, you'll need to link to an acquisitions vendor record.



New Subscription *(You have unsaved changes)*

Subscription ID	(New Subscription) (in publication # 31)
Name	East Branch
Branch	Eastern Branch - NCE
Vendor Account	
Starts	
Expires	
Staff Note	

- American Library Association (American Library Association)
- Angry Librarian (Angry Librarian)
- Book Department (Trader Joes)
- ECF Books Account (ECF Vendor)
- GPO Main Account (GPO)

NOTE: Unlike earlier versions, the serials module now uses the regular acquisitions vendor records. You will need to create records in acquisitions for your serials vendors. Staff users with serials permissions but not acquisitions permissions will still be able to create vendors in acquisitions if needed.

Next, enter start and end dates for your subscription. **Both dates are required –issue records may not be generated without both dates**. The Late After setting is used by a new cron job which automatically marks issues late after X days beyond the expected date.

Starts 01/01/2022

Expires 12/31/2022

Staff Note

Discovery Layer Note

Late After (days) 2

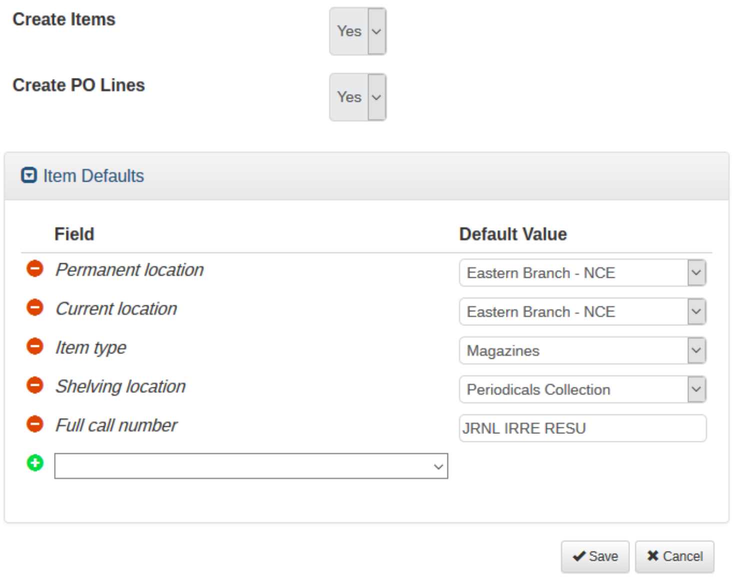
The staff note and Discovery Layer note fields are meant to display on the subscription tab under the title record in the staff and Discovery Layer interfaces respectively. You can use them for additional information about the subscription for your users.

If you want to link the subscription to an acquisitions purchase order (useful for automatically creating a purchase orderline for each issue received), set the Create PO lines field to Yes. You can create the link later from the acquisitions module's purchase order.

Save your subscription record after making all your edits. Add new subscriptions as needed.

14.2.1 Item Defaults

If your library creates item records for individual issues (only needed if you check out those issues), set Create Items to Yes in the subscription record. Then in the section below, you can enter certain item defaults, such as branch, item type, location, call number. Use the pulldown to select the item field, then enter your data. The system will use the subscription's branch for permanent and current location (home and current branch), but you may want to set those just to be sure. You probably will want to set item type, shelving location, and call number. You can override any of these defaults when you receive individual issues.



Create Items: Yes

Create PO Lines: Yes

Item Defaults

Field	Default Value
Permanent location	Eastern Branch - NCE
Current location	Eastern Branch - NCE
Item type	Magazines
Shelving location	Periodicals Collection
Full call number	JRNL IRRE RESU

If you don't want to create items, set that field to No and ignore the item default area.

14.2.2 Link to Acquisitions Purchase Order

If your site uses acquisitions, and you have a Standing Order purchase order for this title, you can link your subscription record to that order record. Then, as issues are received, a new orderline is automatically created in acquisitions, which can be used for vendor invoicing.

In the subscription record, first select your vendor record. Then click the Create PO lines box. If you do not have a vendor record selected, you'll get a screen warning and will be unable to proceed:

Vendor Account:

Starts: 10/02/2017

Expires: 12/31/2018

Staff Note:

OPAC Note:

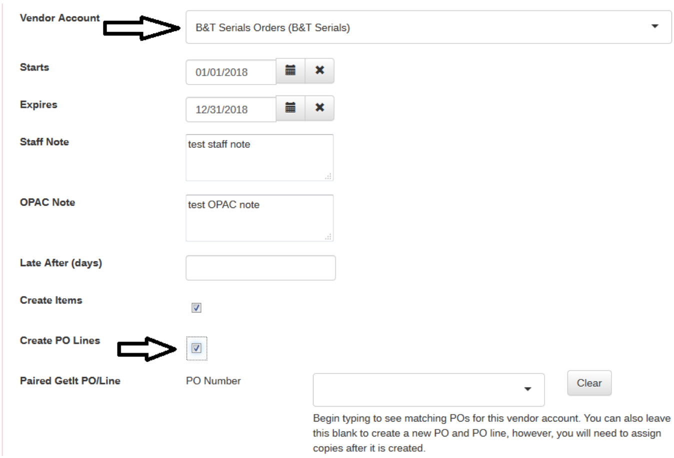
Late After (days):

Create Items ☑

Create PO Lines ☑

You must select a vendor account (above) before choosing a PO and PO line

After selecting a vendor record, click the Create PO Lines box:



Vendor Account: B&T Serials Orders (B&T Serials)

Starts: 01/01/2018

Expires: 12/31/2018

Staff Note: test staff note

OPAC Note: test OPAC note

Late After (days):

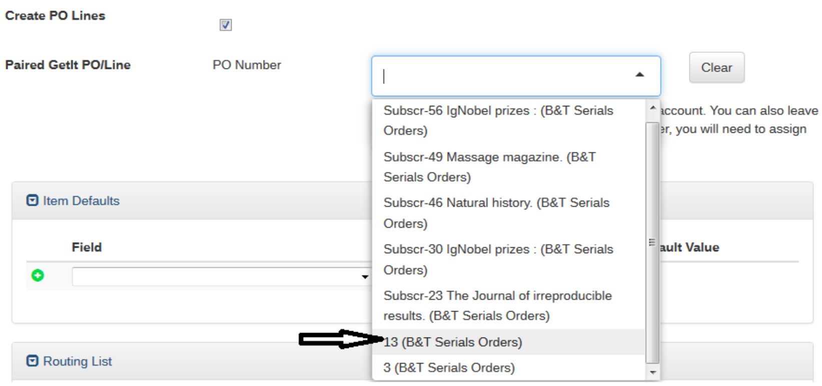
Create Items: ☑

Create PO Lines: ☑

Paired GetIt PO/Line: PO Number

Begin typing to see matching POs for this vendor account. You can also leave this blank to create a new PO and PO line, however, you will need to assign copies after it is created.

To link the record to the purchase order click in the Paired GetIt PO/Line pulldown and find your purchase order number:

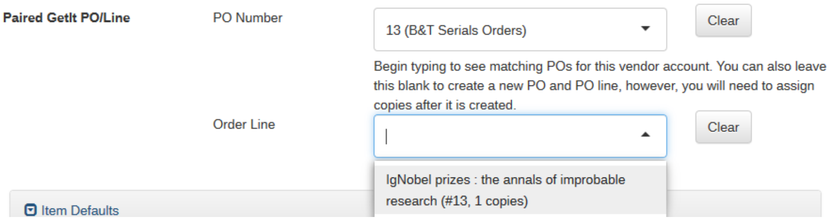


Create PO Lines: ☑

Paired GetIt PO/Line: PO Number

- Subscr-56 IgNobel prizes : (B&T Serials Orders)
- Subscr-49 Massage magazine. (B&T Serials Orders)
- Subscr-46 Natural history. (B&T Serials Orders)
- Subscr-30 IgNobel prizes : (B&T Serials Orders)
- Subscr-23 The Journal of irreproducible results. (B&T Serials Orders)
- 13 (B&T Serials Orders)
- 3 (B&T Serials Orders)

Once you select that, you'll get a second pulldown to select your orderline for this particular title:

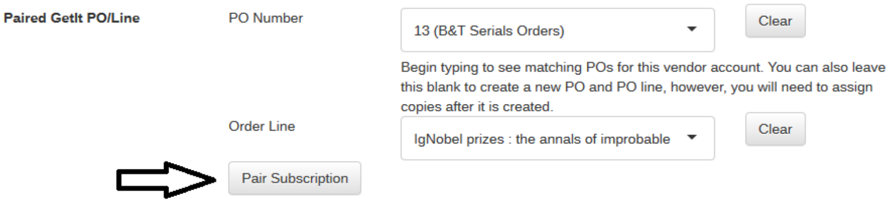


Paired GetIt PO/Line: PO Number: 13 (B&T Serials Orders)

Begin typing to see matching POs for this vendor account. You can also leave this blank to create a new PO and PO line, however, you will need to assign copies after it is created.

Order Line: IgNobel prizes : the annals of improbable research (#13, 1 copies)

Select your orderline, then click the Pair Subscription button:



Paired GetIt PO/Line: PO Number: 13 (B&T Serials Orders)

Begin typing to see matching POs for this vendor account. You can also leave this blank to create a new PO and PO line, however, you will need to assign copies after it is created.

Order Line: IgNobel prizes : the annals of improbable

The subscription screen will then show the paired status.


Late After (days)

Create Items ☑

Create PO Lines ☑

Paired GetIt PO/Line

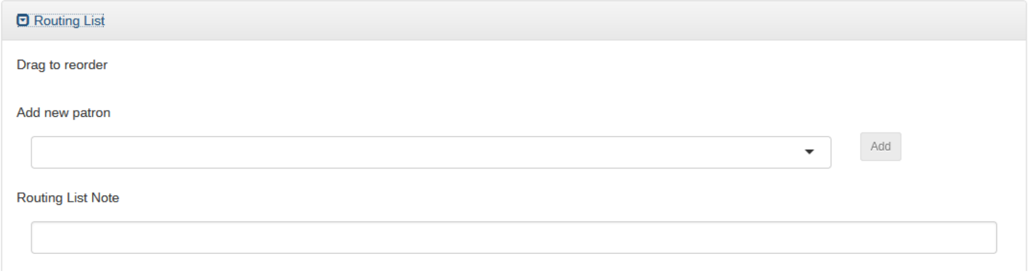
This subscription is paired with a GetIt PO [13 - IgNobel prizes : the annals of improbable research (13)]. To unpair, remove the subscription ID from this PO line in GetIt, then refresh this page.

Paired successfully

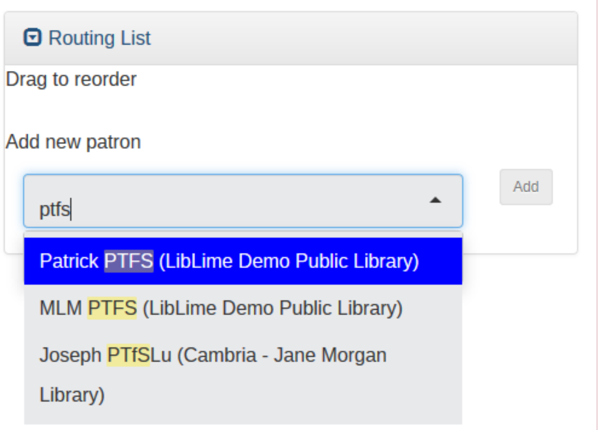
Now, every time you receive an issue on this subscription record, a new copy line will be created on that purchase order. That data is available for creating vendor invoices in acquisitions.

14.2.3 Routing Lists

If your library routes new issues to people on staff (primarily used in departmental or business libraries), you can create a routing list. Go to the lower area of the subscription record, under the Item Defaults section.



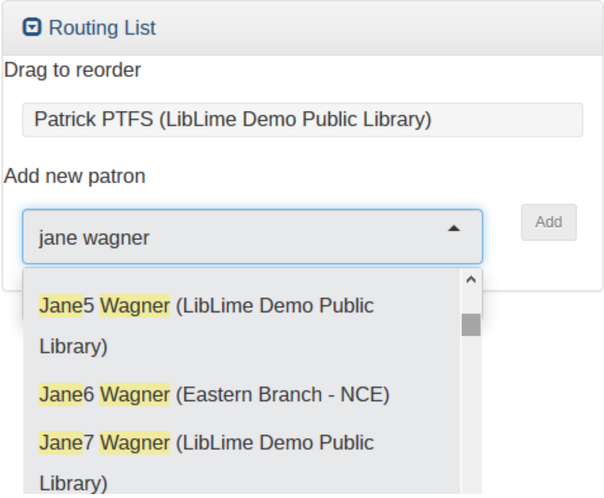
To add patrons, start typing the patron name in the box. A dropdown will show matching records; select the one you want.



ptfs

Patrick PTFS (LibLime Demo Public Library)
MLM PTFS (LibLime Demo Public Library)
Joseph PTfSLu (Cambria - Jane Morgan Library)

Click Add to save that patron to the routing list. Then search for your next patron:



Patrick PTFS (LibLime Demo Public Library)

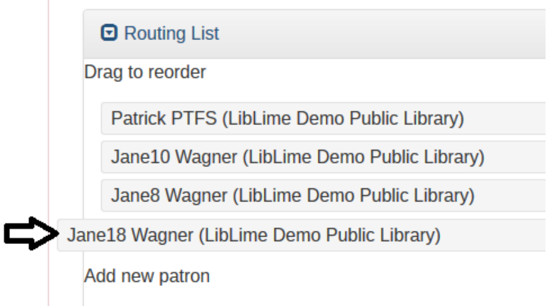
jane wagner

Jane5 Wagner (LibLime Demo Public Library)

Jane6 Wagner (Eastern Branch - NCE)

Jane7 Wagner (LibLime Demo Public Library)

You can rearrange the order of the names at any time. Hold down your cursor on a name and drag it to where you want it (the one out of alignment in this screenshot is being dragged):



Patrick PTFS (LibLime Demo Public Library)

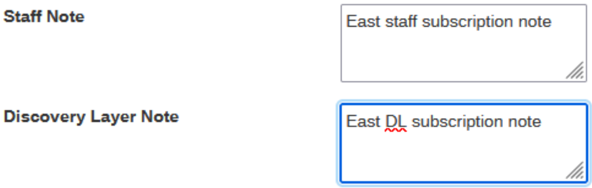
Jane10 Wagner (LibLime Demo Public Library)

Jane8 Wagner (LibLime Demo Public Library)

Jane18 Wagner (LibLime Demo Public Library)

14.2.4 Staff and Public Notes

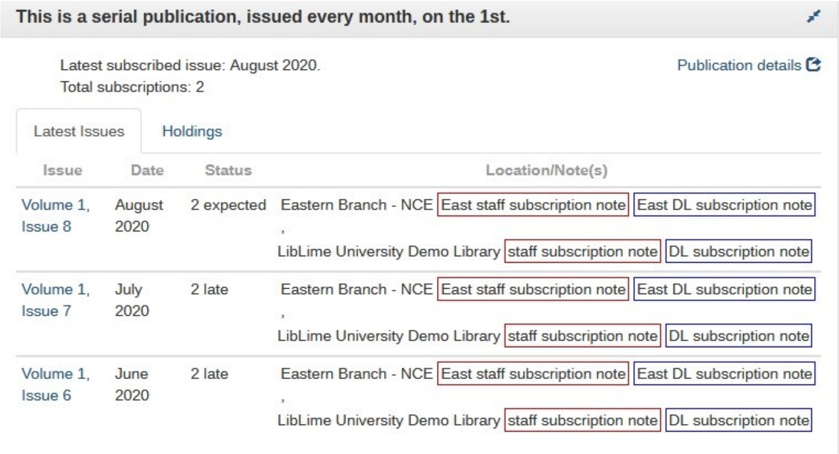
The subscription record has fields for entering staff and public notes about this subscription:



Staff Note East staff subscription note

Discovery Layer Note East DL subscription note

In staff mode, the title display of subscription data will show both notes – staff will be outlined in red and Discovery Layer notes will be outlined in blue:

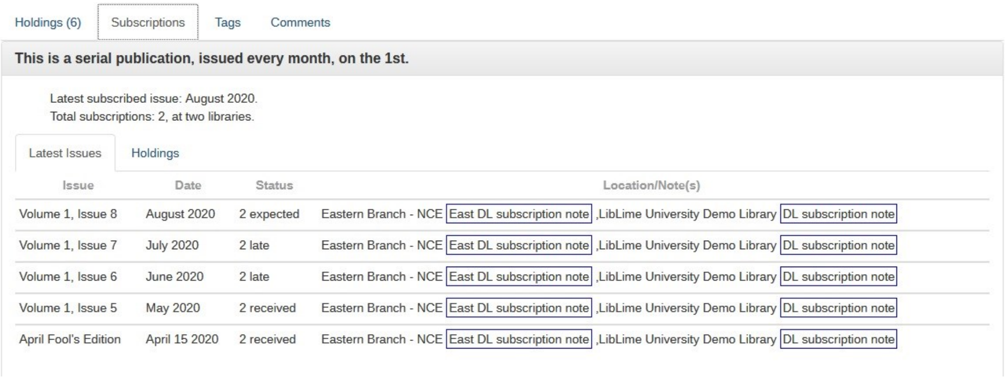


This is a serial publication, issued every month, on the 1st.

Latest subscribed issue: August 2020.
Total subscriptions: 2

Issue	Date	Status	Location/Note(s)
Volume 1, Issue 8	August 2020	2 expected	Eastern Branch - NCE East staff subscription note East DL subscription note , LibLime University Demo Library staff subscription note DL subscription note
Volume 1, Issue 7	July 2020	2 late	Eastern Branch - NCE East staff subscription note East DL subscription note , LibLime University Demo Library staff subscription note DL subscription note
Volume 1, Issue 6	June 2020	2 late	Eastern Branch - NCE East staff subscription note East DL subscription note , LibLime University Demo Library staff subscription note DL subscription note

The Discovery Layer view will only show the public notes:



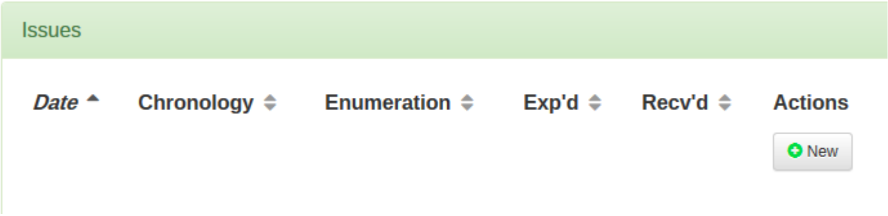
This is a serial publication, issued every month, on the 1st.

Latest subscribed issue: August 2020.
Total subscriptions: 2, at two libraries.

Issue	Date	Status	Location/Note(s)
Volume 1, Issue 8	August 2020	2 expected	Eastern Branch - NCE East DL subscription note ,LibLime University Demo Library DL subscription note
Volume 1, Issue 7	July 2020	2 late	Eastern Branch - NCE East DL subscription note ,LibLime University Demo Library DL subscription note
Volume 1, Issue 6	June 2020	2 late	Eastern Branch - NCE East DL subscription note ,LibLime University Demo Library DL subscription note
Volume 1, Issue 5	May 2020	2 received	Eastern Branch - NCE East DL subscription note ,LibLime University Demo Library DL subscription note
April Fool's Edition	April 15 2020	2 received	Eastern Branch - NCE East DL subscription note ,LibLime University Demo Library DL subscription note

14.3 Receiving Issues

NOTE: if issues have not been generated, you may need to do so before you can receive. To generate issue records manually (without waiting for the cron job to do it), on the publication record screen, at lower right click New under the Issues section.

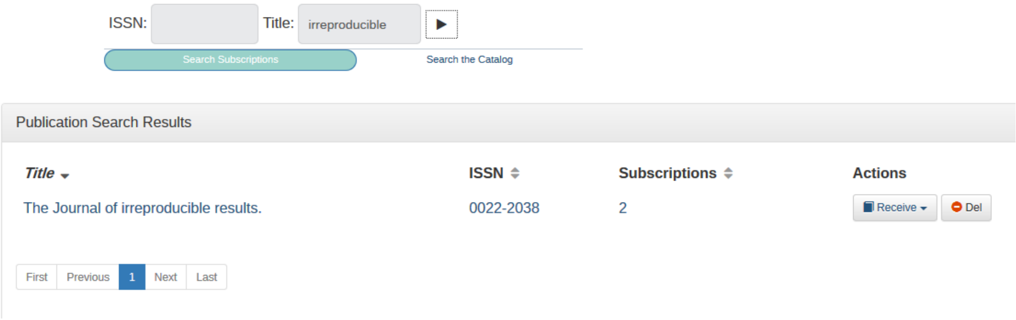


That will add an expected issue; move back to this screen and add more if needed.

Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
02/01/2018	February 2018	Volume 15, Issue 2	2/2	0/2	Edit Del New

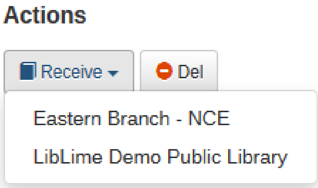
If no issues show when you go to the Receive screen, go back and do this step.

You can receive expected issues from different places, but you usually must receive issues separately for each subscription. From the serials home screen, search for your title and you'll see how many subscriptions are attached:


ISSN: Title: irreproducible

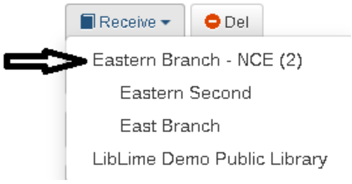
Title	ISSN	Subscriptions	Actions
The Journal of irreproducible results.	0022-2038	2	Receive Del

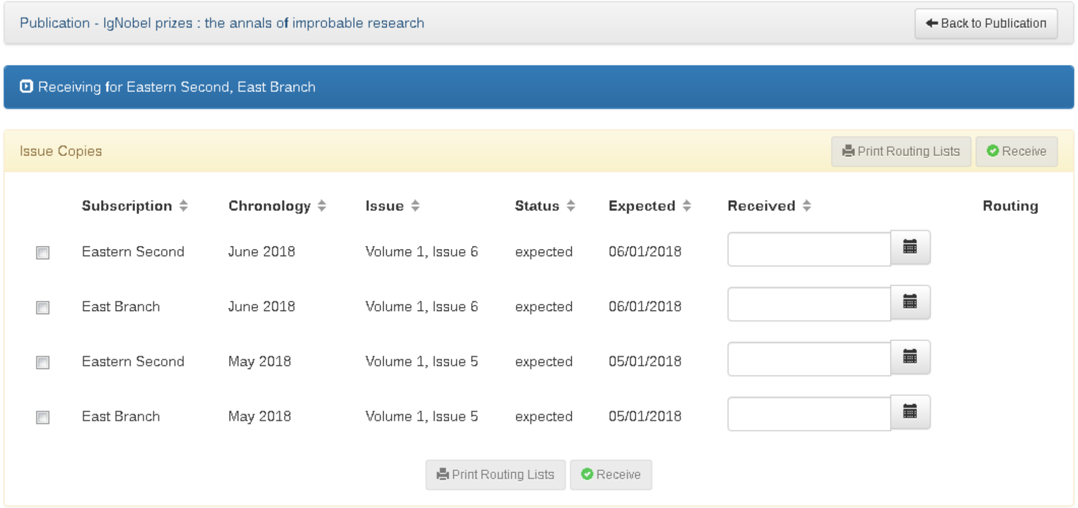
A dropdown from the Receive button here will let you choose which subscription to receive on:



That in turn will take you into the receive screen for that subscription (see below).

If you have two subscriptions for the same branch, from this screen you will be able to select both and receive both together:

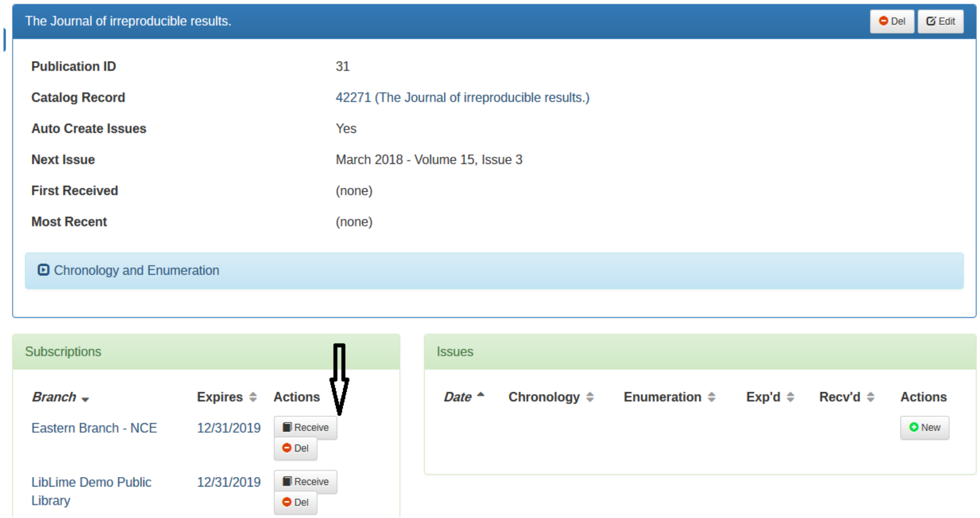




	Subscription	Chronology	Issue	Status	Expected	Received	Routing
☐	Eastern Second	June 2018	Volume 1, Issue 6	expected	06/01/2018		
☐	East Branch	June 2018	Volume 1, Issue 6	expected	06/01/2018		
☐	Eastern Second	May 2018	Volume 1, Issue 5	expected	05/01/2018		
☐	East Branch	May 2018	Volume 1, Issue 5	expected	05/01/2018		

Receiving for multiple subscriptions is only possible when starting from the main search list, and only possible when the subscriptions belong to the same branch.

You can also receive from the publication record. Clicking on the title from the above results list will display that record. At the lower left, you'll see the subscriptions attached, each with a Receive button:

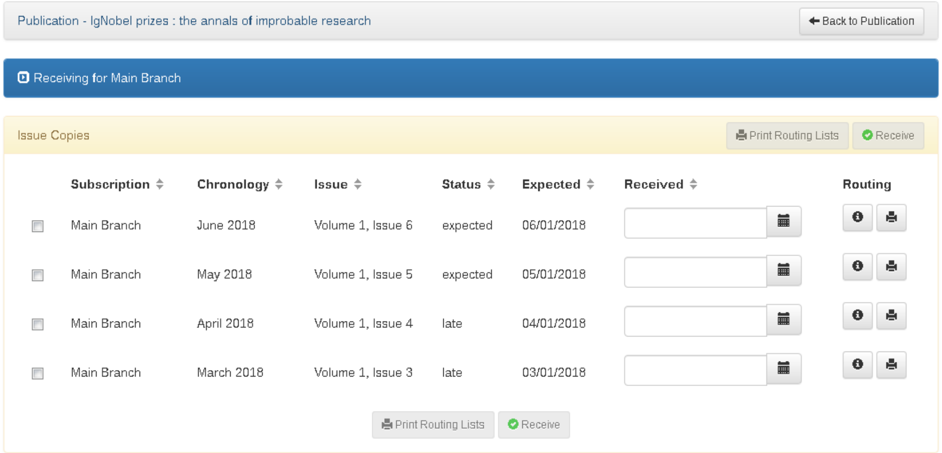


Publication ID	31
Catalog Record	42271 (The Journal of irreproducible results.)
Auto Create Issues	Yes
Next Issue	March 2018 - Volume 15, Issue 3
First Received	(none)
Most Recent	(none)

Branch	Expires	Actions
Eastern Branch - NCE	12/31/2019	Receive Del
LibLime Demo Public Library	12/31/2019	Receive Del

Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
					New

Again, clicking the Receive button will take you to the Receive screen:



Publication - IgNobel prizes : the annals of improbable research

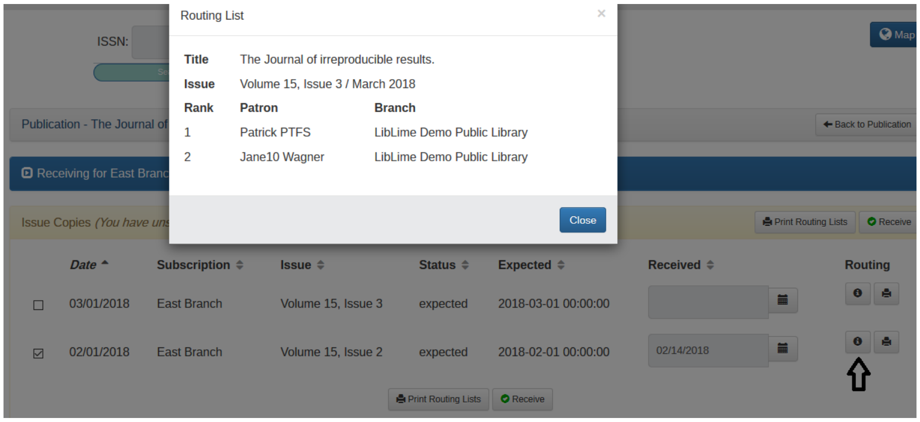
Receiving for Main Branch

Issue Copies

	Subscription	Chronology	Issue	Status	Expected	Received	Routing
☐	Main Branch	June 2018	Volume 1, Issue 6	expected	06/01/2018		
☐	Main Branch	May 2018	Volume 1, Issue 5	expected	05/01/2018		
☐	Main Branch	April 2018	Volume 1, Issue 4	late	04/01/2018		
☐	Main Branch	March 2018	Volume 1, Issue 3	late	03/01/2018		

On this screen, check off the issue(s) you want to receive. The system will automatically insert today's date into the Received field; you can change that if needed.

If this subscription has a routing list, at the end of the line, the "i" button will let you view it. (If there is no routing list, no buttons will show in this area.)



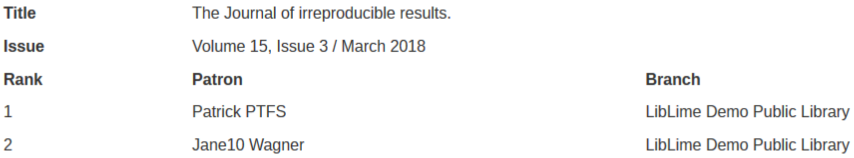
Routing List

Title	The Journal of irreproducible results.
Issue	Volume 15, Issue 3 / March 2018

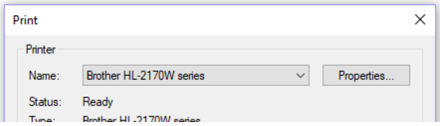
Rank	Patron	Branch
1	Patrick PTFS	LibLime Demo Public Library
2	Jane10 Wagner	LibLime Demo Public Library

	Date	Subscription	Issue	Status	Expected	Received	Routing
☐	03/01/2018	East Branch	Volume 15, Issue 3	expected	2018-03-01 00:00:00		
☑	02/01/2018	East Branch	Volume 15, Issue 2	expected	2018-02-01 00:00:00	02/14/2018	

The printer button next to the "i" button will open a separate browser window so you can print it:



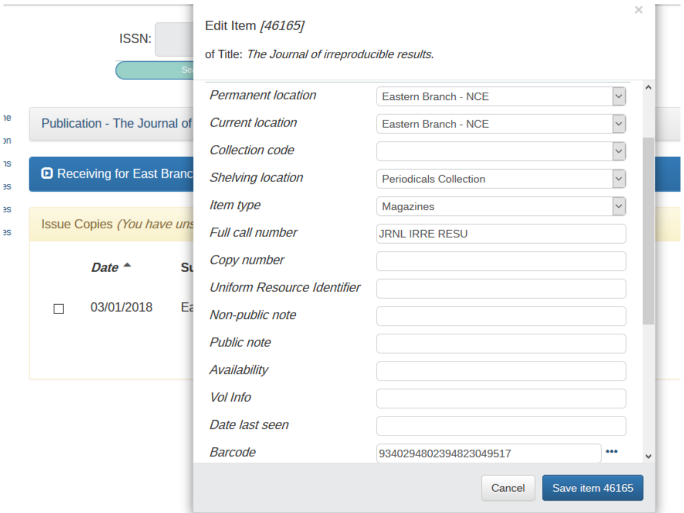
Title	The Journal of irreproducible results.	
Issue	Volume 15, Issue 3 / March 2018	
Rank	**Patron**	**Branch**
1	Patrick PTFS	LibLime Demo Public Library
2	Jane10 Wagner	LibLime Demo Public Library



Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series

Alternatively, the Print Routing Lists button at the bottom will print lists for all the items marked as received.

When you have selected the issue(s) to receive, you MUST click the Receive button at the bottom. If your subscription is set to create items, an item edit popup window will appear. At this point, you can add a barcode, change any of the default fields, or enter additional item information:



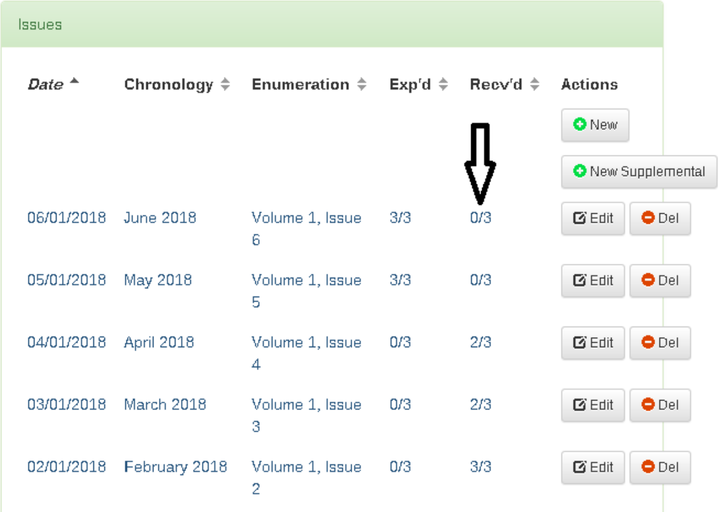
Edit Item *[46165]*

of Title: *The Journal of irreproducible results.*

Permanent location	Eastern Branch - NCE
Current location	Eastern Branch - NCE
Collection code	
Shelving location	Periodicals Collection
Item type	Magazines
Full call number	JRNL IRRE RESU
Copy number	
Uniform Resource Identifier	
Non-public note	
Public note	
Availability	
Vol Info	
Date last seen	
Barcode	9340294802394823049517

At this point, the item record has already been created; you are just making any desired changes to it. Click the Save button to save those changes.

Go back to the publication record display. In the Issues section, you'll see that the count has changed. In this example, two of the three expected issues for March and April have been received.

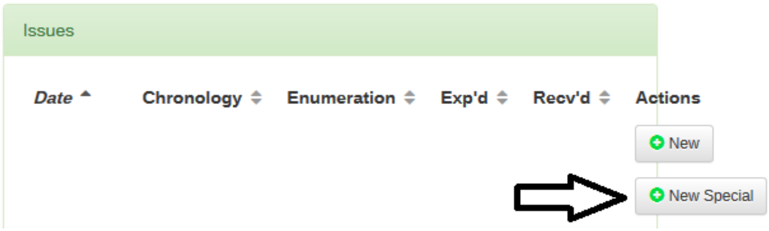


Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
06/01/2018	June 2018	Volume 1, Issue 6	3/3	0/3	Edit Del
05/01/2018	May 2018	Volume 1, Issue 5	3/3	0/3	Edit Del
04/01/2018	April 2018	Volume 1, Issue 4	0/3	2/3	Edit Del
03/01/2018	March 2018	Volume 1, Issue 3	0/3	2/3	Edit Del
02/01/2018	February 2018	Volume 1, Issue 2	0/3	3/3	Edit Del

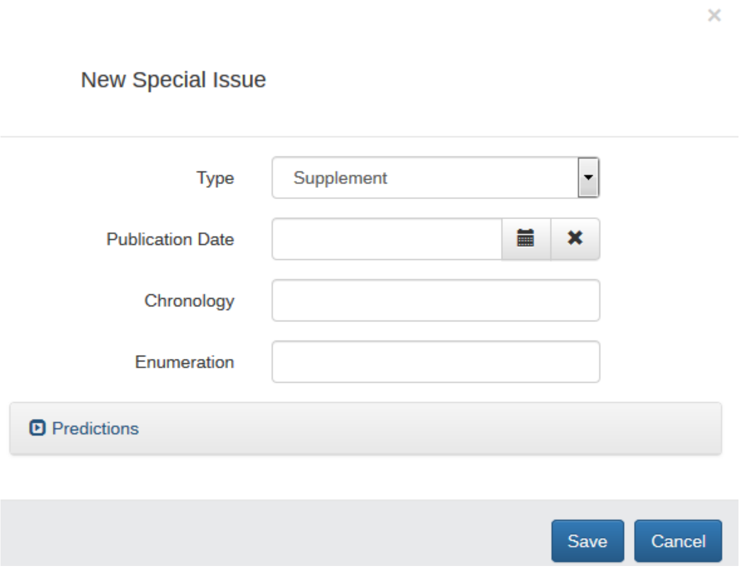
Go into the Receive screen for the other subscription attached and receive the same issue, and the count will drop to zero expected and three received.

14.3.1 Unexpected Issues or Supplements

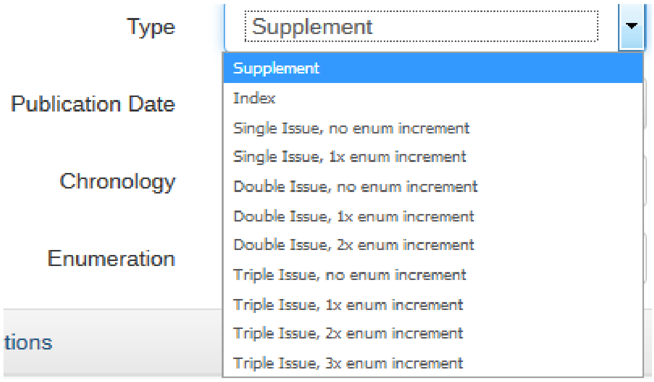
Journals may sometimes send an unexpected issue or supplement (not accounted for in the prediction). You can create a new issue record when it arrives. In the Issues section, click the New Special button:



This produces a popup window.

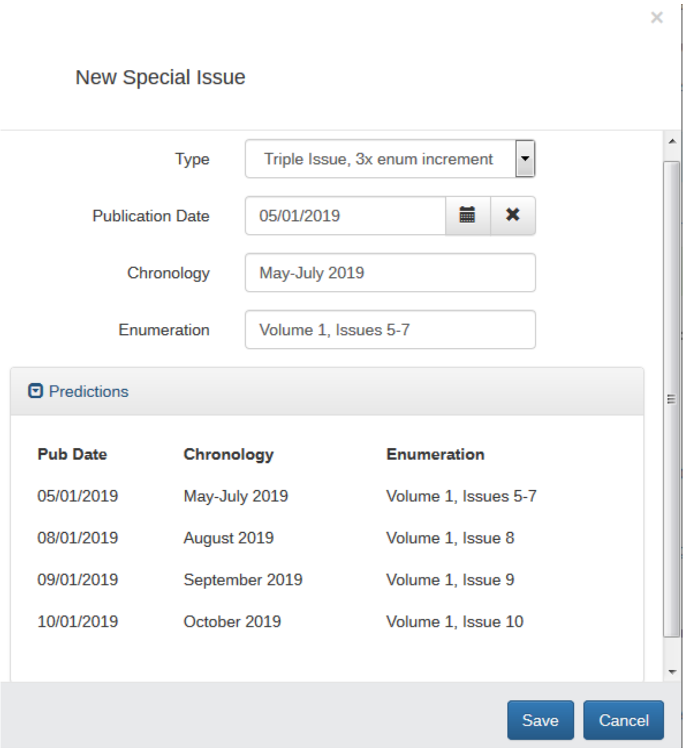


At this point you have some options for how to handle the special issue. Look in the Type pulldown:



Supplements and Indexes do not normally increment the issue counters. However, you may receive an extra single issue, or an unexpected double or triple issue. Depending on the journal's numbering, you may choose to increment the issue once, twice, or three times.

For example, to enter a triple issue, select Triple Issue, 3x enum increment. Then fill in the rest of the fields manually:



Type: Triple Issue, 3x enum increment

Publication Date: 05/01/2019

Chronology: May-July 2019

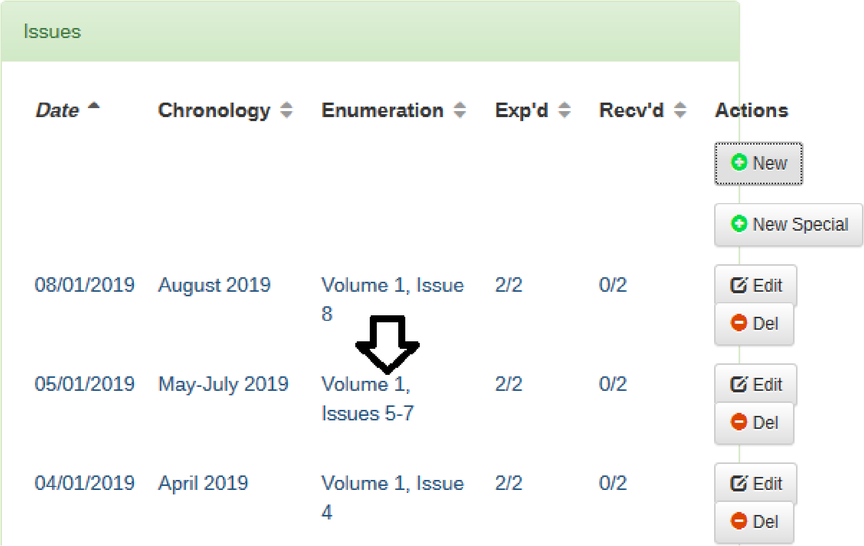
Enumeration: Volume 1, Issues 5-7

Predictions

Pub Date	Chronology	Enumeration
05/01/2019	May-July 2019	Volume 1, Issues 5-7
08/01/2019	August 2019	Volume 1, Issue 8
09/01/2019	September 2019	Volume 1, Issue 9
10/01/2019	October 2019	Volume 1, Issue 10

Clicking the arrow next to Predictions at the bottom will show you the proposed entry. If it is what you want, click Save.

The new issue is added to the list and is ready to be marked as received. If you then generate another issue, it will pick up the next available issue number:



Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
08/01/2019	August 2019	Volume 1, Issue 8	2/2	0/2	Edit Del
05/01/2019	May-July 2019	Volume 1, Issues 5-7	2/2	0/2	Edit Del
04/01/2019	April 2019	Volume 1, Issue 4	2/2	0/2	Edit Del

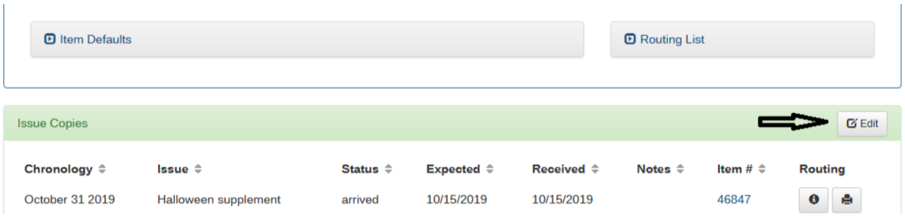
Use the New Special button only to generate records for unexpected issues or supplements. If a publication has a standard supplement at the same time every year, add it into the publication record’s schedule.

14.3.2 Editing Expected Issue Data

There may be times when you need to edit specific issues, to alter the enumeration, the expected date or perhaps change the status.

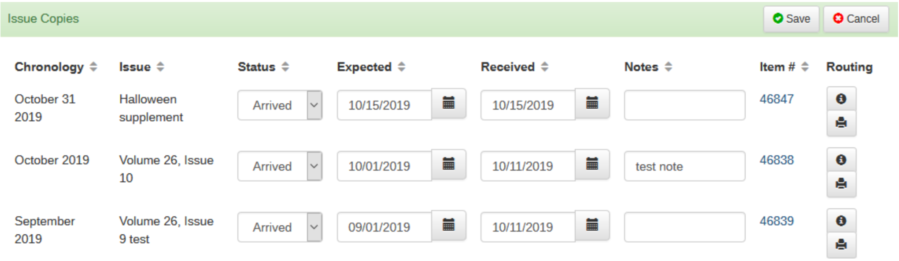
14.3.2.1 Editing Status or Date or Adding Note

Date or status may be edited for one branch's subscription by opening the subscription record, then clicking edit on the bottom part of the screen:



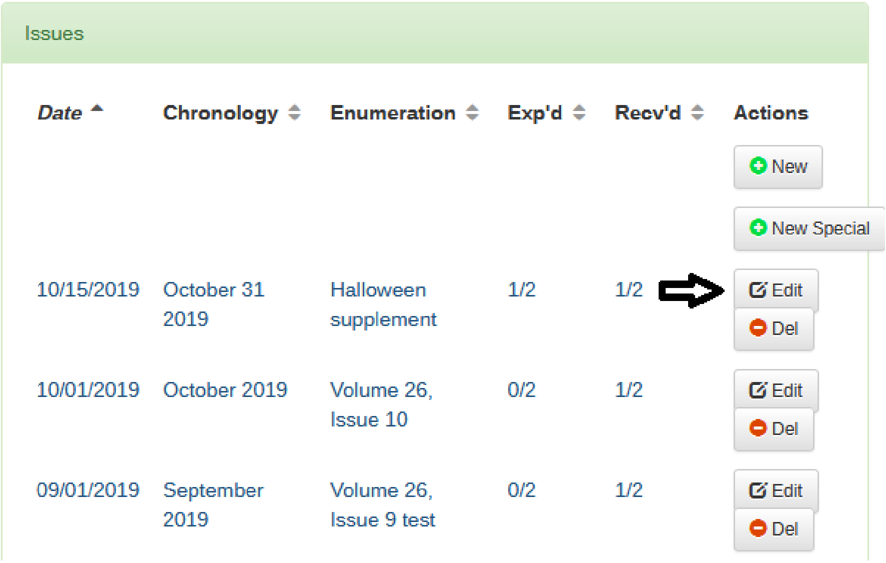
Chronology	Issue	Status	Expected	Received	Notes	Item #	Routing
October 31 2019	Halloween supplement	arrived	10/15/2019	10/15/2019		46847	

That will open an edit screen for just the issues belonging to that subscription; staff can change status or date, or add a note relevant to that issue:



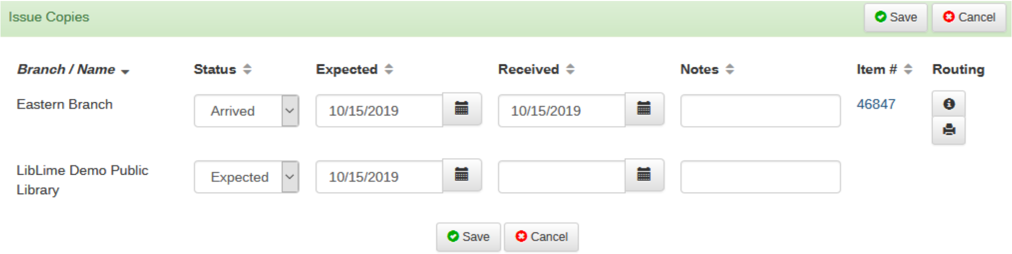
Chronology	Issue	Status	Expected	Received	Notes	Item #	Routing
October 31 2019	Halloween supplement	Arrived	10/15/2019	10/15/2019		46847	
October 2019	Volume 26, Issue 10	Arrived	10/01/2019	10/11/2019	test note	46838	
September 2019	Volume 26, Issue 9 test	Arrived	09/01/2019	10/11/2019		46839	

From the main publication record, clicking Edit next to an individual issue



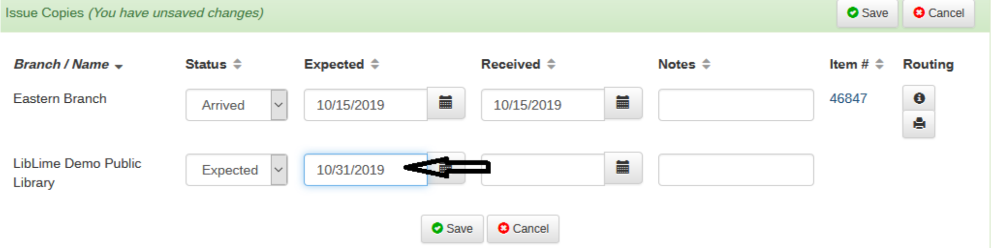
Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
10/15/2019	October 31 2019	Halloween supplement	1/2	1/2	Edit Del
10/01/2019	October 2019	Volume 26, Issue 10	0/2	1/2	Edit Del
09/01/2019	September 2019	Volume 26, Issue 9 test	0/2	1/2	Edit Del

and clicking the Edit button in the lower part of the screen will open all the issues for all the subscriptions:



Branch / Name	Status	Expected	Received	Notes	Item #	Routing
Eastern Branch	Arrived	10/15/2019	10/15/2019		46847	
LibLime Demo Public Library	Expected	10/15/2019				

Change the status or the date and save. Note that you would not normally need to edit issue data – only if there is something unusual about this issue or if you need to manually mark an issue for claiming, or need to add a note. In this example, I left the status as Expected but changed the date on one of the issues:



Branch / Name	Status	Expected	Received	Notes	Item #	Routing
Eastern Branch	Arrived	10/15/2019	10/15/2019		46847	
LibLime Demo Public Library	Expected	10/31/2019				

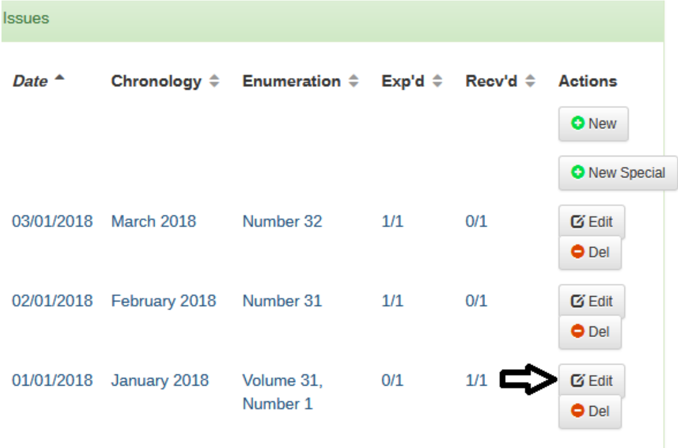
You can also use this screen to manually set status to late or claimed. Be sure to save your changes.

