

User's Guide



Integrated Library System

Virtua Profiler

Circulation Parameters

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

Virtua Profiler
Circulation Parameters
Version 16.1
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Table of Contents

TABLE OF CONTENTS	I
--------------------------	----------

TABLE OF FIGURES	VII
-------------------------	------------

TABLE OF FIGURES	VII
-------------------------	------------

1. INTRODUCTION AND GETTING STARTED	1
--	----------

1.1 USING THIS GUIDE	1
----------------------	---

1.2 OVERVIEW OF CIRCULATION PARAMETERS	3
--	---

1.2.1 ACCESSING CIRCULATION PARAMETERS	4
--	---

1.2.2 A NOTE ABOUT SYSTEM-ASSIGNED SETTINGS	6
---	---

1.2.3 ABOUT ADDING ITEMS TO THE TREE	6
--------------------------------------	---

1.3 RECOMMENDED ORDER FOR SETTING PROFILER PARAMETERS	7
---	---

2. WORKING WITH THE LOCATION + ITEM MATRIX	9
---	----------

2.1 ACCESSING LOCATION/ITEM COMBINATIONS	10
--	----

2.2 SETTINGS ON THE ITEM INFO TAB	13
-----------------------------------	----

2.2.1 LIBRARY CALENDAR	14
------------------------	----

2.2.2 MUST PICK UP AT SHELVING LOCATION SETTING	14
---	----

2.2.3 ITEMS CIRCULATING LESS THAN ONE DAY ARE DUE AT CLOSING	15
--	----

2.2.4 ITEMS CIRCULATING ONE DAY OR MORE ARE DUE AT CLOSING	16
--	----

2.2.5 REPLACEMENT COST AT BILLING	16
-----------------------------------	----

2.2.6 DEFAULT ITEM PRICE	17
--------------------------	----

2.2.7 FINES ACCRUE DURING NON-OPERATING HOURS	17
---	----

2.2.8 PREP TIME FOR MATERIALS	17
-------------------------------	----

2.2.9 HOLD PICKUP TIME	18
------------------------	----

2.2.10 INSPECTION TIME FOR MATERIALS	19
--------------------------------------	----

2.2.11 DEFAULT BOOKING TIME FOR MATERIALS	19
---	----

2.2.12 MINIMUM BOOKING TIME FOR MATERIALS	20
---	----

2.2.13 ALLOW RENEWAL WITHIN X DAYS OF DUE DATE	20
--	----

2.2.14 MIN FLOATING ITEM COUNT THRESHOLD	21
--	----

2.2.15 MAX FLOATING ITEM COUNT THRESHOLD	21
--	----

2.3 SETTING VALUES ON THE LOST/ DAMAGED TAB	22
---	----

2.4 APPLYING SETTINGS TO OTHER MATRIX COMBINATIONS	25
--	----

3. WORKING WITH THE LOCATION + PATRON MATRIX	29
---	-----------

3.1	SETTING VALUES IN THE LOCATION + PATRON MATRIX	29