14.3.2.2 Changing Enumeration or Chronology

Changing the enumeration is NOT recommended as a standard practice. Unexpected issues should be resolved by using the New Special button (see that section). However, there are times when sites need to change this data. This would most likely be used to edit manually-created issues or supplements – to change the description in the enumeration field, for example.

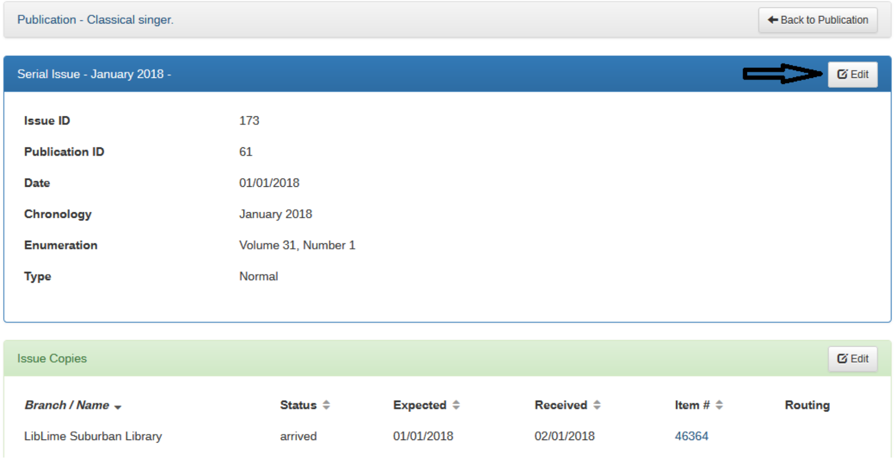
Note that if you edit an issue that has been received and change the chronology or enumeration, your list of expected issues may not reflect the change. If that is the case, edit the publication record itself. Then in the Chronology, Enumeration, and Schedule section, change the date and/or enumeration counters for the next issue to be generated.

Unlike status or date received, this can only be changed for all issues (not just for one subscription. Click the Edit button next to a particular issue:



Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
03/01/2018	March 2018	Number 32	1/1	0/1	
02/01/2018	February 2018	Number 31	1/1	0/1	
01/01/2018	January 2018	Volume 31, Number 1	0/1	1/1	

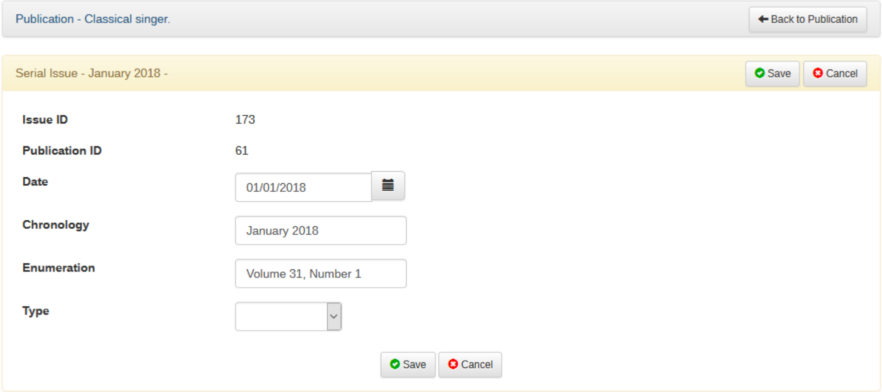
As above, it opens a two-part screen with information about that particular issue. Instead of clicking the Edit button in the bottom section, use the button in the top section:



Issue ID	173
Publication ID	61
Date	01/01/2018
Chronology	January 2018
Enumeration	Volume 31, Number 1
Type	Normal

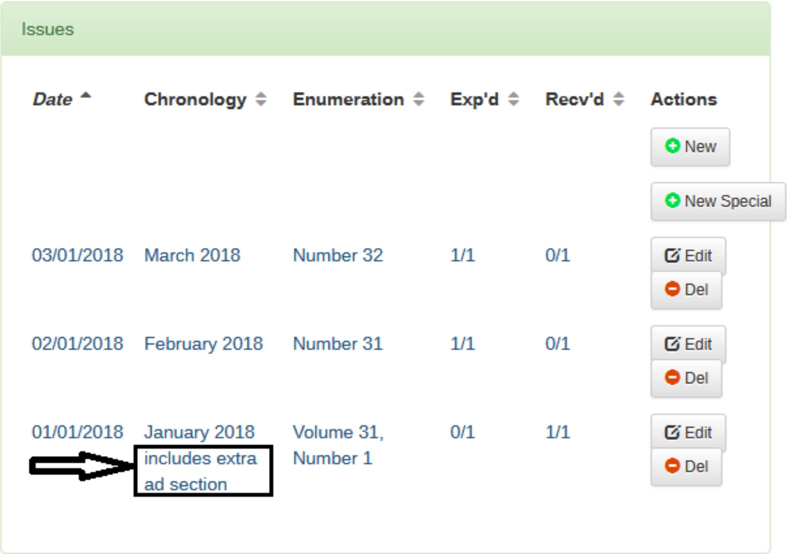
Branch / Name	Status	Expected	Received	Item #	Routing
LibLime Suburban Library	arrived	01/01/2018	02/01/2018	46364	

That opens an edit screen for chronology and enumeration:



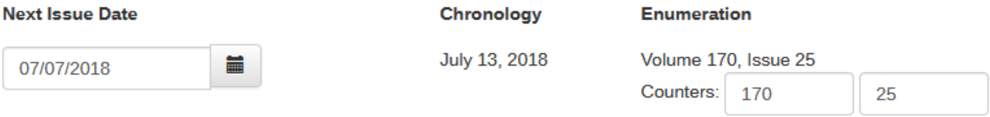
Issue ID	173
Publication ID	61
Date	01/01/2018
Chronology	January 2018
Enumeration	Volume 31, Number 1
Type	

Make your changes and save; the issue display will update accordingly:


Issues

Date	Chronology	Enumeration	Exp'd	Recv'd	Actions
					New New Special
03/01/2018	March 2018	Number 32	1/1	0/1	Edit Del
02/01/2018	February 2018	Number 31	1/1	0/1	Edit Del
01/01/2018	January 2018 includes extra ad section	Volume 31, Number 1	0/1	1/1	Edit Del

If for some reason you change the chronology and/or enumeration, after saving be sure to edit the publication record and check the next issue date and enumeration. Make sure that both are valid for the next issue you expect; edit if needed and save.


Next Issue Date: 07/07/2018

Chronology: July 13, 2018

Enumeration: Volume 170, Issue 25

Counters: 170 25

Again, this is NOT a recommended practice.

14.3.3 Title Record Display of Serials Issues

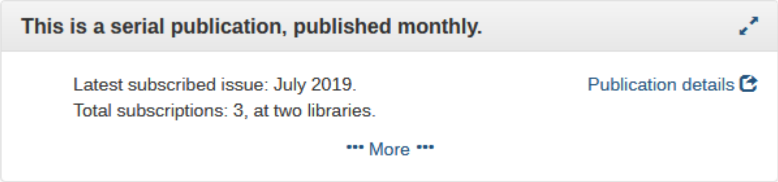
Details on serials issues can be seen from the linked title record in a couple of places. **NOTE: The Latest Issues tab will not show in the staff or Discovery Layer display if the MARC record is not defined as a serial (leader positions 6 and 7, rtype=a and blvl=s)**. The publication record will give a warning if linked to a non-serial title:

Publication ID: 85

Catalog Record: 10404 (India, a modern history.)

Title is not a serial record. Edit MARC Leader[06-07] to ensure data from serials module displays to patrons and staff.

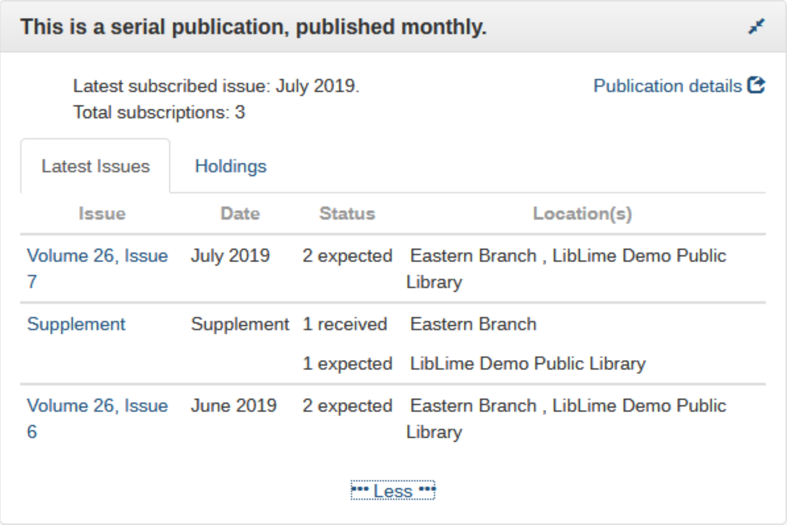
If a serial title record is linked to one or more subscriptions, a new section in the staff display will show details:



This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3, at two libraries.

The Publication Details link will take you to the serials publication record. Click the More or the double arrow icon and you'll see information on subscriptions and latest issues received:



This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Issue	Date	Status	Location(s)
Volume 26, Issue 7	July 2019	2 expected	Eastern Branch , LibLime Demo Public Library
Supplement	Supplement	1 received	Eastern Branch
		1 expected	LibLime Demo Public Library
Volume 26, Issue 6	June 2019	2 expected	Eastern Branch , LibLime Demo Public Library

The number of issues displayed is controlled by the StaffSerialIssueDisplayCount syspref; the default is three.

Click the Holdings tab to see an auto-generated holdings statement based on all the issues received in the serials module. This is created on the fly from all of the issues received in Serials; you can also create an 86x record in either the MFHD or the title record with notes about earlier issues.

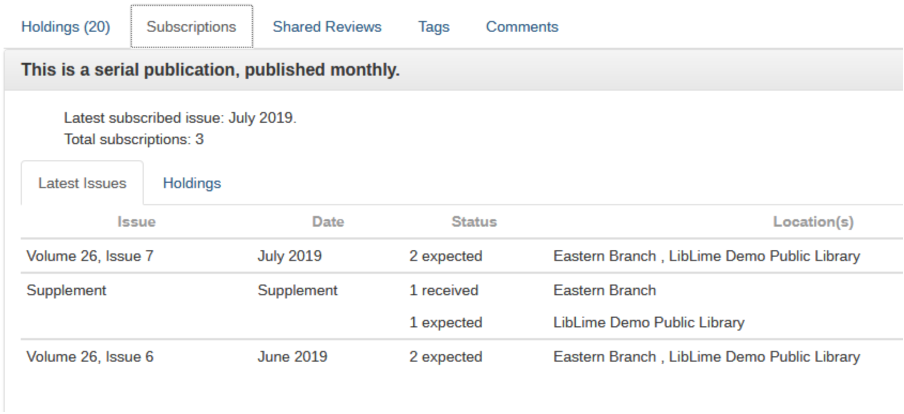
This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Location	Holdings Summary
LibLime Demo Public Library	v.15, is.2(February 2018),v.15, is.4(April 2018),v.15, is.5(May 2018)-v.15, is.7(June 2018)

You can close the expanded screen by clicking on Less or on the double arrow icon.

In the Discovery Layer, a tab at the bottom labelled Subscriptions will show the same serials information:



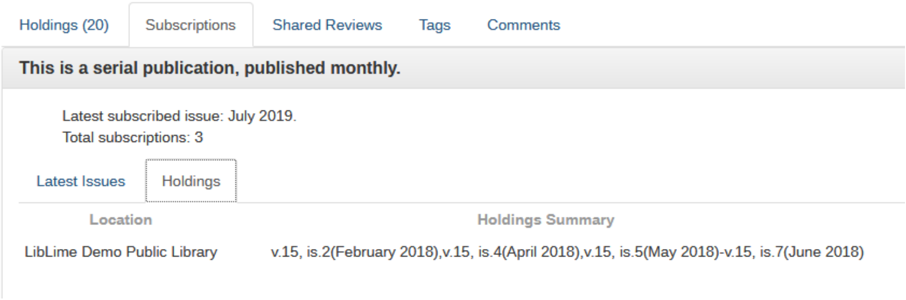
This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Issue	Date	Status	Location(s)
Volume 26, Issue 7	July 2019	2 expected	Eastern Branch , LibLime Demo Public Library
Supplement	Supplement	1 received 1 expected	Eastern Branch LibLime Demo Public Library
Volume 26, Issue 6	June 2019	2 expected	Eastern Branch , LibLime Demo Public Library

The number of issues displayed is controlled by the OPACSerialIssueDisplayCount syspref; the default is three.

As with the staff display, the Holdings tab in this display will show the auto-generated textual holdings string:

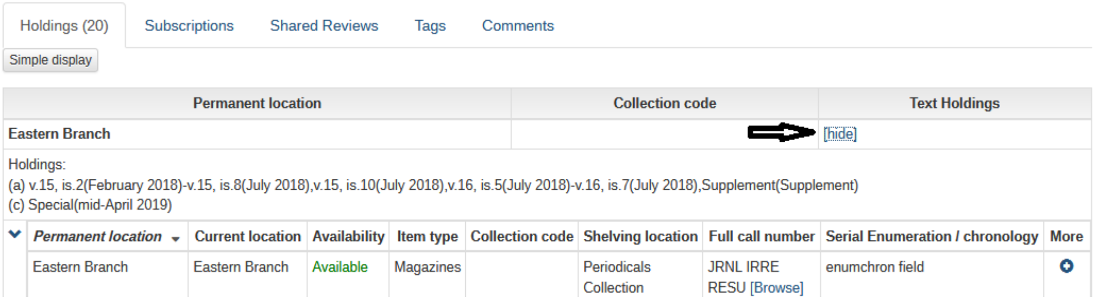


This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Location	Holdings Summary
LibLime Demo Public Library	v.15, is.2(February 2018),v.15, is.4(April 2018),v.15, is.5(May 2018)-v.15, is.7(June 2018)

In addition, if you created MFHD and item records, the auto-generated holdings string is shown in the Discovery Layer item/MFHD holdings table (the display can be toggled between Show and Hide):

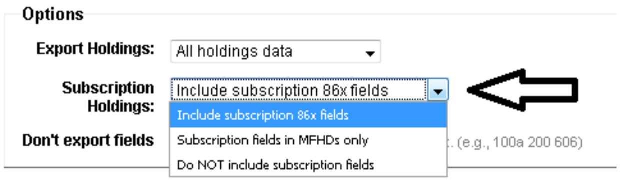


Permanent location	Collection code	Text Holdings
Eastern Branch		[hide]

Holdings:
(a) v.15, is.2(February 2018)-v.15, is.8(July 2018),v.15, is.10(July 2018),v.16, is.5(July 2018)-v.16, is.7(July 2018),Supplement(Supplement)
(c) Special(mid-April 2019)

Permanent location	Current location	Availability	Item type	Collection code	Shelving location	Full call number	Serial Enumeration / chronology	More
Eastern Branch	Eastern Branch	Available	Magazines		Periodicals Collection	JRNL IRRE RESU [Browse]	enumchron field	⊕

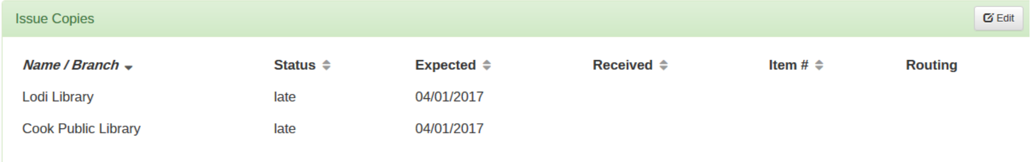
Although the 86x entries are auto-generated, they will be converted and exported with MFHD records during a bibliographic export if that option is selected:



Export Holdings: All holdings data
Subscription Holdings: Include subscription 86x fields
Don't export fields (e.g., 100a 200 606)

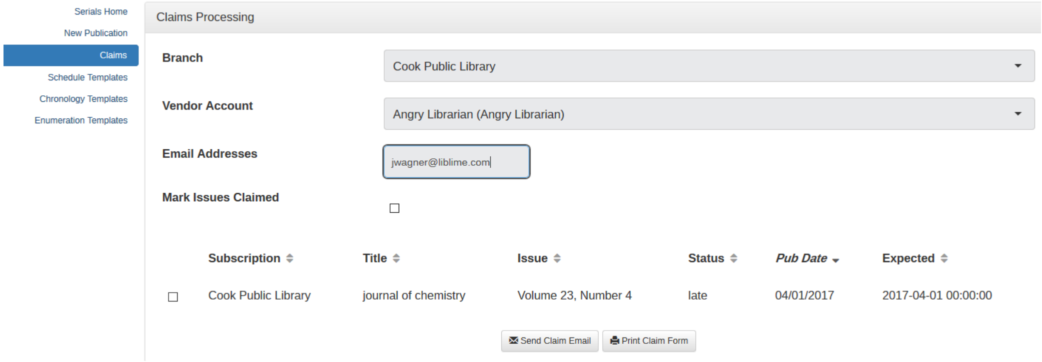
14.4 Claiming

If your subscription is configured for automatically marking items as late (the Late After setting in the subscription record) and the cron job is running, items should automatically have their statuses changed to Late. Otherwise, you can mark something late manually (above). The status will show in the Issue Copies section -- remember, you get to that screen by clicking the Edit link next to a particular issue from the publication record screen:



Name / Branch	Status	Expected	Received	Item #	Routing
Lodi Library	late	04/01/2017			
Cook Public Library	late	04/01/2017			

You can send a claim by email or print it out. To create a claim notice, go to the Claims tab in serials. Then select the branch and the vendor to see what issues have not been received. If the vendor account has an email address, that will be used. Otherwise, enter an email address here if you want to send the claim by email. You may want to do this if your vendor has a separate email address specifically for claims. You can also enter multiple email addresses if you want to send copies to more than one person; separate the addresses with a comma or a space.



Branch Cook Public Library

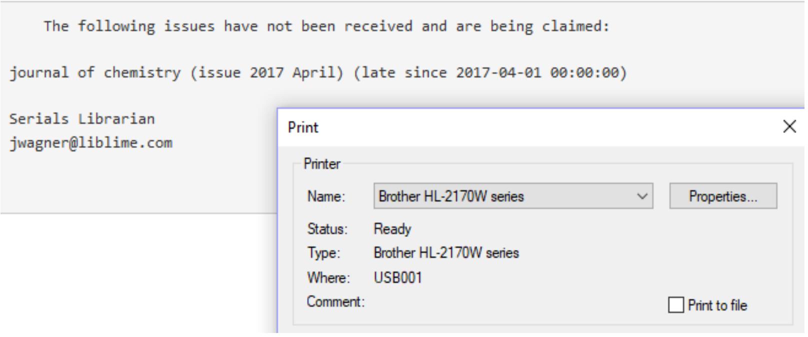
Vendor Account Angry Librarian (Angry Librarian)

Email Addresses jwagner@liblime.com

Mark Issues Claimed ☐

	Subscription	Title	Issue	Status	*Pub Date*	Expected
☐	Cook Public Library	journal of chemistry	Volume 23, Number 4	late	04/01/2017	2017-04-01 00:00:00

If you would rather print the claim letter, click the Print Claim Form button. A new browser window will open with the message to print:

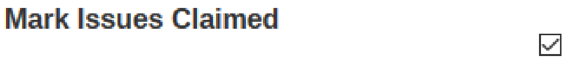


```
    The following issues have not been received and are being claimed:

journal of chemistry (issue 2017 April) (late since 2017-04-01 00:00:00)

Serials Librarian
jwagner@liblime.com
```

Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series
Where: USB001
Comment:
☐ Print to file

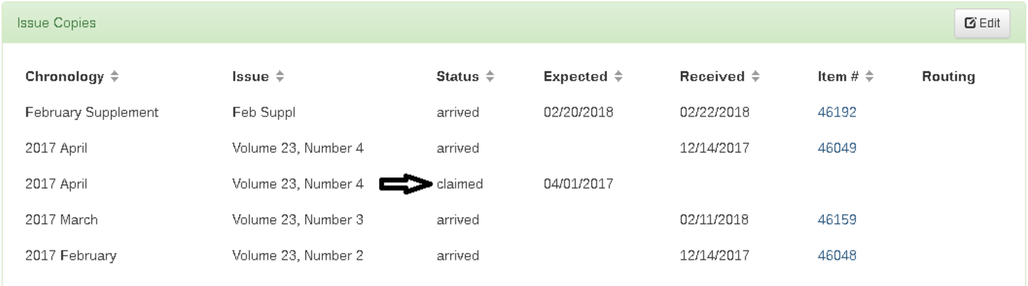
Both the email and the print claim use the same message template (Serials Claim) so you can modify the text to your needs.

Be sure to check the Mark Issues Claimed box before printing or emailing. Otherwise, the issues will not change status.



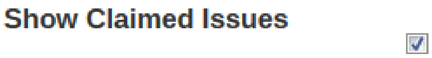
Mark Issues Claimed ☑

With that box checked, when you print or email, the issue will be removed from this list. Back on the Issue Copies screen, the status will show as claimed:



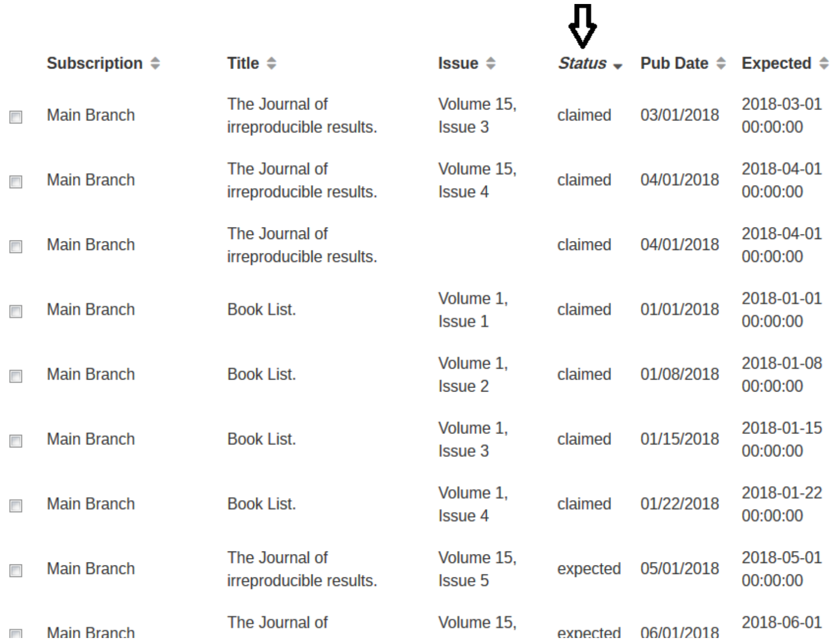
Chronology	Issue	Status	Expected	Received	Item #	Routing
February Supplement	Feb Suppl	arrived	02/20/2018	02/22/2018	46192	
2017 April	Volume 23, Number 4	arrived		12/14/2017	46049	
2017 April	Volume 23, Number 4	claimed	04/01/2017			
2017 March	Volume 23, Number 3	arrived		02/11/2018	46159	
2017 February	Volume 23, Number 2	arrived		12/14/2017	46048	

On the claims screen, you can see what issues have been claimed for that branch and vendor, by checking the Show Claimed Issues box:



Show Claimed Issues ☑

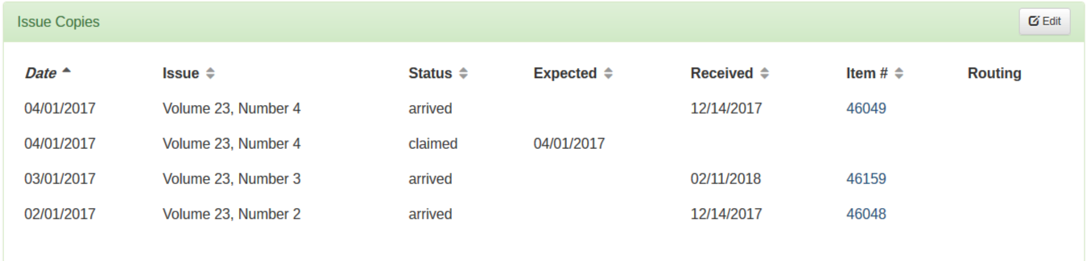
Then, you can sort the list by Status to see all the claimed issues together, and all the late and expected issues together:



	Subscription	Title	Issue	Status	Pub Date	Expected
☐	Main Branch	The Journal of irreproducible results.	Volume 15, Issue 3	claimed	03/01/2018	2018-03-01 00:00:00
☐	Main Branch	The Journal of irreproducible results.	Volume 15, Issue 4	claimed	04/01/2018	2018-04-01 00:00:00
☐	Main Branch	The Journal of irreproducible results.		claimed	04/01/2018	2018-04-01 00:00:00
☐	Main Branch	Book List.	Volume 1, Issue 1	claimed	01/01/2018	2018-01-01 00:00:00
☐	Main Branch	Book List.	Volume 1, Issue 2	claimed	01/08/2018	2018-01-08 00:00:00
☐	Main Branch	Book List.	Volume 1, Issue 3	claimed	01/15/2018	2018-01-15 00:00:00
☐	Main Branch	Book List.	Volume 1, Issue 4	claimed	01/22/2018	2018-01-22 00:00:00
☐	Main Branch	The Journal of irreproducible results.	Volume 15, Issue 5	expected	05/01/2018	2018-05-01 00:00:00
☐	Main Branch	The Journal of	Volume 15,	expected	06/01/2018	2018-06-01

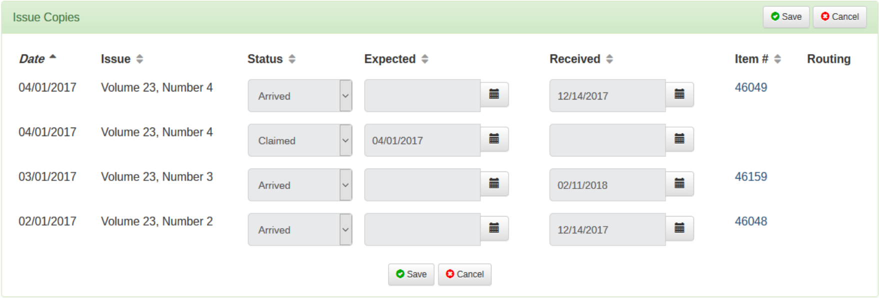
14.5 Editing Issues That Have Been Received

Occasionally you may want to edit or change status on an issue that has already been received. This is similar to the process described above in Editing Expected Issue Data. From the publication record screen, click on the subscription. That brings up the Issue Copies screen:



Date	Issue	Status	Expected	Received	Item #	Routing
04/01/2017	Volume 23, Number 4	arrived		12/14/2017	46049	
04/01/2017	Volume 23, Number 4	claimed	04/01/2017			
03/01/2017	Volume 23, Number 3	arrived		02/11/2018	46159	
02/01/2017	Volume 23, Number 2	arrived		12/14/2017	46048	

Click the Edit button and you can change the status or date of any issue, including those already received:



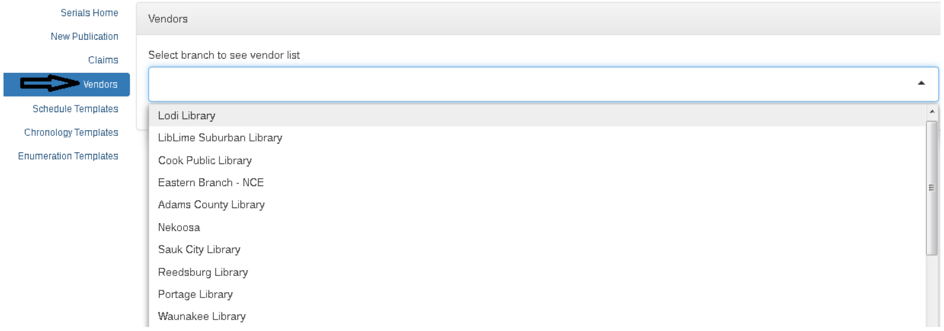
Date	Issue	Status	Expected	Received	Item #	Routing
04/01/2017	Volume 23, Number 4	Arrived		12/14/2017	46049	
04/01/2017	Volume 23, Number 4	Claimed	04/01/2017			
03/01/2017	Volume 23, Number 3	Arrived		02/11/2018	46159	
02/01/2017	Volume 23, Number 2	Arrived		12/14/2017	46048	

This should not be necessary except in unusual circumstances.

14.6 Managing Serials Vendors

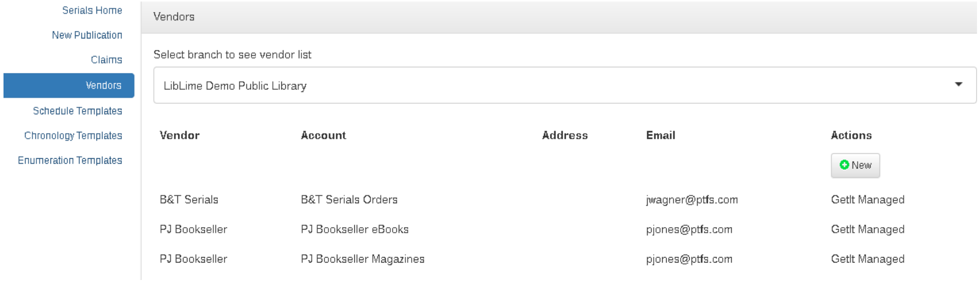
Vendor records are needed for claiming serials issues. The serials module uses the acquisitions module’s vendor database; vendors can be set up in either the serial or acquisition module. However, not all sites have implemented acquisitions. Therefore, the serials module has an interface to create, edit, or delete vendor records without going into the acquisitions module.

To set up vendors under serials, in the sidebar menu, in the sidebar menu, click Vendors, and you’ll be asked for your branch:



The branch selection is needed for certain large sites which have separate acquisitions installations for different branches; sites with only one installation (or none) will share vendors between all branches, so this setting is not restrictive.

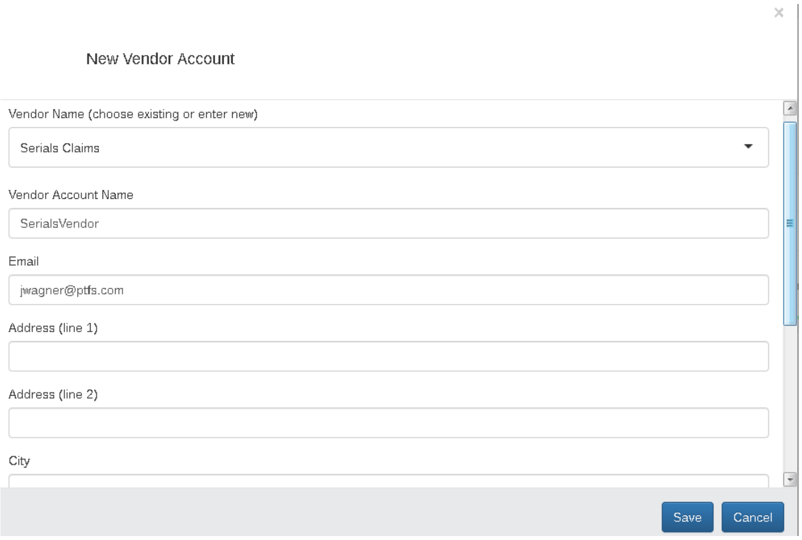
If there is an available acquisitions installation, you will see vendor records from that database. You cannot modify those records from within the serials interface, but you can use them for claiming.



Select branch to see vendor list: LibLime Demo Public Library

Vendor	Account	Address	Email	Actions
				New
B&T Serials	B&T Serials Orders		jwagner@ptfs.com	GetIt Managed
PJ Bookseller	PJ Bookseller eBooks		pjones@ptfs.com	GetIt Managed
PJ Bookseller	PJ Bookseller Magazines		pjones@ptfs.com	GetIt Managed

If there is not an available acquisitions installation, you can create a new vendor record from here. Click the New button and you’ll get a popup for a new vendor record.



New Vendor Account

Vendor Name (choose existing or enter new): Serials Claims

Vendor Account Name: SerialsVendor

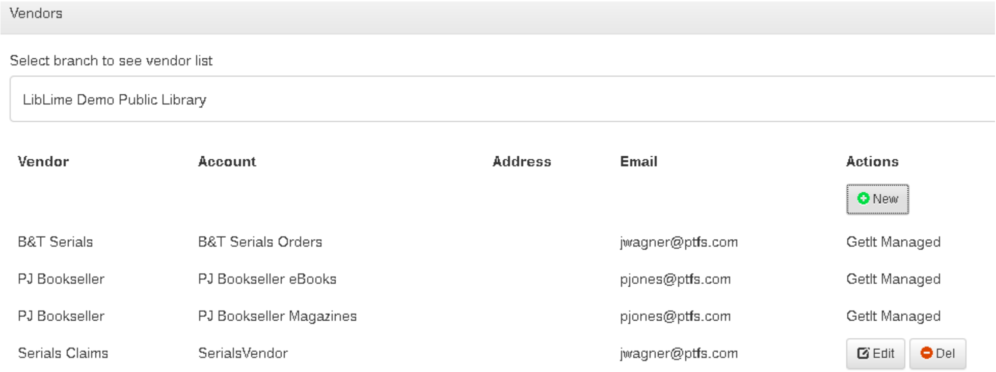
Email: jwagner@ptfs.com

Address (line 1):

Address (line 2):

City:

If you plan to send claims messages by email, you just need to give it a name and email address. If you need to mail claims messages, fill out the address fields as well. Save the record, and your new vendor will show in the list:



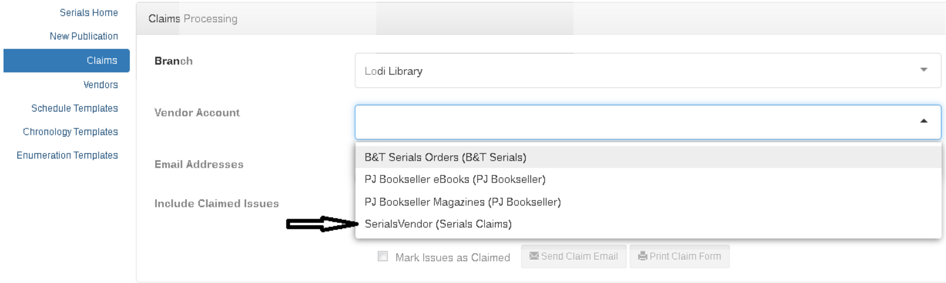
Vendors

Select branch to see vendor list: LibLime Demo Public Library

Vendor	Account	Address	Email	Actions
				New
B&T Serials	B&T Serials Orders		jwagner@ptfs.com	GetIt Managed
PJ Bookseller	PJ Bookseller eBooks		pjones@ptfs.com	GetIt Managed
PJ Bookseller	PJ Bookseller Magazines		pjones@ptfs.com	GetIt Managed
Serials Claims	SerialsVendor		jwagner@ptfs.com	Edit Del

Note that while you cannot edit vendor records created through the acquisitions module, you can edit or delete records created through the serials interface – click the Edit or Delete buttons if needed.

The new vendor record is now available for use in Claims (you may need to refresh your browser to see it):



Claims Processing

Branch: Lodi Library

Vendor Account:
- B&T Serials Orders (B&T Serials)
- PJ Bookseller eBooks (PJ Bookseller)
- PJ Bookseller Magazines (PJ Bookseller)
- SerialsVendor (Serials Claims)

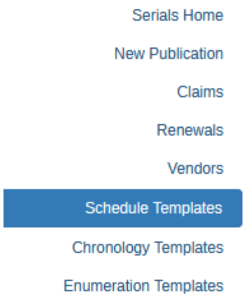
Email Addresses

Include Claimed Issues

Note: Multi-library sites which do not share acquisitions and serials vendors require some additional setup. We have added a new system preference, SerialBranchSharedVendors. If this is off, then any time a branch makes a new serial vendor, it's tagged with the branch code, and only that branch has access to it. If the syspref is on, then all branches tied to a single acquisitions database share vendors.

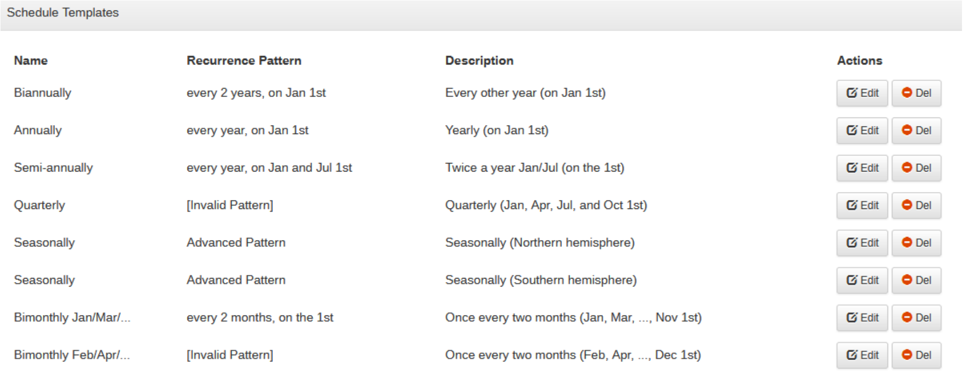
14.7 Managing Custom Templates

You can save custom templates for schedule, chronology, and enumeration – each entry screen has a place to enter a name. You can also create a new one outside those screens. To see the templates currently available, go to one of the tabs on the left side of the serials module:



14.7.1 Schedule Templates

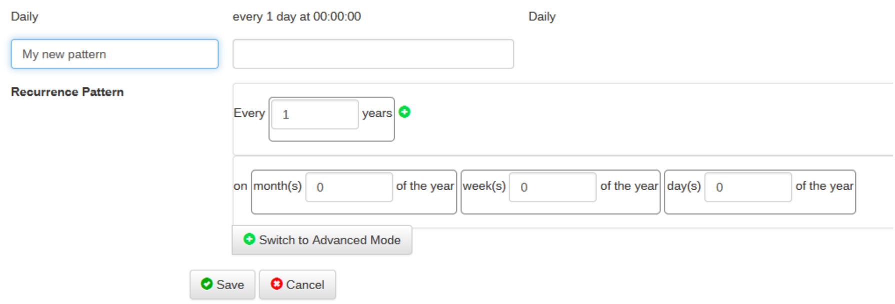
A number of templates are delivered with the module; you will also see any custom templates you have saved.



Schedule Templates

Name	Recurrence Pattern	Description	Actions
Biannually	every 2 years, on Jan 1st	Every other year (on Jan 1st)	Edit Del
Annually	every year, on Jan 1st	Yearly (on Jan 1st)	Edit Del
Semi-annually	every year, on Jan and Jul 1st	Twice a year Jan/Jul (on the 1st)	Edit Del
Quarterly	[Invalid Pattern]	Quarterly (Jan, Apr, Jul, and Oct 1st)	Edit Del
Seasonally	Advanced Pattern	Seasonally (Northern hemisphere)	Edit Del
Seasonally	Advanced Pattern	Seasonally (Southern hemisphere)	Edit Del
Bimonthly Jan/Mar/...	every 2 months, on the 1st	Once every two months (Jan, Mar, ..., Nov 1st)	Edit Del
Bimonthly Feb/Apr/...	[Invalid Pattern]	Once every two months (Feb, Apr, ..., Dec 1st)	Edit Del

You can edit an existing template or click the New button at the bottom of the screen to create a new one. That opens a line in the list; give it a name:



Daily | every 1 day at 00:00:00 | Daily

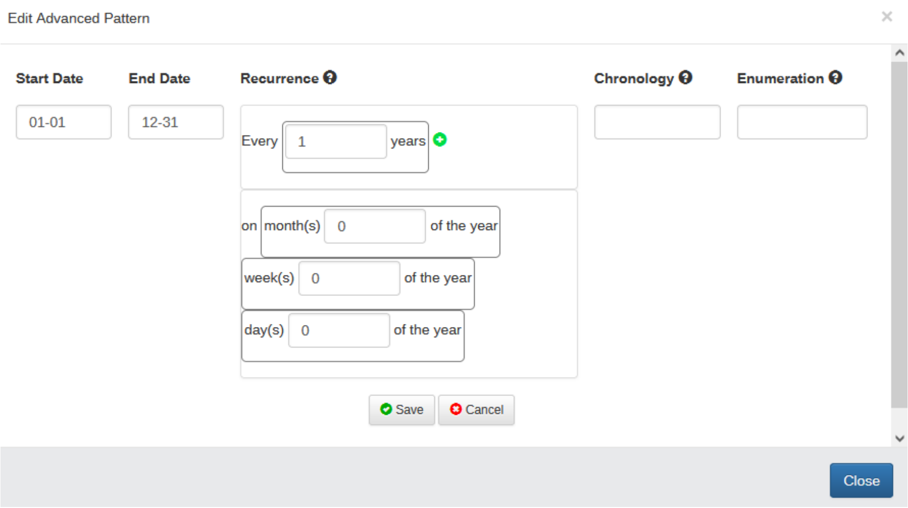
My new pattern

Recurrence Pattern

Every 1 years

on month(s) 0 of the year week(s) 0 of the year day(s) 0 of the year

If necessary, click Switch to Advanced Mode to customize the pattern. Add or edit a pattern:



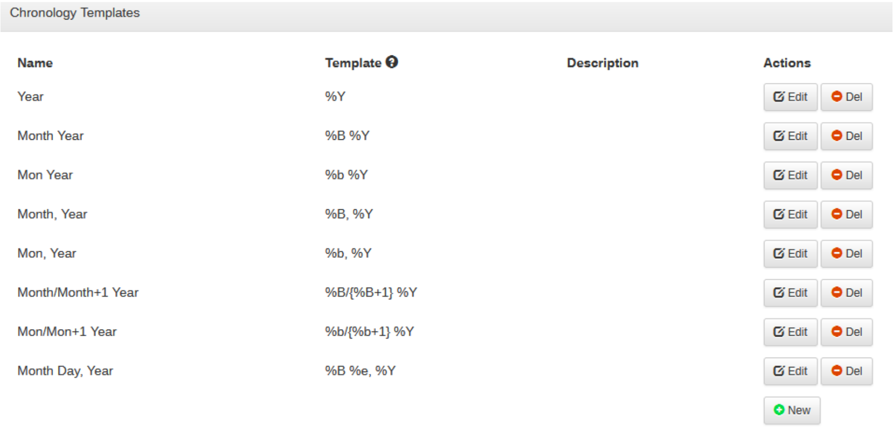
Edit Advanced Pattern

Start Date	End Date	Recurrence	Chronology	Enumeration
01-01	12-31	Every 1 years on month(s) 0 of the year week(s) 0 of the year day(s) 0 of the year		

The question mark icons will bring up help screens for that section.

14.7.2 Chronology Templates

These templates control the chronology patterns. You can edit one of the delivered templates or create your own.



Chronology Templates

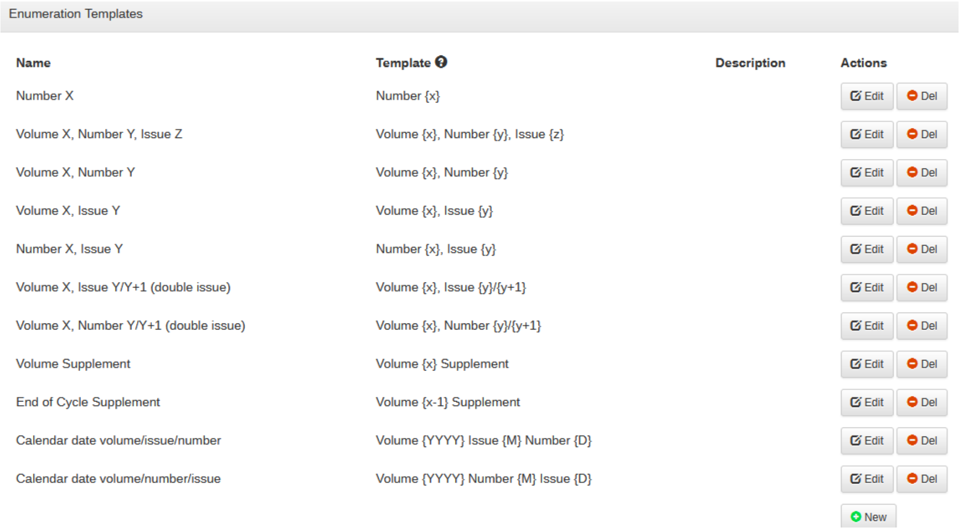
Name	Template	Description	Actions
Year	%Y		Edit Del
Month Year	%B %Y		Edit Del
Mon Year	%b %Y		Edit Del
Month, Year	%B, %Y		Edit Del
Mon, Year	%b, %Y		Edit Del
Month/Month+1 Year	%B/{%B+1} %Y		Edit Del
Mon/Mon+1 Year	%b/{%b+1} %Y		Edit Del
Month Day, Year	%B %e, %Y		Edit Del
			New

If you need to edit one, below is the list of directives that can be used and their meaning. Note that these templates use a 'printf' format in which percent-sign-prefixed single-character directives render as specific date elements. For example, '%B' is the month, '%Y' is the year. These are case sensitive, e.g. '%b' is the abbreviated month. You can usually do basic calculations on dates by using brace-expressions: for a date in August, "%b/{%b+1}" would render "Aug/Sep", "{%b-1}/%b" as "Jul/Aug", etc. Numeric calculations are non-modulo, i.e. they do not loop at the min/max values, thus {%d+1} on Jan 31st would render "32".

Directive	Meaning	Brace-expressions?
%Y	4-digit year	Yes
%y	2-digit year	Yes (non-modulo)
%m	2-digit month	Yes (non-modulo)
%b	Month abbrev (Jan)	Yes
%B	Month name (January)	Yes
%d	2-digit day	Yes (non-modulo)
%a	Weekday abbrev (Sun)	Yes
%A	Weekday (Sunday)	Yes
%w	Day of week (1=Monday)	Yes (no modulo)
%E	Day of month (1st, 2nd, ...)	No
%q	Northern hemisphere seasons	
%Q	Southern hemisphere seasons	

14.7.3 Enumeration Templates

These templates control how issues are numbered:



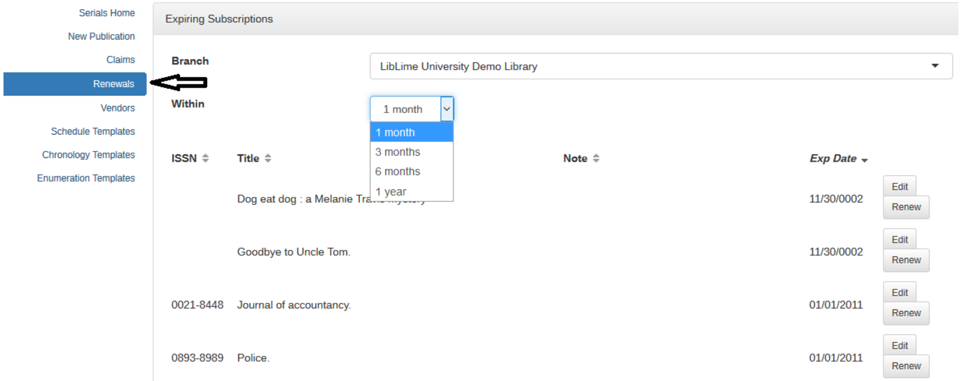
Enumeration Templates

Name	Template	Description	Actions
Number X	Number {x}		Edit Del
Volume X, Number Y, Issue Z	Volume {x}, Number {y}, Issue {z}		Edit Del
Volume X, Number Y	Volume {x}, Number {y}		Edit Del
Volume X, Issue Y	Volume {x}, Issue {y}		Edit Del
Number X, Issue Y	Number {x}, Issue {y}		Edit Del
Volume X, Issue Y/Y+1 (double issue)	Volume {x}, Issue {y}/{y+1}		Edit Del
Volume X, Number Y/Y+1 (double issue)	Volume {x}, Number {y}/{y+1}		Edit Del
Volume Supplement	Volume {x} Supplement		Edit Del
End of Cycle Supplement	Volume {x-1} Supplement		Edit Del
Calendar date volume/issue/number	Volume {YYYY} Issue {M} Number {D}		Edit Del
Calendar date volume/number/issue	Volume {YYYY} Number {M} Issue {D}		Edit Del
			New

You can create your own numbering pattern. Again, click the New button to open a line for editing:

14.8 Managing Upcoming Renewals

A serials function will help staff identify subscriptions that are near to their expiration dates. Click the Renewals tab in the serials sidebar menu. Then select the branch and the desired date range. The default is for subscriptions that expire within the next month.



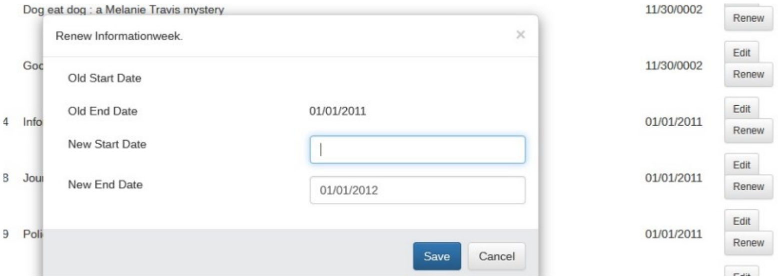
Expiring Subscriptions

Branch: LibLime University Demo Library

Within: 1 month

ISSN	Title	Note	Exp Date	
	Dog eat dog : a Melanie Tra		11/30/0002	Edit Renew
	Goodbye to Uncle Tom.		11/30/0002	Edit Renew
0021-8448	Journal of accountancy.		01/01/2011	Edit Renew
0893-8989	Police.		01/01/2011	Edit Renew

Each entry has buttons that will allow staff to edit that subscription record or just renew the subscription. If you opt to renew from this screen, a popup allows entry of new dates.



Dog eat dog : a Melanie Travis mystery

Renew Informationweek.

Old Start Date

Old End Date 01/01/2011

New Start Date

New End Date 01/01/2012

14.9 SQL Reports

Here are some SQL reports that may be helpful for working with serials; these will be added to the LibLime Reports Library.

List of Titles with a Serials Publication Record

```
select periodicals.id AS "Periodical Record", biblio.title from periodicals
JOIN biblio on (periodicals.bib_id = biblio.biblionumber) order by
biblio.title
```

Subscriptions by Branch, Title

```
select subscriptions.branch_code, subscriptions.start_date,
subscriptions.expiration_date, periodicals.id AS "Periodical Record",
biblio.title from subscriptions JOIN periodicals on
(subscriptions.periodical_id = periodicals.id) JOIN biblio on
(periodicals.bib_id = biblio.biblionumber) order by
subscriptions.branch_code, biblio.title
```

Serial Claims by Branch

```
select periodicals.id, bib_id,subscriptions.id,branch_code, count(*) "num of
claims", date(start_date) as "start Date" ,date(expiration_date) as "expiry
date",title from periodicals join subscriptions on ( periodicals.id =
periodical_id ) join biblio on (bib_id=biblionumber) join serial_instances on
( subscriptions.id=subscription_id and status = 7) group by subscriptions.id
order by title,branch_code
```

Serials - Number of Issues Late

```
select periodicals.id, bib_id,subscriptions.id,branch_code, count(*) "num of
late", date(start_date) as "start Date" ,date(expiration_date) as "expiry
date",title from periodicals join subscriptions on ( periodicals.id =
periodical_id ) join biblio on (bib_id=biblionumber) join serial_instances on
```

```
( subscriptions.id=subscription_id and status = 3) group by subscriptions.id
order by title,branch_code
```

Serials Summary by Issues Status

```
select periodicals.id, bib_id,subscriptions.id,branch_code, ( select count(*)
from serial_instances where subscription_id=subscriptions.id and status = 1)
"1 expected", ( select count(*) from serial_instances where
subscription_id=subscriptions.id and status = 2) as "2 received", ( select
count(*) from serial_instances where subscription_id=subscriptions.id and
status = 3) as "3 late", ( select count(*) from serial_instances where
subscription_id=subscriptions.id and status = 4) as "4 missing", ( select
count(*) from serial_instances where subscription_id=subscriptions.id and
status = 5) as "5 unavalable", ( select count(*) from serial_instances where
subscription_id=subscriptions.id and status = 6) as " 6 deleted", ( select
count(*) from serial_instances where subscription_id=subscriptions.id and
status = 7) as "7 claimed", date(start_date) as "start Date",
date(expiration_date) as "expiry date",title from periodicals join
subscriptions on ( periodicals.id = periodical_id ) join biblio on
(bib_id=biblionumber) order by title
```

Serials List of Issues for a Bib (expects a biblionumber as a runtime parameter)

```
select bib_id, branch_code, status, expected_date, received_date, barcode,
item_id, chronology_vintage, sequence_vintage, title from periodicals join
subscriptions on ( periodicals.id = periodical_id ) join biblio on
(bib_id=biblionumber and bib_id = "__BIB__") join serial_instances on (
subscriptions.id=subscription_id ) left join items on ( itemnumber=item_id)
join serial_editions on ( serial_edition_id=serial_editions.id) order by
sequence_vintage
```

Subscriptions with Number of Issues Received and Not Received

```
select periodicals.id, bib_id,subscriptions.id,branch_code, ( select count(*)
from serial_instances where subscription_id=subscriptions.id and status = 2)
"received",( select count(*) from serial_instances where
subscription_id=subscriptions.id and status <> 2) as "not
received",date(start_date) as "start Date" ,date(expiration_date) as "expiry
date",title from periodicals join subscriptions on ( periodicals.id =
periodical_id ) join biblio on (bib_id=biblionumber) order by title
```

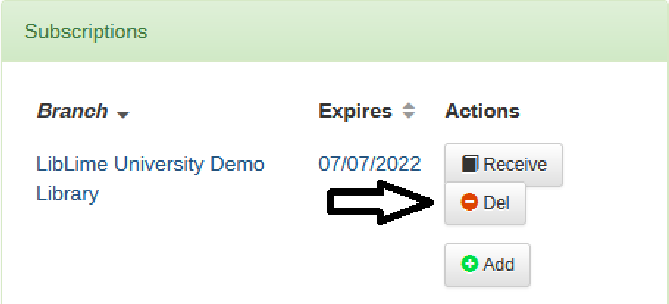
Serials with expired subscriptions

```
select biblio.title, subscriptions.branch_code, subscriptions.start_date,
subscriptions.expiration_date, periodicals.id AS "Periodical Record" from
subscriptions JOIN periodicals on (subscriptions.periodical_id =
periodicals.id) JOIN biblio on (periodicals.bib_id = biblio.biblionumber)
```

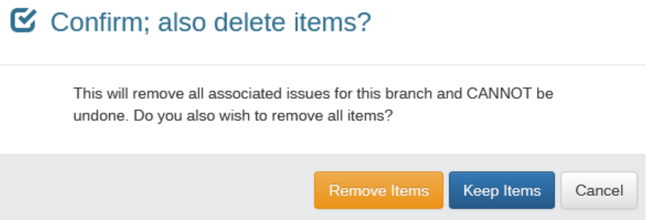
```
WHERE subscriptions.expiration_date < date(NOW()) order by
subscriptions.branch_code, biblio.title
```

14.10 Deleting Subscriptions

An individual subscription can be deleted while leaving the publication record in place. To do so, click the Del button next to the subscription summary:



If the subscription was configured to create items (sysprefs SerialDeleteItem and SerialDeleteItemConstraints), a popup will ask if you want to delete those items as well:



Confirm; also delete items?

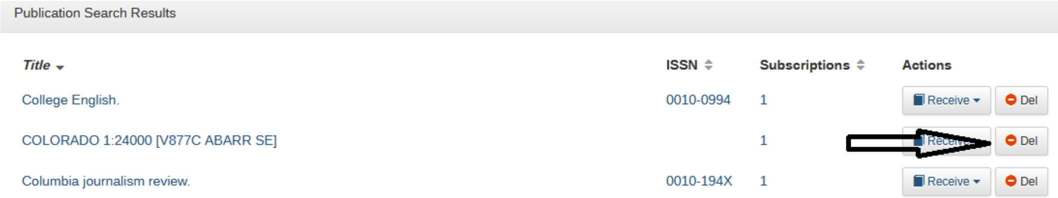
This will remove all associated issues for this branch and CANNOT be undone. Do you also wish to remove all items?

Note that you can opt to keep the items while deleting the subscription. If you choose the Remove Items button, the item records and the MFHD holdings record (if created by serials) will be deleted from the title record. If you click Keep Items, the item records (and MFHD) will remain attached to the bib record, but the link to serials will be removed and the subscription record deleted.

If the subscription does not create items as issues are received, the bib and item records will not be affected.

14.11 Deleting Publication Records

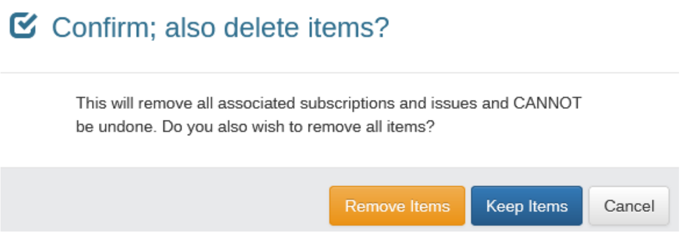
Usually you will want to keep publication records even if there are no active subscriptions, because the publication record has the serial pattern information. However, these records can be deleted if desired. From the main serials screen, find the title and click the Del button at the end of the line:



Publication Search Results

Title	ISSN	Subscriptions	Actions
College English.	0010-0994	1	Receive Del
COLORADO 1:24000 [V877C ABARR SE]		1	Receive Del
Columbia journalism review.	0010-194X	1	Receive Del

As above, you'll be asked to confirm deletion of any items that may have been created by receiving serials issues. You can choose to keep the items or delete them (and MFHD record, if created).



☑ Confirm; also delete items?

This will remove all associated subscriptions and issues and CANNOT be undone. Do you also wish to remove all items?

You'll get a popup confirming the publication record deletion:

Publication deleted

15. Lists

The list function allows users to create lists items that may or may be shared with other users. It is available in both staff and the Discovery Layer. Lists may be public, private or open.

- A private list is created, managed and seen only by the person who created it;
- A public list is seen by everyone but managed only by the person who created it;
- An open list can be seen and managed by everyone. This can become unwieldy or unmanageable and is not recommended.

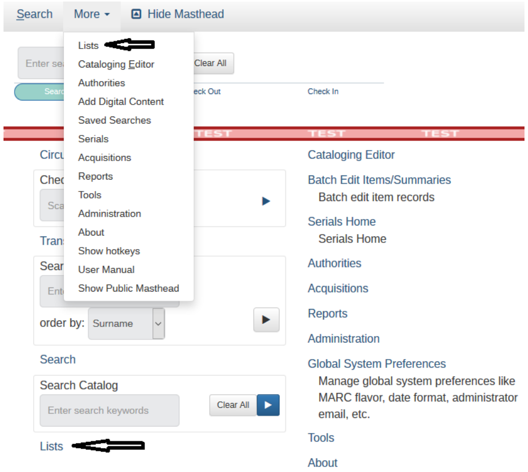
The individual staff or public patron or the associated Role must have the

catalogue, bib_list -- Lists/virtshelves of bibs

granular permission (see that section) to be able to create lists.

15.1 Creating a List (Staff Mode)

To create and manage lists in the staff mode, select Lists from the home page menu or from the More dropdown:



Manage global system preferences like MARC flavor, date format, administrator email, etc.

When you select Lists from the home page you are taken to a display of your current private and public lists:

List Name	Contents	Sort by	Type	Options
Music list	20 item(s)	title	Private	Edit Delete

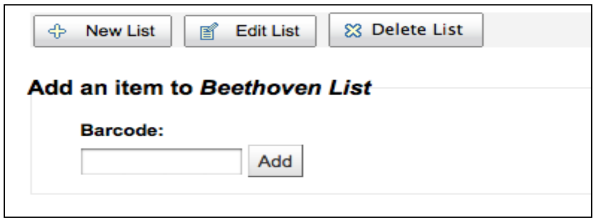
From here, you can create a new list, edit an existing list, or delete a list.

To add a new list, click on the button New List. This will bring up a template for the new list details. This includes a name for the list, how it will sort, and whether it is Private, Public or Open.

Name:
Owner: ptfs
Sort this list by: Title
Category: Private

A **Private** List is managed by you and can be seen only by you.
A **Public** List can be seen by everybody, but managed only by you.
A **Open** List can be seen and managed by everybody.

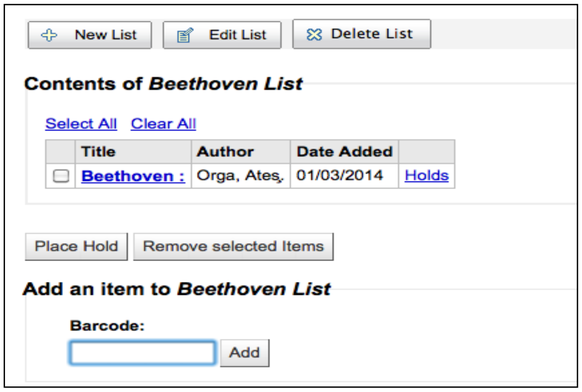
Click Save when you are done. When the template is saved, you are taken to a screen where items can be added to the list. To add the items, scan in the barcode and click “Add.”



Add an item to ***Beethoven List***

Barcode:

After an item is scanned it appears in the list:



Contents of ***Beethoven List***

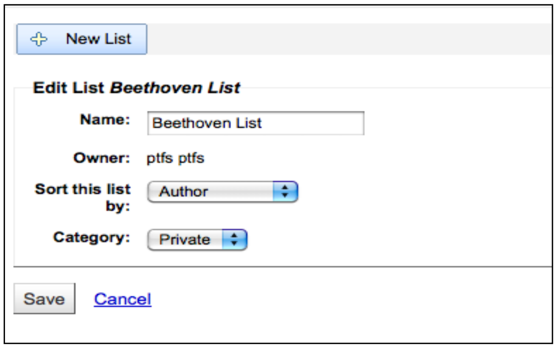
	Title	Author	Date Added	
☐	Beethoven :	Orga, Ates,	01/03/2014	Holds

Add an item to ***Beethoven List***

Barcode:

You may continue to add as many items as needed from this point. Note also that once items are added to the list they are available for placing a Hold through the list.

Clicking on the Edit button of the list takes you back to the set-up parameters, which allows you to change the name of the list, how it is sorted or whether it is Private or Public.



Edit List ***Beethoven List***

Name: Beethoven List

Owner: ptfs ptfs

Sort this list by: Author

Category: Private

15.2 Deleting a List

You may also Delete a list from the staff mode. Go back to the main Lists display (More, Lists). If you click on Delete, you will be asked to confirm the action. If you agree to the Delete action, but there are items in the list, you will be asked for further confirmation:

The list *Music list* is not empty.
It has **20** entries.
Use the "Confirm" button below to confirm deletion.

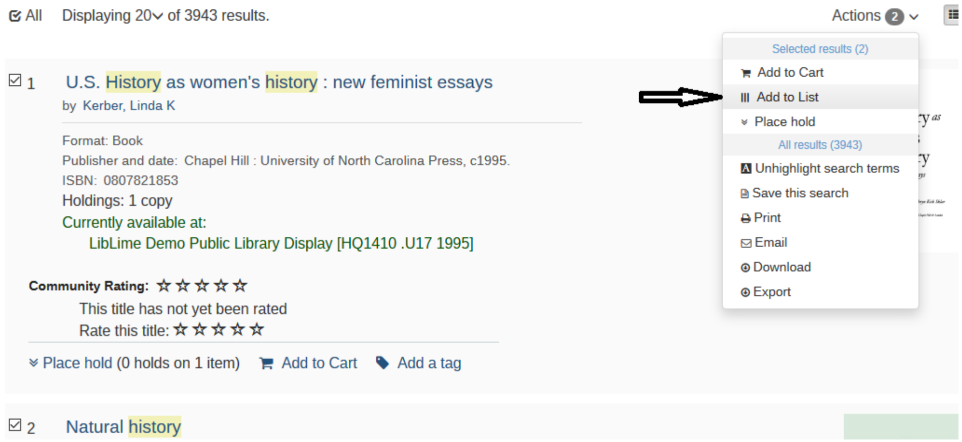
Lists

List Name	Contents	Sort by	Type	Options
Beethoven List	1 item(s)	author	Private	Edit Delete
Music list	20 item(s)	title	Private	Edit ✓ Confirm

The list will not be deleted until you Confirm; once deleted it cannot be retrieved. Note that this does NOT delete the titles themselves, just the grouping into a list.

15.3 Creating/Adding to a List From Search Results

Lists can also be created or added to through the search results list. Select titles from the results list and go under the Selected button at the top:

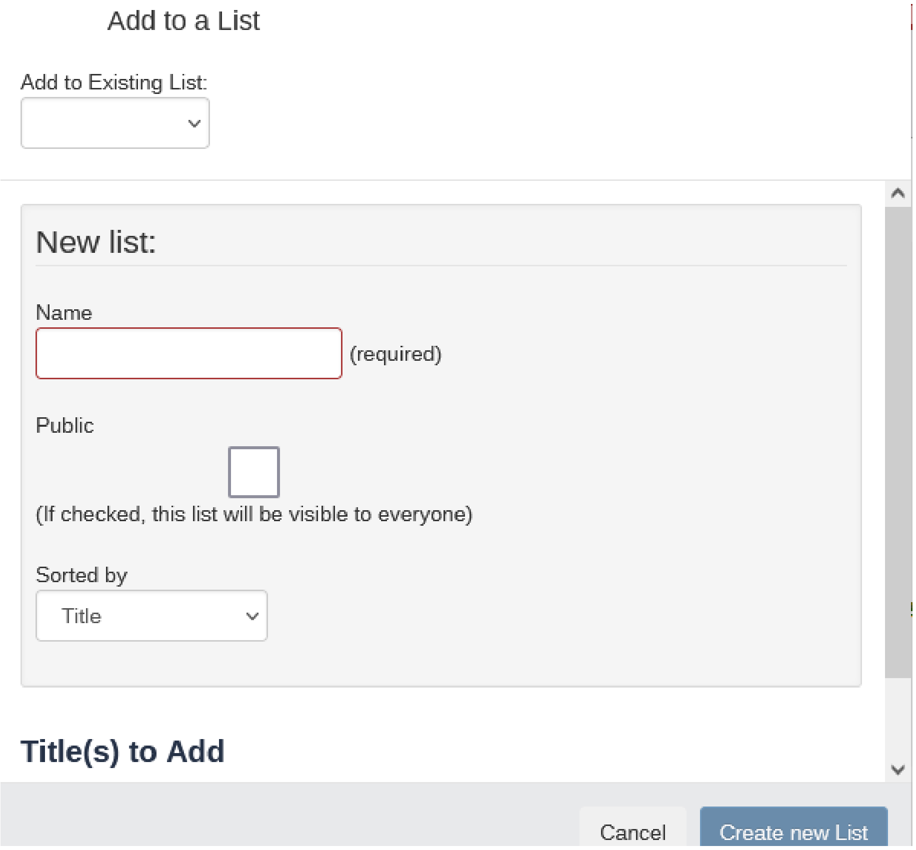


Displaying 20 of 3943 results.

☑ 1 U.S. History as women's history : new feminist essays
by Kerber, Linda K
Format: Book
Publisher and date: Chapel Hill : University of North Carolina Press, c1995.
ISBN: 0807821853
Holdings: 1 copy
Currently available at:
LibLime Demo Public Library Display [HQ1410 .U17 1995]
Community Rating: ☆☆☆☆☆
This title has not yet been rated
Rate this title: ☆☆☆☆☆

☑ 2 Natural history

Select Add to List (or Shelf if you've changed the wording). You can either create a new list at this point or add your selections to an existing list (use the pulldown to choose the list):



See the Discovery Layer section for information about working with lists in the public interface.

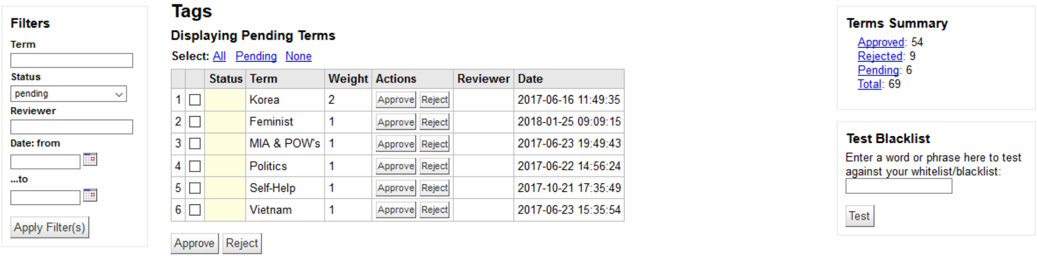
16. Moderating Tags and Comments

16.1 Moderating Tags

Tags are added by users in the Discovery Layer (see that section), and can be moderated by staff, if enabled (syspref TagsEnabled). When a patron adds a new tag it is subject to moderation by staff (if TagsModeration syspref is enabled). We strongly recommend that library staff moderate tags.

NOTE: Tag moderation is overridden and the term is automatically approved if the term is whitelisted. A term will be whitelisted if the program defined in the TagsExternalDictionary syspref says that the term is a legitimate word. If you want to force moderation for all tags, remove the value in TagsExternalDictionary.

To check and approve newly-added tags to go Tools, Tags:



Status: pending

Tags

Displaying Pending Terms

Select: All Pending None

		Status	Term	Weight	Actions	Reviewer	Date
1	☐		Korea	2	Approve Reject		2017-06-16 11:49:35
2	☐		Feminist	1	Approve Reject		2018-01-25 09:09:15
3	☐		MIA & POW's	1	Approve Reject		2017-06-23 19:49:43
4	☐		Politics	1	Approve Reject		2017-06-22 14:56:24
5	☐		Self-Help	1	Approve Reject		2017-10-21 17:35:49
6	☐		Vietnam	1	Approve Reject		2017-06-23 15:35:54

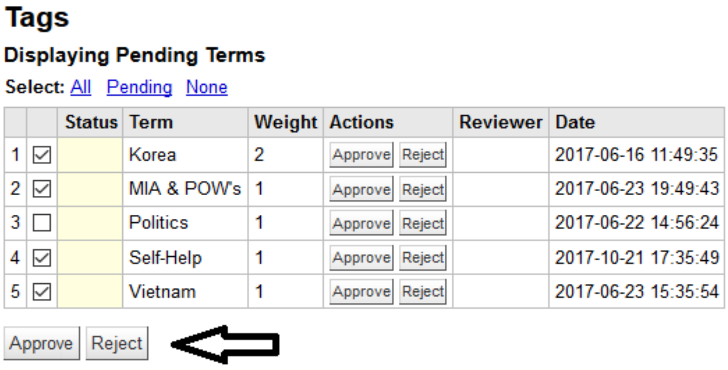
Terms Summary

Approved: 54
Rejected: 9
Pending: 6
Total: 69

From this screen you can:

- Search for terms that are pending, approved, or rejected;
- Filter tags by Searches, by Reviewer, or a date range;
- Test a term against the Test Blacklist, which is a whitelist/blacklist of terms;
- See a summary of all terms currently moderated; click on the link to see the terms under each category.

New tags appear in the list of Pending terms (the default display, above), where they can be Approved or Rejected. You can approve one tag at a time by clicking the Approve button on that line, or check several boxes and then the Approve (or Reject) button at the bottom:



Tags

Displaying Pending Terms

Select: All Pending None

		Status	Term	Weight	Actions	Reviewer	Date
1	☑		Korea	2	Approve Reject		2017-06-16 11:49:35
2	☑		MIA & POW's	1	Approve Reject		2017-06-23 19:49:43
3	☐		Politics	1	Approve Reject		2017-06-22 14:56:24
4	☑		Self-Help	1	Approve Reject		2017-10-21 17:35:49
5	☑		Vietnam	1	Approve Reject		2017-06-23 15:35:54

If Approved, the tag will be added to the Tag Cloud, where it can be used for searching by any patron.

It will also be added to the Test Blacklist. Searching against this test will tell if you a tag is permitted, prohibited, or has not yet been moderated. For example, an approved tag gives the following information:

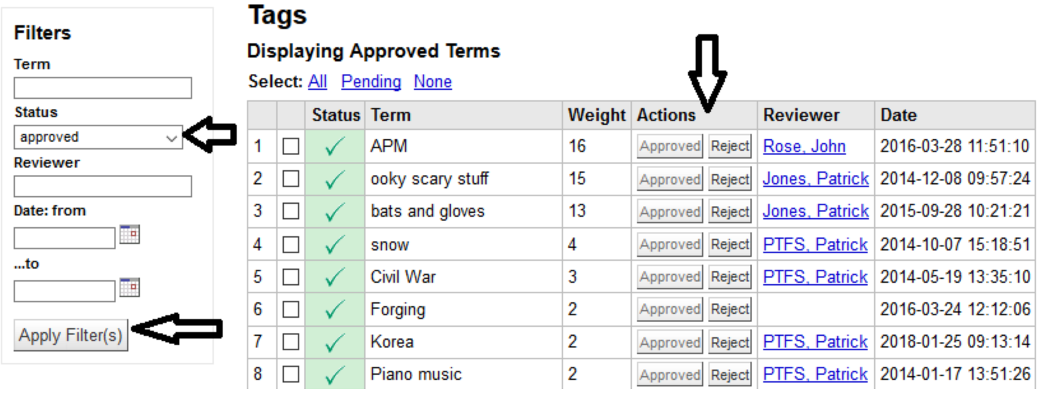
Test Blacklist

Enter a word or phrase here to test against your whitelist/blacklist:

Korea

Korea is permitted!

Note also that from the main screen you can retrieve a list of all tags that have been moderated to date and revise the original decision. Set the sidebar filter to Approved and apply the new filter:



Filters

Term:

Status: approved

Reviewer:

Date: from

...to

Tags

Displaying Approved Terms

Select: All Pending None

		Status	Term	Weight	Actions	Reviewer	Date
1	☐	✓	APM	16	Approved Reject	Rose, John	2016-03-28 11:51:10
2	☐	✓	ooky scary stuff	15	Approved Reject	Jones, Patrick	2014-12-08 09:57:24
3	☐	✓	bats and gloves	13	Approved Reject	Jones, Patrick	2015-09-28 10:21:21
4	☐	✓	snow	4	Approved Reject	PTFS, Patrick	2014-10-07 15:18:51
5	☐	✓	Civil War	3	Approved Reject	PTFS, Patrick	2014-05-19 13:35:10
6	☐	✓	Forging	2	Approved Reject		2016-03-24 12:12:06
7	☐	✓	Korea	2	Approved Reject	PTFS, Patrick	2018-01-25 09:13:14
8	☐	✓	Piano music	2	Approved Reject	PTFS, Patrick	2014-01-17 13:51:26

Reject buttons can be used to reject a previously-approved term.

See the Discovery Layer section for how tags appear and can be used in the public interface.

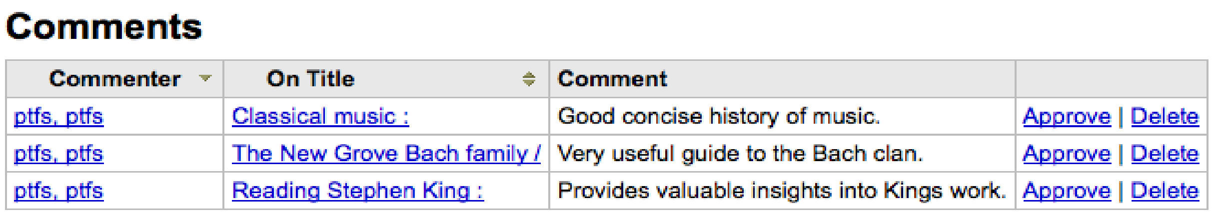
16.2 Moderating Comments

The system allows users to write comments or reviews about items held by the library. These comments are available for others to read. If enabled (syspref reviewson), a tab labeled Comments appears in the bibliographic display in the Discovery Layer. Patrons must be logged in to submit comments.

Comments are moderated by staff before they are made public. Staff must have the moderate_comments granular permission to moderate comments.

Comments are moderated in Tools, Comments. All pending comments will be listed here, awaiting action. Information on the patron commenting, the title of the item, and the comment are included here.

Click on Approve or Delete to take action on the comment:



Comments

Commenter	On Title	Comment	
ptfs, ptfs	Classical music :	Good concise history of music.	Approve | Delete
ptfs, ptfs	The New Grove Bach family /	Very useful guide to the Bach clan.	Approve | Delete
ptfs, ptfs	Reading Stephen King :	Provides valuable insights into Kings work.	Approve | Delete

Once a comment is approved or deleted it cannot be retrieved or changed.

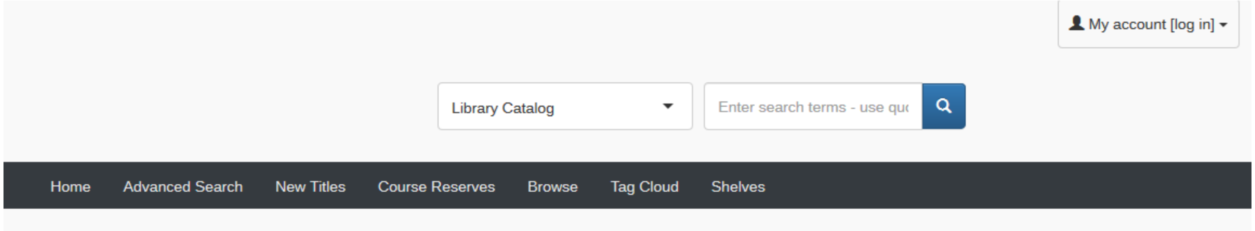
See the Discovery Layer section for how tags appear and can be used in the public interface. Note that users can modify their own comments, so the same title/entry may reappear on the staff approval list.

17. Using the Discovery Layer

The Discovery Layer is the patron interface to the catalog (the OPAC). Patrons can search, place holds, renew items and see information about their account.

17.1 Home Page

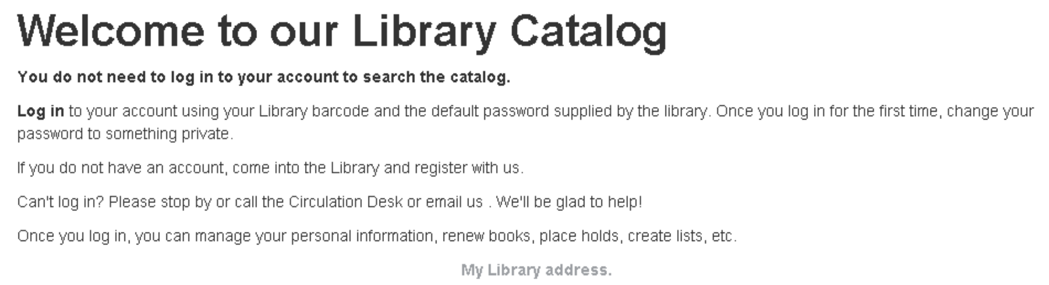
The home page is the main entry point to the Discovery Layer. The masthead bar contains a search box and links to several options. In the upper right corner is a link to log in. Sites may add images or text to the masthead or to the body of the main page as desired.



The options available from the masthead depend on how your system is configured. The Lists and Map buttons are controlled by system preferences and initial setup. (The Cart button now does not always show on the masthead; it only appears when items have been placed in it. The Cart and Lists may be renamed in the configuration editor; other common labels are Bookbag and Shelves.) The Cart allows users to collect titles for emailing or downloading. Lists are predefined groups of titles created either by library staff or by the user. The Map button allows searching and display by map coordinates.

New Titles is a list of titles added to the catalog in the last X days (timing specified in the syspref NewTitlesAge). Course Reserves is the patron interface to the course reserves module. Browse allows browsing by authorized terms (author, subject, uniform title). Tag Cloud shows tags that have been applied by all users to records in the system. If enabled and the patron has permission, Add Content will allow upload of digital objects. Any or all of these can be disabled.

The middle of the page may include news items, informational text, search tips, links to library and other resources, and contact information. This is controlled by the library through the Discovery Layer Configuration Editor (see that manual).



Welcome to our Library Catalog

You do not need to log in to your account to search the catalog.

Log in to your account using your Library barcode and the default password supplied by the library. Once you log in for the first time, change your password to something private.

If you do not have an account, come into the Library and register with us.

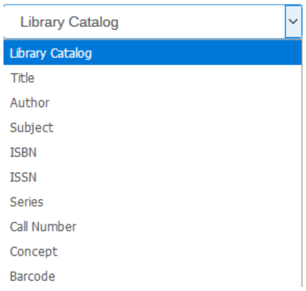
Can't log in? Please stop by or call the Circulation Desk or email us . We'll be glad to help!

Once you log in, you can manage your personal information, renew books, place holds, create lists, etc.

My Library address.

17.2 Simple Search

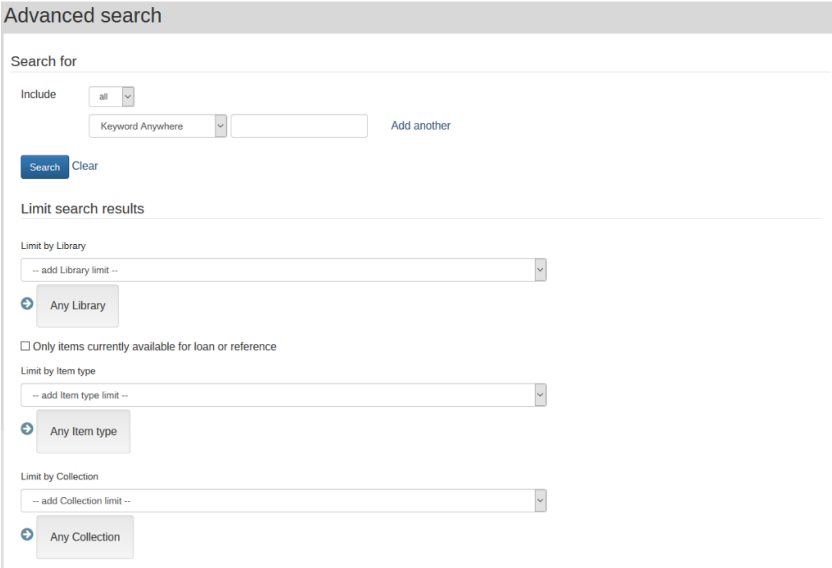
The masthead has a search box; you can select from certain indexes, enter a term, and click Go to perform a search. The default Library Catalog is a keyword search – every field in the MARC record is included.



Because the keyword index is so broad, users will probably get better results by choosing an index more suited to what is being searched. Search terms and facet selections are persistent but may be cleared from the box by using the circled X in the upper right of the search box (previous versions had a separate Clear button). The search results will remain on the screen.

17.3 Advanced Search

The Advanced Search page offers more options for focusing a search, depending on how your system is configured. System administrators can configure additional indexes to be added to the search pull-down box. Users can also select specific item types, collection codes, shelving locations, languages, target audience, publication date, musical instrumentation, and owning library.



Search entries are persistent – they will remain if the user comes back to the Advanced Search screen later. Click the Clear link to clear previous settings.

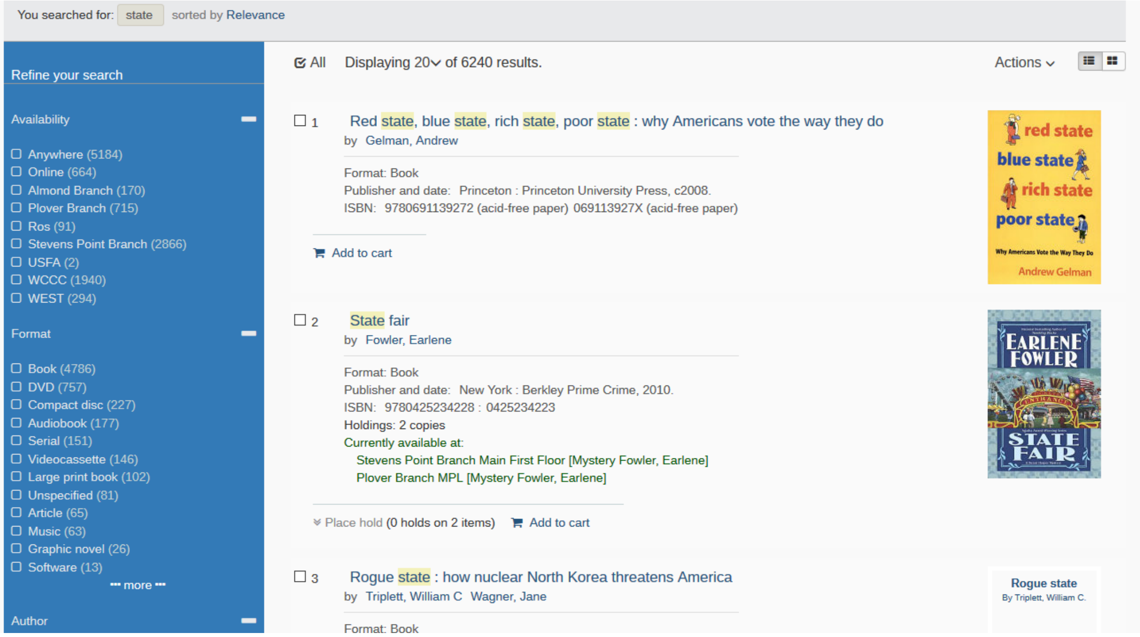
Your system may have the various options configured as checkboxes rather than pulldowns. See the section on searching earlier in the User Manual for additional options and search tips.

17.4 Results List

From either basic or advanced search, you'll be taken to a results list. The screen will show the search strategy used, titles, and information about item availability. If you used more than one setting in your search, you'll see an X next to your limiters; you can remove that limitation and redo the search if desired. **NOTE**: For titles with a lot of items attached, the results list will now display only the first three items/call numbers, with a note of how many others there are (e.g., "and 7 other locations"). The first three are displayed on separate lines for better readability.

Note that if there are no physical copies attached to the title, the results list will omit that section rather than saying zero copies. The previous display was confusing for electronic resources which usually do not have items attached.

If the system is configured for it (see Discovery Layer Configuration Guide), and there is only one result, the display may go directly into the title display.



You searched for: state sorted by Relevance

Refine your search

Availability

- ☐ Anywhere (5184)
- ☐ Online (664)
- ☐ Almond Branch (170)
- ☐ Plover Branch (715)
- ☐ Ros (91)
- ☐ Stevens Point Branch (2866)
- ☐ USFA (2)
- ☐ WCCC (1940)
- ☐ WEST (294)

Format

- ☐ Book (4786)
- ☐ DVD (757)
- ☐ Compact disc (227)
- ☐ Audiobook (177)
- ☐ Serial (151)
- ☐ Videocassette (146)
- ☐ Large print book (102)
- ☐ Unspecified (81)
- ☐ Article (65)
- ☐ Music (63)
- ☐ Graphic novel (26)
- ☐ Software (13)

··· more ···

Author

☑ All Displaying 20 of 6240 results. Actions

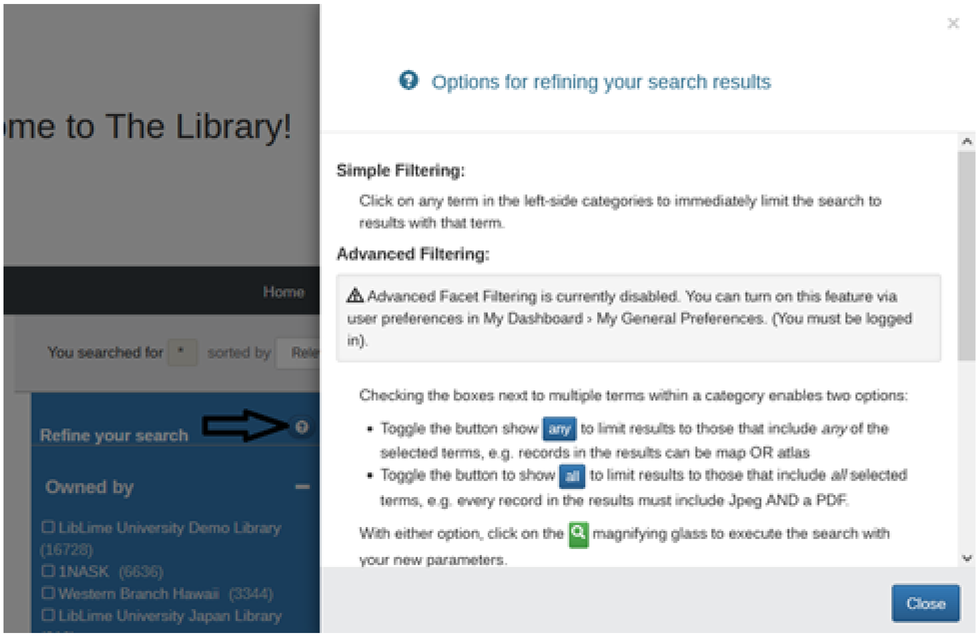
☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do
by Gelman, Andrew
Format: Book
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)
Add to cart

☐ 2 State fair
by Fowler, Earlene
Format: Book
Publisher and date: New York : Berkley Prime Crime, 2010.
ISBN: 9780425234228 : 0425234223
Holdings: 2 copies
Currently available at:
Stevens Point Branch Main First Floor [Mystery Fowler, Earlene]
Plover Branch MPL [Mystery Fowler, Earlene]
Place hold (0 holds on 2 items) Add to cart

☐ 3 Rogue state : how nuclear North Korea threatens America
by Triplett, William C Wagner, Jane
Format: Book

At the left side, you’ll see facets for narrowing your search. Depending on your site’s configuration, these can include availability, format (based on the MARC fixed fields), author, subject, language, geographic region, publication date, item type, and collection code. Clicking on any entry from the facet will narrow the existing search.

A help button (question mark icon) will open a popup window with facet tips:



Options for refining your search results

Simple Filtering:

Click on any term in the left-side categories to immediately limit the search to results with that term.

Advanced Filtering:

⚠ Advanced Facet Filtering is currently disabled. You can turn on this feature via user preferences in My Dashboard › My General Preferences. (You must be logged in).

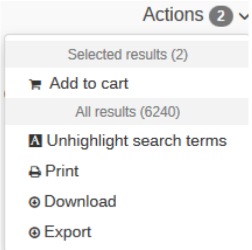
Checking the boxes next to multiple terms within a category enables two options:

- Toggle the button show **any** to limit results to those that include *any* of the selected terms, e.g. records in the results can be map OR atlas
- Toggle the button to show **all** to limit results to those that include *all* selected terms, e.g. every record in the results must include Jpeg AND a PDF.

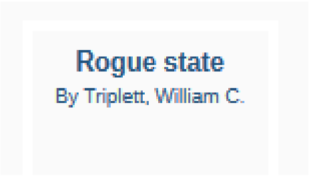
With either option, click on the 🔍 magnifying glass to execute the search with your new parameters.

NOTE: There is an upper limit of 200 for the number of entries displayed for any facet group. If you do a search with a large results set, facets with few entries may not be displayed. For example, if an author or subject is only used once in the results set, it may not show if the number of more frequently-used terms is large.

From links on the results list, you can individually add titles to a cart or list or place a hold. (Some actions require that you be logged in first.) You can also use the checkboxes next to each title to select multiple entries, then use the Action pull-down at the top upper right.

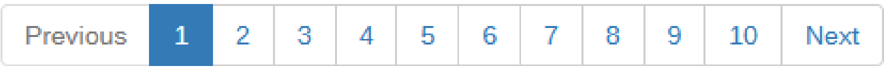


If your site is configured to use external content, you will see dust jacket images where available. Titles which do not have available images will show a box with the title and author:



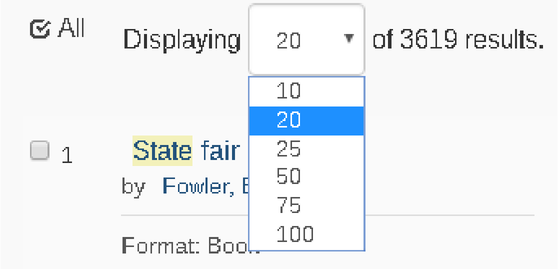
17.4.1 Search Results Paging

Beneath the statement of the search terms are the search results; at the bottom, a pagination bar allows you to move to the next page of results. In earlier versions, this only showed four page options at a time. Now sites can configure the number of pages to show in the pager bar.



By default, 20 search results will display per page; this can be adjusted in the administrative settings (the OPACnumSearchResults syspref) if desired. Users can adjust the number of results per page by clicking the down arrow next to the count:

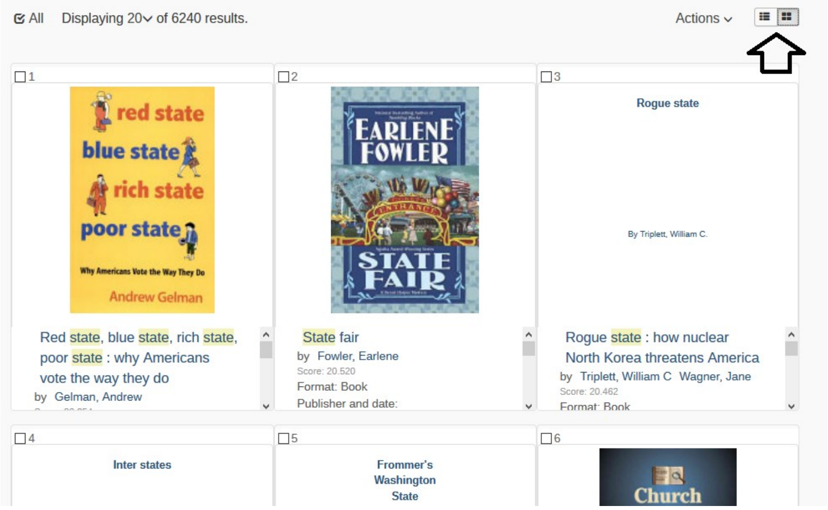
This opens a dropdown; the user can choose another count:



This is persistent for the current session or until the browser is refreshed. If a user refreshes, log outs, or closes and reopens the interface, it will reset to the system default.

17.4.2 Display Results as List or Images

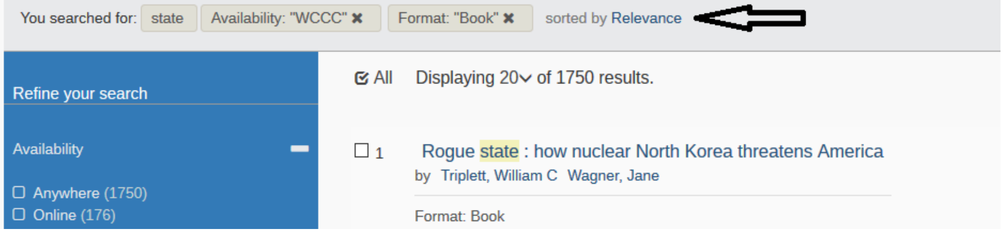
You can switch views of the search results. The standard view is List, as shown above. You can use the icon at upper right to switch to Images. If selected, this will display the search results with available images (either dust jackets or thumbnails from digital objects):



A user's choice is persistent – if you have images selected and log out, then log back in and do another search, images will still be the default view. If a user is not logged in, the choice does not carry over to the next anonymous session.

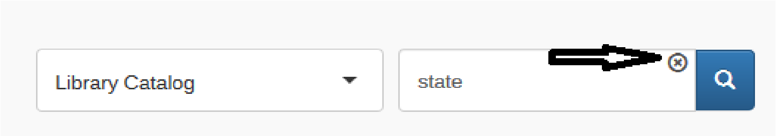
17.4.3 Clearing Terms and/or Facets

Search terms may be cleared in different ways to begin a new search. If you have done a search and applied one or more facets, you can clear the facets by clicking the X next to the facet at the top of the results list:



Clearing the facet using the X will redo the search without the facet.

To clear a search term from the masthead search box, either select it and delete, or use the X icon.

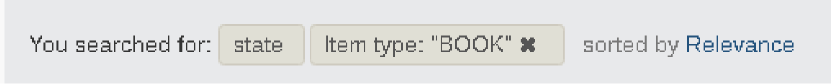


NOTE: If the patron or Role record has enabled enhanced facets, logged-in patrons will be able to use the Boolean options. See earlier section on Enhanced Facets for Boolean Operators.

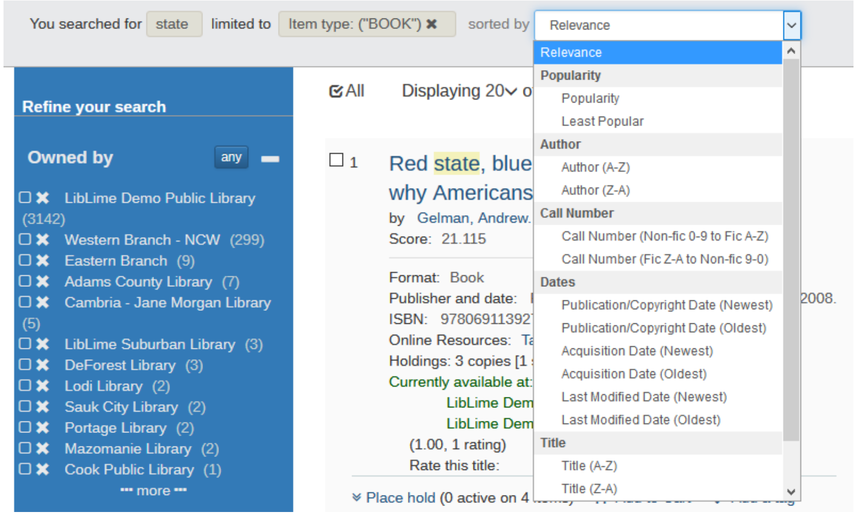
17.4.4 Sort Order and Relevance Ranking

The default sort order is relevance ranking. The Solr search engine is configured to give more weight to records with the search term in specified fields (such as title, author, and subject). Entries with the search terms adjacent to each other will be ranked higher as well. The weighting for keyword goes title - subject - author - isbn - fulltext.

In previous versions, results list sort options have been hard-coded -- sites could not hide unwanted options or add new ones. Now the Discovery Layer Configuration Editor allows sites to specify the sort options they want. Users can sort on the configured options by clicking on the word Relevance in the top line.

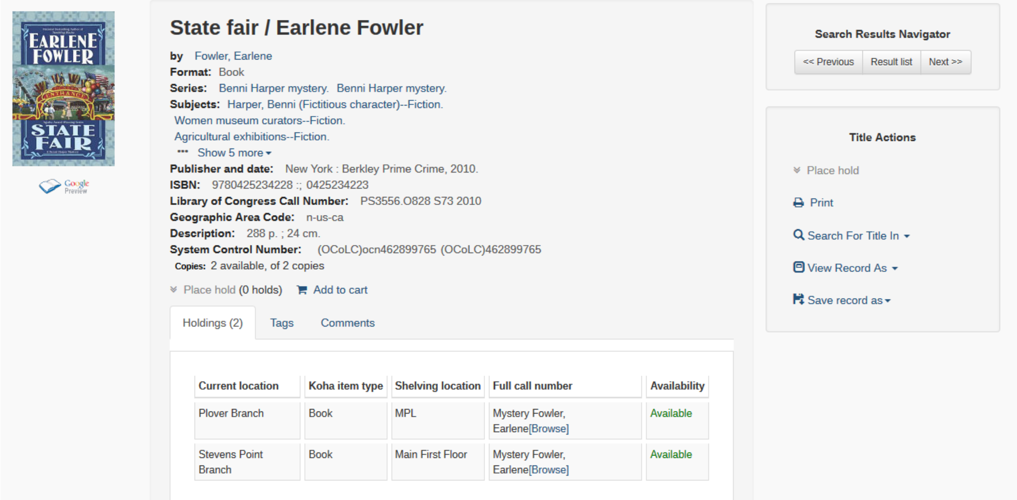


That opens a pulldown with the configured options:



17.5 Title Display

Clicking on a title from the results list will bring up the title display screen. Here you will see information about the title and about items attached to that title.