3.2	DESCRIPTIONS OF LOCATION + PATRON MATRIX SETTINGS	35
3.2.1	ABOUT SETTING THE DEFAULT DATE AND TIME	35
3.2.2	WORKING WITH PROCESSING FEES	36
3.2.3	WORKING WITH THE ITEM PRICE FEE PARAMETERS	38
3.2.4	WORKING WITH PATRON RECORD SETTINGS	38
3.2.5	DETERMINING IF HOLDS ARE ALLOWED ON ITEMS AVAILABLE AT THE LOG-IN LOCATION	40
3.2.6	DETERMINING IF HOLDS ARE ALLOWED ON ITEMS AVAILABLE AT NON-LOG-IN LOCATIONS	40
3.2.7	DETERMINING IF HOLDS ARE ALLOWED ON BIBLIOGRAPHIC RECORDS WITHOUT ITEMS	41
3.3	APPLYING SETTINGS TO OTHER MATRIX COMBINATIONS	41
4.	<u>WORKING WITH THE LOCATION + PATRON + ITEM MATRIX</u>	44
4.1	SETTING VALUES IN THE LOCATION + PATRON + ITEM MATRIX	44
4.2	ABOUT LOAN RULES	54
4.3	ABOUT FINES AND GRACE PERIODS	58
4.3.1	ABOUT SETTING FINES FOR OVERDUE ITEMS	60
4.3.2	ABOUT OVERRIDING FINES FOR OVERDUE ITEMS	61
4.3.3	ABOUT SETTING THE GRACE PERIOD FOR OVERDUE ITEMS	63
4.3.4	ABOUT THE GUARANTEED CIRCULATION PERIOD, THE MAIL GRACE PERIOD, AND THE PERIOD FROM RECALL LETTER TO DUE DATE	63
4.4	ABOUT NOTICE SCHEDULES AND RENEWAL LIMITS	66
4.4.1	ABOUT CONFIGURING NOTICE GENERATION SCHEDULES	68
4.4.2	ABOUT SETTING RENEWAL LIMITS	69
4.4.3	ABOUT REVIEW NOTICES	69
4.5	ABOUT REQUESTS	70
4.6	APPLYING SETTINGS TO OTHER MATRIX COMBINATIONS	72
5.	<u>WORKING WITH LOCATION-SPECIFIC PARAMETERS</u>	75
5.1	WORKING WITH LIBRARY-DEFINED DATES	75
5.1.1	ADDING LIBRARY-DEFINED DATES	76
5.1.2	MODIFYING LIBRARY-DEFINED DATES	78
5.1.3	DELETING LIBRARY-DEFINED DATES	80
6.	<u>WORKING WITH THE PATRON TYPES PARAMETER</u>	82
6.1	ADDING NEW PATRON TYPES	82
6.2	MODIFYING PATRON TYPES	85
6.3	DELETING PATRON TYPES	88
6.4	DETAILS OF PATRON TYPE SETTINGS	88
6.4.1	ABOUT THE PATRON TYPE AND PATRON TYPE CODE	88
6.4.2	ABOUT REQUEST LIMITS	89
6.4.3	ABOUT THE MAX OVERDUE FINE	90

6.4.4	ABOUT THE REQUEST PLACEMENT ORDER	90
6.4.5	ABOUT THE UPDATE PATRON TYPE SETTINGS	91
6.4.6	ABOUT THE NUMBER OF REQUESTS ALLOWED ON SAME BIB-ID	92
6.4.7	ABOUT THE INCLUDE ITEM-LEVEL REQUESTS IN THAT NUMBER SETTING	92
6.4.8	ABOUT THE ITEM BOOKING LIMIT	92
6.4.9	ABOUT THE MAXIMUM HOLD, RECALL, LOAN, PAGE LIMIT	93
6.4.10	ABOUT THE TOTAL DISPUTE THRESHOLD	93
6.4.11	ABOUT THE TOTAL LOST THRESHOLD	93
6.4.12	ABOUT THE EXPIRATION ALERT (DAYS)	93