State fair / Earlene Fowler

by Fowler, Earlene
Format: Book
Series: Benni Harper mystery. Benni Harper mystery.
Subjects: Harper, Benni (Fictitious character)--Fiction.
Women museum curators--Fiction.
Agricultural exhibitions--Fiction.
Show 5 more
Publisher and date: New York : Berkley Prime Crime, 2010.
ISBN: 9780425234228 :; 0425234223
Library of Congress Call Number: PS3556.O828 S73 2010
Geographic Area Code: n-us-ca
Description: 288 p. ; 24 cm.
System Control Number: (OCoLC)ocn462899765 (OCoLC)462899765
Copies: 2 available, of 2 copies

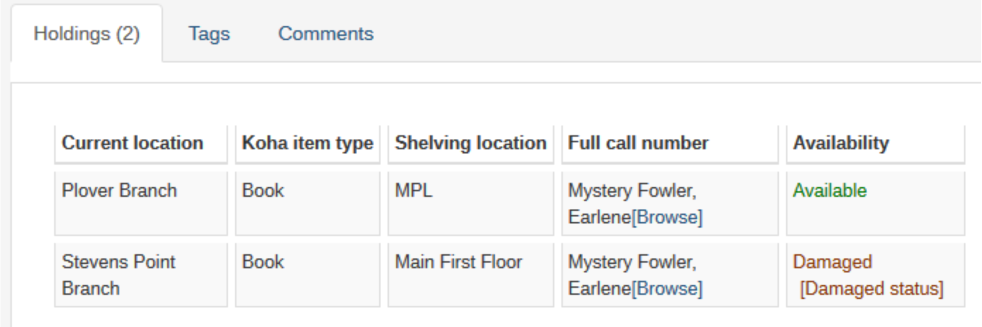
Place hold (0 holds) Add to cart

Holdings (2) Tags Comments

Current location	Koha item type	Shelving location	Full call number	Availability
Plover Branch	Book	MPL	Mystery Fowler, Earlene[Browse]	Available
Stevens Point Branch	Book	Main First Floor	Mystery Fowler, Earlene[Browse]	Available

There are also links to place holds and requests, move through the results list, view or save the record in other formats, and send a search for this title to other resources such as WorldCat or Google Scholar. Some options will be disabled until you log into your account.

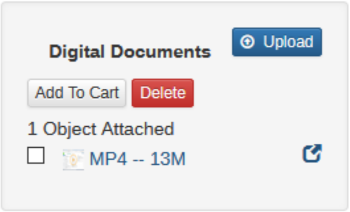
The bottom part of the display gives details about the item records – shelving location, call number, availability, etc. The display can show if an item is checked out, on hold, in transit, damaged, or lost. Locally-defined custom statuses will also display.



Current location	Koha item type	Shelving location	Full call number	Availability
Plover Branch	Book	MPL	Mystery Fowler, Earlene[Browse]	Available
Stevens Point Branch	Book	Main First Floor	Mystery Fowler, Earlene[Browse]	Damaged [Damaged status]

Note that it is possible for sites to customize both the fields and the order in which item data is shown; your site may be different than the screenshots. This is documented in the Superlibrarian Training Guide.

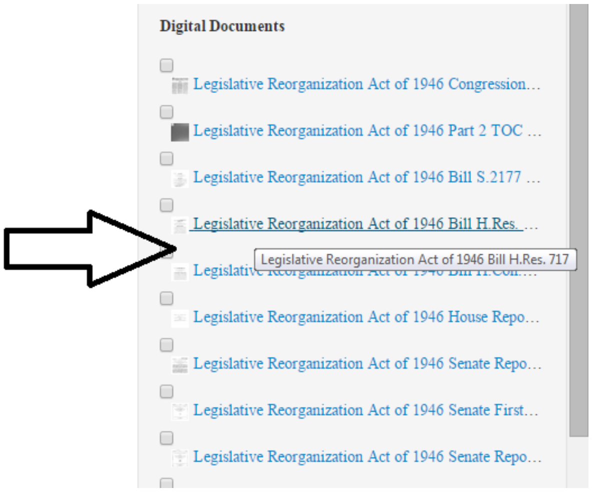
If the site is configured for the full Bibliovation system (with digital object functionality), and the title has associated digital objects, links will show at the right-hand side with certain information (object type, size, etc.).



1 Object Attached
☐ MP4 -- 13M

(If the user has the appropriate permissions, an Upload and/or a Delete link will also appear, allowing a new digital object to be uploaded to this title, or removal of the selected digital object.)

Digital objects show the file type or file name. If there are multiple objects attached, and the names are lengthy, the truncated display makes it hard to tell them apart. A display name can be entered in the 856$y. The display will show that as a tooltip-style popup if the cursor hovers over a name:



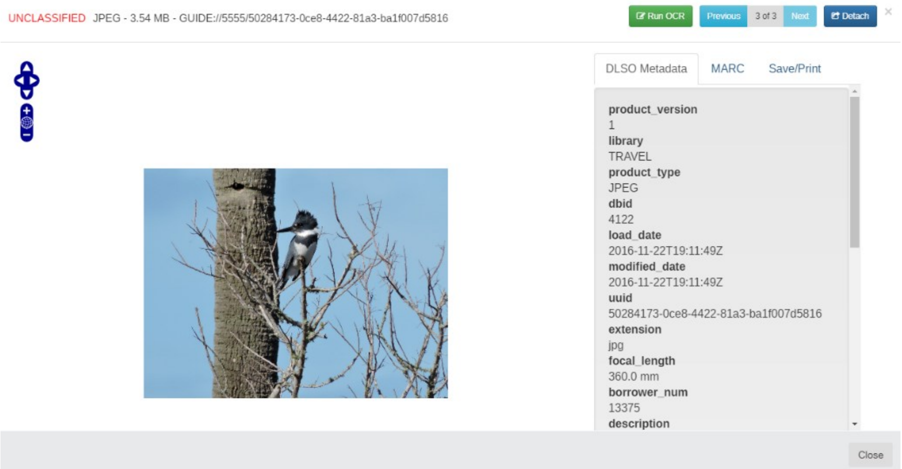
Digital Documents

- ☐ Legislative Reorganization Act of 1946 Congression…
- ☐ Legislative Reorganization Act of 1946 Part 2 TOC …
- ☐ Legislative Reorganization Act of 1946 Bill S.2177 …
- ☐ Legislative Reorganization Act of 1946 Bill H.Res. …
- ☐ Legislativ… Legislative Reorganization Act of 1946 Bill H.Res. 717
- ☐ Legislative Reorganization Act of 1946 House Repo…
- ☐ Legislative Reorganization Act of 1946 Senate Repo…
- ☐ Legislative Reorganization Act of 1946 Senate First…
- ☐ Legislative Reorganization Act of 1946 Senate Repo…

That same entry is used as alt text for screenreader software.

You can add any of the digital objects to your Cart by clicking the checkbox.

The thumbnail image shows in both the bib and results list display; clicking on the thumbnail will open the object in a viewer. Clicking on the thumbnail or any of the file links will open the digital object in a popup viewer window:



UNCLASSIFIED JPEG - 3.54 MB - GUIDE://5555/50284173-0ce8-4422-81a3-ba1f007d5816

product_version
1
library
TRAVEL
product_type
JPEG
dbid
4122
load_date
2016-11-22T19:11:49Z
modified_date
2016-11-22T19:11:49Z
uuid
50284173-0ce8-4422-81a3-ba1f007d5816
extension
jpg
focal_length
360.0 mm
borrower_num
13375
description

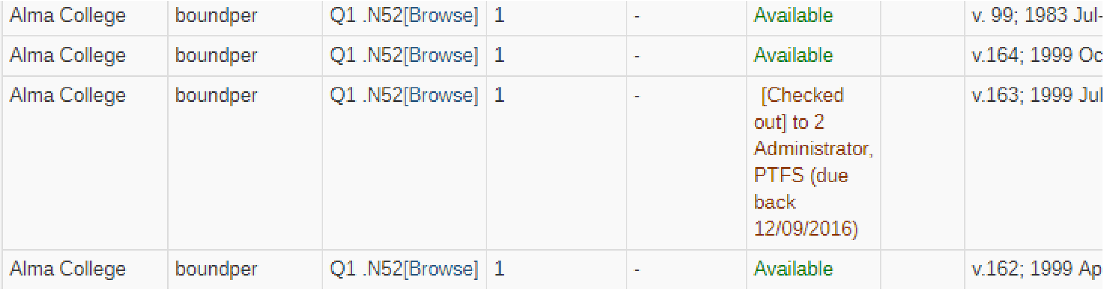
You will see the object along with certain information about it. Other tabs give you options for downloading or printing the object, or focusing in on particular geographic boundaries.

Clicking the **Detach** button in the upper right opens the document viewer in another window.

Click the X in the upper right corner to close the Document Viewer window and return to the previous view.

17.5.1 Showing the Name of the Person Who Has Checked Out

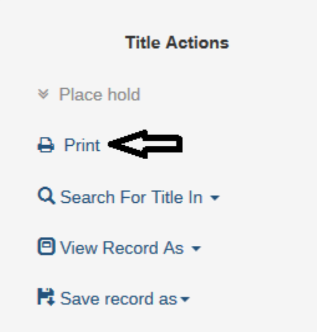
Certain specialized libraries need the public interface to show who has an item checked out; this should be disabled for most libraries. A public user will see the checkout patron information if (1) the OPACShowCheckoutName syspref is on and (2) the user has the new circulate.issue_history.view and the borrowers.borrowers_details.name permissions. (If the syspref is on and the user is superlibrarian, the name will also show.) These should be set in the associated Role record or (rarely) directly in the patron's record.



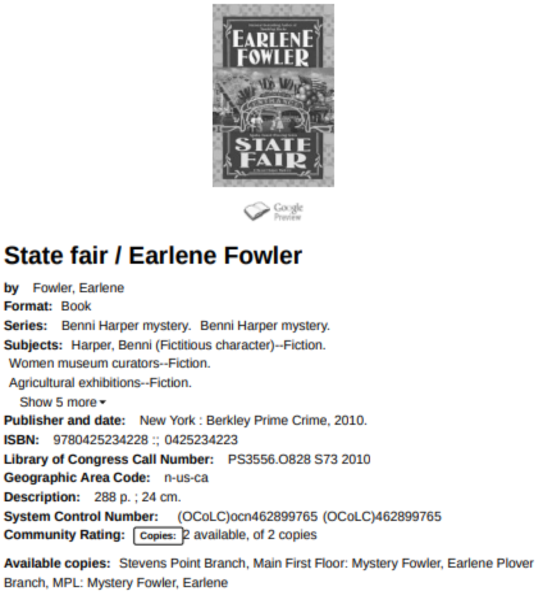
Alma College	boundper	Q1 .N52[Browse]	1	-	Available		v. 99; 1983 Jul-
Alma College	boundper	Q1 .N52[Browse]	1	-	Available		v.164; 1999 Oc
Alma College	boundper	Q1 .N52[Browse]	1	-	[Checked out] to 2 Administrator, PTFS (due back 12/09/2016)		v.163; 1999 Jul
Alma College	boundper	Q1 .N52[Browse]	1	-	Available		v.162; 1999 Ap

17.5.2 Printing a Record

The title display has a Print Record link on the left side of the screen:



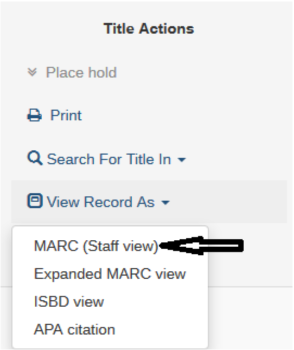
That feature will print a streamlined version of the record:



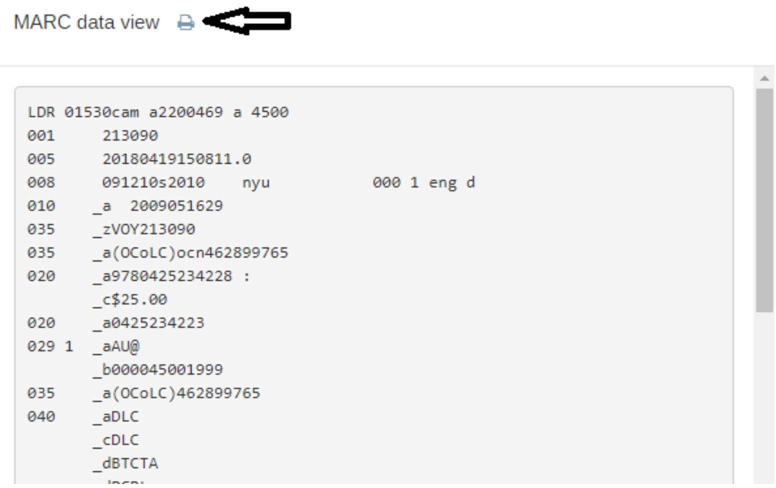
State fair / Earlene Fowler

by Fowler, Earlene
Format: Book
Series: Benni Harper mystery. Benni Harper mystery.
Subjects: Harper, Benni (Fictitious character)--Fiction.
Women museum curators--Fiction.
Agricultural exhibitions--Fiction.
Show 5 more
Publisher and date: New York : Berkley Prime Crime, 2010.
ISBN: 9780425234228 :; 0425234223
Library of Congress Call Number: PS3556.O828 S73 2010
Geographic Area Code: n-us-ca
Description: 288 p. ; 24 cm.
System Control Number: (OCoLC)ocn462899765 (OCoLC)462899765
Community Rating: Copies: 2 available, of 2 copies
Available copies: Stevens Point Branch, Main First Floor: Mystery Fowler, Earlene Plover Branch, MPL: Mystery Fowler, Earlene

However, if you need to print the entire MARC record, click the View Record As button and select MARC from the pulldown:



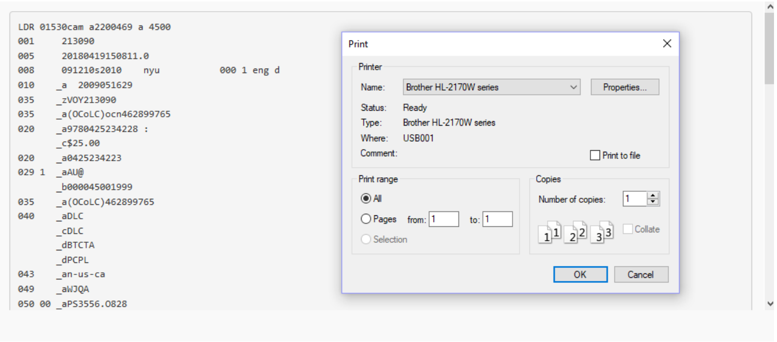
A popup window will show the MARC record; a print icon at the top allows for printing the record in that form:



MARC data view

```
LDR 01530cam a2200469 a 4500
001     213090
005     20180419150811.0
008     091210s2010    nyu           000 1 eng d
010    _a  2009051629
035    _zVOY213090
035    _a(OCoLC)ocn462899765
020    _a9780425234228 :
       _c$25.00
020    _a0425234223
029 1  _aAU@
       _b000045001999
035    _a(OCoLC)462899765
040    _aDLC
       _cDLC
       _dBTCTA
```

Clicking the icon opens a new window, ready for printing:



```
LDR 01530cam a2200469 a 4500
001     213090
005     20180419150811.0
008     091210s2010    nyu           000 1 eng d
010    _a  2009051629
035    _zVOY213090
035    _a(OCoLC)ocn462899765
020    _a9780425234228 :
       _c$25.00
020    _a0425234223
029 1  _aAU@
       _b000045001999
035    _a(OCoLC)462899765
040    _aDLC
       _cDLC
       _dBTCTA
       _dPCPL
043    _an-us-ca
049    _aWJQA
050 00 _aPS3556.O828
```

Print

Printer
Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series
Where: USB001
Comment:
☐ Print to file

Print range
● All
○ Pages from: 1 to: 1
○ Selection

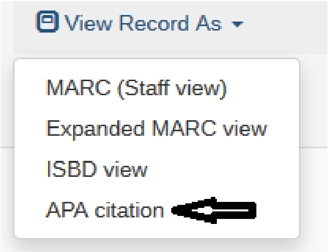
Copies
Number of copies: 1
☐ Collate

17.5.3 Exporting Record in APA Citation Format

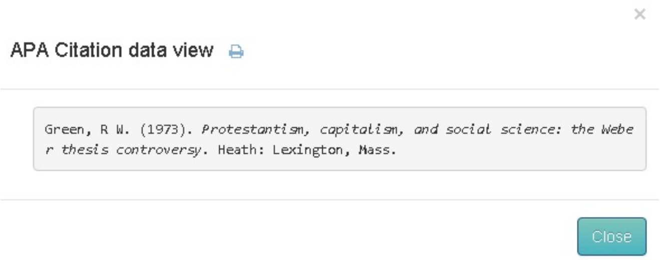
Patrons can now produce American Psychological Association (APA) style citations from contents of MARC record. The output returns a citation in one of four classifications: book, journal article, dissertation/thesis, or offprint article. If the record in question is not one of those four, it will produce a message saying that the citation is not available.

17.5.3.1 Individual Records

The citation is available in the DL bib detail view under View record as, APA Citation.



If the current title has matching data, this produces a popup with the output formatted appropriately:



```
Green, R W. (1973). Protestantism, capitalism, and social science: the Webe
r thesis controversy. Heath: Lexington, Mass.
```

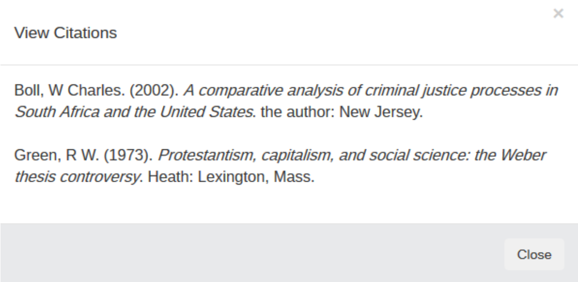
Users can copy and paste the contents, or use the Print icon to print the citation.

17.5.3.2 Multiple Records

You can also get multiple citations by adding records to the Cart. When you've collected all the records you want, go into the Cart. Select all desired titles and you'll see a link for View Citations:

None	Title details	Library holdings
☑	Protestantism, capitalism, and social science; the Weber thesis controversy. by Green, Robert W. Lexington, Mass., Heath [1973]	1 available of 1 copies.
☑	A comparative analysis of criminal justice processes in South Africa and the United States / by Boll, William Charles. [New Jersey] : the author, 2002.	1 available of 1 copies.

Click that and a popup will show the citations. As above, you can copy/paste the citation data.



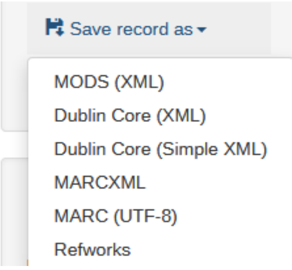
Boll, W Charles. (2002). *A comparative analysis of criminal justice processes in South Africa and the United States*. the author: New Jersey.

Green, R W. (1973). *Protestantism, capitalism, and social science: the Weber thesis controversy*. Heath: Lexington, Mass.

Remember that if the record doesn't contain the appropriate data, the citation will be incomplete.

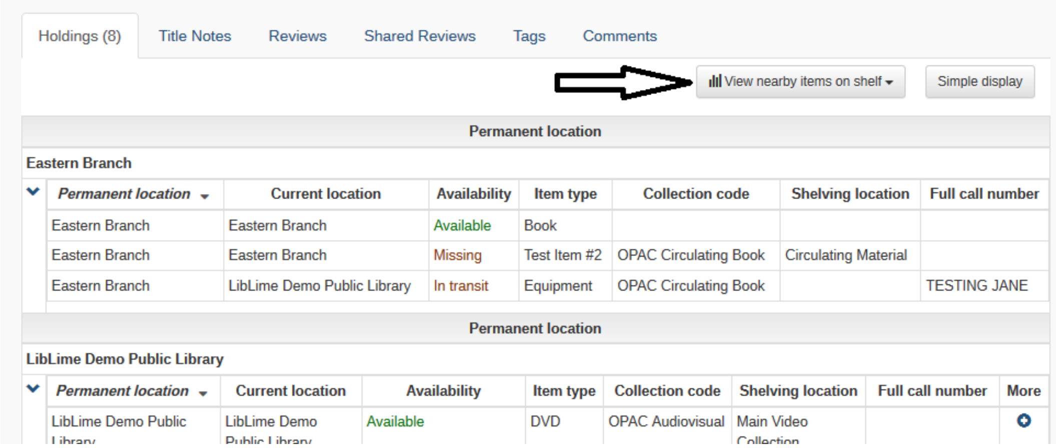
17.5.4 Exporting in Other Formats

Records can be exported/saved to file in several formats, including Dublin Core:



17.5.5 Shelf Browser

NOTE: The display for this feature has changed from earlier versions. If enabled (syspref OPACShelfBrowser), a user can click the View Nearby Items on Shelf button at the top of the item holdings table to see what items are on the shelf nearby.



Permanent location

Eastern Branch

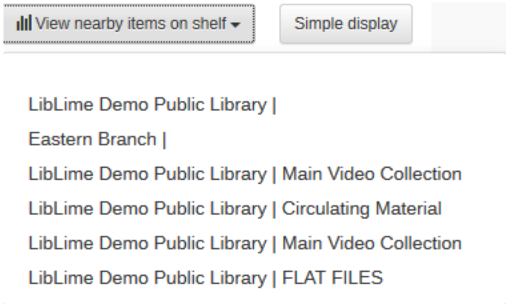
Permanent location	Current location	Availability	Item type	Collection code	Shelving location	Full call number
Eastern Branch	Eastern Branch	Available	Book			
Eastern Branch	Eastern Branch	Missing	Test Item #2	OPAC Circulating Book	Circulating Material	
Eastern Branch	LibLime Demo Public Library	In transit	Equipment	OPAC Circulating Book		TESTING JANE

Permanent location

LibLime Demo Public Library

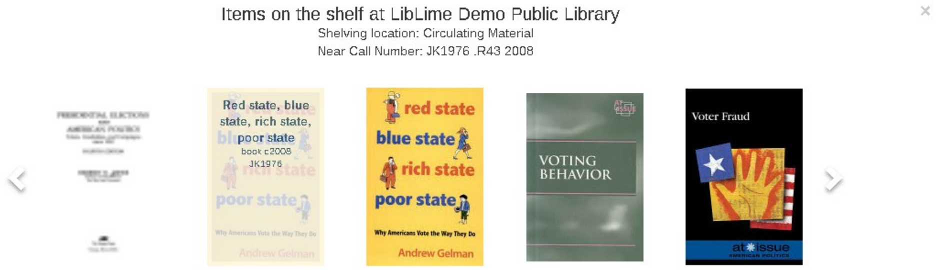
Permanent location	Current location	Availability	Item type	Collection code	Shelving location	Full call number	More
LibLime Demo Public	LibLime Demo	Available	DVD	OPAC Audiovisual	Main Video		⊕

Clicking the button produces a dropdown with the branches and shelving locations of attached items:



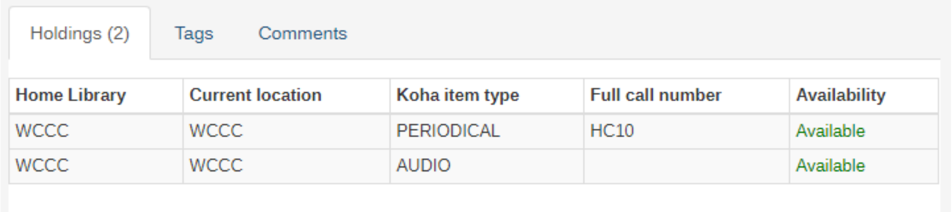
LibLime Demo Public Library |
Eastern Branch |
LibLime Demo Public Library | Main Video Collection
LibLime Demo Public Library | Circulating Material
LibLime Demo Public Library | Main Video Collection
LibLime Demo Public Library | FLAT FILES

Select one, and a popup window shows nearby items. This is based on a combination of call number and shelving location. The default display is the cover image (or text with title/author/call number if no image is available). Hovering the mouse over an image will display the title/author/call number information superimposed over the image, as in the second title below. Users can click the left/right arrows to page through the display.


Items on the shelf at LibLime Demo Public Library
Shelving location: Circulating Material
Near Call Number: JK1976 .R43 2008

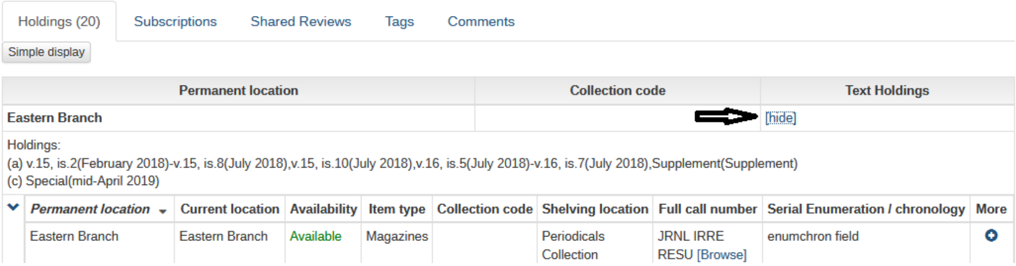
17.5.6 Serials and MFHD Display

Serials titles with attached MARC holdings (MFHD) records have different display options, depending on your configuration (see the Discovery Layer Configuration Guide). The simple display won't show the MFHD record in the Discovery Layer; the holdings display will look like any other record:



Home Library	Current location	Koha item type	Full call number	Availability
WCCC	WCCC	PERIODICAL	HC10	Available
WCCC	WCCC	AUDIO		Available

If the system is set to display and group holdings records, the MFHD shows with a textual holdings string.

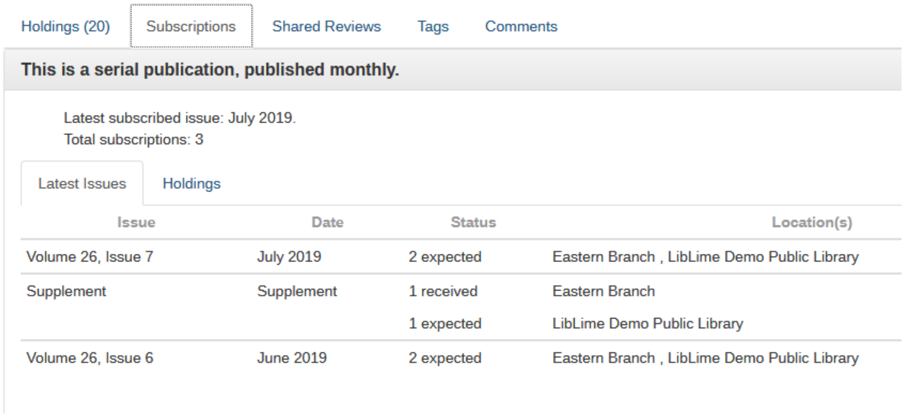


Permanent location	Collection code	Text Holdings
Eastern Branch		[hide]

Holdings:
(a) v.15, is.2(February 2018)-v.15, is.8(July 2018),v.15, is.10(July 2018),v.16, is.5(July 2018)-v.16, is.7(July 2018),Supplement(Supplement)
(c) Special(mid-April 2019)

Permanent location	Current location	Availability	Item type	Collection code	Shelving location	Full call number	Serial Enumeration / chronology	More
Eastern Branch	Eastern Branch	Available	Magazines		Periodicals Collection	JRNL IRRE RESU [Browse]	enumchron field	⊕

The Subscriptions tab in the Discovery Layer will show latest issues received for each subscription.

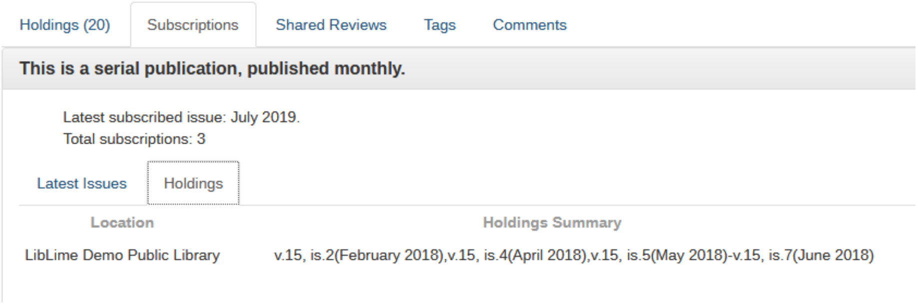


This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Issue	Date	Status	Location(s)
Volume 26, Issue 7	July 2019	2 expected	Eastern Branch , LibLime Demo Public Library
Supplement	Supplement	1 received	Eastern Branch
		1 expected	LibLime Demo Public Library
Volume 26, Issue 6	June 2019	2 expected	Eastern Branch , LibLime Demo Public Library

The Holdings tab will show the textual holdings string.

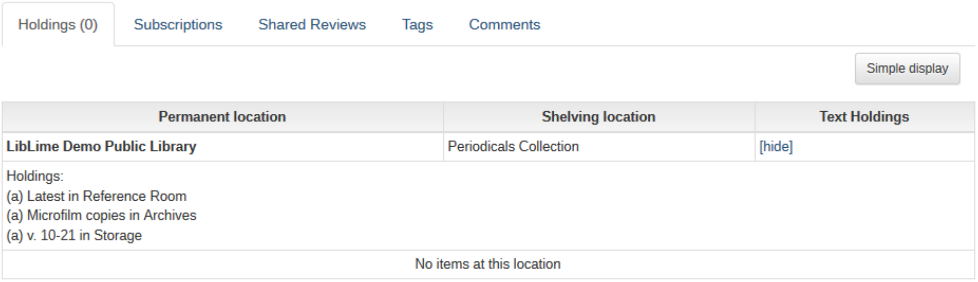


This is a serial publication, published monthly.

Latest subscribed issue: July 2019.
Total subscriptions: 3

Location	Holdings Summary
LibLime Demo Public Library	v.15, is.2(February 2018),v.15, is.4(April 2018),v.15, is.5(May 2018)-v.15, is.7(June 2018)

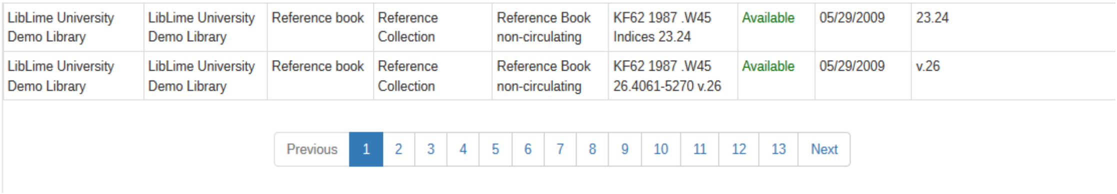
IMPORTANT: If a bib record has no items, but does have an MFHD record that is not linked to a serial subscription, that record will not show in the Discovery Layer unless the holdings table is set to 'group by holdings' in the Discovery Layer Configiguration Editor. If it is properly configured, such a record would display like this:



Permanent location	Shelving location	Text Holdings
LibLime Demo Public Library	Periodicals Collection	[hide]
Holdings: (a) Latest in Reference Room (a) Microfilm copies in Archives (a) v. 10-21 in Storage		
No items at this location		

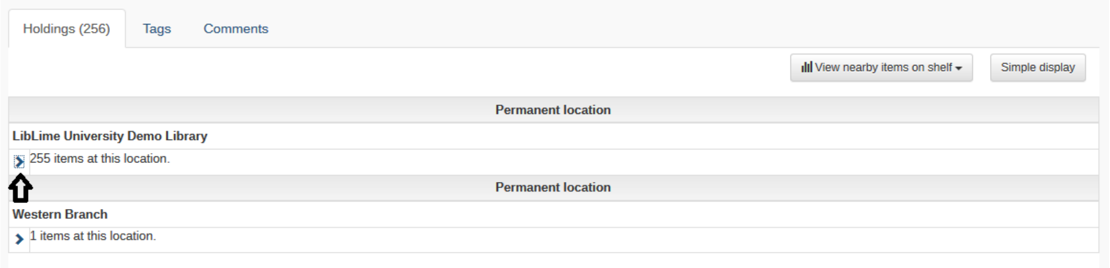
17.5.7 Records with Large Number of Items

To improve response time, records with more than 30 items attached will break the item display into multiple pages. In the Discovery Layer, users will see screens of 20 items with a pager at the bottom:



LibLime University Demo Library	LibLime University Demo Library	Reference book	Reference Collection	Reference Book non-circulating	KF62 1987 .W45 Indices 23.24	Available	05/29/2009	23.24
LibLime University Demo Library	LibLime University Demo Library	Reference book	Reference Collection	Reference Book non-circulating	KF62 1987 .W45 26.4061-5270 v.26	Available	05/29/2009	v.26

If the Discovery Layer is set for simple item display, sorting by any column will sort all items. If the display is grouped by branch, sorting will only sort the items belonging to that branch. You can click the arrow under the branch name to collapse that branch's holdings, so that you can see other branches.



Permanent location

LibLime University Demo Library

255 items at this location.

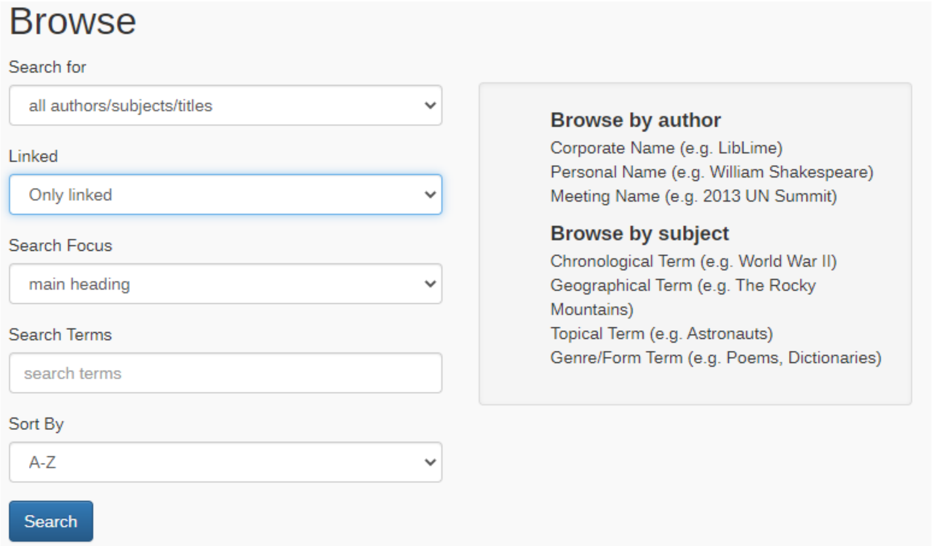
Permanent location

Western Branch

1 items at this location.

17.6 Authority Browse

If enabled, the Browse link in the masthead will allow users to browse for titles related by an authorized term (author, subject, uniform title).



Browse

Search for: all authors/subjects/titles

Linked: Only linked

Search Focus: main heading

Search Terms: search terms

Sort By: A-Z

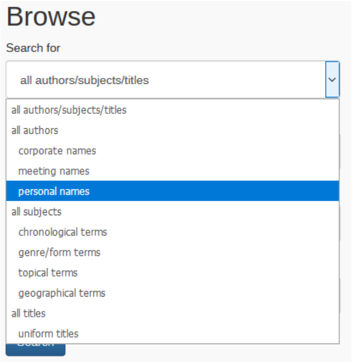
Browse by author

Corporate Name (e.g. LibLime)
Personal Name (e.g. William Shakespeare)
Meeting Name (e.g. 2013 UN Summit)

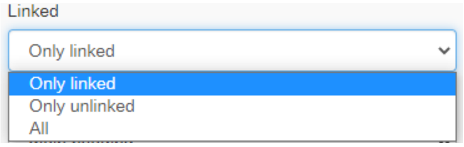
Browse by subject

Chronological Term (e.g. World War II)
Geographical Term (e.g. The Rocky Mountains)
Topical Term (e.g. Astronauts)
Genre/Form Term (e.g. Poems, Dictionaries)

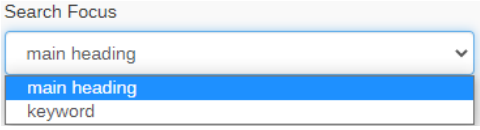
Use the pulldown to select the appropriate authority index; the default will search all indexes:



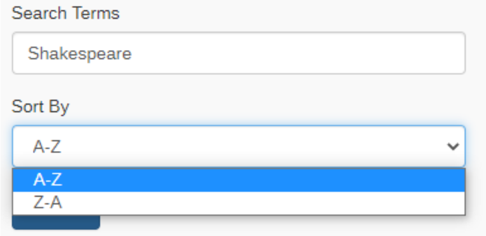
The second box on the search line specifies whether to only search authority records that are linked to bib records, or all records. The default is to search only linked records:



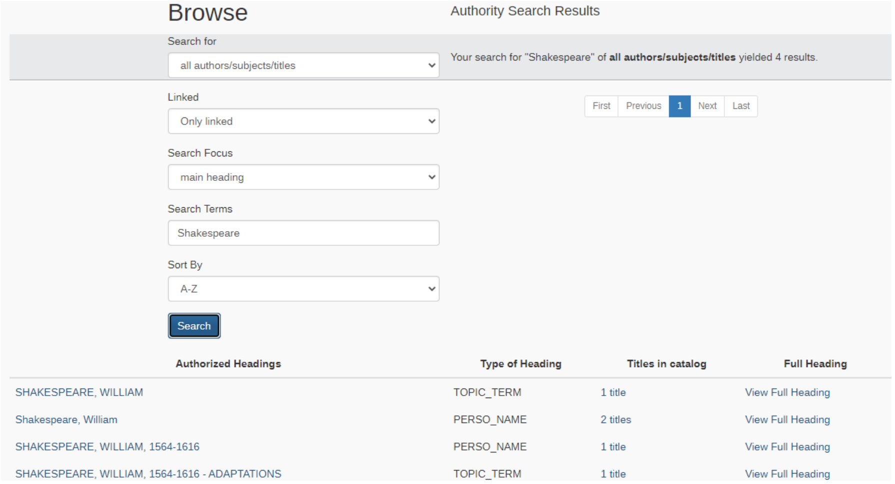
The Search Focus says whether you want to search against an exact main entry, or just find the term anywhere in the record:



Enter your search term and (if desired) change the default sort:



The results list will show you the authority record entries and how many times they are used in the catalog. The View Full Heading link will pop up a window with the full MARC authority record. Clicking on either the heading entry itself or the link under Titles in Catalog will bring up a search results page with the titles that use the heading.


Browse

Authority Search Results

Search for: all authorities/subjects/titles

Your search for "Shakespeare" of **all authors/subjects/titles** yielded 4 results.

Linked: Only linked

Search Focus: main heading

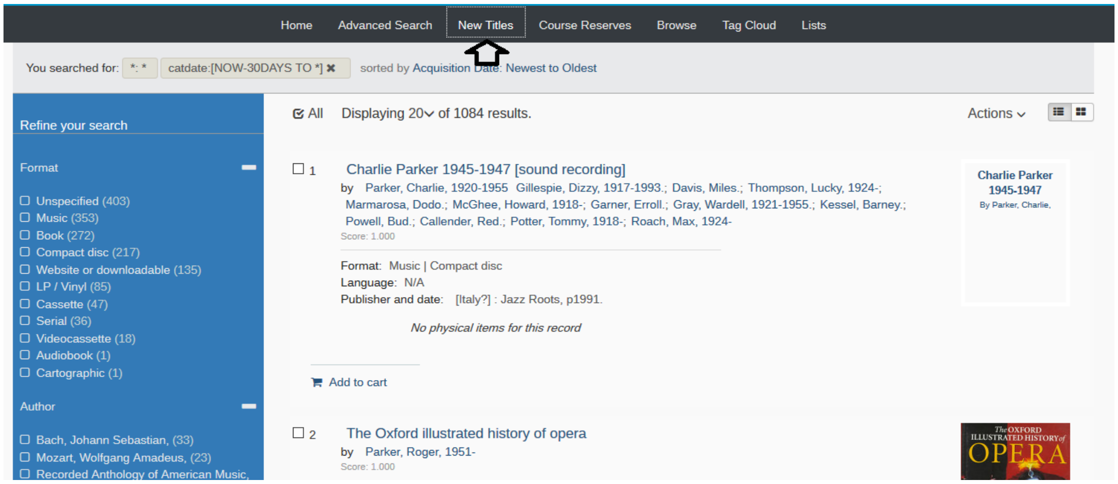
Search Terms: Shakespeare

Sort By: A-Z

Authorized Headings	Type of Heading	Titles in catalog	Full Heading
SHAKESPEARE, WILLIAM	TOPIC_TERM	1 title	View Full Heading
Shakespeare, William	PERSO_NAME	2 titles	View Full Heading
SHAKESPEARE, WILLIAM, 1564-1616	PERSO_NAME	1 title	View Full Heading
SHAKESPEARE, WILLIAM, 1564-1616 - ADAPTATIONS	TOPIC_TERM	1 title	View Full Heading

17.7 New Titles

The New Titles feature allows sites to easily feature new material. It is a list of titles added to the catalog in the last X days (number of days specified in the syspref NewTitlesAge). The feature uses only new title records, not new items added to existing titles.



You searched for: *:* catdate:[NOW-30DAYS TO *] ✖ sorted by Acquisition Date: Newest to Oldest

Displaying 20 of 1084 results.

☐ 1 Charlie Parker 1945-1947 [sound recording]
by Parker, Charlie, 1920-1955 Gillespie, Dizzy, 1917-1993.; Davis, Miles.; Thompson, Lucky, 1924-; Marmarosa, Dodo.; McGhee, Howard, 1918-; Garner, Erroll.; Gray, Wardell, 1921-1955.; Kessel, Barney.; Powell, Bud.; Callender, Red.; Potter, Tommy, 1918-; Roach, Max, 1924-
Score: 1.000

Format: Music | Compact disc
Language: N/A
Publisher and date: [Italy?] : Jazz Roots, p1991.

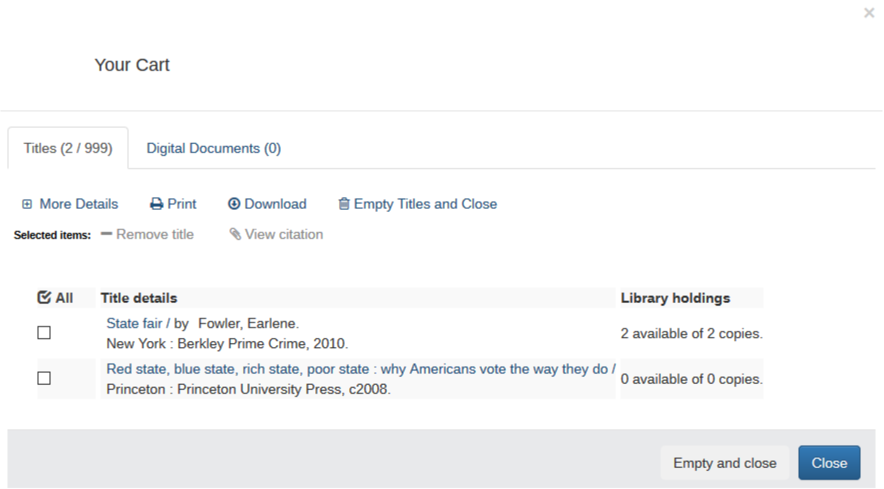
No physical items for this record

☐ 2 The Oxford illustrated history of opera
by Parker, Roger, 1951-
Score: 1.000

17.8 Cart

The Cart is a holding place for a collection of records. (Note that sites can change the name from Cart to something else, like Bookbag.) When you have added items to the cart, the masthead display will show a cart icon and a count:

Clicking on the Cart button in the masthead will open a popup window with the contents of your cart.

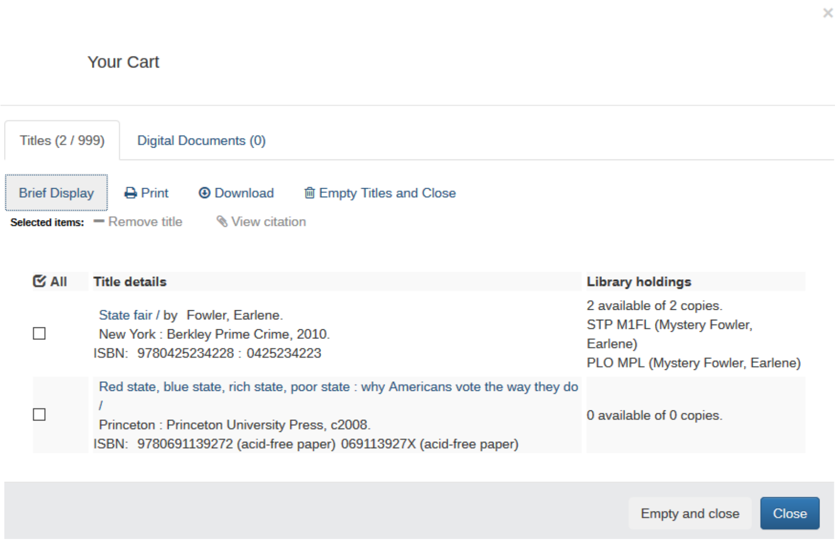


Your Cart

Titles (2 / 999) Digital Documents (0)

☑ All	Title details	Library holdings
☐	State fair / by Fowler, Earlene. New York : Berkley Prime Crime, 2010.	2 available of 2 copies.
☐	Red state, blue state, rich state, poor state : why Americans vote the way they do / Princeton : Princeton University Press, c2008.	0 available of 0 copies.

The More Details link will expand the entries:

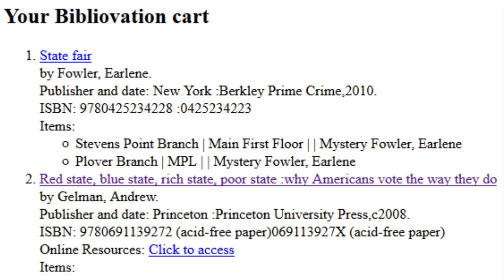


Your Cart

Titles (2 / 999) Digital Documents (0)

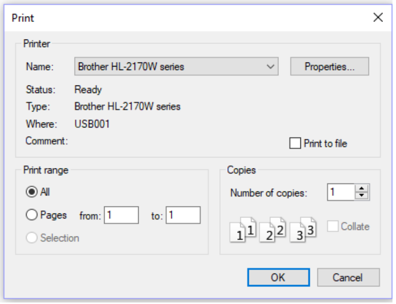
☑ All	Title details	Library holdings
☐	State fair / by Fowler, Earlene. New York : Berkley Prime Crime, 2010. ISBN: 9780425234228 : 0425234223	2 available of 2 copies. STP M1FL (Mystery Fowler, Earlene) PLO MPL (Mystery Fowler, Earlene)
☐	Red state, blue state, rich state, poor state : why Americans vote the way they do / Princeton : Princeton University Press, c2008. ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)	0 available of 0 copies.

You can email the group of records (MARC format), print them, add to a list, or place holds. The cart is not persistent – if you create a cart during one session, it will not remain in place the next time you log in. It's meant as a temporary holding bin for a collection of records during a catalog session. The cart display does not include much item data, but the print or download output does:



Your Bibliovation cart

1. State fair
   by Fowler, Earlene.
   Publisher and date: New York :Berkley Prime Crime,2010.
   ISBN: 9780425234228 :0425234223
   Items:
   - Stevens Point Branch | Main First Floor | | Mystery Fowler, Earlene
   - Plover Branch | MPL | | Mystery Fowler, Earlene
2. Red state, blue state, rich state, poor state :why Americans vote the way they do
   by Gelman, Andrew.
   Publisher and date: Princeton :Princeton University Press,c2008.
   ISBN: 9780691139272 (acid-free paper)069113927X (acid-free paper)
   Online Resources: Click to access
   Items:



Print

Printer
Name: Brother HL-2170W series
Status: Ready
Type: Brother HL-2170W series
Where: USB001
Comment:
☐ Print to file

Print range
● All
○ Pages from: 1 to: 1
○ Selection

Copies
Number of copies: 1
☐ Collate

You can add items to the cart and print them without being logged in, but you must log into your account to be able to email them or add them to a list. In addition, your patron account record must have an email address for validation.

The titles in the cart are hyperlinked; clicking on one will change the underlying screen to that record. When you are finished with this group of records, you can empty the cart and close the window with the Empty and Close link.

17.9 Lists

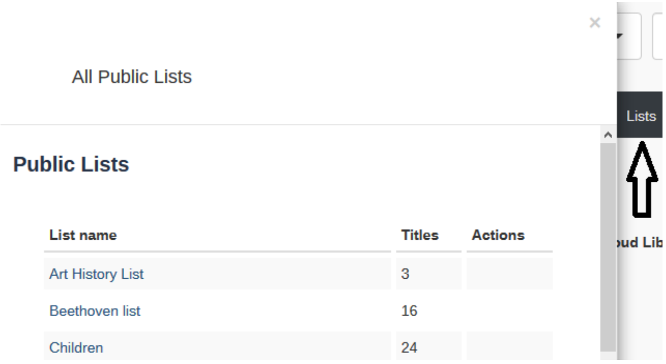
A patron must be logged into his/her account before creating or editing a list; existing public lists can be accessed without logging in. (Note that sites can change the name from Lists to something else, like Shelves or Collections.) The individual patron or the associated Role must have the

catalogue, bib_list -- Lists/virtshelves of bibs

granular permission (see that section) to be able to create personal lists.

17.9.1 Viewing a List

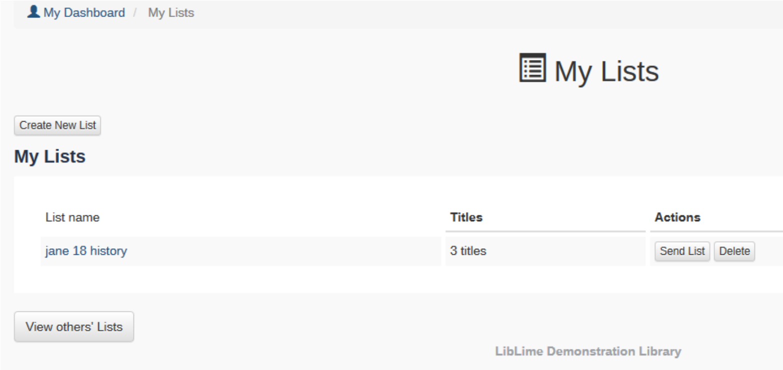
Go to the Lists link in the masthead and click on the drop down. Select one of the lists to view. If you are logged in, the lists you created are towards the bottom, under the caption "Your Lists."



Public Lists

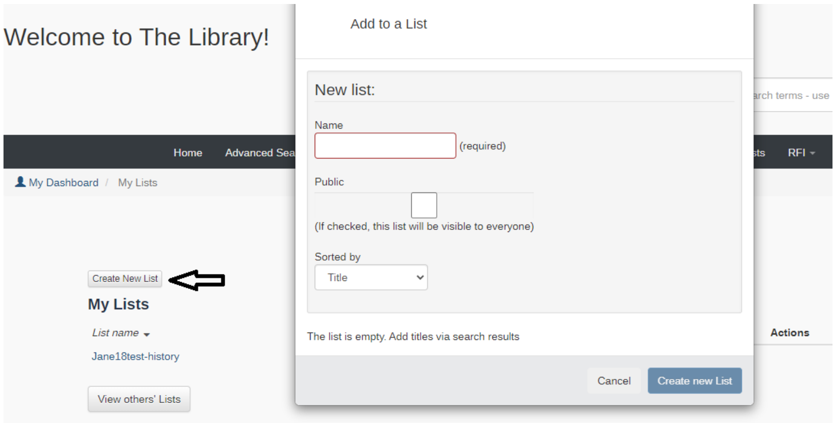
List name	Titles	Actions
Art History List	3	
Beethoven list	16	
Children	24	

If you are logged in, you can create a personal list in a couple of ways. Go to your dashboard (see that section later) and click the My Lists tab. You'll see any lists you have already created, and a button allowing you to create a new one.



List name	Titles	Actions
jane 18 history	3 titles	Send List Delete

For a new list, enter the name of the list. Make the list public, if desired, which means it can be viewed by anyone. Choose how to sort the list – by title, author, or date. Then click on Create New List.



Name ☐ (required)

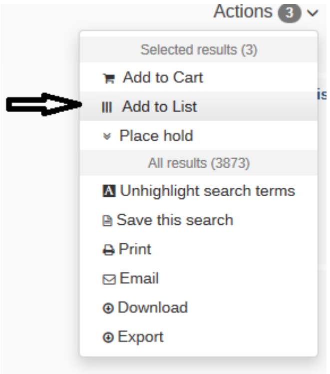
Public ☐

(If checked, this list will be visible to everyone)

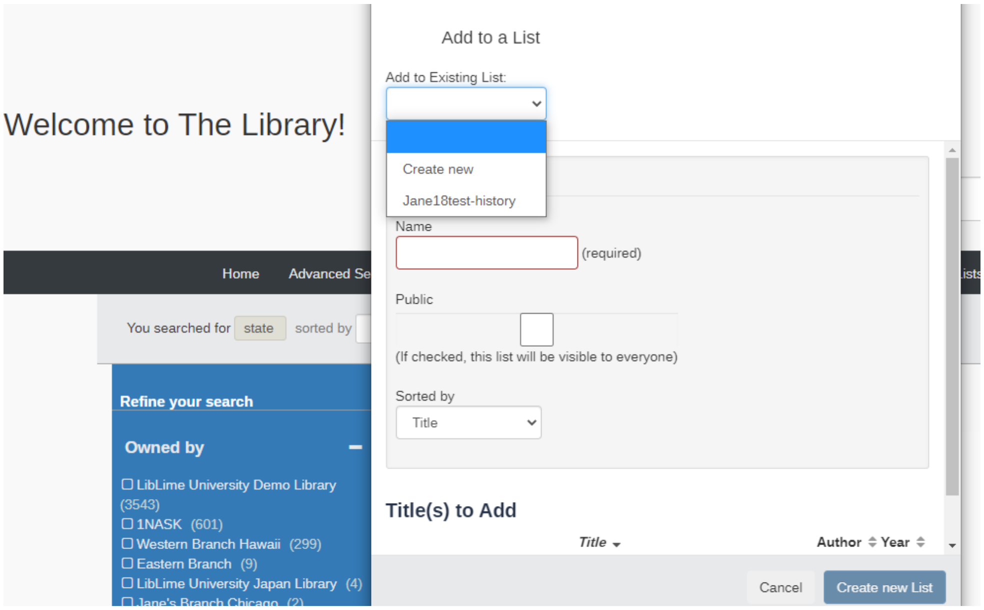
Sorted by: Title

The list is empty. Add titles via search results

You can add items to a list (or create a new one) from any search while you're logged in to the Discovery Layer. From a search results screen, click the checkboxes next to the titles you want, and select Add to List under the Actions pulldown.



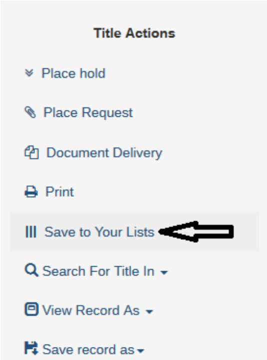
The popup will allow you to create a new list at that point, or select one of your existing lists from the pulldown.



(If checked, this list will be visible to everyone)

Sorted by Title

When you view an individual title, the option to add to your list appears to the right of the bibliographic display, under Title Actions.

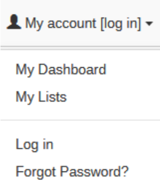


Clicking that link brings up the same window as above; create a new list or add to one of your existing lists.

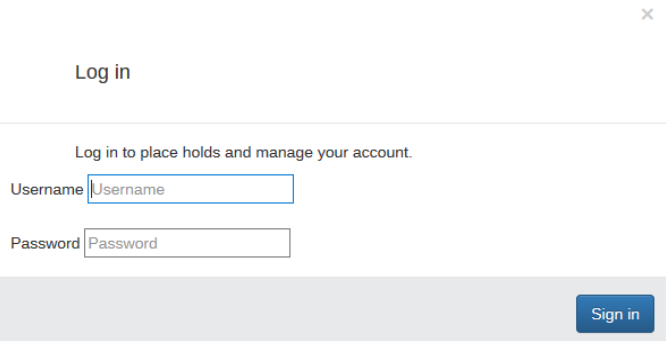
All of your lists are available for viewing and managing in your dashboard.

17.10 Logging In

You can log into your account at any time by clicking the Log In link in the upper right corner. If you click on something that requires a login status, such as placing a hold, you'll also be prompted:

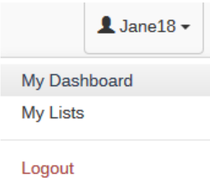


Enter your ID and password. **NOTE: a user can log in either with the defined userid (DL Login field) or the cardnumber – if the value entered does not match the DL Login, it will try to match against a cardnumber.**

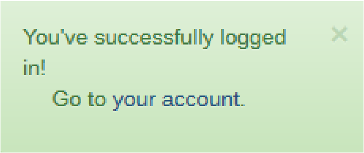


Log in to place holds and manage your account.

When you log in, the screen will change to show your name. You can then proceed with what you were doing, or go to your account page by clicking on your name and selecting My Dashboard.



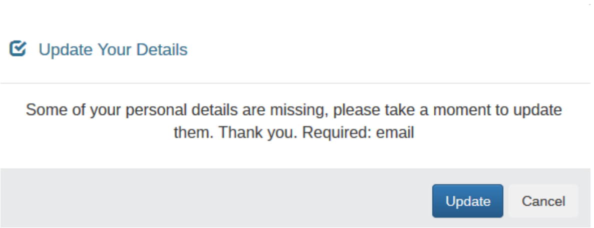
A popup message with a link to your account will also display briefly:



You've successfully logged in!
Go to your account.

17.10.1 Prompt for Missing Account Information

If configured, the system will prompt a user at login to add missing data to the user's account:



Some of your personal details are missing, please take a moment to update them. Thank you. Required: email

Clicking on the Update button will take the user to the My Personal Details tab (see below for more information) with a prompt to complete the required fields:

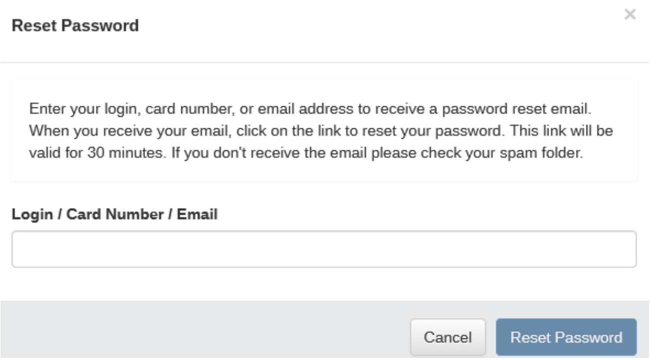
The user can choose to ignore the prompt, but it will show at every login until the required field data is added to the patron record. The patron's update note will be emailed to the address in the branchcode policy (or the KohaAdminEmailAddress syspref if there is no address in the branchcode), and library staff will update the patron record.

17.10.2 Logging in With Partial Barcode

If configured, patrons can log in with a partial barcode (only the unique string after the branch's prefix). Related to the staff Partial Patron Barcode Searching feature, this requires use of patron barcode prefixes in the branchcode policy. If a site uses branch-specific URLs, the system will attempt to use the prefix in the branch defined in the host-regex setting. Otherwise, all branch prefixes will be checked. If more than one prefix expansion finds a patron record, lookup will fail (reverting to non-expanded lookup).

17.10.3 Forgot Password Reset Option

The Login dropdown now has an option for patrons to reset their passwords if needed. Select Forgot Password? from the menu and you'll get a popup:

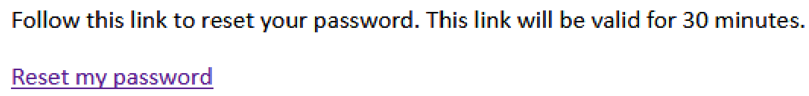


Reset Password

Enter your login, card number, or email address to receive a password reset email. When you receive your email, click on the link to reset your password. This link will be valid for 30 minutes. If you don't receive the email please check your spam folder.

Login / Card Number / Email

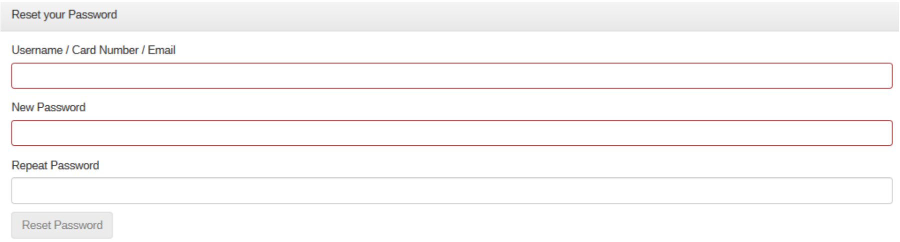
Enter either cardnumber, email address, or login ID and the system will search for the patron record. You will receive an email at the address on your patron record:



Follow this link to reset your password. This link will be valid for 30 minutes.

Reset my password

Click on the link and you'll be taken to a screen with data fields:



Reset your Password

Username / Card Number / Email

New Password

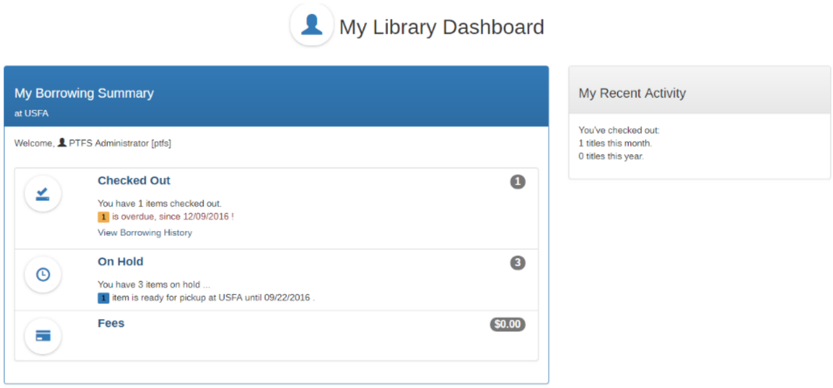
Repeat Password

Enter either cardnumber, email address, or login ID in the first field, then create a new password and confirm it. When you click Reset Password, the system will update the database. You can then log in using the new password.

Note that if the site has turned off the OpacPasswordChange syspref (the default for LDAP authentication), the Forgot Password link will not appear.

17.11 Discovery Layer Patron Dashboard

The Discovery Layer patron account section has been reorganized into a dashboard. The top of the display shows current checkouts, holds, and fines.



My Library Dashboard

My Borrowing Summary
at USFA

Welcome, PTFS Administrator [ptfs]

Checked Out 1

You have 1 items checked out.
1 is overdue, since 12/09/2016 !
View Borrowing History

On Hold 3

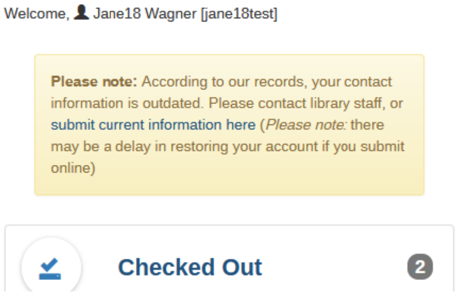
You have 3 items on hold ...
1 item is ready for pickup at USFA until 09/22/2016 .

Fees $0.00

My Recent Activity

You've checked out:
1 titles this month.
0 titles this year.

This area of the screen may also show alerts for various conditions. In this example, the patron's record was flagged as "gone no address" so a warning appeared:

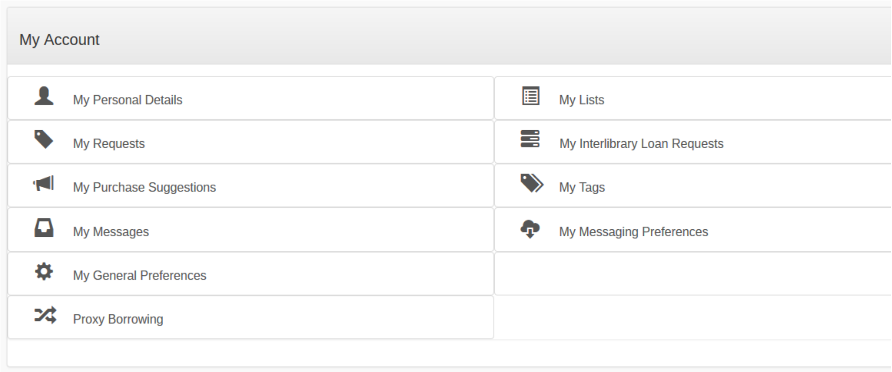


Welcome, Jane18 Wagner [jane18test]

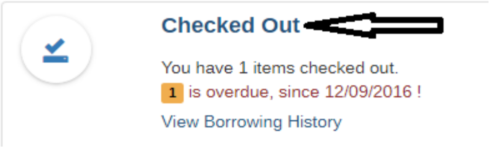
Please note: According to our records, your contact information is outdated. Please contact library staff, or submit current information here (*Please note:* there may be a delay in restoring your account if you submit online)

Checked Out 2

Below that are tabs for various sections (what shows depends on your site's configuration).

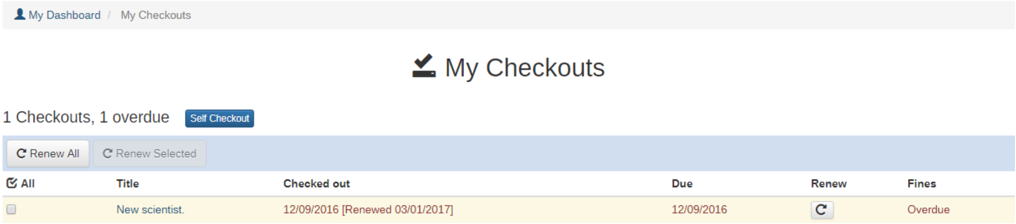


17.11.1 Checkouts



You have 1 items checked out.
1 is overdue, since 12/09/2016 !
View Borrowing History

Clicking the Checked Out link in the first section shows what items you currently have checked out.



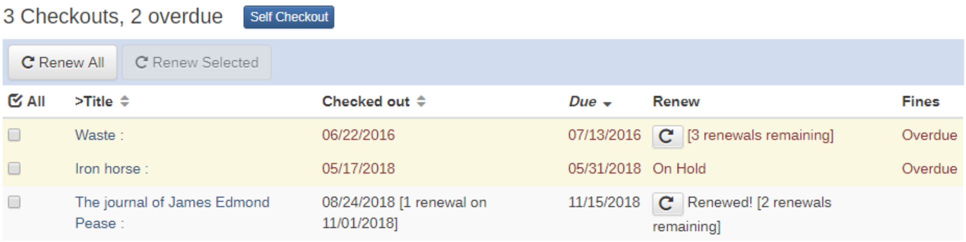
1 Checkouts, 1 overdue

☑ All	Title	Checked out	Due	Renew	Fines
☐	New scientist.	12/09/2016 [Renewed 03/01/2017]	12/09/2016	↻	Overdue

17.11.1.1 Renewing

A Renew button (half-circle arrow icon) will allow the item to be renewed, and a note will show how many renewals remain. An item that is on hold for another user cannot be renewed by the patron (staff may be able to override and renew). However, patrons will be allowed to renew eligible items if there are other items available in the system to fill other active holds on the same bibliographic record.

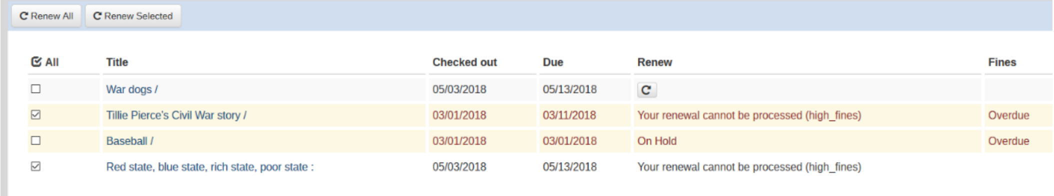
If a renewal is blocked for another reason, such as max number of renewals reached, the Renew button won't show for that item.



☑ All	>Title	Checked out	Due	Renew	Fines
☐	Waste :	06/22/2016	07/13/2016	↻ [3 renewals remaining]	Overdue
☐	Iron horse :	05/17/2018	05/31/2018	On Hold	Overdue
☐	The journal of James Edmond Pease :	08/24/2018 [1 renewal on 11/01/2018]	11/15/2018	↻ Renewed! [2 renewals remaining]	

NOTE: Certain sites need to mark titles as suppressed but still check them out to users. To allow title information to show on the patron's list of checkouts, the patron or (preferably) the Role assigned to those patron categories must have the catalogue.view_suppressed_bibs granular permission.

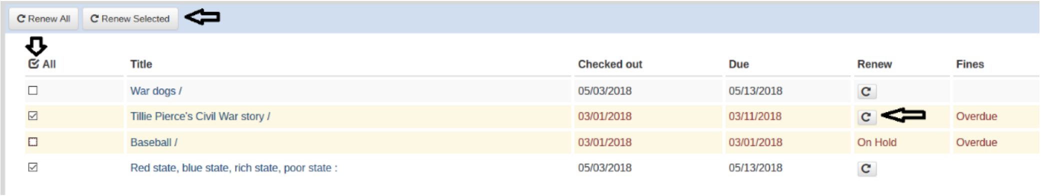
Note that sites may have configured the system to block renewals if the amount owed is above a certain threshold, or for other reasons. If that is the case, an error message will show when the user tries to renew. A popup message will say something like "Could not renew some items at this time" and the list of checkouts may show the reason:



☑ All	Title	Checked out	Due	Renew	Fines
☐	War dogs /	05/03/2018	05/13/2018	↻	
☑	Tillie Pierce's Civil War story /	03/01/2018	03/11/2018	Your renewal cannot be processed (high_fines)	Overdue
☐	Baseball /	03/01/2018	03/01/2018	On Hold	Overdue
☑	Red state, blue state, rich state, poor state :	05/03/2018	05/13/2018	Your renewal cannot be processed (high_fines)	

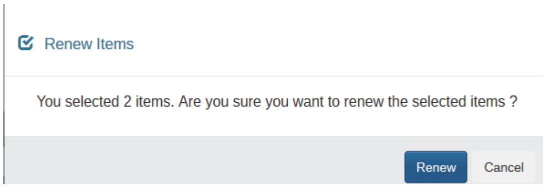
17.11.1.2 Renewing Multiple Items

You can click the button under the Renew column to renew an individual item, or you can select multiple checkboxes to renew several at once



☑ All	Title	Checked out	Due	Renew	Fines
☐	War dogs /	05/03/2018	05/13/2018	↻	
☑	Tillie Pierce's Civil War story /	03/01/2018	03/11/2018	↻	Overdue
☐	Baseball /	03/01/2018	03/01/2018	On Hold	Overdue
☑	Red state, blue state, rich state, poor state :	05/03/2018	05/13/2018	↻	

A popup window will ask for confirmation:



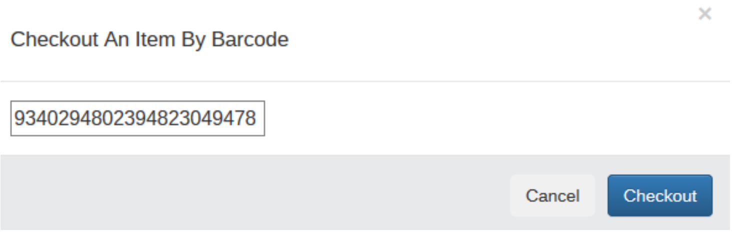
You selected 2 items. Are you sure you want to renew the selected items ?

17.11.1.3 Self Checkout

If the patron has the self_checkout granular permission (either directly or through a Role assignment), a Self Checkout button will show on the My Checkouts screen:


1 Checkouts, 1 overdue

The patron can click that button, enter a barcode in the popup form, and check an item out:

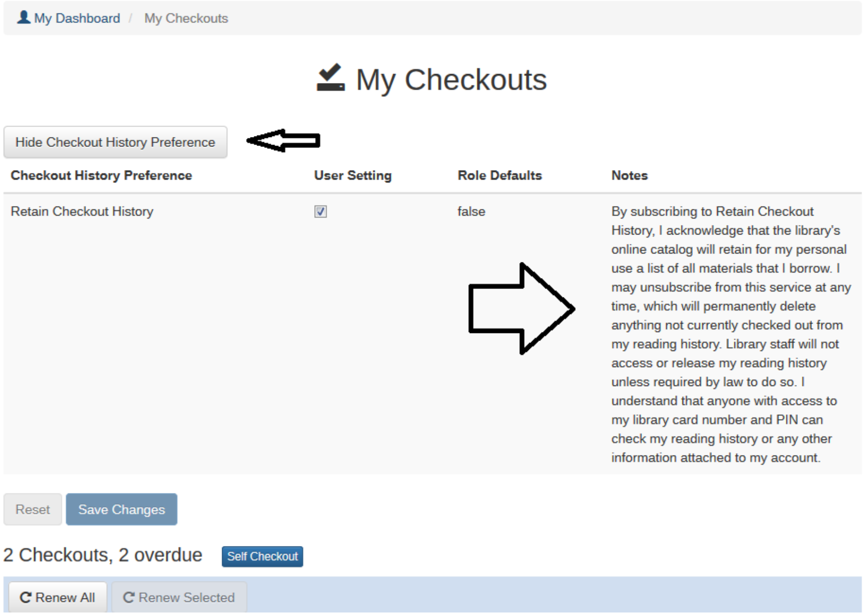

Checkout An Item By Barcode

9340294802394823049478

NOTE: The older self-check module no longer works and has been removed. A new Kiosk module has been added (see that section and the Superlibrarian Guide under System Preferences).

17.11.1.4 Checkout History Anonymization

If enabled, users can choose to retain their checkout history under the Show Checkout History Preference button on the Dashboard, My Checkouts display:

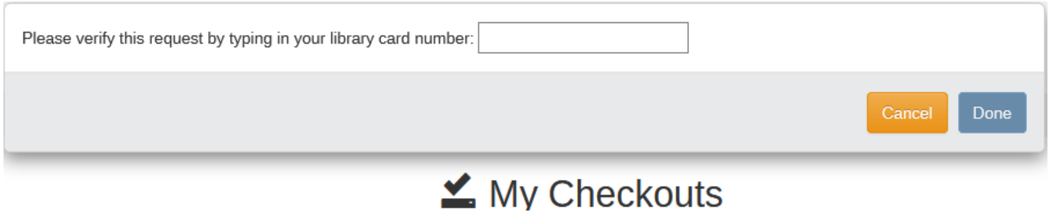


Checkout History Preference	User Setting	Role Defaults	Notes
Retain Checkout History	☑	false	By subscribing to Retain Checkout History, I acknowledge that the library's online catalog will retain for my personal use a list of all materials that I borrow. I may unsubscribe from this service at any time, which will permanently delete anything not currently checked out from my reading history. Library staff will not access or release my reading history unless required by law to do so. I understand that anyone with access to my library card number and PIN can check my reading history or any other information attached to my account.

2 Checkouts, 2 overdue

Retain Checkout History works with the anonymization function. If that feature is being used, note that the default behavior is to **REMOVE** previous checkouts. To keep that history, this button **MUST** be checked. If configured in the Discovery Layer (see that manual), users who choose not to retain their history will not see borrowing history, but they WILL continue to see their current checkouts.

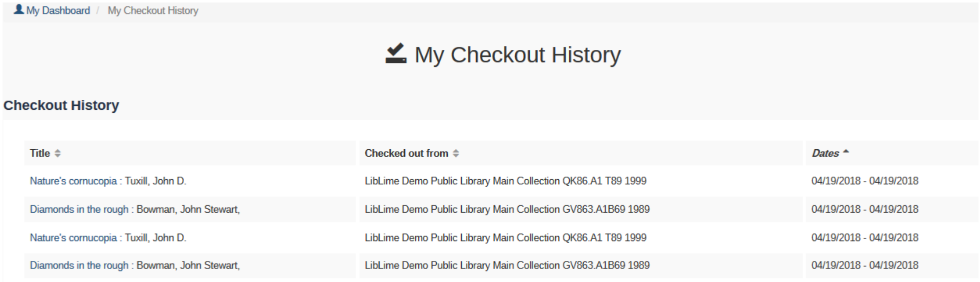
When users make a change to settings, they will be asked to enter their password for confirmation:



Please verify this request by typing in your library card number:

17.11.1.5 View Checkout History

If enabled, patrons can use the View Borrowing History link under Checkouts to view previous checkouts.



Checkout History

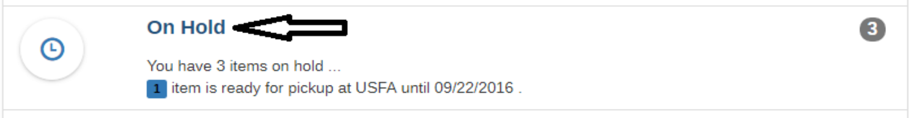
Title	Checked out from	Dates
Nature's cornucopia : Tuxill, John D.	LibLime Demo Public Library Main Collection QK86.A1 T89 1999	04/19/2018 - 04/19/2018
Diamonds in the rough : Bowman, John Stewart,	LibLime Demo Public Library Main Collection GV863.A1B69 1989	04/19/2018 - 04/19/2018
Nature's cornucopia : Tuxill, John D.	LibLime Demo Public Library Main Collection QK86.A1 T89 1999	04/19/2018 - 04/19/2018
Diamonds in the rough : Bowman, John Stewart,	LibLime Demo Public Library Main Collection GV863.A1B69 1989	04/19/2018 - 04/19/2018

NOTE: If the new Anonymize Reading History feature is being used, old checkout data may not appear. Earlier versions used a syspref; the new code uses a combination of granular permissions and user preferences. See the section on anonymizing data in the Superlibrarian Guide. To simply view the reading history, only the permission circulate.issue_history.view is required. This can be assigned in the Role record.

The list can be sorted as desired, by clicking on the arrows in the column headers.

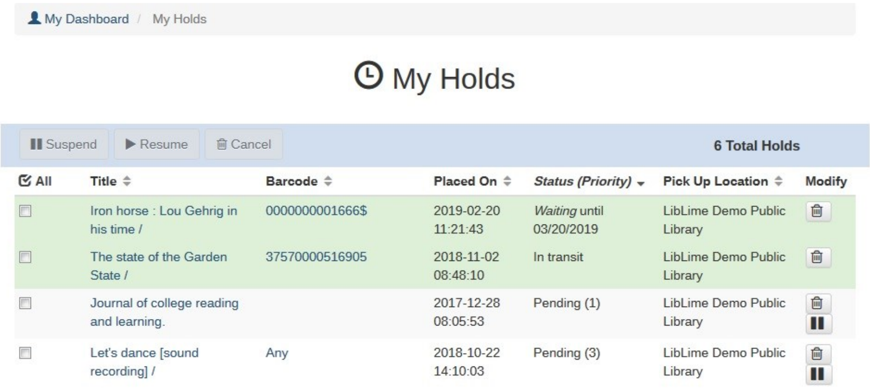
17.11.2 My Holds

Clicking the On Hold link will show details about your present holds, including the expiration date for holds that have been triggered.



You have 3 items on hold ...
1 item is ready for pickup at USFA until 09/22/2016 .

The title display has been expanded to include extra subfields so users can distinguish between similar titles. You can see if an item is in transit, waiting for pickup, or is still pending. If a waiting hold has expired without being picked up, it will no longer show in the Dashboard list.

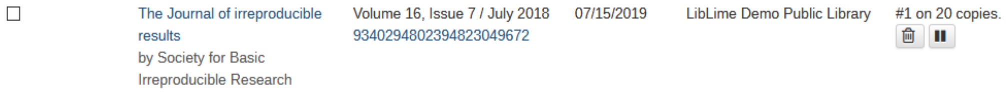


My Holds

6 Total Holds

All	Title	Barcode	Placed On	Status (Priority)	Pick Up Location	Modify
☐	Iron horse : Lou Gehrig in his time /	0000000001666$	2019-02-20 11:21:43	*Waiting* until 03/20/2019	LibLime Demo Public Library	🗑
☐	The state of the Garden State /	37570000516905	2018-11-02 08:48:10	In transit	LibLime Demo Public Library	🗑
☐	Journal of college reading and learning.		2017-12-28 08:05:53	Pending (1)	LibLime Demo Public Library	🗑 ❚❚
☐	Let's dance [sound recording] /	Any	2018-10-22 14:10:03	Pending (3)	LibLime Demo Public Library	🗑 ❚❚

For serials titles, the enumeration and chronology has been added to the display:



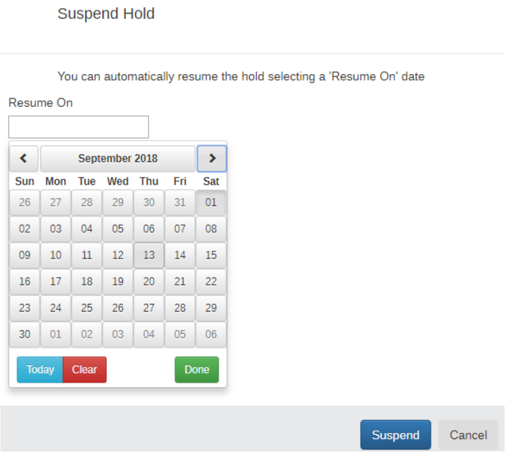
☐	The Journal of irreproducible results by Society for Basic Irreproducible Research	Volume 16, Issue 7 / July 2018 9340294802394823049672	07/15/2019	LibLime Demo Public Library	#1 on 20 copies. 🗑 ❚❚

If configured (syspref OPACDisplayRequestPriority), your position in the holds priority queue will show in parentheses after the Pending status. You may cancel any hold that has not yet been triggered. **NOTE**: a new granular permission circulate.cancel_waiting_holds will allow users to cancel even triggered holds; this permission can be assigned in the Role record but is not recommended for most sites.

As with renewals, checkboxes will allow action on multiple holds at once.

17.11.2.1 Suspending Holds

Users may suspend any hold which has not yet been triggered (waiting for pickup). Click the Suspend icon (double vertical bars); a popup window will appear.



Suspend Hold

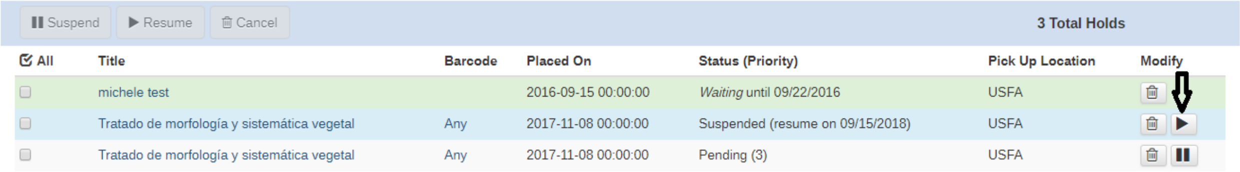
You can automatically resume the hold selecting a 'Resume On' date

Resume On

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	01	02	03	04	05	06

You can set a date for the hold to automatically resume (controlled by the cron job misc/cronjobs/holds/resume_suspended_reserves.pl). To set a date, click in the Resume On box and a calendar gadget will appear. Navigate to the desired date and click Done. Then click the Suspend button. If you want the hold to be suspended until you resume it, ignore the date field and just click Suspend.

The Discovery Layer display changes to show the suspend status, with a button to Resume the hold (right arrow icon):

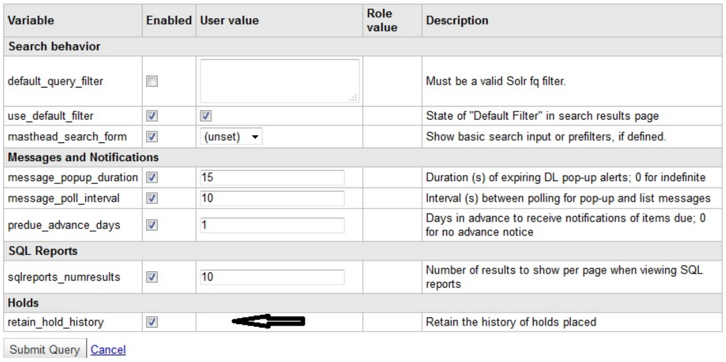


☑ All	Title	Barcode	Placed On	Status (Priority)	Pick Up Location	Modify
☐	michele test		2016-09-15 00:00:00	*Waiting* until 09/22/2016	USFA	
☐	Tratado de morfología y sistemática vegetal	Any	2017-11-08 00:00:00	Suspended (resume on 09/15/2018)	USFA	
☐	Tratado de morfología y sistemática vegetal	Any	2017-11-08 00:00:00	Pending (3)	USFA	

Even if the hold was suspended with a "resume on" date, the user can resume it at any time by clicking the Resume button. It does not have to wait for the target date.

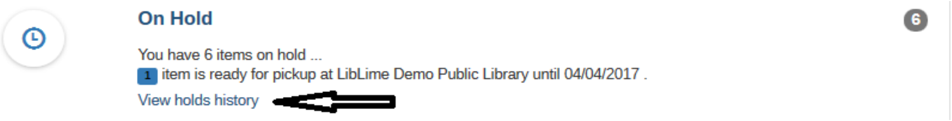
17.11.2.2 Holds History

A new user preference (Retain Hold History) allows users to display a record of previous holds. This can be set by staff in individual patron records or Role records (under the Patron user preferences section):



Variable	Enabled	User value	Role value	Description
Search behavior				
default_query_filter	☐			Must be a valid Solr fq filter.
use_default_filter	☑	☑		State of "Default Filter" in search results page
masthead_search_form	☑	(unset)		Show basic search input or prefilters, if defined.
Messages and Notifications				
message_popup_duration	☑	15		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
message_poll_interval	☑	10		Interval (s) between polling for pop-up and list messages
predue_advance_days	☑	1		Days in advance to receive notifications of items due; 0 for no advance notice
SQL Reports				
sqlreports_numresults	☑	10		Number of results to show per page when viewing SQL reports
Holds				
retain_hold_history	☑			Retain the history of holds placed

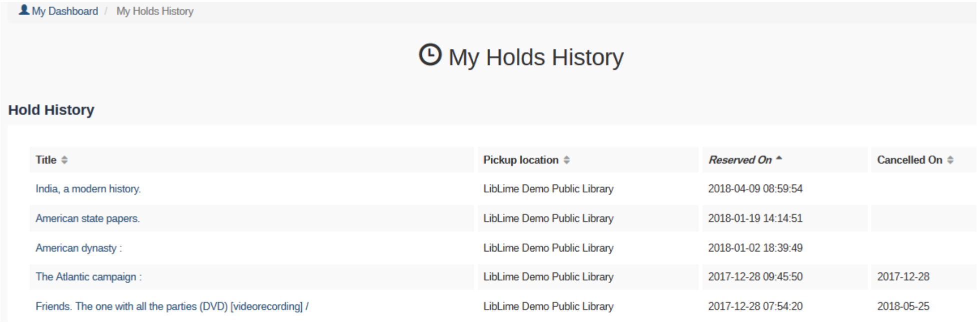
It can also be set by patrons themselves under the My General Preferences tab. If it is enabled, you can click the View Holds History link at the top of the dashboard:



On Hold

You have 6 items on hold ...
1 item is ready for pickup at LibLime Demo Public Library until 04/04/2017 .
View holds history

This will show previous filled and cancelled holds:



My Dashboard / My Holds History

My Holds History

Hold History

Title	Pickup location	Reserved On	Cancelled On
India, a modern history.	LibLime Demo Public Library	2018-04-09 08:59:54	
American state papers.	LibLime Demo Public Library	2018-01-19 14:14:51	
American dynasty :	LibLime Demo Public Library	2018-01-02 18:39:49	
The Atlantic campaign :	LibLime Demo Public Library	2017-12-28 09:45:50	2017-12-28
Friends. The one with all the parties (DVD) [videorecording] /	LibLime Demo Public Library	2017-12-28 07:54:20	2018-05-25

17.11.3 Fees

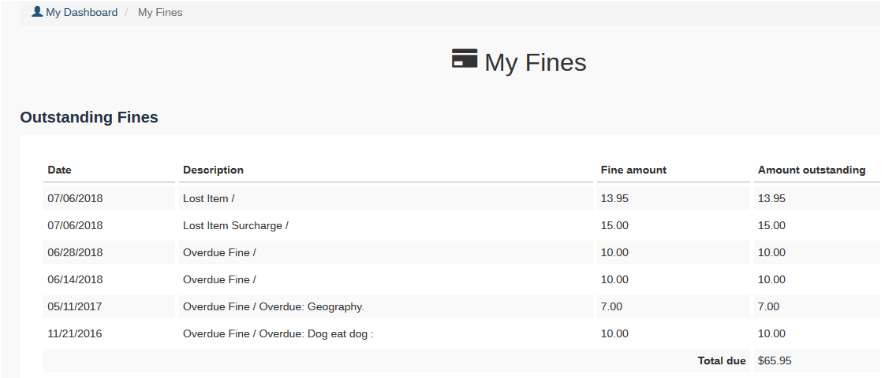
The Fees link will show current charges:

Fees

You have a balance of $65.95.

$65.95

The Fees screen will show details:



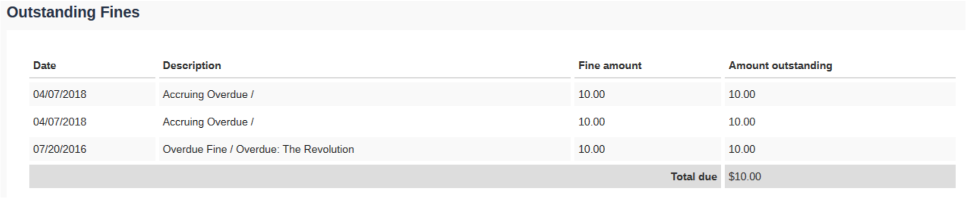
My Dashboard / My Fines

My Fines

Outstanding Fines

Date	Description	Fine amount	Amount outstanding
07/06/2018	Lost Item /	13.95	13.95
07/06/2018	Lost Item Surcharge /	15.00	15.00
06/28/2018	Overdue Fine /	10.00	10.00
06/14/2018	Overdue Fine /	10.00	10.00
05/11/2017	Overdue Fine / Overdue: Geography.	7.00	7.00
11/21/2016	Overdue Fine / Overdue: Dog eat dog :	10.00	10.00
		Total due	$65.95

Accruing fines on items that are still checked out will show, but won't be included in the total owed:

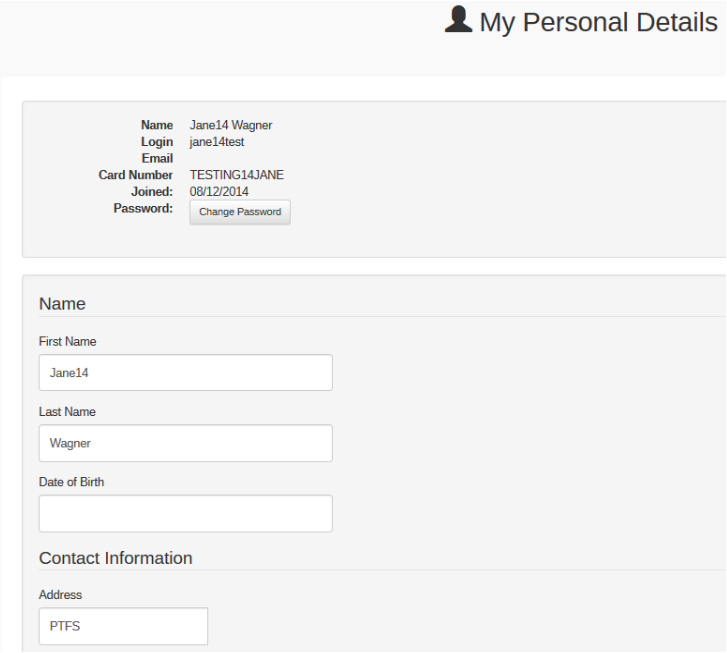


Outstanding Fines

Date	Description	Fine amount	Amount outstanding
04/07/2018	Accruing Overdue /	10.00	10.00
04/07/2018	Accruing Overdue /	10.00	10.00
07/20/2016	Overdue Fine / Overdue: The Revolution	10.00	10.00
		Total due	$10.00

17.11.4 My Personal Details

This tab shows patrons the contact information on file for them.


My Personal Details

Name Jane14 Wagner
Login jane14test
Email
Card Number TESTING14JANE
Joined: 08/12/2014
Password:

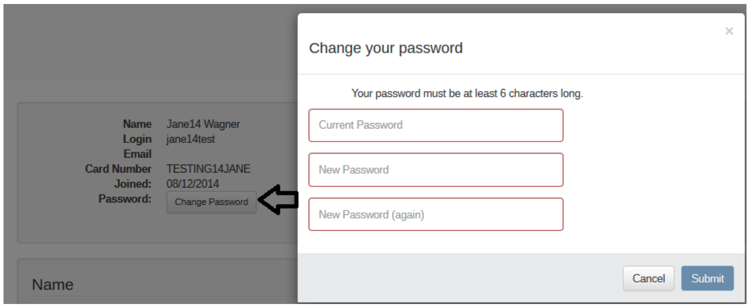
Name

First Name: Jane14
Last Name: Wagner
Date of Birth:

Contact Information

Address: PTFS

You can use the Change Password button at the top of this screen to change your password. That will bring up a popup window with boxes for the current and new passwords:


Change your password

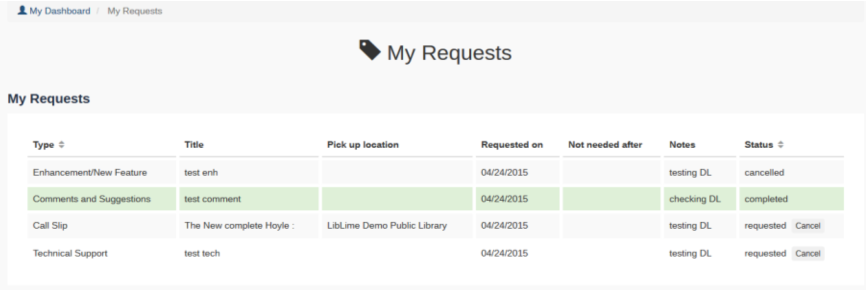
Your password must be at least 6 characters long.

Users will be blocked from entering a password shorter than the system-specified length.

Patrons can enter new data in various fields and click the Submit Changes button at the bottom. The patron's update note will be emailed to the address in the branchcode policy (or the KohaAdminEmailAddress syspref if there is no address in the branchcode). Library staff must then review the update(s) and make the changes in the patron record as needed. Patrons may not directly modify the database.

17.11.5 My Requests

If call slips, document delivery, or informational request forms are configured, patrons can see their requests under the My Requests tab.



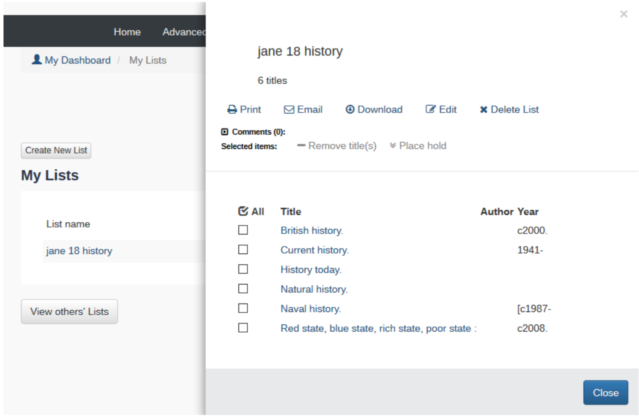
My Requests

Type	Title	Pick up location	Requested on	Not needed after	Notes	Status
Enhancement/New Feature	test enh		04/24/2015		testing DL	cancelled
Comments and Suggestions	test comment		04/24/2015		checking DL	completed
Call Slip	The New complete Hoyle :	LibLime Demo Public Library	04/24/2015		testing DL	requested Cancel
Technical Support	test tech		04/24/2015		testing DL	requested Cancel

As library staff update the status or post responses, those become visible. See the section below on placing requests through the Discovery Layer.

17.11.6 My Lists

As covered under the Lists section, from your account page you can manage your personal lists.



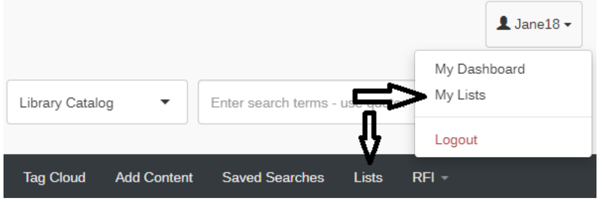
jane 18 history

6 titles

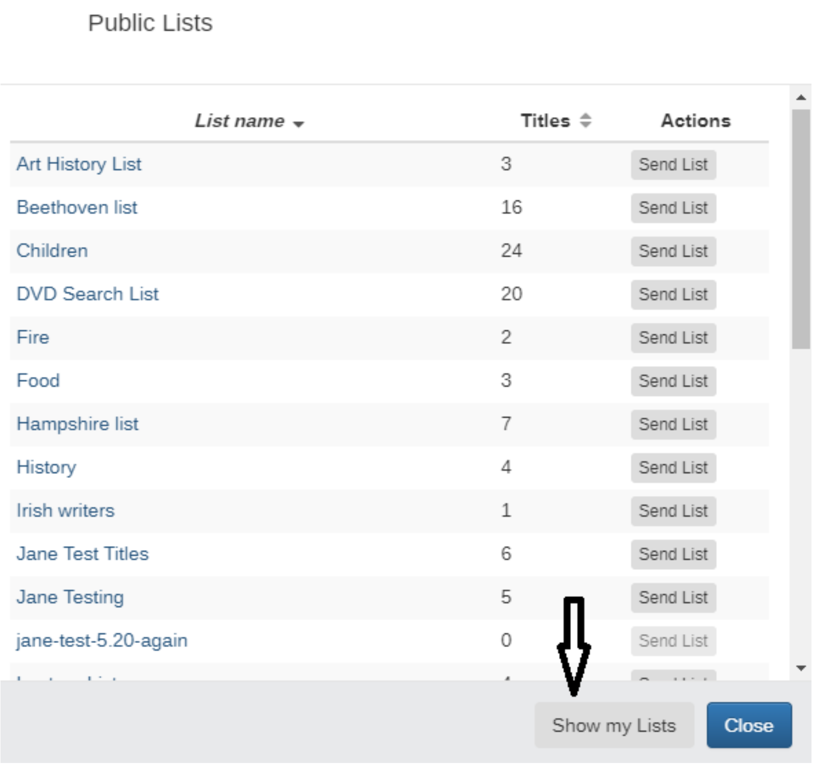
☑ All	Title	Author	Year
☐	British history.		c2000.
☐	Current history.		1941-
☐	History today.		
☐	Natural history.		
☐	Naval history.		[c1987-
☐	Red state, blue state, rich state, poor state :		c2008.

From here you can review the items on a list, edit the list, and send the list to an email address. To email a list, your patron account record must have an email address for validation. A personal list may also be deleted from here.

In the Discovery Layer, you can see your own lists under either the My Lists link or the masthead Lists:



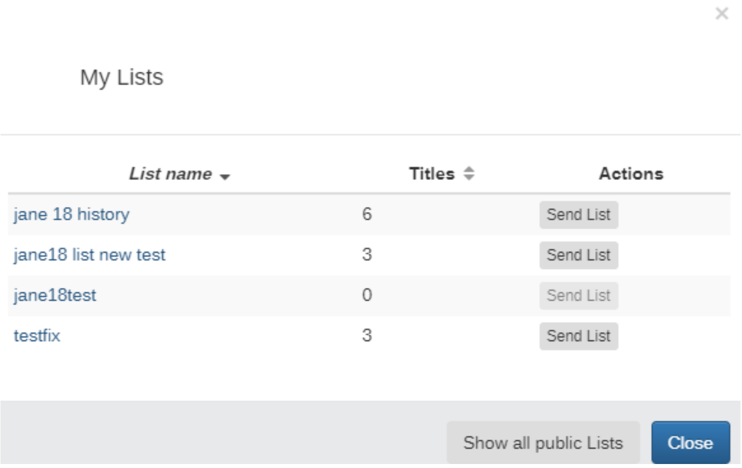
Either opens the public list display. At the bottom, click Show My Lists:



Public Lists

List name	Titles	Actions
Art History List	3	Send List
Beethoven list	16	Send List
Children	24	Send List
DVD Search List	20	Send List
Fire	2	Send List
Food	3	Send List
Hampshire list	7	Send List
History	4	Send List
Irish writers	1	Send List
Jane Test Titles	6	Send List
Jane Testing	5	Send List
jane-test-5.20-again	0	Send List

This displays your own lists; you can switch back to the public set if desired:



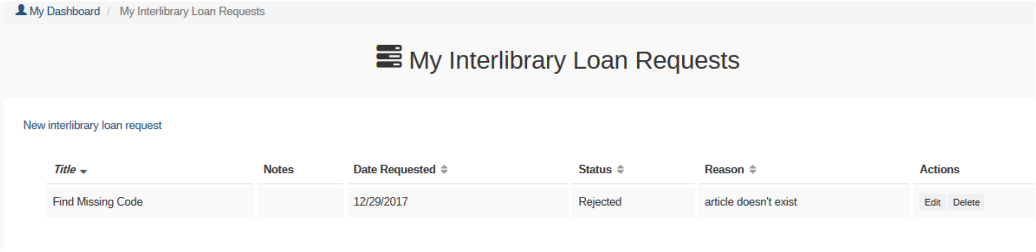
My Lists

List name	Titles	Actions
jane 18 history	6	Send List
jane18 list new test	3	Send List
jane18test	0	Send List
testfix	3	Send List

A granular permission (catalogue.bib_lists.create_public) is required for patrons to create lists that are publicly available to other users. Otherwise, patrons can only create personal lists.

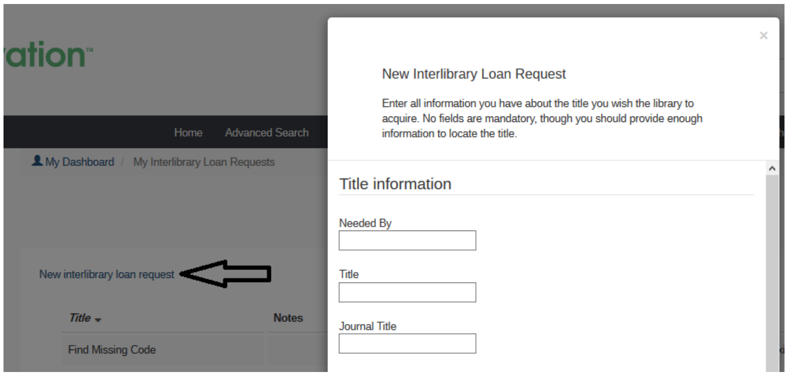
17.11.7 My Interlibrary Loan Requests

If enabled (ILLRequests system preference), the Interlibrary Loan module allows patrons to place requests and staff to manage those requests. It works similarly to Call Slips and Document Delivery, but is intended for material not owned by the library. In the dashboard, under the My Interlibrary Loan Requests tab, you will see a list of current requests and their status.



Title	Notes	Date Requested	Status	Reason	Actions
Find Missing Code		12/29/2017	Rejected	article doesn't exist	Edit Delete

Click the New Interlibrary Loan Request link to create a new one. That opens a popup window with various fields (the fields on the form can be controlled by the site in the Discovery Layer configuration editor).

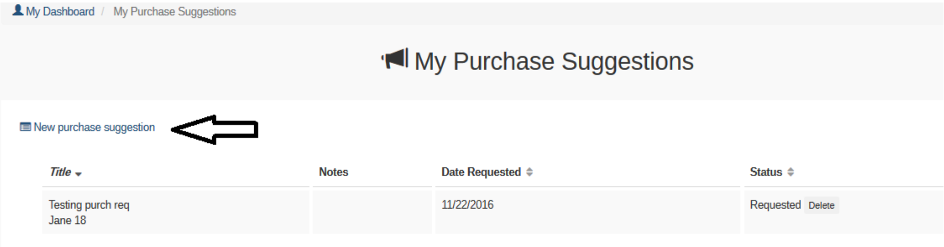


Enter all information you have about the title you wish the library to acquire. No fields are mandatory, though you should provide enough information to locate the title.

The user would fill out as much information as possible, and click Submit Request. The request is then visible in the Discovery Layer screen; the user could cancel it or edit it to include additional information

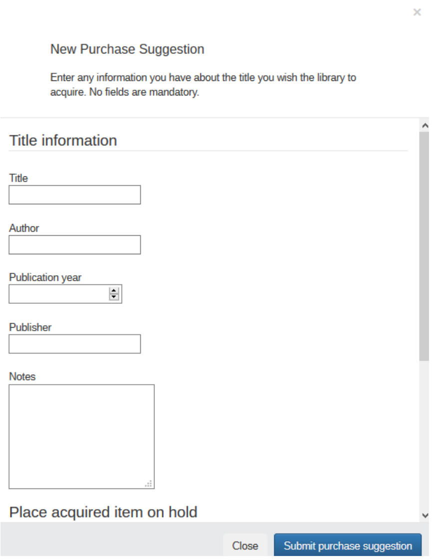
17.11.8 My Purchase Suggestions

If enabled (syspref suggestion and some associated configuration and permissions), patrons may create purchase suggestions from the Discovery Layer or see the status of previous suggestions. Patrons can delete suggestions if desired.



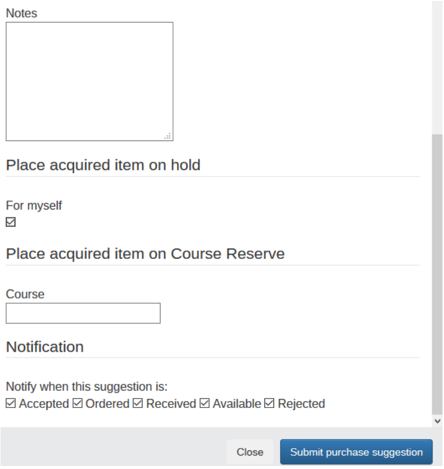
Title	Notes	Date Requested	Status
Testing purch req Jane 18		11/22/2016	Requested Delete

To create a new suggestion, click the "New Purchase Suggestion" link. That will open a data entry popup screen:



Enter any information you have about the title you wish the library to acquire. No fields are mandatory.

In the top part of the screen, complete as much information as possible about the requested title. Scroll down to ask for the item to be placed on hold or course reserve, and for notification options.



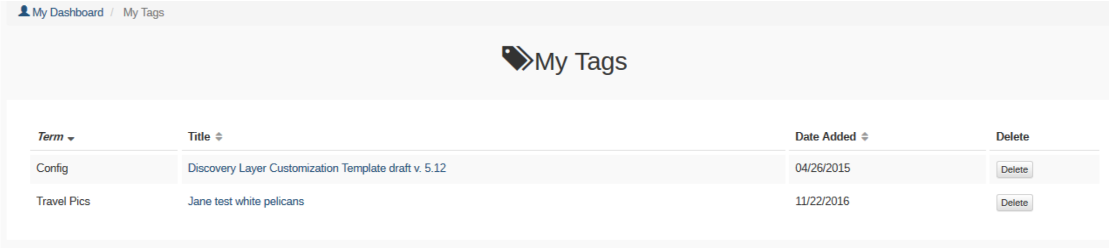
For myself
☑

Notify when this suggestion is:
☑ Accepted ☑ Ordered ☑ Received ☑ Available ☑ Rejected

Library staff can review and act upon suggestions in Acquisitions.

17.11.9 My Tags

If Tags are enabled on the system, this tab shows any tags the patron has created, with a link to the title and an option to delete the tag. Note that the system may be configured to require staff approval of tags; if that is the case, your tags may not show until library staff approves them.

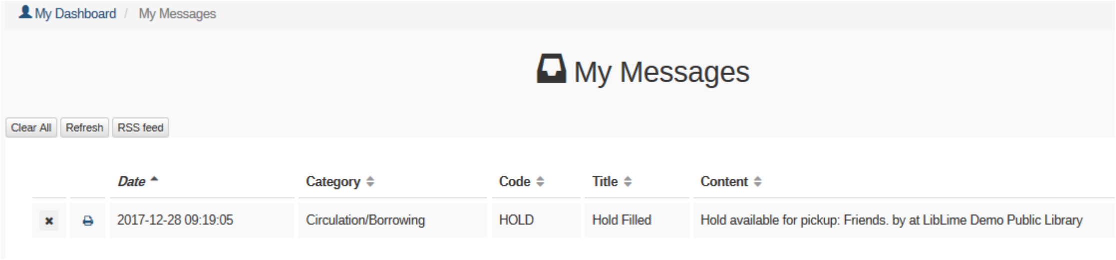


Term	Title	Date Added	Delete
Config	Discovery Layer Customization Template draft v. 5.12	04/26/2015	Delete
Travel Pics	Jane test white pelicans	11/22/2016	Delete

17.11.10 *My Messages*

The My Messages tab shows a list of messages which have been delivered to the list message endpoint type. These are retrieved periodically according to the Messaging Poll Interval (in the My Messaging Preferences tab).

Messages stay on this list until they are explicitly removed, either by clicking the X button on a given message, or the Clear All button at the top of the page. The Refresh button will retrieve any new messages immediately. The printer icon next to each message will print that message.



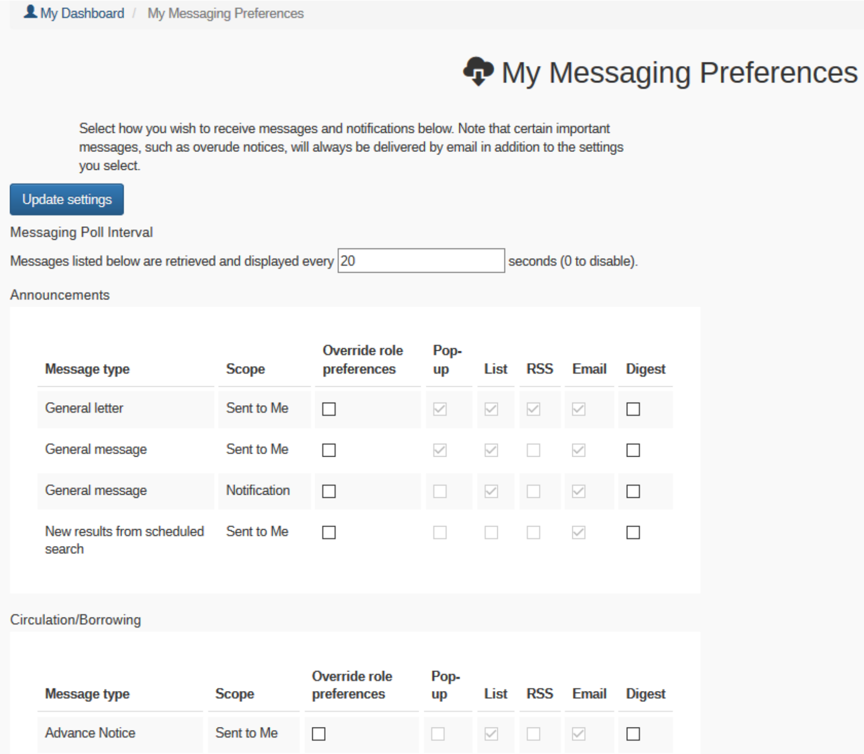
		Date	Category	Code	Title	Content
✖	🖶	2017-12-28 09:19:05	Circulation/Borrowing	HOLD	Hold Filled	Hold available for pickup: Friends. by at LibLime Demo Public Library

Remember, this only shows messages directed to the list endpoint – email messages do not show here.

17.11.11 *My Messaging Preferences*

Under this tab, patrons can see existing settings for notifications, and make changes as desired. The tab shows a table of all message types the patron is authorized to receive by their permissions. Message types are grouped by category. The Scope column indicates whether this is a unicast message (Sent to Me) or multicast message (Anyone). The remaining columns indicate the delivery preferences.

Default message settings from the Role record show as grayed out checks.



My Messaging Preferences

Select how you wish to receive messages and notifications below. Note that certain important messages, such as overude notices, will always be delivered by email in addition to the settings you select.

Messaging Poll Interval

Messages listed below are retrieved and displayed every 20 seconds (0 to disable).

Announcements

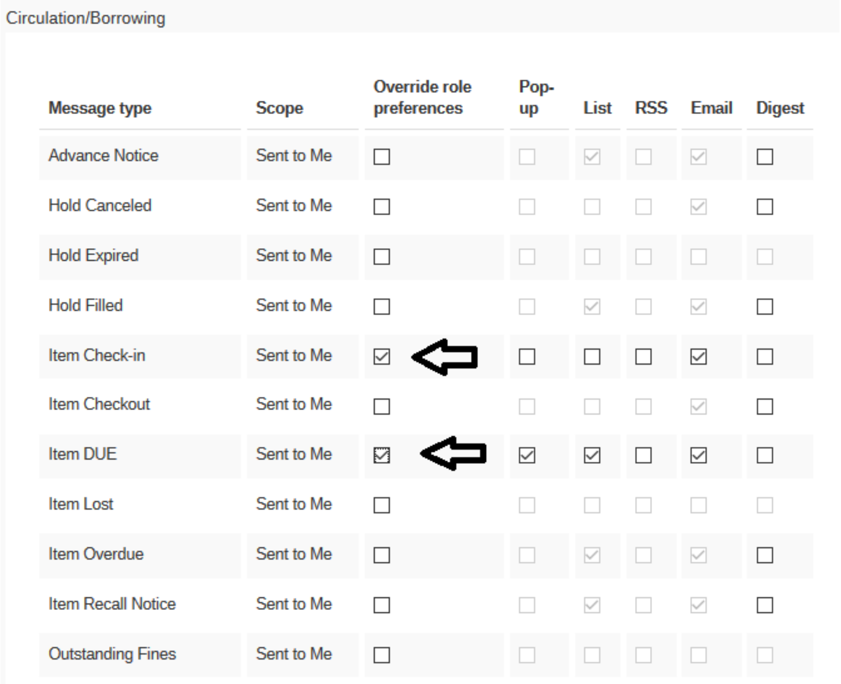
Message type	Scope	Override role preferences	Pop-up	List	RSS	Email	Digest
General letter	Sent to Me	☐	☑	☑	☑	☑	☐
General message	Sent to Me	☐	☑	☑	☐	☑	☐
General message	Notification	☐	☐	☑	☐	☑	☐
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☑	☐

Circulation/Borrowing

Message type	Scope	Override role preferences	Pop-up	List	RSS	Email	Digest
Advance Notice	Sent to Me	☐	☐	☑	☐	☑	☐

If the Override role preferences box is unchecked, the remaining checkboxes (Popup, List, RSS, etc) show the patron's Role preferences, if any. To alter these, the patron must

- check Override role preferences
- change their delivery settings or unsubscribe from messages entirely (by unchecking all endpoint type boxes).



Circulation/Borrowing

Message type	Scope	Override role preferences	Pop-up	List	RSS	Email	Digest
Advance Notice	Sent to Me	☐	☐	☑	☐	☑	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☑	☐
Hold Expired	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Filled	Sent to Me	☐	☐	☑	☐	☑	☐
Item Check-in	Sent to Me	☑	☐	☐	☐	☑	☐
Item Checkout	Sent to Me	☐	☐	☐	☐	☑	☐
Item DUE	Sent to Me	☑	☑	☑	☐	☑	☐
Item Lost	Sent to Me	☐	☐	☐	☐	☐	☐
Item Overdue	Sent to Me	☐	☐	☑	☐	☑	☐
Item Recall Notice	Sent to Me	☐	☐	☑	☐	☑	☐
Outstanding Fines	Sent to Me	☐	☐	☐	☐	☐	☐

For some message types, users may request an email digest, in which case all email messages of a given type are merged together whenever the queue is processed (typically daily).

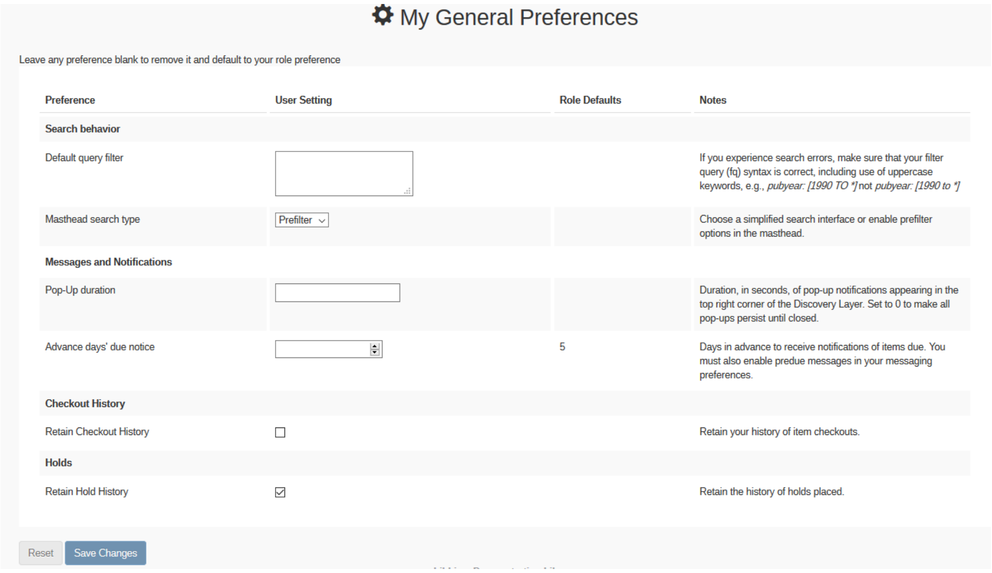
Popup and list messages are retrieved periodically by the Discovery Layer from the LAK backend. The frequency is governed by the Messaging Poll Interval setting at the top of the page. This setting has role and category role defaults; if none of these are set, the default is 20 seconds. The duration that popups stay on the screen is governed by a setting in the My General Preferences tab (see below).

Changes to any of these settings are not saved until the patron presses the Submit Changes button!

IMPORTANT: there is a subtle but important semantic difference between user and role preferences. For example, suppose Alice and Bob are both assigned the AdultPatronRole role, and that role is subscribed to receive overdue messages by list alone. Alice overrides these role preferences (checking the Override role preferences box) and changes to RSS alone (RSS checked, but all others are unchecked). Later, a staff member decides to change the AdultPatronRole role to receive overdue notices by email. Now, Bob will receive these by email, because he has not overridden his role preferences. **Alice, however, will still get overdue notices only by RSS, because she has overridden her role preferences.** If she unchecks Override role preferences, she will automatically go back to the current role defaults (email).

17.11.12 My General Preferences

The General Preferences tab has an assortment of options. Staff can also set these on patron records or Role records through the staff interface; patrons can override those settings here. Different sites may show different preference options, depending on system configuration.



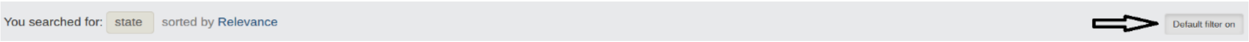
My General Preferences

Leave any preference blank to remove it and default to your role preference

Preference	User Setting	Role Defaults	Notes
Search behavior			
Default query filter			If you experience search errors, make sure that your filter query (fq) syntax is correct, including use of uppercase keywords, e.g., *pubyear: [1990 TO *]* not *pubyear: [1990 to *]*
Masthead search type	Prefilter		Choose a simplified search interface or enable prefilter options in the masthead.
Messages and Notifications			
Pop-Up duration			Duration, in seconds, of pop-up notifications appearing in the top right corner of the Discovery Layer. Set to 0 to make all pop-ups persist until closed.
Advance days' due notice		5	Days in advance to receive notifications of items due. You must also enable predue messages in your messaging preferences.
Checkout History			
Retain Checkout History	☐		Retain your history of item checkouts.
Holds			
Retain Hold History	☑		Retain the history of holds placed.

The first one (Default Query Filter) allows the user to set a filter that will automatically be applied to all searches. See the manual section on searching for more information; this setting should probably not be used except in special circumstances. You must be familiar with the Solr index names and search syntax to set these up properly. Use this option with caution – invalid settings could disable searching altogether.

The filter is applied automatically, but the patron can turn it off on a search results set by clicking the Default Filter toggle button:



The search re-executes, and the button toggles to Default Filter On.

If the site has configured extra search filters or options in the masthead, the Masthead search type pulldown will allow the user to keep those settings (Prefilter) or return to a Simple masthead search box.

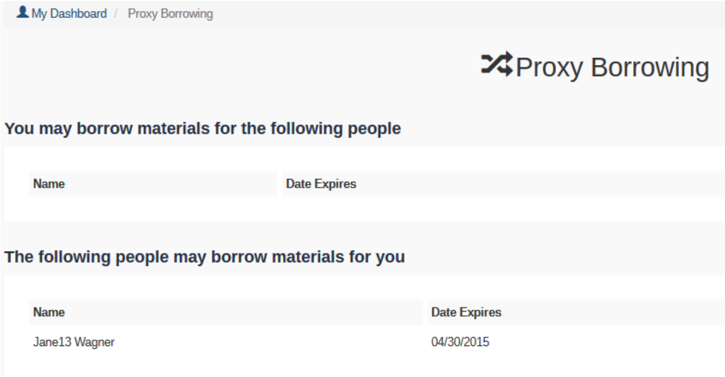
The Popup Duration setting controls how long a popup message remains on the screen in the Discovery Layer. The default is 10 seconds; users can set that to any duration (in seconds) desired. Setting this to zero will make all popups persist until the user actively closes them.

The Advance Days' Due Notice is the number of days in advance that Advance Notices should be sent. If the patron opts to receive Advance Notices, this is what controls the timing. This is the most important of the settings on this screen.

Retain Hold History allows your previous holds to display in the Discovery Layer (see section above).

17.11.13 Proxy Borrowing

This tab shows any proxy relationships configured on your account – if you can borrow for other patrons, or if other patrons can borrow for you.



Proxy Borrowing

You may borrow materials for the following people

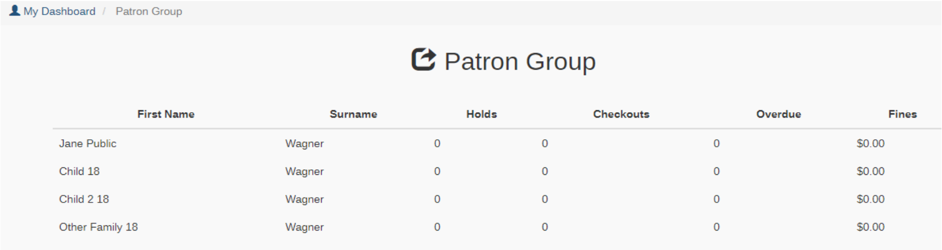
Name	Date Expires

The following people may borrow materials for you

Name	Date Expires
Jane13 Wagner	04/30/2015

17.11.12 Patron Group

A Patron Group section of the Discovery Layer dashboard will show details for a family group on the “head of household” account:



Patron Group

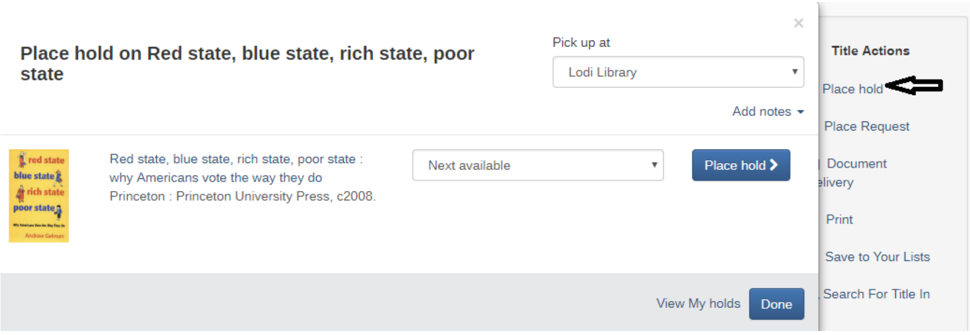
First Name	Surname	Holds	Checkouts	Overdue	Fines
Jane Public	Wagner	0	0	0	$0.00
Child 18	Wagner	0	0	0	$0.00
Child 2 18	Wagner	0	0	0	$0.00
Other Family 18	Wagner	0	0	0	$0.00

This allows the responsible account to monitor circulation status for all family members.

A family group member Discovery Layer account will only show the name of the parent/head of household account.

17.12 Placing Holds

There are links in the Discovery Layer to place holds in a search results list, the title display page, the cart, and lists. From whatever point you begin, a popup window will show you the title and hold options:



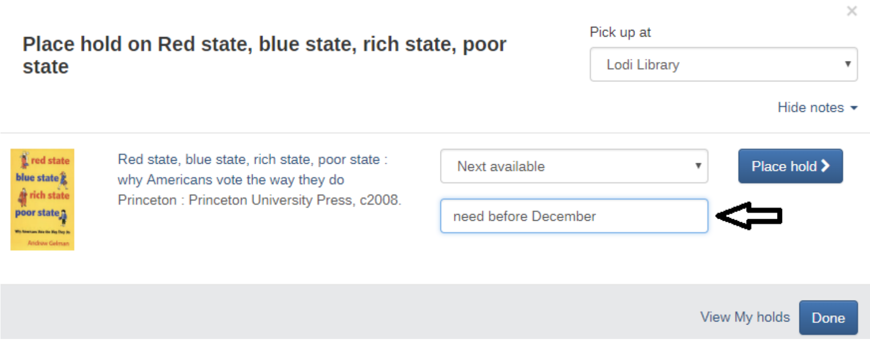
Place hold on Red state, blue state, rich state, poor state

Pick up at: Lodi Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Next available

Click the Add Notes toggle to enter any special notes in the Notes field. If needed, select a different pickup location.



Place hold on Red state, blue state, rich state, poor state

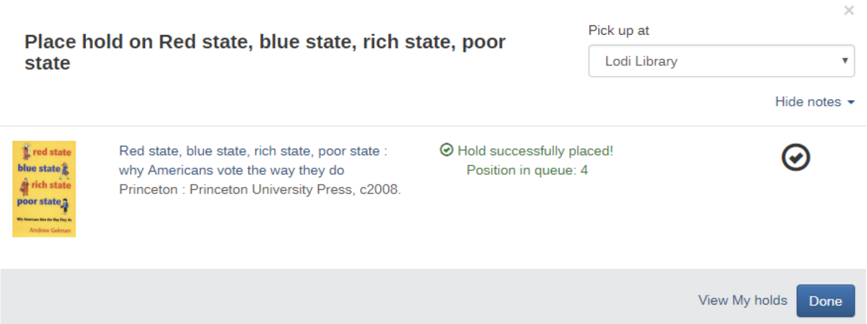
Pick up at: Lodi Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Next available

need before December

Click the Place Hold button to place a title-level hold.



Place hold on Red state, blue state, rich state, poor state

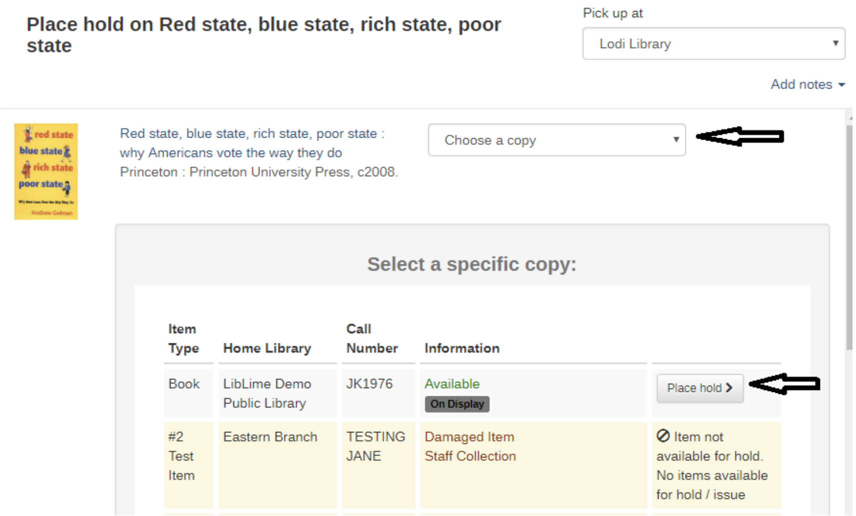
Pick up at: Lodi Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Hold successfully placed!
Position in queue: 4

You can click the View My Holds link to see your account's Holds screen. Otherwise, click Done to close the popup window.

If your library allows item-specific holds, you can change the pulldown from Next Available to Choose A copy. Then click the Place Hold button next to the desired item. However, in most cases users should select Next Available.



Place hold on Red state, blue state, rich state, poor state

Pick up at: Lodi Library

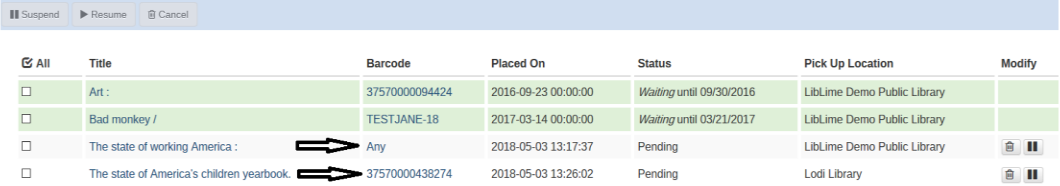
Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Choose a copy

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	JK1976	Available On Display	Place hold
#2 Test Item	Eastern Branch	TESTING JANE	Damaged Item Staff Collection	⊘ Item not available for hold. No items available for hold / issue

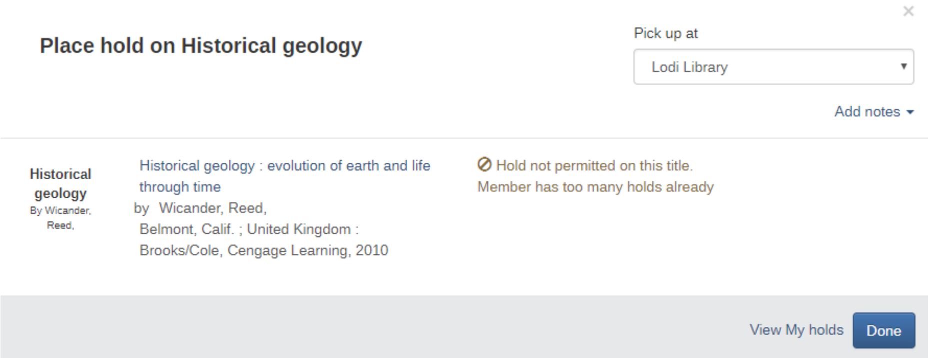
The list of holds in your Dashboard will show whether the hold is on any copy or a specific item.



☑ All	Title	Barcode	Placed On	Status	Pick Up Location	Modify
☐	Art :	37570000094424	2016-09-23 00:00:00	*Waiting* until 09/30/2016	LibLime Demo Public Library	
☐	Bad monkey /	TESTJANE-18	2017-03-14 00:00:00	*Waiting* until 03/21/2017	LibLime Demo Public Library	
☐	The state of working America :	Any	2018-05-03 13:17:37	Pending	LibLime Demo Public Library	
☐	The state of America's children yearbook.	37570000438274	2018-05-03 13:26:02	Pending	Lodi Library	

If your library doesn't allow on-shelf holds, you'll get a "blocked" message when you try to place a hold on an available item. You will be able to place holds on items that are currently checked out.

If your library limits the number of on-shelf holds per day, you will get a blocked message when you reach that limit:



Place hold on Historical geology

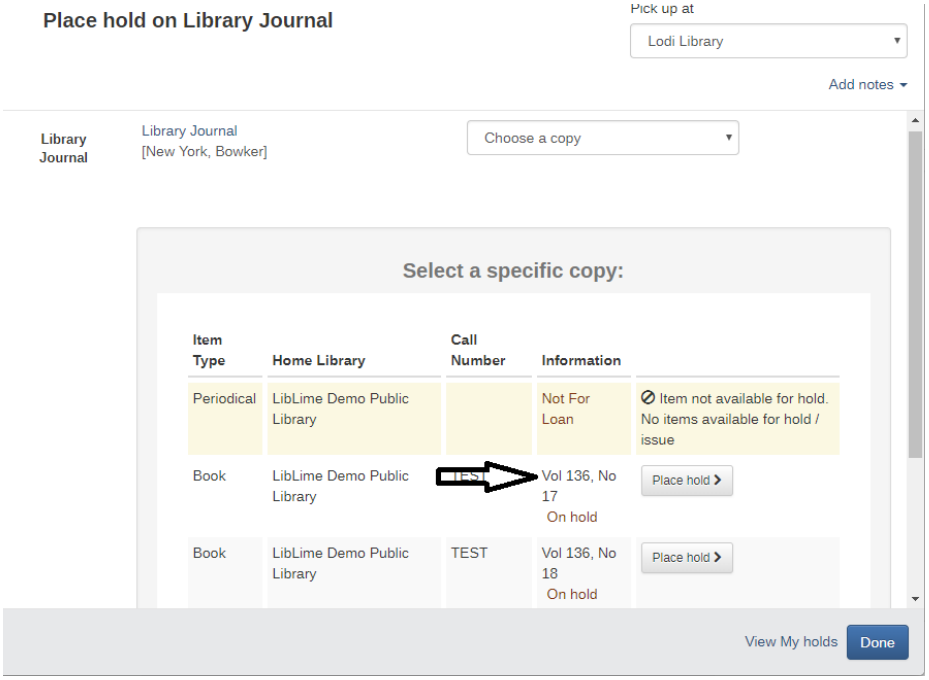
Pick up at: Lodi Library

Historical geology By Wicander, Reed,

Historical geology : evolution of earth and life through time
by Wicander, Reed,
Belmont, Calif. ; United Kingdom : Brooks/Cole, Cengage Learning, 2010

Hold not permitted on this title.
Member has too many holds already

Note that if you're placing a hold on a serials title with enumchron data, that data now shows on the holds screen:



Place hold on Library Journal

Pick up at: Lodi Library

Library Journal

Library Journal
[New York, Bowker]

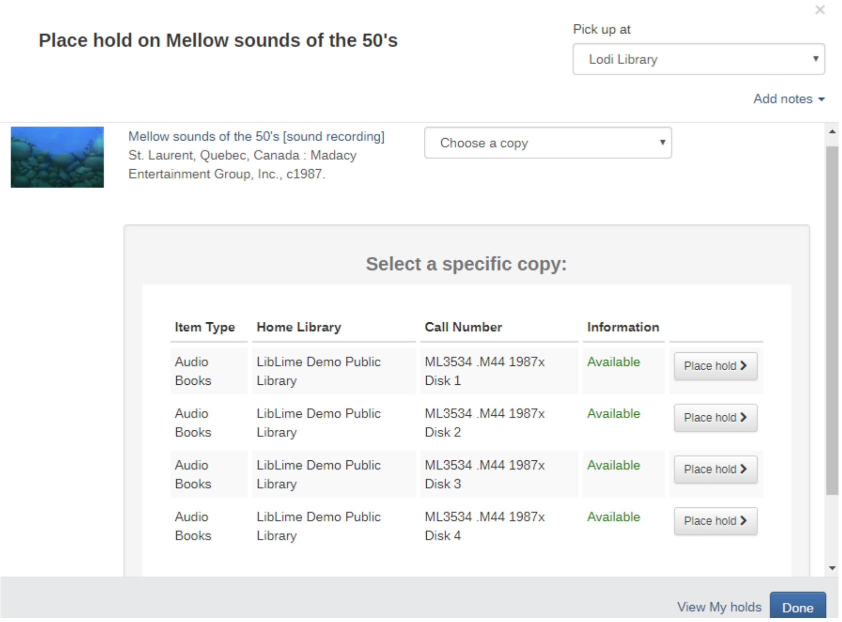
Choose a copy

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Periodical	LibLime Demo Public Library		Not For Loan	Item not available for hold. No items available for hold / issue
Book	LibLime Demo Public Library	TEST	Vol 136, No 17 On hold	Place hold
Book	LibLime Demo Public Library	TEST	Vol 136, No 18 On hold	Place hold

17.12.1 Placing Holds on Multiple Items on the Same Title

If permitted, users may place holds on more than one item on the same title. The intended use is for titles like periodicals or DVD sets, where the title has items for different issues or parts – a user might want to place a hold on issues 33 and 35 of a magazine, for example. After getting the Place Hold popup, change the pulldown from Next Available to Choose a Copy.



Place hold on Mellow sounds of the 50's

Mellow sounds of the 50's [sound recording]
St. Laurent, Quebec, Canada : Madacy Entertainment Group, Inc., c1987.

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 1	Available	Place hold >
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 2	Available	Place hold >
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 3	Available	Place hold >
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 4	Available	Place hold >

This will show the items attached. Click the Place Hold button next to each item for which you want to place a hold. That places the hold on the particular item, and lets you continue placing holds on other items:

Place hold on Mellow sounds of the 50's

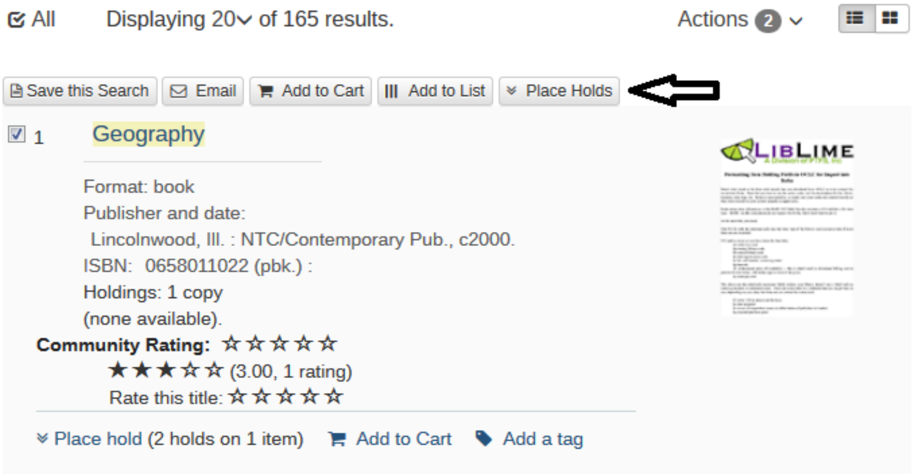
Select a specific copy:

Item Type	Home Library	Call Number	Information	
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 1	Available	✓ Hold successful! Position in queue: 1
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 2	Available	✓ Hold successful! Position in queue: 2
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 3	Available	Place hold >
Audio Books	LibLime Demo Public Library	ML3534 .M44 1987x Disk 4	Available	✓ Hold successful! Position in queue: 3

When you are finished, click Done to close the popup.

17.12.2 Placing Holds and Other Actions from the Results List

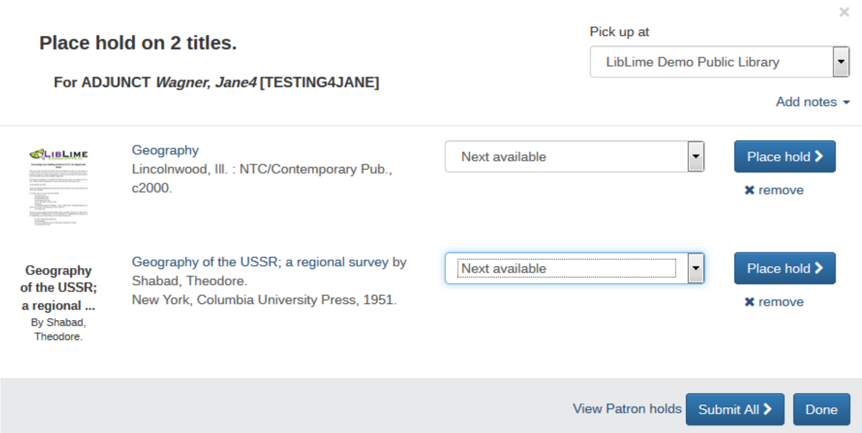
Users can place a hold on a single title in the results list by clicking the Place Hold link at the bottom of each title entry. Buttons to perform actions on multiple titles are normally hidden. If enabled, users can also place holds on multiple titles by checking off entries. When you do, new buttons will appear at the top of the results list:



Geography

Format: book
Publisher and date:
Lincolnwood, Ill. : NTC/Contemporary Pub., c2000.
ISBN: 0658011022 (pbk.) :
Holdings: 1 copy
(none available).
Community Rating: ☆☆☆☆☆
★★★☆☆ (3.00, 1 rating)
Rate this title: ☆☆☆☆☆

These buttons replicate some of the actions available under the Actions dropdown, but are more visible. Click the Place Holds button and you'll be placed into a holds popup with all the selected titles:



Place hold on 2 titles.

For ADJUNCT *Wagner, Jane4* [TESTING4JANE]

Pick up at: LibLime Demo Public Library

Geography
Lincolnwood, Ill. : NTC/Contemporary Pub., c2000.
Next available

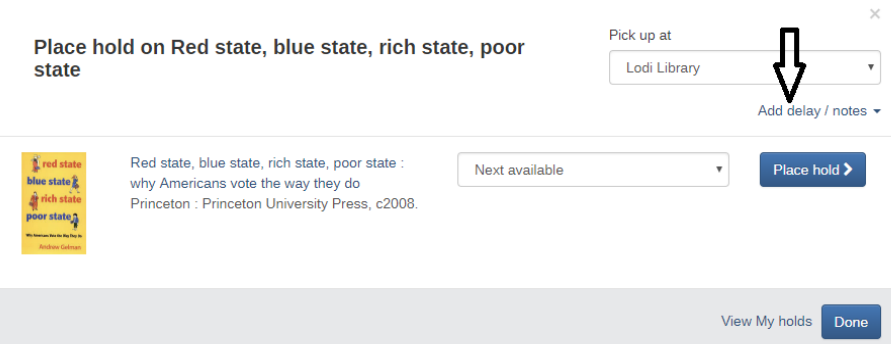
Geography of the USSR; a regional survey by Shabad, Theodore.
New York, Columbia University Press, 1951.
Next available

If desired, you can choose a specific copy rather than Next Available. Be sure to click the Place Hold button on each title. Click Done when finished.

You can also save the search or add items to the cart or a list.

17.12.3 Hold Date in the Future

If the syspref OPACAllowHoldDateInFuture is on (rarely used and not recommended), patrons placing holds will have an option of specifying a start date:

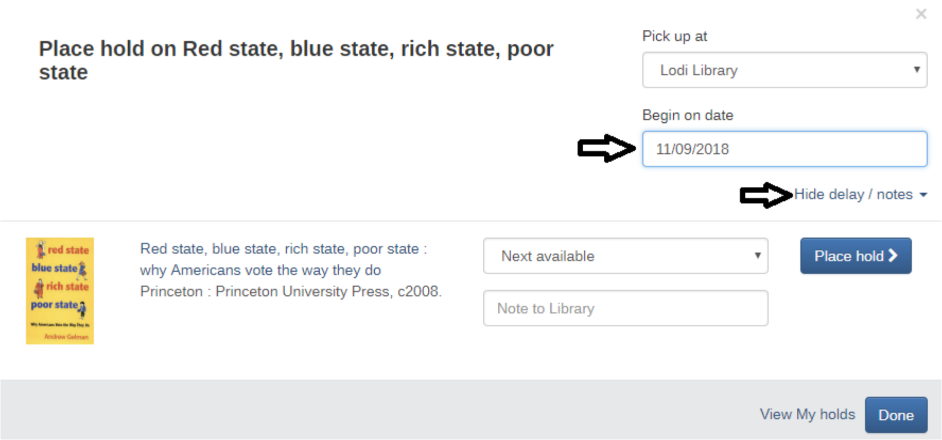

Place hold on Red state, blue state, rich state, poor state

Pick up at: Lodi Library

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

Next available

Click the Add Delay toggle and you can enter a start date (a calendar widget will appear).


Place hold on Red state, blue state, rich state, poor state

Pick up at: Lodi Library

Begin on date: 11/09/2018

Red state, blue state, rich state, poor state : why Americans vote the way they do
Princeton : Princeton University Press, c2008.

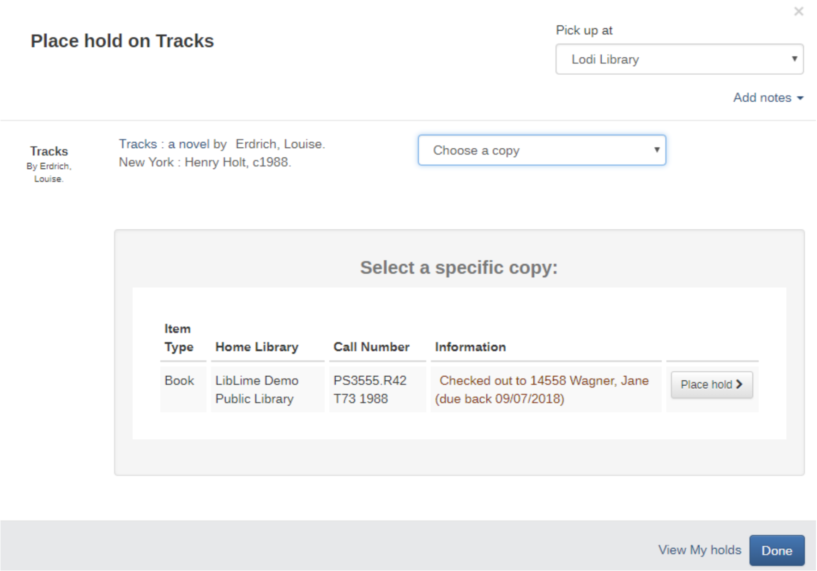
Next available

Note to Library

The hold will become active on that date.

17.13 Recalls

If the system and the applicable circulation policy are configured to allow it, a patron placing a hold on a checked-out item may request a recall. This will show as an option in the holds popup window. To trigger a recall, place an item-level hold – select Choose instead of Any in the Copy field. Then, from the list of items, click the Place Hold button on an item that is checked out.



Place hold on Tracks

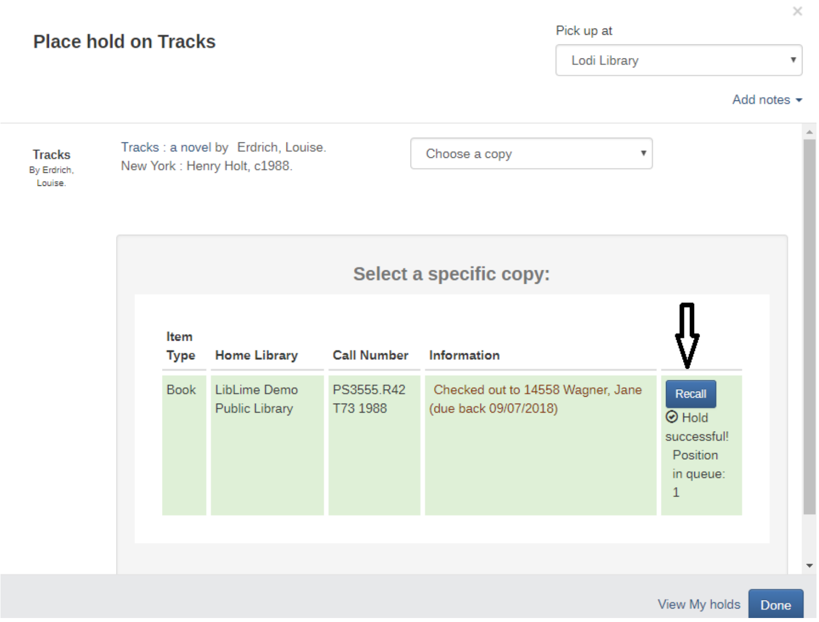
Pick up at: Lodi Library

Tracks : a novel by Erdrich, Louise.
New York : Henry Holt, c1988.

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	PS3555.R42 T73 1988	Checked out to 14558 Wagner, Jane (due back 09/07/2018)	Place hold

Once you have placed the hold, you'll see a Recall option. **NOTE: This is a change from earlier versions, where the hold and recall were placed in one step**.



Place hold on Tracks

Pick up at: Lodi Library

Tracks : a novel by Erdrich, Louise.
New York : Henry Holt, c1988.

Select a specific copy:

Item Type	Home Library	Call Number	Information	
Book	LibLime Demo Public Library	PS3555.R42 T73 1988	Checked out to 14558 Wagner, Jane (due back 09/07/2018)	Recall Hold successful! Position in queue: 1

Click the Recall button to have a recall notice sent. You'll see a popup about the action:

Item successfully recalled.

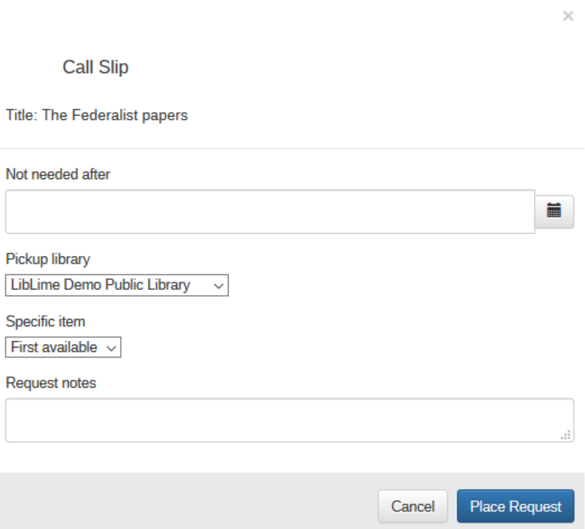
The holds screen will not change, though. Click Done to close it. The current user has the option to keep the item for some period of time (set in the circulation policy).

As noted in the staff section on recalls, placing a recall does NOT automatically move the user to the top of the priority list. If others have holds, those holds will be filled first unless staff manually rearrange the queue.

17.14 Call Slips and Document Delivery

If configured, Call Slip and Document Delivery features let patrons place requests on items in closed stacks or remote storage, for retrieval by the staff. Most call slip and document delivery requests are placed by the patron in the Discovery Layer. The patron must be logged in to place a request. Search for the item that is wanted; when it is retrieved click on the Place Request (call slip) or Document Delivery links at the right of the detailed bibliographic record:

This will open the Request screen as a popup:



Title: The Federalist papers

Not needed after

Pickup library
LibLime Demo Public Library

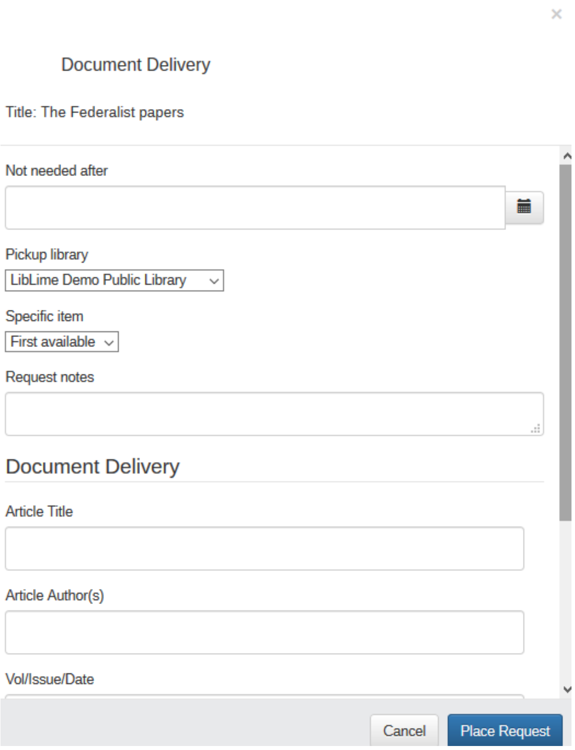
Specific item
First available

Request notes

The request screen asks for:

- Not Needed After date (this will be the expiration date of the request);
- Pickup Library (default is the library from which the request is made);
- Items requested, from the dropdown choices;
- Notes

In the case of a Document Delivery request it also requires the specific citation information:



Document Delivery

Title: The Federalist papers

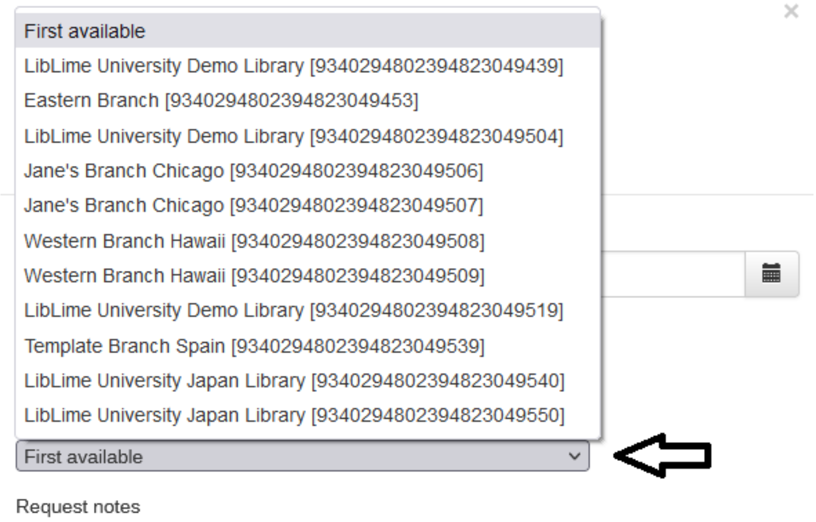
Not needed after

Pickup library: LibLime Demo Public Library

Specific item: First available

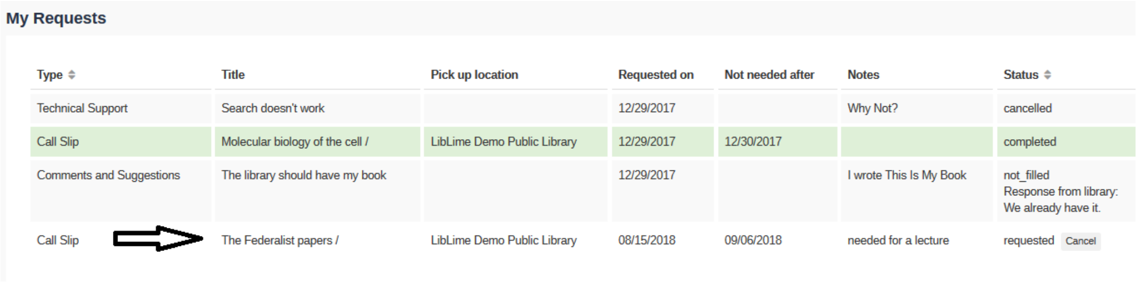
Request notes

For either type of request, patrons can select a specific item if desired:



First available
LibLime University Demo Library [9340294802394823049439]
Eastern Branch [9340294802394823049453]
LibLime University Demo Library [9340294802394823049504]
Jane's Branch Chicago [9340294802394823049506]
Jane's Branch Chicago [9340294802394823049507]
Western Branch Hawaii [9340294802394823049508]
Western Branch Hawaii [9340294802394823049509]
LibLime University Demo Library [9340294802394823049519]
Template Branch Spain [9340294802394823049539]
LibLime University Japan Library [9340294802394823049540]
LibLime University Japan Library [9340294802394823049550]

Click Place Request when finished. When the request is saved it will be given a Request ID number. The request shows in the patron's dashboard My Requests screen with the current status:

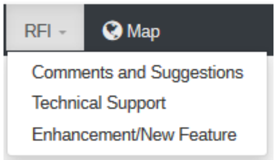


My Requests

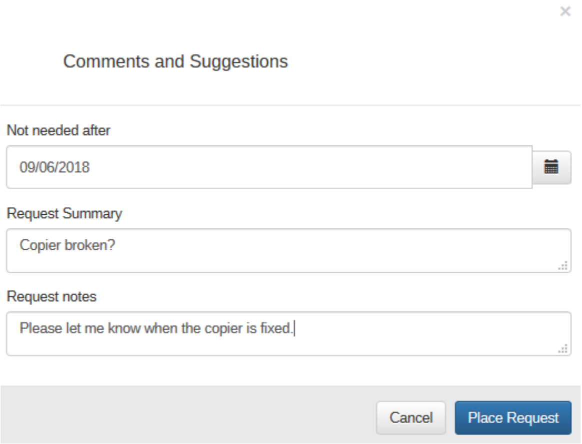
Type	Title	Pick up location	Requested on	Not needed after	Notes	Status
Technical Support	Search doesn't work		12/29/2017		Why Not?	cancelled
Call Slip	Molecular biology of the cell /	LibLime Demo Public Library	12/29/2017	12/30/2017		completed
Comments and Suggestions	The library should have my book		12/29/2017		I wrote This Is My Book	not_filled Response from library: We already have it.
Call Slip	The Federalist papers /	LibLime Demo Public Library	08/15/2018	09/06/2018	needed for a lecture	requested Cancel

17.15 Other Request Forms

Three informational forms are available; these are Comments and Suggestions, Technical Support, and Enhancement/New Feature. The RFI (Request for Information) module controls these; it is only visible if you are logged into the Discovery Layer. If you are logged in, you will see the RFI menu pulldown in the masthead (note that library staff may change the default descriptions to something specific to the site, or hide the option altogether):



All three types produce a general request form where users can enter notes, comments and questions:



Comments and Suggestions

Not needed after

09/06/2018

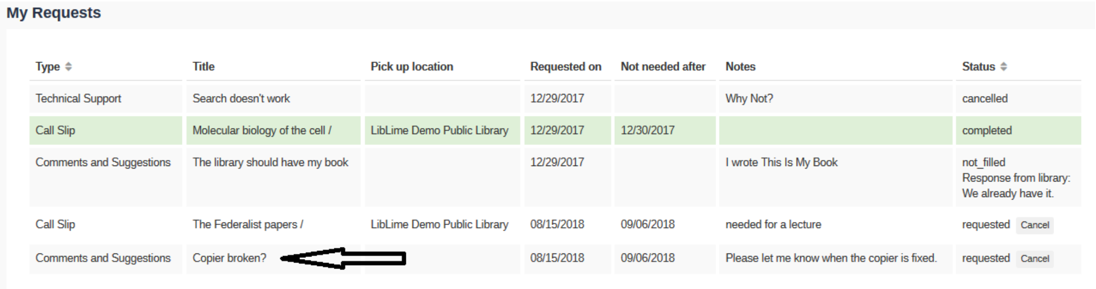
Request Summary

Copier broken?

Request notes

Please let me know when the copier is fixed.

As with call slips and document delivery, these requests show on the patron dashboard’s My Requests tab:



My Requests

Type	Title	Pick up location	Requested on	Not needed after	Notes	Status
Technical Support	Search doesn't work		12/29/2017		Why Not?	cancelled
Call Slip	Molecular biology of the cell /	LibLime Demo Public Library	12/29/2017	12/30/2017		completed
Comments and Suggestions	The library should have my book		12/29/2017		I wrote This Is My Book	not_filled Response from library: We already have it.
Call Slip	The Federalist papers /	LibLime Demo Public Library	08/15/2018	09/06/2018	needed for a lecture	requested Cancel
Comments and Suggestions	Copier broken?		08/15/2018	09/06/2018	Please let me know when the copier is fixed.	requested Cancel

Responses from library staff will be delivered to this screen, so patrons will need to monitor it.

17.16 Comments

If enabled, the system allows users to write comments or reviews about items held by the library. These comments are available for others to read. To submit a comment in the Discovery Layer the user must be signed in.

Click on the Comments tab that appears in the holdings display of the bibliographic record:

Red state, blue state, rich state, poor state : why Americans vote the way they do / Andrew Gelman ... [et al.]

by Gelman, Andrew
Format: Book
Subjects: Elections--United States.
Political parties--United States.
Politics, Practical--United States.
Presidents--Election
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper); 069113927X (acid-free paper)
Library of Congress Call Number: JK1976 .R43 2008
Geographic Area Code: n-us---
Description: 233 p. : ill. ; 24 cm.
Contents (as listed on item): Show
System Control Number: (OCoLC)220858594
Online Resources: Table of contents only
Community Rating: ☆☆☆☆☆
Copies: 0 available, of 0 copies

There are no comments for this title.

Click on Add New Comment and write your comments in the popup window.


Review / Comments on

Red state, blue state, rich state, poor state

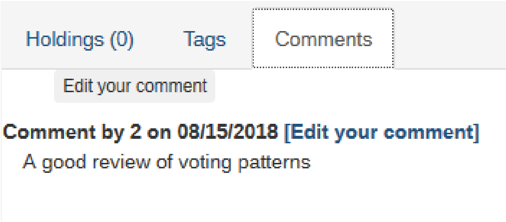
A good review of voting patterns

Note: your comments (or changes) must be approved by the library.

Note that comments must be approved by library staff. When you click Submit, a popup message appears saying the comment has been successfully submitted and will be published after staff has approved it.


Comment submission succeeded! The library will publish your comments after review.

Once approved, comments can be viewed by any user:



Comment by 2 on 08/15/2018 [Edit your comment]

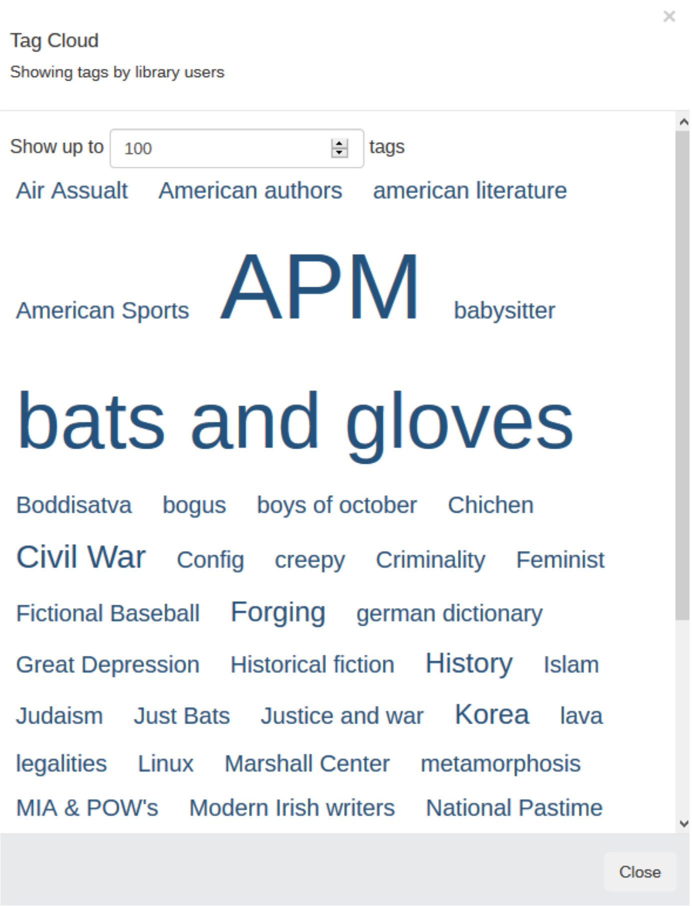
A good review of voting patterns

You can edit your own comments, but changes must also be approved by staff before the new version is visible to others.

17.17 Tags

Once tags are enabled, a patron can search by existing tags and add tags to the details record and/or results list. Tags can be searched and viewed without logging in, but you must be logged into your account in order to create new tags.

Click the Tag Cloud link in the masthead to see a popup window with the existing list of tags to search from:



Tag Cloud

Showing tags by library users

Show up to 100 tags

Air Assault American authors american literature

American Sports APM babysitter

bats and gloves

Boddisatva bogus boys of october Chichen

Civil War Config creepy Criminality Feminist

Fictional Baseball Forging german dictionary

Great Depression Historical fiction History Islam

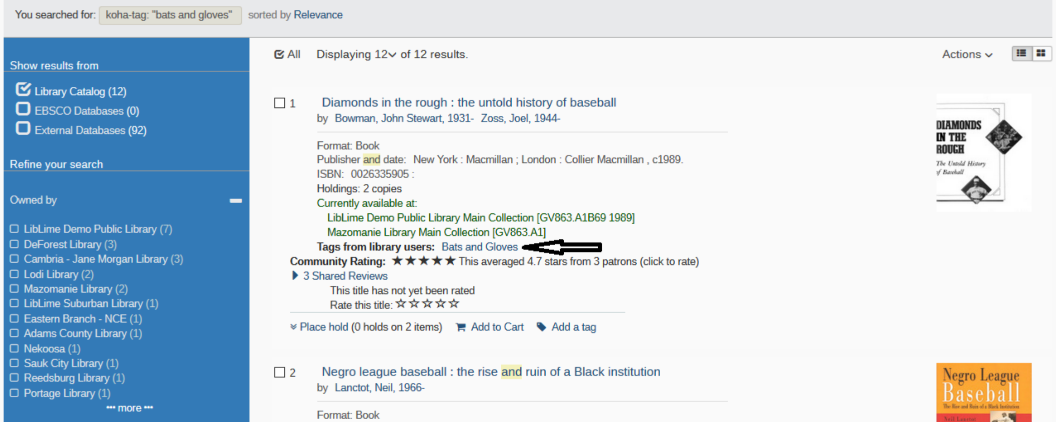
Judaism Just Bats Justice and war Korea lava

legalities Linux Marshall Center metamorphosis

MIA & POW's Modern Irish writers National Pastime

The font size indicates the number of titles with that tag applied – the larger the font, the more records use it.

Clicking on a tag in this window will take you to all records that have the tag assigned to it:



You searched for: koha-tag: "bats and gloves" sorted by Relevance

Show results from

☑ Library Catalog (12)
☐ EBSCO Databases (0)
☐ External Databases (92)

Refine your search

Owned by

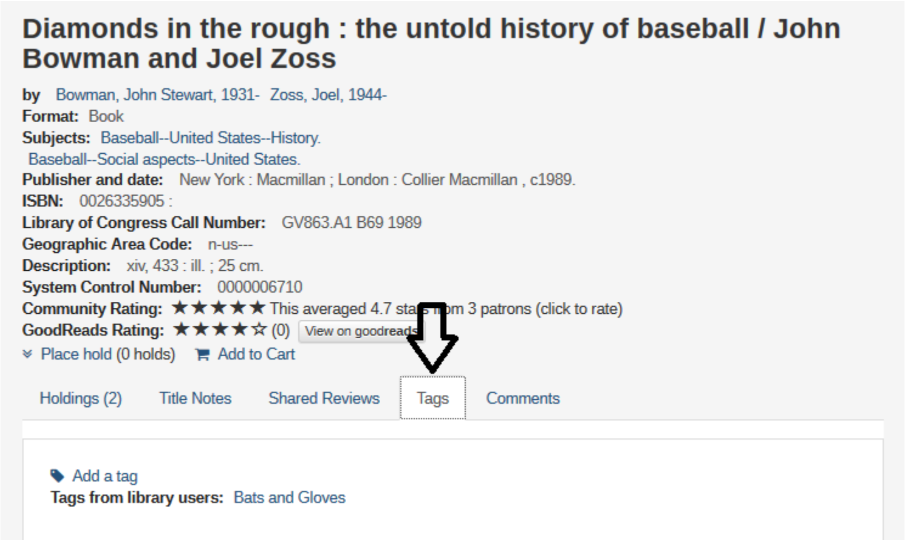
☐ LibLime Demo Public Library (7)
☐ DeForest Library (3)
☐ Cambria - Jane Morgan Library (3)
☐ Lodi Library (2)
☐ Mazomanie Library (2)
☐ LibLime Suburban Library (1)
☐ Eastern Branch - NCE (1)
☐ Adams County Library (1)
☐ Nekoosa (1)
☐ Sauk City Library (1)
☐ Reedsburg Library (1)
☐ Portage Library (1)
··· more ···

☑ All Displaying 12 of 12 results.

☐ 1 Diamonds in the rough : the untold history of baseball
by Bowman, John Stewart, 1931- Zoss, Joel, 1944-
Format: Book
Publisher and date: New York : Macmillan ; London : Collier Macmillan , c1989.
ISBN: 0026335905 :
Holdings: 2 copies
Currently available at:
LibLime Demo Public Library Main Collection [GV863.A1B69 1989]
Mazomanie Library Main Collection [GV863.A1]
Tags from library users: Bats and Gloves
Community Rating: ★★★★★ This averaged 4.7 stars from 3 patrons (click to rate)
3 Shared Reviews
This title has not yet been rated
Rate this title: ☆☆☆☆☆
Place hold (0 holds on 2 items) Add to Cart Add a tag

☐ 2 Negro league baseball : the rise and ruin of a Black institution
by Lanctot, Neil, 1966-
Format: Book

Tags are shown in the results list and in the Tags tab of the details record:

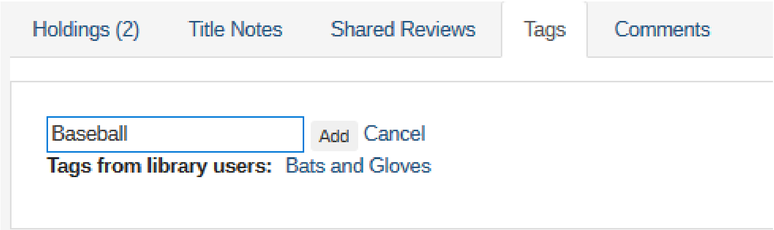

Diamonds in the rough : the untold history of baseball / John Bowman and Joel Zoss

by Bowman, John Stewart, 1931- Zoss, Joel, 1944-
Format: Book
Subjects: Baseball--United States--History.
Baseball--Social aspects--United States.
Publisher and date: New York : Macmillan ; London : Collier Macmillan , c1989.
ISBN: 0026335905 :
Library of Congress Call Number: GV863.A1 B69 1989
Geographic Area Code: n-us---
Description: xiv, 433 : ill. ; 25 cm.
System Control Number: 0000006710
Community Rating: ★★★★★ This averaged 4.7 sta om 3 patrons (click to rate)
GoodReads Rating: ★★★★☆ (0)

Tags from library users: Bats and Gloves

You must be logged in to add your own tag to a record. Search for the record you want and, when found, click on the Add a Tag link in the results list or title record.

It will expand to a text box; enter your term and click Add.


Baseball

Tags from library users: Bats and Gloves

If required by your system configuration, new tags must be moderated and approved before they will appear in the tag cloud. Patrons can always see their own tags under their dashboard in the Discovery Layer (see that section above).

17.18 Ratings

Users with appropriate granular permissions will have the ability to rank a bibliographic record and/or view bib ratings but not create or modify them. **Users lacking these permissions will not see bib rankings at all.** By clicking on the stars in the display 1-5 (1 is lowest, 5 is highest) a user can show their rank or approval of a title. Titles can be rated in the results list:

☐ 42 Historical Highlights 1855-1967 Riverview Hospital

Publisher and date: 2000-07-06T13:53:22Z
Holdings: 1 copy
Currently available at:
LibLime Demo Public Library Main Collection []

This title has not yet been rated
Rate this title: ☆ ☆ ☆ ☆ ☆

After a bib is ranked, the results list display will change; the ranking assigned by the user (logged in) will display as will any other patron/user rankings:

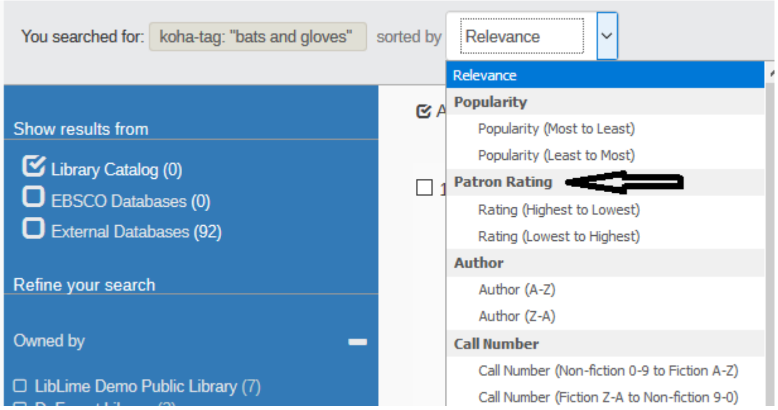
☐ 42 Historical Highlights 1855-1967 Riverview Hospital

Publisher and date: 2000-07-06T13:53:22Z
Holdings: 1 copy
Currently available at:
LibLime Demo Public Library Main Collection []

★ ★ ☆ ☆ ☆ (2.00, 1 rating)
Your rating: ★ ★ ☆ ☆ ☆

Rankings do not show on the title display page.

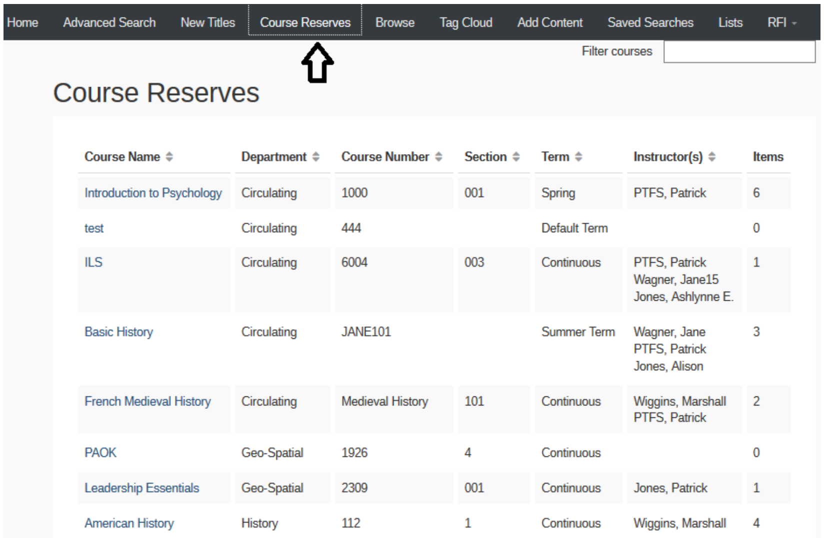
The rank assigned to each bibliographic record is stored by Solr in sorting. Sort options now have Patron Ranking as a category.



You searched for: koha-tag: "bats and gloves" sorted by Relevance

17.19 Course Reserves

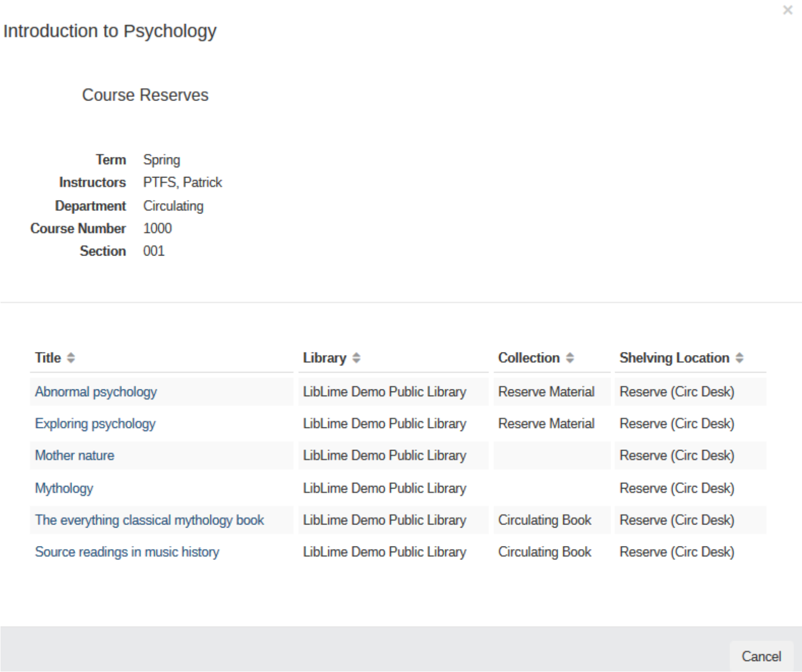
If Course Reserves are enabled, users can view course materials through the Discovery Layer; click on the link in the masthead:



Course Reserves

Course Name	Department	Course Number	Section	Term	Instructor(s)	Items
Introduction to Psychology	Circulating	1000	001	Spring	PTFS, Patrick	6
test	Circulating	444		Default Term		0
ILS	Circulating	6004	003	Continuous	PTFS, Patrick Wagner, Jane15 Jones, Ashlynne E.	1
Basic History	Circulating	JANE101		Summer Term	Wagner, Jane PTFS, Patrick Jones, Alison	3
French Medieval History	Circulating	Medieval History	101	Continuous	Wiggins, Marshall PTFS, Patrick	2
PAOK	Geo-Spatial	1926	4	Continuous		0
Leadership Essentials	Geo-Spatial	2309	001	Continuous	Jones, Patrick	1
American History	History	112	1	Continuous	Wiggins, Marshall	4

Click on a course name, and a popup will show titles that are on reserve for that course:

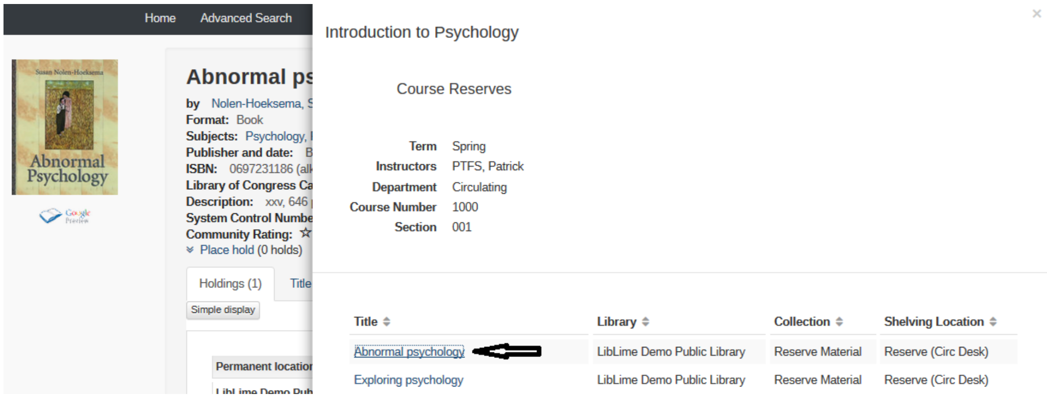

Introduction to Psychology

Course Reserves

Term	Spring
Instructors	PTFS, Patrick
Department	Circulating
Course Number	1000
Section	001

Title	Library	Collection	Shelving Location
Abnormal psychology	LibLime Demo Public Library	Reserve Material	Reserve (Circ Desk)
Exploring psychology	LibLime Demo Public Library	Reserve Material	Reserve (Circ Desk)
Mother nature	LibLime Demo Public Library		Reserve (Circ Desk)
Mythology	LibLime Demo Public Library		Reserve (Circ Desk)
The everything classical mythology book	LibLime Demo Public Library	Circulating Book	Reserve (Circ Desk)
Source readings in music history	LibLime Demo Public Library	Circulating Book	Reserve (Circ Desk)

Clicking on a title from the popup will open the title in the window beneath:



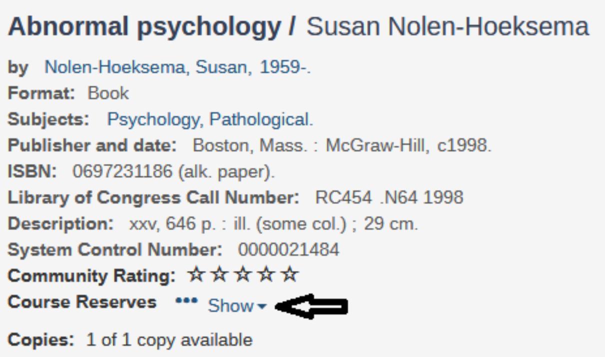
Introduction to Psychology

Course Reserves

Term	Spring
Instructors	PTFS, Patrick
Department	Circulating
Course Number	1000
Section	001

Title	Library	Collection	Shelving Location
Abnormal psychology	LibLime Demo Public Library	Reserve Material	Reserve (Circ Desk)
Exploring psychology	LibLime Demo Public Library	Reserve Material	Reserve (Circ Desk)

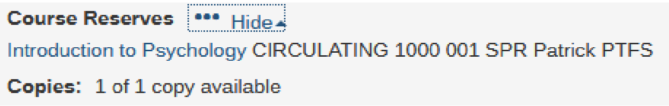
A title attached to a course will show a link in the Discovery Layer Display:



Abnormal psychology / Susan Nolen-Hoeksema

by Nolen-Hoeksema, Susan, 1959-.
Format: Book
Subjects: Psychology, Pathological.
Publisher and date: Boston, Mass. : McGraw-Hill, c1998.
ISBN: 0697231186 (alk. paper).
Library of Congress Call Number: RC454 .N64 1998
Description: xxv, 646 p. : ill. (some col.) ; 29 cm.
System Control Number: 0000021484
Community Rating: ☆☆☆☆☆
Course Reserves ••• Show ▾
Copies: 1 of 1 copy available

Click the Show link to display details:



Course Reserves ••• Hide ▴
Introduction to Psychology CIRCULATING 1000 001 SPR Patrick PTFS
Copies: 1 of 1 copy available

17.20 Saved Searches

When logged in to the Discovery Layer, all users have the ability to save a search. Existing searches can be retrieved from the masthead link; this link will not show until you have saved at least one search.

To do this, create a search and view the results. At the top of the results list, you will see the search strategy used. Under the Actions dropdown, select Save This Search:

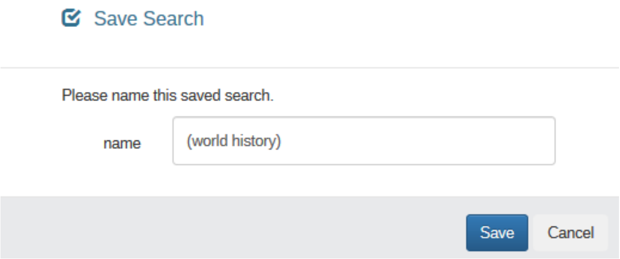
You searched for: (world history) sorted by Relevance

Displaying 20 of 618 results.

☐ 1 World history : original and secondary source readings
by Frazee, Charles A

Format: Book
Publisher and date: San Diego, CA : Greenhaven Press, c1999.
Holdings: 3 copies
Currently available at:
LibLime Demo Public Library Main Collection [D20 .W886 1999 v.2]

Selecting that option will bring up a screen where you can name the search:

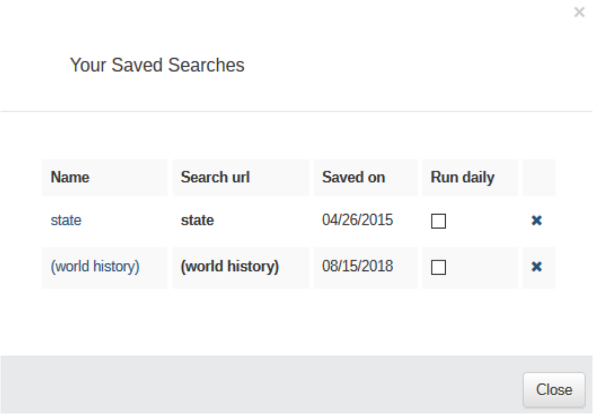


Please name this saved search.

name: (world history)

You can name it anything you want; the default name is the search term. In this example, the term is in parentheses because it was a multiple word search.

After saving, you'll see a Saved Search link in the masthead. Click it and you'll get a popup window with your existing searches:



Name	Search url	Saved on	Run daily	
state	state	04/26/2015	☐	✖
(world history)	(world history)	08/15/2018	☐	✖

Click the search name to run it again. Note that you can schedule a search to run daily; if you select this option and the library has enabled a nightly cron job, it will run the search and email any new results to you.

17.21 Map / Geospatial Functionality

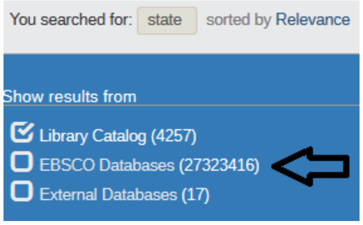
Bibliographic records with key data in the 034 field (Coded Cartographic Mathematical Data) will display in a map if the GeoSpatial options are configured upon install. See the section under Searching for more information and tips. Most sites will have this disabled.

18. External Content in the Discovery Layer

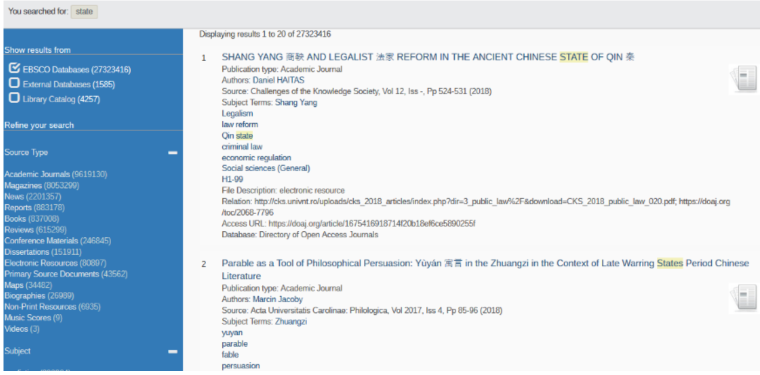
This version of the code adds the option to display content from several third-party providers. In almost all cases a subscription to the service is required, as well as server-level configuration. OverDrive requires an active SIP2 connection as well. For some content, the user must be logged into the Discovery Layer; if required, a login popup will appear before you can proceed. See the Superlibrarian Guide for setup information.

18.1 EBSCO Discovery Service

If the library has database subscriptions from EBSCO and is also purchasing the EDS service, the system can be configured to search and display EBSCO database results directly in the Discovery Layer. Once configured (see the Superlibrarian Guide), the full results of a Discovery Layer search will show as a separate display; click the EBSCO link at the top of the facets sidebar:



That will populate the main results list with entries from the databases to which your library subscribes. The facets change to entries appropriate to the content, and can be used to narrow results.



Displaying results 1 to 20 of 27323416

1 SHANG YANG 商鞅 AND LEGALIST 法家 REFORM IN THE ANCIENT CHINESE STATE OF QIN 秦
Publication type: Academic Journal
Authors: Daniel HAITAS
Source: Challenges of the Knowledge Society, Vol 12, Iss -, Pp 524-531 (2018)
Subject Terms: Shang Yang
Legalism
law reform
Qin state
criminal law
economic regulation
Social sciences (General)
H1-99
File Description: electronic resource
Relation: http://cks.univnt.ro/uploads/cks_2018_articles/index.php?dir=3_public_law%2F&download=CKS_2018_public_law_020.pdf; https://doaj.org/toc/2068-7796
Access URL: https://doaj.org/article/1675416918714f20b18ef6ce5890255f
Database: Directory of Open Access Journals

2 Parable as a Tool of Philosophical Persuasion: Yùyán 寓言 in the Zhuangzi in the Context of Late Warring States Period Chinese Literature
Publication type: Academic Journal
Authors: Marcin Jacoby
Source: Acta Universitatis Carolinae: Philologica, Vol 2017, Iss 4, Pp 85-96 (2018)
Subject Terms: Zhuangzi
yuyan
parable
fable
persuasion

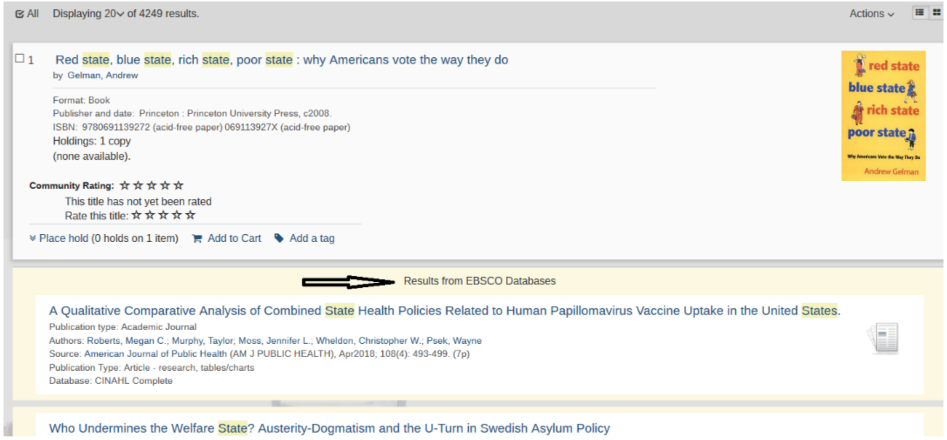
Clicking on a title will show information about that entry and, if available, an option to view the full text in the EDS database.

Parable as a Tool of Philosophical Persuasion: Yùyán 寓言 in the Zhuangzi in the Context of Late Warring States Period Chinese Literature

Authors Marcin Jacoby
Source Acta Universitatis Carolinae: Philologica, Vol 2017, Iss 4, Pp 85-96 (2018)
Publisher Information Karolinum Press, 2018.
Publication Year 2018
Collection LCC:Philology. Linguistics
Subject Terms Zhuangzi
yuyan
parable
fable
persuasion
pre-Qin literature
Warring States Period literature
Philology. Linguistics
P1-1091
Description Yùyán is an important part of the legacy of pre-Qin Chinese literature, and is widely used in persuasive texts of the late Warring States Period. These narratives closely resemble Western parables, especially of the New Testament tradition. The author discusses in detail the history and uses of the term yùyán, and its definitions and interpretations in modern Chinese research, concluding that 'parable' seems the closest English-language equivalent of yùyán. The famous philosophical work

Clicking that link will open a separate browser window; you will need to log into your EBSCO account. Some titles may also have a link to view a .pdf view of the document.

Some EBSCO titles can be interleaved in the main results list if configured; local holdings are continued below these entries in the list:



All Displaying 20 of 4249 results.

☐ 1 Red state, blue state, rich state, poor state : why Americans vote the way they do
by Gelman, Andrew

Format: Book
Publisher and date: Princeton : Princeton University Press, c2008.
ISBN: 9780691139272 (acid-free paper) 069113927X (acid-free paper)
Holdings: 1 copy
(none available).

Community Rating: ☆☆☆☆☆
This title has not yet been rated
Rate this title: ☆☆☆☆☆

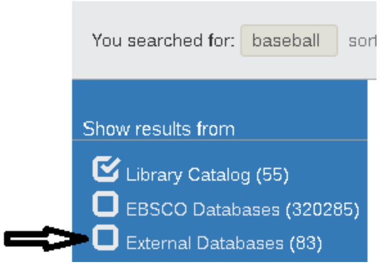
Results from EBSCO Databases

A Qualitative Comparative Analysis of Combined State Health Policies Related to Human Papillomavirus Vaccine Uptake in the United States.
Publication type: Academic Journal
Authors: Roberts, Megan C.; Murphy, Taylor; Moss, Jennifer L.; Wheldon, Christopher W.; Psek, Wayne
Source: American Journal of Public Health (AM J PUBLIC HEALTH), Apr2018; 108(4): 493-499. (7p)
Publication Type: Article - research, tables/charts
Database: CINAHL Complete

Who Undermines the Welfare State? Austerity-Dogmatism and the U-Turn in Swedish Asylum Policy

18.2 Index Data MasterKey Widgets to Access Databases

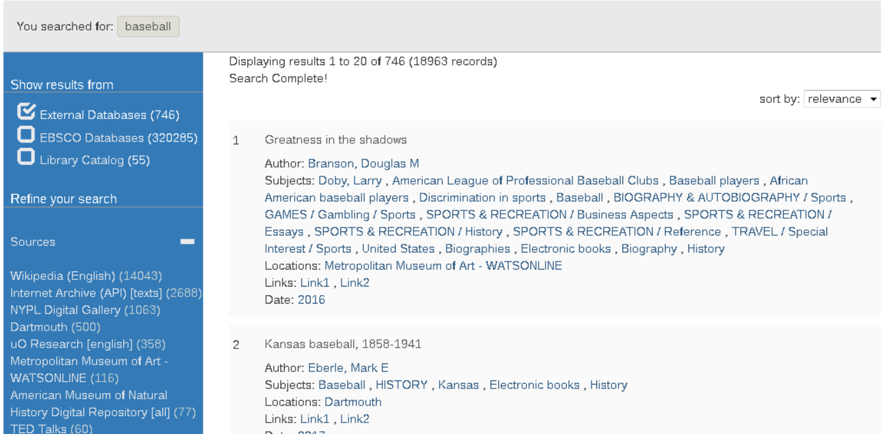
Index Data's MasterKey Widgets can be used to search remote databases directly from the Discovery Layer. These can also be viewed from the search results. If configured, it will be another option at the top of the facets sidebar.



You searched for: baseball

Show results from
☑ Library Catalog (55)
☐ EBSCO Databases (320285)
☐ External Databases (83)

Click the External Databases link, and the system will retrieve results from the various databases in that resource:



You searched for: baseball

Displaying results 1 to 20 of 746 (18963 records)
Search Complete!

1 Greatness in the shadows
Author: Branson, Douglas M
Subjects: Doby, Larry , American League of Professional Baseball Clubs , Baseball players , African American baseball players , Discrimination in sports , Baseball , BIOGRAPHY & AUTOBIOGRAPHY / Sports , GAMES / Gambling / Sports , SPORTS & RECREATION / Business Aspects , SPORTS & RECREATION / Essays , SPORTS & RECREATION / History , SPORTS & RECREATION / Reference , TRAVEL / Special Interest / Sports , United States , Biographies , Electronic books , Biography , History
Locations: Metropolitan Museum of Art - WATSONLINE
Links: Link1 , Link2
Date: 2016

2 Kansas baseball, 1858-1941
Author: Eberle, Mark E
Subjects: Baseball , HISTORY , Kansas , Electronic books , History
Locations: Dartmouth
Links: Link1 , Link2

There is no individual title display for these results. You can click on any of the hyperlinked entries to limit your results; facets for these results are also available on the left.

The Links entry (Link1, Link2 in the above screenshot) will take you to the original source(s) for the material; that source may require a user account.

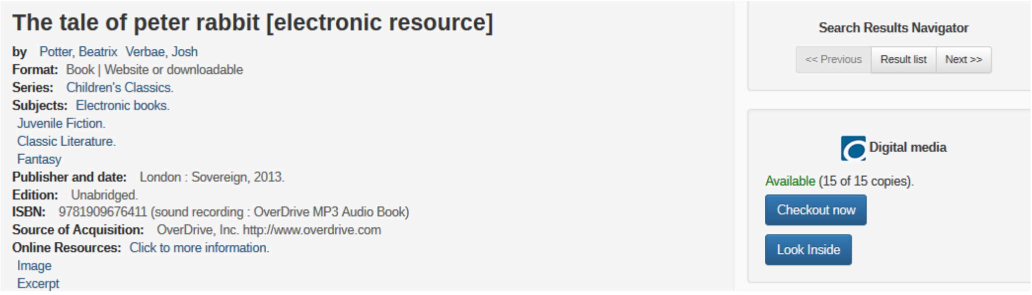
18.3 OverDrive eBooks

Sites with OverDrive subscriptions can offer direct checkout of titles from the Discovery Layer. Links for previews and checkouts will show on the results list:

☐ 1 The tale of peter rabbit [electronic resource]
by Potter, Beatrix Verbae, Josh
Format: Book | Website or downloadable
Publisher and date: London : Sovereign, 2013.
Online Resources:
Click to more information.
Image
Excerpt
This title has not yet been rated
Rate this title: ☆☆☆☆☆

Digital media
Available (15 of 15 copies).

The links also show on the record’s title display:



The tale of peter rabbit [electronic resource]
by Potter, Beatrix Verbae, Josh
Format: Book | Website or downloadable
Series: Children's Classics.
Subjects: Electronic books.
Juvenile Fiction.
Classic Literature.
Fantasy
Publisher and date: London : Sovereign, 2013.
Edition: Unabridged.
ISBN: 9781909676411 (sound recording : OverDrive MP3 Audio Book)
Source of Acquisition: OverDrive, Inc. http://www.overdrive.com
Online Resources: Click to more information.
Image
Excerpt

Digital media
Available (15 of 15 copies).

If an OverDrive title is currently in use, you can place a hold on the title from the Discovery Layer. If the item is available, you can click Checkout Now and it will be checked out to you.

Title successfully checked out. Choose format for access.

☐ 6 History of 'billy the kid' and 19th century ba [electronic resource]

by Siringo, Chas A.

Score: 0.717

Format: Book | Website or downloadable

Publisher and date: Garfield Heights : Duke Classics, 2012.

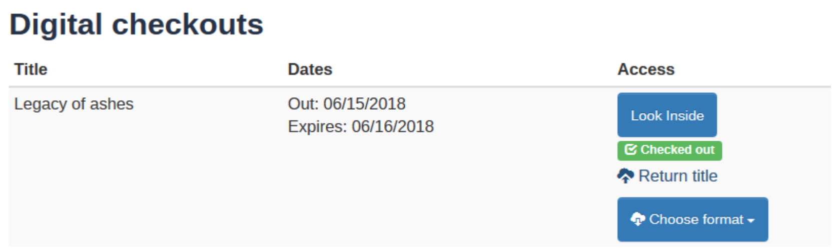
ISBN: 9781620126929 (electronic bk. : Adobe Digital Editions).

Online Resources: Click for more information. Image Excerpt

Community Rating: ☆☆☆☆☆

You can choose your delivery format, or return the title from this screen.

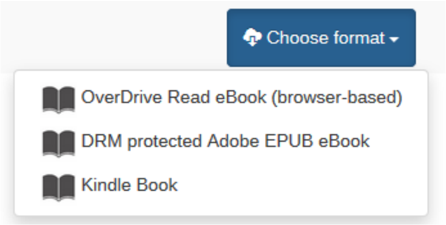
The title also shows in your My Account Checkouts tab:



Digital checkouts

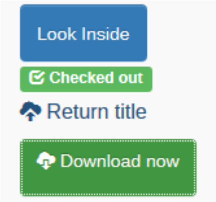
Title	Dates	Access
Legacy of ashes	Out: 06/15/2018 Expires: 06/16/2018	Look Inside Checked out Return title Choose format

Use the Choose Format dropdown to choose the delivery method. Different methods may be available for different titles.

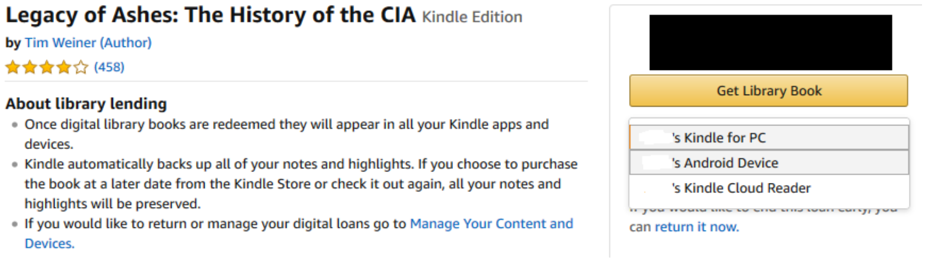


Select the format, and the button changes to a green Download Now. A popup tells you to click that button to get the content.

Format selected. Access title via 'Download' button, or from your account.



If you choose Kindle, for example, you'll be taken to Amazon's site where you may choose your target device:



Legacy of Ashes: The History of the CIA Kindle Edition

by Tim Weiner (Author)

★★★★☆ (458)

About library lending

- Once digital library books are redeemed they will appear in all your Kindle apps and devices.
- Kindle automatically backs up all of your notes and highlights. If you choose to purchase the book at a later date from the Kindle Store or check it out again, all your notes and highlights will be preserved.
- If you would like to return or manage your digital loans go to Manage Your Content and Devices.

[redacted]

Get Library Book

's Kindle for PC
's Android Device
's Kindle Cloud Reader

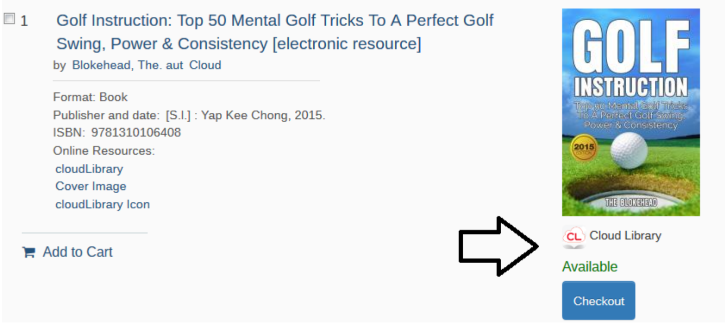
can return it now.

Choosing epub will download a copy of the book to be read on your computer. The OverDrive option will take you to a web copy of the book.

When you are finished, you can return the title from your Checkout tab; click the Return Title link.

18.4 Bibliotheca cloudLibrary eBooks

If configured, eBooks from Bibliotheca's cloudLibrary can be downloaded from the Discovery Layer. From the results list, matching items will show availability:



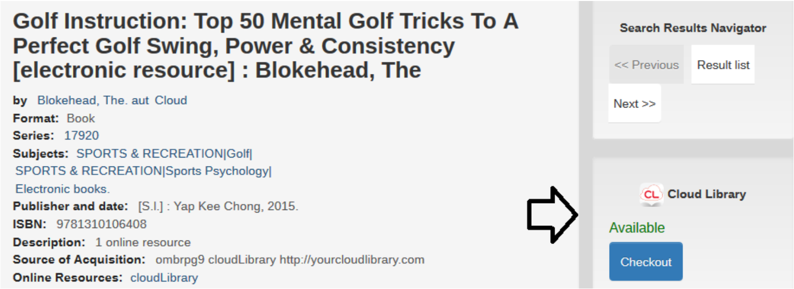
☐ 1 Golf Instruction: Top 50 Mental Golf Tricks To A Perfect Golf Swing, Power & Consistency [electronic resource]

by Blokehead, The. aut Cloud

Format: Book
Publisher and date: [S.l.] : Yap Kee Chong, 2015.
ISBN: 9781310106408
Online Resources:
cloudLibrary
Cover Image
cloudLibrary Icon

Add to Cart

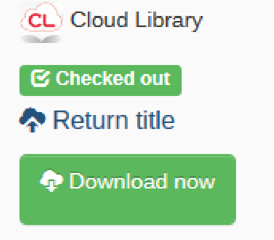
The same data and checkout button also shows on the title display:



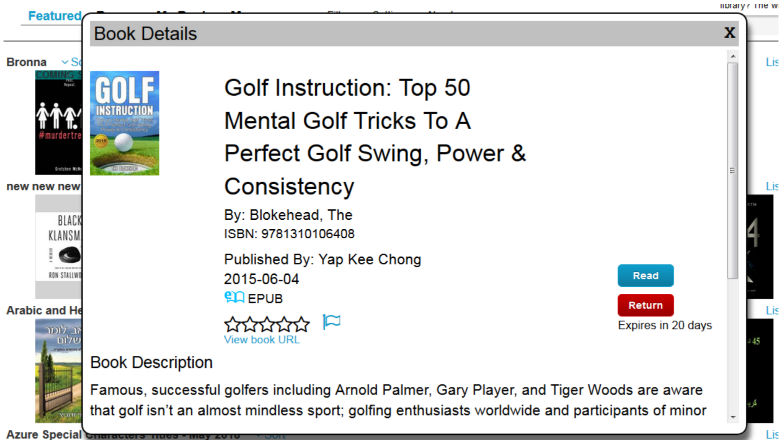
Golf Instruction: Top 50 Mental Golf Tricks To A Perfect Golf Swing, Power & Consistency [electronic resource] : Blokehead, The

by Blokehead, The. aut Cloud
Format: Book
Series: 17920
Subjects: SPORTS & RECREATION|Golf| SPORTS & RECREATION|Sports Psychology| Electronic books.
Publisher and date: [S.l.] : Yap Kee Chong, 2015.
ISBN: 9781310106408
Description: 1 online resource
Source of Acquisition: ombrpg9 cloudLibrary http://yourcloudlibrary.com
Online Resources: cloudLibrary

Clicking the Checkout button will do the checkout. The screen changes to show that; your My Account Checkouts tab will also show it. Click Download Now to start reading.



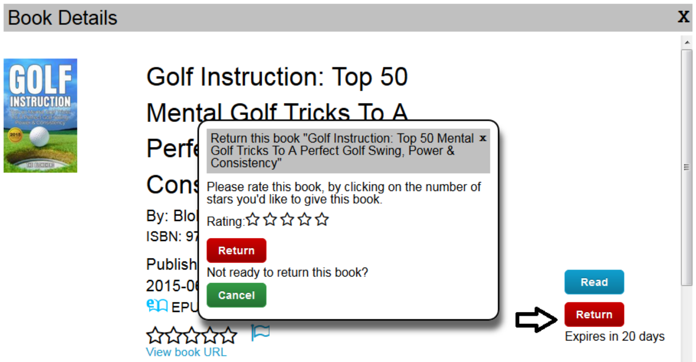
That takes you to the cloudLibrary site; you may need to enter your library cardnumber. Then you'll get a popup screen with the title:



Golf Instruction: Top 50 Mental Golf Tricks To A Perfect Golf Swing, Power & Consistency
By: Blokehead, The
ISBN: 9781310106408
Published By: Yap Kee Chong
2015-06-04
EPUB
View book URL

Book Description
Famous, successful golfers including Arnold Palmer, Gary Player, and Tiger Woods are aware that golf isn't an almost mindless sport; golfing enthusiasts worldwide and participants of minor

You can start reading on the site. If you leave the site, you can return to the book later from the Download button in the My Account Checkouts tab. When finished, you can return it from the cloudLibrary site

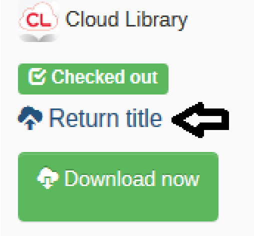


Golf Instruction: Top 50 Mental Golf Tricks To A

Return this book "Golf Instruction: Top 50 Mental Golf Tricks To A Perfect Golf Swing, Power & Consistency"
Please rate this book, by clicking on the number of stars you'd like to give this book.
Rating: ☆ ☆ ☆ ☆ ☆

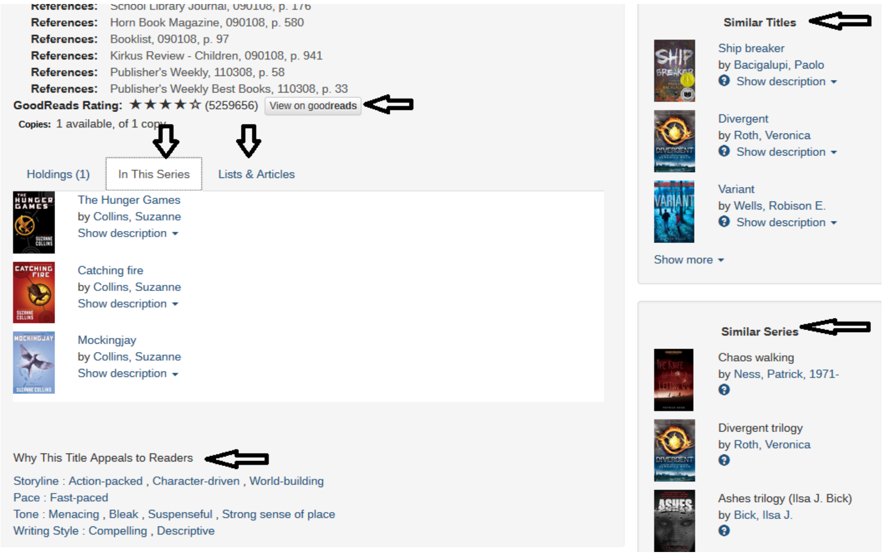
Not ready to return this book?

Or from the Return Now link in the Dashboard list of checkouts.



18.5 EBSCO NoveList

Sites with EBSCO NoveList accounts will see extra content such as more titles in the series, related authors, related series, and GoodReads. This will show on the record’s title display:


References: School Library Journal, 090108, p. 176
References: Horn Book Magazine, 090108, p. 580
References: Booklist, 090108, p. 97
References: Kirkus Review - Children, 090108, p. 941
References: Publisher's Weekly, 110308, p. 58
References: Publisher's Weekly Best Books, 110308, p. 33
GoodReads Rating: ★★★★☆ (5259656) View on goodreads
Copies: 1 available, of 1 copy

Holdings (1) | In This Series | Lists & Articles

The Hunger Games
by Collins, Suzanne
Show description

Catching fire
by Collins, Suzanne
Show description

Mockingjay
by Collins, Suzanne
Show description

Why This Title Appeals to Readers
Storyline : Action-packed , Character-driven , World-building
Pace : Fast-paced
Tone : Menacing , Bleak , Suspenseful , Strong sense of place
Writing Style : Compelling , Descriptive

Similar Titles

Ship breaker
by Bacigalupi, Paolo
Show description

Divergent
by Roth, Veronica
Show description

Variant
by Wells, Robison E.
Show description

Show more

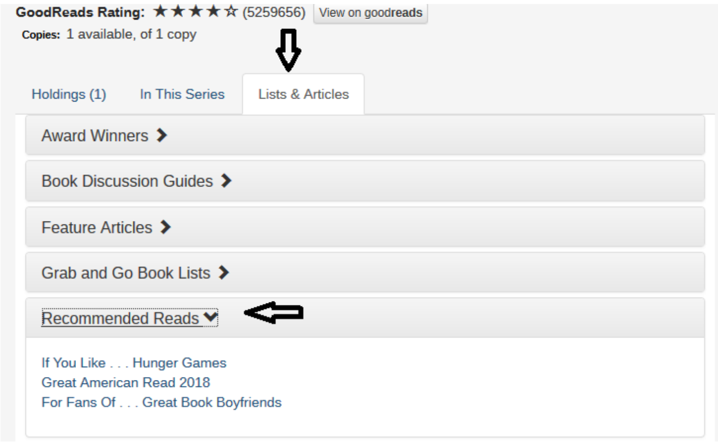
Similar Series

Chaos walking
by Ness, Patrick, 1971-

Divergent trilogy
by Roth, Veronica

Ashes trilogy (Ilsa J. Bick)
by Bick, Ilsa J.

The available content will depend on the title. Other content that may show:


GoodReads Rating: ★★★★☆ (5259656) View on goodreads
Copies: 1 available, of 1 copy

Holdings (1) | In This Series | Lists & Articles

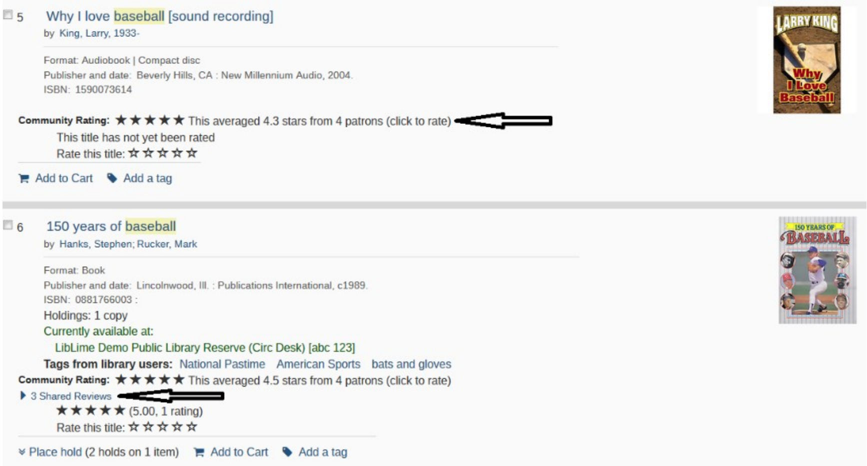
Award Winners
Book Discussion Guides
Feature Articles
Grab and Go Book Lists
Recommended Reads

If You Like . . . Hunger Games
Great American Read 2018
For Fans Of . . . Great Book Boyfriends

18.6 LibLime Community Reviews and Ratings

Sites can participate in a LibLime community-based database of reviews and ratings. Information from your library and all other participating Bibliovation libraries are included in this database. Community reviews and comments will display in a "Shared Reviews" tab under each title. Patrons can add their own reviews, or comment on other patrons' reviews, and this content is available to all other participating institutions. Community ratings will display both on the search results and the tile detail pages. Patrons can make their own ratings. The aggregate rating for a title is calculated across all participating institutions. This community shared content is indexed based on the title's primary ISBN. Note that this is unrelated to the bib rating feature described above.

In the results list, users will see the aggregated rating on a title, and if anyone has written a review:



☐ 5 Why I love baseball [sound recording]

by King, Larry, 1933-

Format: Audiobook | Compact disc

Publisher and date: Beverly Hills, CA : New Millennium Audio, 2004.

ISBN: 1590073614

Community Rating: ★★★★★ This averaged 4.3 stars from 4 patrons (click to rate)

This title has not yet been rated

Rate this title: ☆☆☆☆☆

☐ 6 150 years of baseball

by Hanks, Stephen; Rucker, Mark

Format: Book

Publisher and date: Lincolnwood, Ill. : Publications International, c1989.

ISBN: 0881766003 :

Holdings: 1 copy

Currently available at:

LibLime Demo Public Library Reserve (Circ Desk) [abc 123]

Tags from library users: National Pastime American Sports bats and gloves

Community Rating: ★★★★★ This averaged 4.5 stars from 4 patrons (click to rate)

3 Shared Reviews

★★★★★ (5.00, 1 rating)

Rate this title: ☆☆☆☆☆

In the record’s title page, the ratings are also displayed, and users can see the reviews under the Shared Reviews tab; this example is from a demo system:

Description: 504 p. : chiefly ill. (some col.) ; 32 cm.

Community Rating: ★★★★★ This averaged 4.5 stars from 4 patrons (click to rate)

1 available, of 1 copy

Patrick Jones@Bibliovation (*10/19/2017 19:14:20*)

Die-hard baseball fans will love the organized chronicling of the sport. More casual fans will love the great pictures, illustrations, and accesible text. There are examples of players shown in advertising of the era. This is priceless and helps the reader identify with the unique history each player experienced. The book has good coverage of the Negro League legends as well. There are great photos of Josh Gibson, Martin DiHigo, and Cool Papa Bell. I thoroughly enjoyed the book.

Amanda Stone@Bibliovation (*10/18/2017 19:03:20*)

A very informative book. A must-read for baseball fans. This is a terrific book. I bought this as a teenager and read it cover to cover. The book was written in the late 1980's, so it is a bit dated. However, it is great reading for students of baseball. The book is written in segments starting with the early pioneers of the game. The contributors do an especially good job of explaining the rule changes and evolution of the game. Even the dimensions changed over time. For example, the pitchers mound was originally much closer to home plate than it is now. The book contains easy-to-follow text and a multitude of pictures. There are short bios on the most significant players such as Jackie Robinson, Babe Ruth, Ted Williams, etc. There is a general overview of the significant changes of each decade. For example, there is explanation of the effect World War II had on the game in the 1940's or free agency in the 1970's. The book contains a good amount of statistics, but it reads like a narrative. They are introduced in the context of the book rather than boring lists. The colorful personalities of the players shine through. Players like Dizzy Dean or Satchel Paige can't be reduced to statistics. The personalities of players and teams (like the "Gas House Gang" St. Louis Cardinals of the 1930's) can be understood by the reader. There is a strong focus on pennant races and the post season in the book. I thoroughly enjoyed the book. I grew up in the 1980's and loved to watch Mike Schmidt, Jim Rice, Steve Carlton, George Brett, Doc Gooden, Robin Yount, Dale Murphy, Eddie Murray, Ozzie Smith, and countless others. This book will appeal mostly to an older audience, but I loved reading about baseball history as a kid and was fascinated by stories of older legends such as Walter Johnson, Tris Speaker, Mickey Cochrane, Hank Greenberg, Christy Matthewson. I thought a particular strong point of the book was the detailed examination of the early years of baseball. The evolution of the game, the formation of the National League and American League, and the transition from the small-ball era of bunting and stolen bases to the power hitting live-ball era were clearly explained. The authors explain factors that determine a player's greatness. For example, Lefty Grove was a dominating pitcher in an era where hitters dominated baseball. His numbers were dramatically better than the average pitcher of the day and the author's make the successful case of him being one of the greatest pitchers who ever lived. This type of astute analysis is present in the text. Die-hard baseball fans will love the organized chronicling of the sport. More casual fans will love the great pictures, illustrations, and accesible text. There are examples of players shown in advertising of the era. This is priceless and helps the reader identify with the unique history each player experienced. The book has good coverage of the Negro League legends as well. There are great photos of Josh Gibson, Martin DiHigo, and Cool Papa Bell. I thoroughly enjoyed the book.

John Rose@Bibliovation (*10/18/2017 18:51:18*)

150 Years of Baseball. Reviewed by By Dr.Sox September 18, 2008 Verified Checkout One of the great baseball fact books of all time. It is a

19. Basic System Configuration and Administration

There are a great many options and settings for configuring the system. Most of these will be reviewed and set at implementation, and will not need further attention unless library policies change. Some will need additional entries as time goes on, such as calendar closed dates, item types, patron categories, circulation rules, and course reserves.

Access to configuration options is limited to staff users with administrative or superlibrarian rights. See the separate Superlibrarian Training and Configuration Guide for details about system setup and management.

20. Discovery Layer Configuration

Various sections of the Discovery Layer can be customized for appearance or functionality. This is done through the Discovery Layer configuration editor. Access to this new editor requires superlibrarian rights; you will also need to log into the Discovery Layer. The older OPAC interface was controlled primarily by system preferences which remain (under the Legacy OPAC tab) but are not used in the Discovery Layer. They will probably be hidden or removed in a future version.

Details on customizing the Discovery Layer are found in the separate Discovery Layer Customization Guide document.

Appendix 1: Solr Index Names

There are several places (record matching rules, Discovery Layer search configuration, facets) where you may need to know the name of the Solr index. Here is the default configuration for the current version (subject to change). Much of this may not make sense; the index name is in the first column and should be reasonably obvious. Fields/subfields included are in the second column. Some indexes are used for internal purposes.

Bibliographic Indexes

```
id | object | emit_id
rtype | record | emit_bib_rtype
biblionumber | 999c

text | record | fullmarc
text | 001[0-15] | trim
f001_lc | 001[0-15] | | trim

author-display | 100acq 110a 111a 700acq 710a 711a
author_rcn_facet | 100 110 111 700 710 711 | emit_rcn_facet
author-full | 100abcd 100q 110ab 111ab 245c 505r 700abcd 700q 710ab 711ab
author-sort | 100a 110a 111a | | first

title-nostem | 245ab 490a 440a | | first
title-short | 245a | | first
title-sort | 245 | first title_sort |
title-full | 245 | cat_alpha_subfields | first
title-alt | 130 222 243 245 246 730 740 | cat_alpha_subfields
title-alt | 240a 247a 505t 700klmnopqrst 710t 711t 780t 785t
series-title | 800at 810at 811at 830at 490a 440a
series-title_rcn_facet | 800 810 811 830 | emit_rcn_facet
series-title-sort | 800at 810at 811at 830at 490a 440a | | first
uniform-title | 130 240 243 730 | cat_alpha_subfields | first
uniform-title_rcn_facet | 130 240 730 | emit_rcn_facet

journal-title | 773t

note | 500a 501a 502abcdgo 504a 505art 506af 508a 511a 518adop 520ab 521a 530bcd3 533abcdefn
534at 536abcdefgh 538a 545a 550a 586a 753abc

subject-exact | 6.. | cat_alpha_subfields
subject | 6.. | cat_alpha_subfields

topic | 650a
topic_facet | 650a
topic_rcn_facet | 650 | emit_rcn_facet
```

```
geo | 651a
geo_facet | 651a
geo_rcn_facet | 651 | emit_rcn_facet

era | 648a
era_facet | 648a
era_rcn_facet | 648 | emit_rcn_facet

genre | 655a
genre_facet | 655a
genre_rcn_facet | 655 | emit_rcn_facet

publisher | 260b 264b
publisher-display | 260b 264b
publoc | 260a 257a 264a
pubyear | 008[7-10] 260c 264c | clean_year | first

url | 856u

format | record | | emit_format
content | record | emit_content
audience | record | emit_audience
language | 008[35-37] | map_language
ln | 008[35-37] 041abdhjkmn 377a

itemtype | 952y | | unique
collection | 9528 | | unique
location | 952c | | unique
barcode | items | emit_barcode

isbn | 020a 020z | | emit_isbn
isbn-a | 020a | | emit_isbn
upc | 024a | | emit_upc
issn | 022a 022y 022z 440x 490x 730x 776x 780x 785x
issn-sort | 022a 022y 022z 440x 490x 730x 776x 780x 785x | | first
callnumber | 952o
callnumber | 099ab 090ab 050ab 082ab
callnumber-a | 099a 090a 050a 082a

lccn | 010a 010z
ctrlnum | 035a 001[0-15] | trim
ctrlnum-035a | 035a | trim
ctrlnum_lc | 035a | ctrlnum_normalize
acq-stock-number | 037a | trim
acq-stock-source | 037b | trim
record-origin | 999 | extract_org
origin-system-id | 999f
```

```
text | 999f | just_numeric | first


# cn-sort -- some catalogs seem to have no cn_sort at bib level, so fall back on first item cn.
cn-sort | 9426 9526 | | first

instrumentation | 048 | cat_alpha_subfields

geo-bbox | bib | emit_bbox
geo-shape | bib | emit_shape
geo-scale | 034b | emit_scale
fulltext | 856b | emit_fulltext
uuid | bib | emit_uuids
eformat | 856q

suppress | 942n | | dne_to_zero
# could use filter here like 'coerce_int'

koha-tag | bib | emit_tags

linked_rcn | record | emit_linked_rcns

popularity | bib | emit_totalissues

subscriptions | bib | emit_total_subscriptions

catdate | bib | emit_datecreated

acqdate | bib | emit_latest_acq

on-shelf-at | items | on_shelf_at | unique
for-loan-at | items | for_loan_at | unique
owned-by | 952a | | unique
lost | bib | lost
# record must have at least one item with lost value < 1, or no items at all.

on_order_count | 942t
in_process_count | 942u

rating | bib | emit_rating

create-date | 260c 264c | first emit_best_effort_timestamp | first
load-date | 856x | just_date emit_best_effort_timestamp
cloudLibrary-id | record | emit_cloudLibrary_id
overdrive_id | record | emit_overdrive_id

pubnum | 028a
geoarea | 043b
```

```
prodcountry | 044a
geoclassarea | 052a
geoclasssubarea | 052b
subject-code | 072a
corpname | 110a 710a 260b
corpnumber | 110n 710n
short-title | 210a
map-series | 246a@1=3@2=3
edition | 250a
content-classification | 355a@1=0
content-releasability | bib | emit_releasability(0)
metadata-classification | 355a@1=5
metadata-releasability | bib | emit_releasability(5)
releasability-normalized | 599c
downgrade-date | 355g | emit_best_effort_timestamp
acquisition-source | 541ac
language-note | 546a
action-id | 583b
action-datetime | 583c | emit_best_effort_timestamp
catsource | 942x
local-collection | 793a
title-version | 830v
guide-site | 952S 856h
guide | bib | emit_guides
modified-datetime | bib | emit_modified_timestamp
creator_i | bib | emit_creator

record-status | record | emit_record_status

start-available | 952{
stop-available | 952}

local1_exact | 930a | first
local2_exact | 931a | first
local3_exact | 932a | first
local4_exact | 933a | first
local5_exact | 934a | first
```

Authority Indexes

```
id | object | emit_id
rtype | record | emit_auth_rtype
authid | 999e
rcn | record | emit_rcn
kauthtype_s | record | emit_authtype
is_stub_b | record | | auth_is_stub
```

```
ctrlnum | 035a 016a 024a | trim
sysctrl | 035a | trim
naco | record | emit_naco
catsource | 040a | trim
modified-datetime | 005[0-15] | first emit_best_effort_timestamp
lccn | 010a
link_count_i | record | emit_link_count

personal-name_auths | 100 | cat_alpha_subfields
corporate-name_auths | 110 | cat_alpha_subfields
meeting-name_auths | 111 | cat_alpha_subfields
uniform-title_auths | 130 | cat_alpha_subfields
chronological-term_auths | 148 | cat_alpha_subfields
topical-term_auths | 150 | cat_alpha_subfields
geographic-name_auths | 151 | cat_alpha_subfields
genre-form_auths | 155 | cat_alpha_subfields

Heading-use-main-or-added-entry | 008[14]
Heading-use-subject-added-entry | 008[15]
Heading-use-series-added-entry | 008[16]
Subject-heading-thesaurus | 008[11]
Match-heading-see-from | 4.. | cat_alpha_subfields

coded-heading_s | record | emit_coded_heading
auth-heading | 1.. | cat_alpha_subfields
auth-heading-sort | 1.. | cat_alpha_subfields
auth-full | 1.. 4.. 5.. | cat_alpha_subfields
```

Appendix 2: Search Tips

See http://lucene.apache.org/core/2_9_4/queryparsersyntax.html for detailed search tips. Here are some extracts and examples.

Phrases

Entering multiple words or putting parentheses around multiple worded terms will search the words in any order. To search a term as an exact phrase, enclose it in quotation marks. For example, searching

United States

(United States)

without quotation marks will find records with the word United and the word States (in any order), but will not limit the search to only those records with the two adjacent. For that, search as

“United States”

Searching Against Indexes

You can search against multiple indexes by specifying the index name followed by a colon and the term. For example:

author:”Mark Twain” and title:”Huckleberry Finn”

See Appendix 1 for a list of Solr index names. Note that there aren’t actually indexes named “author” and “title” alone – those are aliases. They include several of the defined indexes:

- author expands into author-display author-full
- title expands into title-nostem title-full title-alt series-title uniform-title

If you want a tighter result set, use a specific index name from Appendix 1, not the generic author or title alias.

Wildcard Searching

You can do single and multiple character wildcard searches within single terms (not within phrase queries). For single character wildcards, use a ? symbol. For multiple characters, use an *. For example:

te?t will find “test” and “tent” but not “tests” or “tents”

te*t will find “test” and “tent” and “tenet” (among others)

You cannot use the ? or * as the first character of a search.

Fuzzy Searching

Fuzzy searching looks for similar words, based on an internal algorithm. Use the tilde (~) at the end of a single word search, and it will try to find terms that are spelled similarly. For example, searching

mark~

finds not only “mark” and “mark” but also things like “cork” and “mart” and “marx” (and many other variants).

Proximity Searching

You can look for words within a specified distance of each other. For example, searching

"pilot Mississippi"~10

will find records with the “pilot” and “Mississippi” within 10 words of each other somewhere in the record.

Boolean Searching

The Boolean operators AND, "+", OR, NOT and "-" are available. Note that the operators must be entered in all caps. OR is the default – if you enter a multiple word term like United States without the surrounding quotes, it will look for all records with either United or States. You can construct a Boolean search like this:

“United States” AND government

“United States” NOT government

You can also group search terms with parentheses:

(“United States” AND government) NOT Congress

More elaborate queries and additional operators are available; see the above web site for examples and information.

Appendix 3 – Version Changes

The current version change page is at the beginning of this document; historical pages are preserved here.

Changes between Version 5.10 and Version 5.12

These manual sections have been added or updated since version 5.10 was released.

1. Log in to LSP (updated v. 5.11.8)

1.3 News Items (updated v. 5.11.8)

1.4 Custom Menu Configuration (added 5.11.8)

3.1 Basic Search (updated v. 5.12.0)

3.3 Truncation, Wildcard, and Direct Index Searching (updated v. 5.12.2)

5.2 Creating a Patron (updated v. 5.11.12)

6.5 Available Granular Permissions (updated v. 5.11.12, 5.12.1)

6.5.1. Digital Object Permissions (updated v. 5.11.8)

8.4.1 Statistical Data Logging (updated 5.12.0, 5.12.2)

9.1 Opening the Cataloging Editor (updated v. 5.11.8)

9.3.11 Refreshing a Record (new in v. 5.11.8)

9.3.17 Reviewing and Saving a Staged Record (updated v. 5.11.8)

9.3.17.1 Resolving Edit Conflicts (new in v.5.11.12)

9.6.4 Importing Authority Records (updated v. 5.11.8)

9.10 Batch Edit Bib Records (added v. 5.11.12, 5.12.01)

9.10.2 Editing or Deleting a Ruleset (updated v. 5.12.0)

12. Digital Object Handling (LSP Systems Only) (updated v. 5.11.1)

14.3 Routing Slips (updated v. 5.11.2)

14.4 Claiming (updated v. 5.11.1)

17.5.1 Printing a Record (added v. 5.11.4)

Appendix 1: Solr Index Names (updated v. 5.11.12)

Changes between Version 5.12 and Version 5.14

These manual sections have been added or updated since version 5.12 was released.

2. Searching (updated v. 5.13.03)

2.1 Basic Search (updated v. 5.13.03)

2.4.2 Search Results (updated in v. 5.14.08)

2.4.2.1 View Digital Objects (new in v. 5.14.08)

2.4.3 Display Results as List or Images (new v. 5.13.02)

3.2 Viewing Digital Objects (updated v. 5.13.01)

5.12.1 Paying Fines (updated v.5.14.07)

6.5 Available Granular Permissions (updated v. 5.14.01, 5.14.11)

8. Reports (new/revised v. 5.13.01)

8.2.5 HTML Formatting (updated v. 5.13.03)

8.4 Statistical Data Logging (updated v. 5.13.01)

8.4.1.1 Additional User Data Logging (new v. 5.13.01)

9.2.3 Creating a Bibliographic Record using Z39.50 (updated v. 5.14.01)

9.2.6.2 Manage Staged Biblio Records (updated in v. 5.14.08)

9.3.15 Deleting a Single Bibliographic Record (added)

9.5.2 Edit an Item Record (updated v. 5.13)

9.8 Authorized Values (updated v. 5.13.01)

9.10.9 Checking Status of a Ruleset Edit (new v. 5.18.12)

9.11 Identifying and Deleting Records Flagged as Deleted in the Leader (new v. 5.14.01)

9.12 Forcing Reindex of a Single Record (new v. 5.13.01)

12. Digital Object Handling (LSP Systems Only) (updated v5.13.04)

12.1 Uploading as New Titles (updated v. 5.14.02, 5.14.14)

12.1.1 Viewing Objects by GUIDE ID (updated in v. 1.04.03)

12.3 Attaching to an Existing Record in the Cataloging Editor (new in v 5.13.01)

12.4 Linking to a Digital Object Uploaded Separately (new in v. 5.14.02)

12.5 Thumbnail View in Cataloging Editor (new in v. 5.14.02, updated v. 5.14.04)

12.6 Removing a Digital Object From a Title (updated v. 5.13.01)

12.7 OCR Capability (new in v5.13.01)

12.8 Display Text (new in v5.13.01)

13 Acquisitions (text revised and expanded)

13.8 Credit Memos (new feature)

13.13 Hotkeys (new feature)

14.2 Creating a Vendor Record (added)

14.5 Claiming (expanded)

15. Lists (updated v. 5.14.01)

17.4.1 Display Results as List or Images (new v. 5.13.02)

17.5.1 Showing the Name of the Person Who Has Checked Out (new v. 5.14.01)

17.5.3 Exporting Record in APA Citation Format (new v. 5.14.01, updated v. 5.14.04)

17.9 Lists (updated v. 5.14.01)

17.11.1 My Checkouts (updated v. 5.14.11)

Appendix 1 Bibliographic Indexes (updated v. 5.14.03)

Changes between Version 5.14 and Version 5.18

NOTE: Version 5.16 was skipped for production.

These manual sections have been added or updated since version 5.14 was released.

1.5 Hotkeys (new in v. 5.16.04)

2.4.4 Facets (updated v. 5.15.02, 5.18.00)

2.4.8 Default Cover Images (new v.5.16.01, revised v. 5.18.06)

2.6.5 Setting Circle Radius (new v. 5.18.00)

4. Circulation and Material Management (updated v. 5.16.01)

4.1 Checking Out (updated v.5.18.17)

4.2.1 Global Cap on Checkouts (new v. 5.16.02)

4.5 Checking In (updated v. 5.16.01, 5.16.03)

4.5.1 Backdate Checkins (new in v. 5.16.01, 5.16.03)

4.5.2 Clearing On Order Status at Checkin (new v.5.16.01)

4.5.3 Shelving Cart Display (new v.5.16.02)

4.5.4 Checkin Notes (new v. 5.16.03, updated in 5.16.05)

4.7 Handling Transits (updated v. 5.16.04)

4.9.3 Cleaning Up Inventory Problems (updated v. 5.16.05)

4.11.2 Placing a Hold for a Patron (updated v. 5.16.04

4.11.2.1 Placing Holds on Multiple Items on the Same Title (new v. 5.16.05)

4.11.6.1 Triggering Holds When Waiting Holds are Cancelled (new v. 5.16.04)

4.11.7 Holds Queue Report (updated v. 5.16.04, 5.18.10, 5.18.14)

4.11.9 Cancelled Holds (updated v. 5.16.02, 5.16.04)

4.11.10 Hold Fees (new v. 5.16.05)

4.11.11 Hold Handling When Items Become Unavailable (new v. 5.18.14)

4.11.12 Search To Hold (new v.5.18.17)

4.14.5 Kiosk Selfcheck (new v. 5.18.13, 5.18.14)

5.3.1 Patron Display Timeout (new v.5.16.01)

5.12.1 Paying Fines (updated v. 5.16.01)

5.12.8 Paying Accruing Fines (new v. 5.16.01)

5.2 Creating Patrons (updated v. 5.15.05)

5.3 Editing a Patron (updated v. 5.15.05)

6.5 Available Granular Permissions (updated v. 5.15.02, 5.15.06)

6.5.1. Digital Object Permissions (Full LSP Sites Only) (updated v. 5.15.02)

6.8 Permissions for Anonymous Users (new v.5.16.04)

7.1.2 Role or Individual Patron Settings (updated v. 5.18)

7.1.5 Print Notices (new v. 5.16.02, 5.16.03)

7.1.5.1 Change to Overdue Notice Handling (new v. 5.18.23)

8.1.1 Running an Existing Report (updated v.5.15.02, 5.16.01)

8.1.2 Creating and Running a SQL Report

8.1.2.1 Forbidden SQL Commands (new v.5.16.01)

9.2.1 Searching for Existing Bibliographic Records (updated v. 5.15.02)

9.3.3 Validation Error Checking (added separate section to clarify v. 5.18)

9.3.17 Batch Delete Bibliographic Records (updated v. 5.16.05)

9.3.20 Link Bibliographic Record to an Authority Record (updated v. 5.16.03)

9.3.23 Transliteration Macro (new in v. 5.16.05)

9.5 Managing Item Records (major revisions v. 5.15.02, updated 5.16.04, 5.18.14)

9.6.7 Deleting Authority Records (new section added v. 5.18.20)

9.7 HotKeys (updated v. 5.16.04)

9.8 Authorized Values (updated v. 5.15.05)

9.9 Batch Edit Items (updated v. 5.15.2)

9.9.2 Batch Edit Utility (updated v. 5.15.02)

9.10.4 Applying Ruleset to Bibliographic Batch Load (updated v. 5.18.00)

12.1 Uploading as New Titles (updated v.5.16.02)

12.5 Thumbnail View in Cataloging Editor (updated v. 5.18.00)

12.9 Displaying Large Numbers of Digital Objects (new v. 5.18.14)

13. Acquisitions (revised/expanded v. 5.15, new features v. 5.18.10)

13.8.2 Miscellaneous Credits (new feature 5.18.23)

14.6 Editing Issues That Have Been Received (added section v. 5.18)

17.5 Title Display (updated v. 5.15.02)

17.5.4 Shelf Browser (updated v.5.16.01)

17.11.1.1 Self Checkout (updated v. 5.18)

17.11.8 My Hold History (new v. 5.16.03)

17.12 Placing Holds (updated v. 5.16.01)

17.12.1 Placing Holds on Multiple Items on the Same Title (new v. 5.16.05)

17.13 Recalls (updated v. 5.16.03)

Bibliographic Indexes (updated v. 5.16.04, 5.18.00, 5.18.07)

Changes between Version 5.18 and Version 5.20

The underlying stylesheet and code libraries have changed, which means the overall appearance has changed. Screenshots have been updated throughout the manual, although some older screenshots remain. Many sections have minor changes in functionality.

2.1 Basic Search (updated v. 5.19.5)

2.3.4 Did You Mean (updated v. 5.19.06)

2.3.5 ISBN-10 and ISBN-13 Searching (new v. 5.19.21)

2.4 Search Results (updated v. 5.19.x)

2.4.2 Search Results (updated v. 5.19.06)

2.4.4.1 Publication Date Facet (new in v. 5.19.x)

2.5 Manage Search Results (updated v. 5.19.x)

4.1 Checking Out (updated v. 5.19.20)

4.8 Tracking In-House Use (updated v. 5.19.20)

4.11.4 Suspending Holds (updated v. 5.19.10)

4.11.7 Hold Handling for Lost or Withdrawn Items (updated v. 5.19.16)

4.11.9 Clearing the Holds Shelf (updated v. 5.19.10, 5.19.13)

4.14.4 Removing an Item From a Course (added to manual v. 5.19.x)

4.16 Offline Circulation (new v. 5.19.22)

5.2 Creating a Patron (updated v. 5.19.16)

5.5 Messages (updated v. 5.19.x)

5.11 Patron History Tab (new in v. 5.19.x)

5.12.3 Patron Lists (manual updated 5.19.x)

5.13 Fines (major revisions in v. 5.19.13)

5.13.7 Lost Item Handling (updated v. 5.19.x)

5.14 Lost Card Tracking (new v. 5.19.10, updated v. 5.20.00)

5.15 Borrower Notes (new in v. 5.19.11)

5.16 Anonymize Reading History (new in v. 5.19.13)

6. Role Patrons and Default Permissions (updated v. 5.19.13)

6.5 Available Granular Permissions (updated v. 5.19.x)

7. Messaging and Message Preference Defaults (updated v. 5.19.x)

7.1.5.1 Change to Overdue Notice Handling (new in v. 5.19.11)

9.1.1 Authorized Values (section relocated in v. 5.19.x)

9.3.10.1 Item Level Suppression (new in v. 5.19.05)

9.3.24 Retrieving an Unsaved Record (new in v. 5.19.3)

9.5.1 Create an Item (updated v. 5.19.20)

9.5.2 Edit an Item Record (updated v. 5.19.20)

9.5.3.1 Deleting Checked-Out Items (updated v. 5.19.19)

9.5.4 Item Session Defaults (new v. 5.19.13, updated v. 5.20.00)

9.5.5 Item Status Settings (updated v. 5.19.x)

9.5.5.1 Custom Item Status (new in v. 5.19.05)

9.5.5.2 Reports to Find Items with Custom Statuses (new in v. 5.19.05)

9.5.6 Moving Items to Another Title (new v. 5.19.8)

9.8 Batch Edit Items (updated v. 5.19.x)

9.9 Batch Edit Bib Records (updated v. 5.19.16, 5.19.18)

9.9.1 Types of Actions Possible (updated v. 5.19.16)

9.9.2.1 Create Ruleset from Template (updated v. 5.19.18)

9.9.2.2 Create Ruleset from Scratch (updated v. 5.19.18)

13.1.6 Acquisitions System Preferences (updated v. 5.19.x)

13.8 Credit Memos (updated v. 5.19.15)

13.8.2 Miscellaneous Credits (updated v. 5.19.15)

13.11 Link to Serials (updated v. 5.19.x)

14. Serials (new in v. 5.19.x)

17. Using the Discovery Layer (updated, style changes in v. 5.19.x)

17.2 Simple Search (updated v. 5.19.05)

17.4 Results List (updated 5.19.x)

17.5.5 MFHD Display (new v. 5.19.20)

17.11 Discovery Layer Patron Dashboard (new v. 5.19.18)

17.11.1.1 Renewing (updated v. 5.19.10, 5.19.18, 5.19.21)

17.11.1.2 Renewing Multiple Items (new in v. 5.19.x)

17.11.1.4 Checkout History (new location v.5.19.18)

17.11.2 My Holds (updated v. 5.19.05, 5.19.12, 5.19.18, 5.20.00)

17.11.2.2 Holds History (new location v.5.19.18)

17.18 Ratings (updated v. 5.19.x)

18. External Content in the Discovery Layer (new in v. 5.19.x)

18.1 EBSCO Discovery Service (new in v. 5.19.x)

18.2 Index Data MasterKey Widgets to Access Databases

18.3 OverDrive eBooks

18.4 Bibliotheca cloudLibrary eBooks

18.5 EBSCO NoveList (updated v. 5.19.16 additional content)

18.6 LibLime Community Reviews and Ratings

Bibliographic Indexes (updated v. 5.19.22)

Changes between Version 5.20 and Version 6.0

These manual sections have been added or updated since version 5.20 was released.

2.3.6 Partial Item Barcode Searching [new in v. 5.21.02, updated 5.21.07]

2.3.7 Barcode Search Goes to Item Status Tab [new in v. 6.00.01]

2.3.8 Searching in Date Field Indexes [new in v.6.00.08]

2.4.2 Search Results [updated v. 5.21.07]

2.4.4 Facets [updated v6.00.13]

2.4.4.1 Publication Date Facet [updated v. 5.21.09, 5.21.10]

2.4.4.2 Authority Term Facets [new in v.6.00.08]

2.4.5 Enhanced Facets for Boolean Operators [new in v.6.00.09]

3.1 Discovery Layer View of Individual Bibliographic Record [updated v. 5.21.07]

3.4 Staff View of Individual Bibliographic Record [updated v. 5.21.07, 5.21.11]

4.2 Checkout Messages, Warnings, and Blocks [screenshot updated v. 5.21.11]

4.2.2 Limit Number of Current Checkouts Visible [new in v. 5.21.02]

4.3 Receipt Printing [updated v. 6.00.06]

4.4 Renewing Items for a Patron [updated v. 5.21.01, 5.21.10, 5.21.11, 5.21.12]

4.5 Checking In [updated v. 5.21.12]

4.8 Tracking In-House Use [updated v. 5.21.12]

4.11 Holds [updated v. 5.21.x]

4.11.1 Item-Level versus Title-Level Holds [note added v. 6.0]

4.11.2 Placing a Hold for a Patron [updated v. 5.21.01, 5.21.12]

4.11.2.1 Search and Sort Options [new in v. 5.21.12, updated v. 5.21.13]

4.11.2.2 Placing Holds on Multiple Items on the Same Title [updated v. 5.21.01]

4.11.2.3 Placing Holds and Other Actions from the Results List [new v. 5.21.07, updated v. 5.21.08]

4.11.2.4 Hold Date in the Future [updated v. 5.21.01]

4.11.2.5 Overriding a Hold Block for a Patron [updated v. 5.21.06]

4.11.3 Reordering the Priority Queue [updated v. 5.21.05]

4.11.4 Suspending Holds [updated v. 5.21.08]

4.11.5 Recalls [updated v. 5.21.01]

4.11.8.1 Checkin/Pass/Trace Options [new v. 5.21.x, 5.21.11]

4.11.9 Clearing the Holds Shelf [updated v6.00.13]

4.14.2 Adding Items to Courses [updated v6.00.13]

5.1 Searching and Displaying Patrons [updated v. 5.21.01, 5.21.12]

5.1.2 Partial Patron Barcode Searching [new in v. 5.21.02]

5.2.1 Validate Codabar Barcode [new in v. 5.21.01]

5.2.2 Copying an Existing Patron [new in v. 5.21.01]

5.11 Patron History Tab [updated 5.21.03]

5.11.1 Circulation History [new in v. 5.21.12, updated v. 6.00.01]

5.13.3 Waiving or Forgiving Fines [updated v. 5.21.11]

5.13.7 Payment/Credit Details [new v. 6.00.06]

5.13.8.1 Checked Out Items Marked Lost [updated v. 5.21.06, 5.21.08, 6.00.12]

5.13.9 Fine Threshold Forgiveness and Transfers [updated v. 5.21.01]

5.16 Anonymize Reading History [updated v. 5.21.07]

6.4 User Preferences [updated v. 6.x]

6.6 Available Granular Permissions [updated v. 6.x]

7.1.5 Print Notices [updated v. 6.00.12]

8.1.3 Scheduling a Report [new v. 6.00.02]

9.2.6.1 Stage Bibliographic MARC Records for Import [updated v. 6.00.03]

9.2.6.2 Leader 05 Delete Handling [new in v. 6.x]

9.2.6.3 Add Item Profiles [new in v. 5.21.04]

9.3 Editing New or Existing Bibliographic Records [updated v. 6.00.08]

9.3.1.1 Navigating Between Fields [updated v. 6.00.08]

9.3.1.2 Leader/008 Edit Screen [updated v. 6.00.08]

9.3.5.4 Selecting Multiple Fields to Copy or Delete [new v. 6.00.08]

9.3.8 Viewing Two Bibliographic Records in Tabs or Side by Side [updated v. 5.21.14, v.6.00.08]

9.3.10 Discovery Layer Suppression [updated in v.6.00.08]

9.3.16 Deleting a Single Bibliographic Record [updated in v.6.00.14]

9.3.18 Staging a Record for Review (Reservoir) [updated v. 6.00.08]

9.3.18.3 Removing or Abandoning Records in the Reservoir [updated v. 6.00.08]

9.3.19 Link Bibliographic Record to an Authority Record [updated v. 6.00.09]

9.3.24 Individual Record Holds Control [new in v. 5.21.01, updated 5.21.11]

9.3.4 Expanded View Options [updated v. 6.00.10]

9.5 Managing Item Records [updated v. 5.21.01]

9.5.1 Create an Item [updated v. 5.21.04]

9.5.1.1 Validate Codabar Barcodes [new in v. 5.21.01]

9.5.5 Item Status Settings [updated v. 5.21.09, 6.00.09]

9.6.1 Searching for Authority Records [updated in v.6.00.08]

9.6.5 Legacy Authority Search/Display [updated v. 5.21.12]

9.8 Batch Edit Items [new v. 5.21.05]

9.8.3.2 Modifying Items [updated 5.21.11]

9.9.1 Types of Actions Possible [updated v. 6.00.10]

9.9.11 Applying a Ruleset within the Cataloging Editor [new v. 6.00.10]

9.11 Forcing Reindex of a Single Record [updated v. 5.21.11]

10. Label Printing [updated v. 6.00.08]

10.4 Quick Spine Label [new v. 5.21.11, updated v. 5.21.12]

11. Exporting Bibs and Items [updated v. 5.21.09, 5.21.10, 6.00.03]

13.1.2.4 Allocating Money [updated v. 5.21.02]

13.1.2.4.4 Negative Allocations [new in v. 5.21.02]

13.1.6 Acquisitions System Preferences [updated v. 5.21.02, 5.21.09]

13.1.1.7 Reprocess EDI Orders [added v. 6.00.20]

13.1.1.8 Creating a Test EDI Message [added v. 6.02.00]

13.11 Link to Serials [updated v. 5.21.02]

13.3.7 Upload Spreadsheet [new v. 6.00.18]

13.3.9 Printing Purchase Order Information [new v. 6.00.06]

13.14.1 Audit [updated v. 6.00.18]

14. Serials [updated v. 5.21.12, 5.21.13]

14.1.4 Setting up a Supplement [updated v. 5.21.12]

14.1.6 Editing the Enumeration Counters for Special Patterns [new v. 5.21.12]

14.1.6.5 Accounting for Leap Year [updated v. 6.00.28]

14.1.7 Note on Indexing [updated v. 5.21.04]

14.2 Creating a Subscription Record [updated v. 5.21.01, 5.21.07]

14.2.2 Link to Acquisitions Purchase Order [new in v. 5.21.02, updated 5.21.03]

14.3.1 Unexpected Issues or Supplements [updated v. 5.21.12]

14.3.2 Editing Issue Data [updated v. 6.0, 6.00.06]

14.3.2.1 Editing Status or Date or Adding Note [new in v6.00.13]

14.3.2.2 Changing Enumeration or Chronology [updated v. 6.00.06]

14.3.3 Title Record Display of Serials Issues [new in v. 5.21.02, updated 5.21.03, 5.21.12, 5.21.14, 6.00.01]

14.6 Managing Serials Vendors [updated v. 6.00.18]

17.5.4 Exporting in Other Formats [new v. 6.00.03]

17.5.5 Shelf Browser [updated v. 5.21.09, v.6.00.08]

17.5.6 Serials and MFHD Display [updated v. 5.21.02, 5.21.03, 6.00.01, v.6.00.08]

17.10.2 Logging in With Partial Barcode [added v. 6.00.01]

17.10.3 Forgot Password Reset Option [new v. 6.00.06]

17.11.1.1 Renewing [updated v. 5.21.01, 6.00.01]

17.11.1.4 Checkout History Anonymization [new/updated v. 5.21.07, 5.21.12]

17.11.2 My Holds [updated v. 5.21.10]

17.11.12 My General Preferences [updated v. 5.21.07]

17.12 Placing Holds [updated v. 5.21.01]

17.12.1 Placing Holds on Multiple Items on the Same Title [updated 5.21.01]

17.12.2 Placing Holds and Other Actions from the Results List [new v. 5.21.07, updated 5.21.08]

17.12.3 Hold Date in the Future [updated v. 5.21.01]

17.13 Recalls [updated v. 5.21.01]

17.19 Course Reserves [updated v6.00.13]

Appendix 1: Solr Index Names [updated v. 6.x]

Changes between Version 6.0 and 6.2

3.5 Records with Large Number of Items [new in v. 6.02.01]

4.1 Checking Out [updated v. 6.01.03]

14.11.2.7 Paging for Holds Display [new in v. 6.01.01, updated v. 6.02.01]

4.11.8 Holds Queue Report [updated v. 6.01.03]

5.2.2 Password Length [new v. 6.02.02]

5.4 Changing Passwords for Patrons [updated v. 6.02.02]

5.13.1.2 Account Receipt [new in v. 6.02.00]

10.2 Generating Labels [updated v. 6.02.10]

14.1.7 Editing the Enumeration Counters for Special Patterns [updated v. 6.02.00]

14.2.4 Staff and Public Notes [new in v. 6.02.00]

14.8 Managing Upcoming Renewals [new in v. 6.02.00]

17.5.7 Records with Large Number of Items [new in v. 6.02.01]

Changes between Version 6.2 and Version 7.0

2.3.9 Slashes and Hyphens [new in v. 7.00.01]

2.4.2 Search Results Paging [updated v. 7.00.01]

2.4.7 Sort Order and Relevance Ranking [updated v. 7.00.01]

14.11.2.7 Paging for Holds Display [updated v. 7.00.06]

5.2.3 Copying an Existing Patron [updated v. 7.00.03]

5.3.2 Deleting a Patron [updated v. 7.00.03]

5.8 Guarantor or Family Group Records [new/revised in 7.xx]

5.8.2.2 Creating the Link from the Head of Household [updated v. 7.00.06]

5.8.2.3 Enforcing the Circulation Thresholds [updated v. 7.00.06]

5.12.4 Patron Delete Tool [updated v. 7.00.06]

6.6 Available Granular Permissions [updated v. 7.x]

9.3.3.2 Custom Validation Rules [new in v. 7.00.01]

9.3.5.4 Selecting Multiple Fields to Copy or Delete [updated v. 7.00.01]

10.2.2 Label Batch – Searching for Items [updated v. 7.00.06]

17.4.1 Search Results Paging [updated v. 7.00.01]

17.4.4 Sort Order and Relevance Ranking [updated v. 7.00.01]

17.11.12 Patron Group [new in v. 7.x]

Bibliographic Indexes [updated v. 7.x]