7. WORKING WITH THE SCHEDULE CIRC BACKUP JOB PARAMETER **94**

7.1	SCHEDULING THE GENERATION OF THE BLOCKPAT FILE	95
-----	--	----

8. WORKING WITH CIRCULATION SYSTEM PARAMETERS **98**

8.1	ACCESSING CIRCULATION SYSTEM PARAMETERS	99
8.2	WORKING WITH THE ACCOUNT ADJUSTMENT NOTES	100
8.3	WORKING WITH THE ALERTS AND BLOCKS MATRIX	102
8.3.1	SETTING VALUES IN THE ALERTS AND BLOCKS MATRIX	102
8.3.2	APPLYING SETTINGS TO OTHER PATRON TYPES	105
8.3.3	UNDERSTANDING THE ALERTS AND BLOCKS MATRIX	107
8.3.4	VIEWING ALERTS AND BLOCKS IN THE VIRTUA CLIENT	108
8.4	WORKING WITH AUTOMATIC CHECK-INS	110
8.5	WORKING WITH THE BILLED PATRON NOTE PARAMETER	112
8.6	WORKING WITH BLOCK CODE DEFINITIONS	112
8.6.1	ABOUT BLOCK CODE DEFINITIONS	114
8.6.2	ABOUT LIBRARY-DEFINED AND FIXED-FIELD BLOCKS	114
8.6.3	CONFIGURING THE BLOCK CODE DEFINITIONS PARAMETER	118
8.7	WORKING WITH CHECK-OUT LIMITS	120
8.7.1	UNDERSTANDING CHECK-OUT LIMITS TYPES	120
8.7.2	DETERMINING WHICH CHECK-OUT LIMITS TYPES TO USE	122
8.7.3	ASPECTS OF THE CHECK-OUT LIMITS WINDOW	123
8.7.4	SETTING CHECK-OUT LIMITS	125
8.8	WORKING WITH CIRCULATION BASIC OPTIONS	128
8.8.1	SETTING CIRCULATION BASIC OPTIONS	128
8.8.2	ABOUT CIRCULATION BASIC OPTIONS	129
8.9	WORKING WITH THE CLOSED DATES PARAMETER	161
8.9.1	ADDING CLOSED DATES	162
8.9.2	DELETING CLOSED DATES	163
8.9.3	MODIFYING CLOSED DATES	164
8.10	WORKING WITH CONTROLLED PATRON VALUES	166
8.10.1	LEGACY CONTROLLED PATRON VALUE SETTINGS	167
8.10.2	ALTERNATE CONTROLLED PATRON VALUE SETTINGS	170
8.11	WORKING WITH FINE CODE DEFINITIONS	174
8.11.1	SETTING THE FINE CODE DEFINITIONS PARAMETER	174

8.11.2	GUIDELINES FOR SETTING THE FINE CODE DEFINITIONS PARAMETER	176
8.12	WORKING WITH ILL OPTIONS	178
8.12.1	CONFIGURING ITEM INFORMATION	179
8.12.2	CONFIGURING PATRON INFORMATION	180
8.13	WORKING WITH ITEM CLASS DEFINITIONS	180
8.13.1	ADDING NEW ITEM CLASS DEFINITIONS	181
8.13.2	MODIFYING ITEM CLASS DEFINITIONS	183
8.13.3	DELETING ITEM CLASSES	183
8.14	WORKING WITH ITEM CLASS GROUPS	184
8.14.1	ADDING ITEM CLASS GROUPS	184
8.14.2	MODIFYING ITEM CLASS GROUPS	186
8.14.3	DELETING ITEM CLASS GROUPS	187
8.15	WORKING WITH THE LIBRARY CALENDARS PARAMETER	188
8.15.1	ADDING A LIBRARY CALENDAR	188
8.15.2	DELETING A LIBRARY CALENDAR	190
8.15.3	MODIFYING LIBRARY CALENDARS	191
8.15.4	APPLYING CALENDAR SETTINGS TO LOCATION AND ITEM CLASS COMBINATIONS	193
8.15.5	APPLYING CALENDAR SETTINGS TO LOCATIONS	194
8.16	WORKING WITH THE LIBRARY HOURS PARAMETER	195
8.16.1	ADDING LIBRARY HOURS	196
8.16.2	DELETING LIBRARY HOURS	199
8.16.3	MODIFYING LIBRARY HOURS	200
8.16.4	GUIDELINES FOR SETTING THE LIBRARY HOURS PARAMETER	201
8.17	WORKING WITH LOANS/PAGES SETUP	203
8.18	WORKING WITH THE NOTIFICATION OPTIONS PARAMETER	205
8.19	WORKING WITH THE PATRON BLOCK HISTORY PARAMETER	206
8.20	WORKING WITH THE PATRON DEPOSIT ACCOUNTS PARAMETER	207
8.21	WORKING WITH THE PATRON DIAGNOSTIC MESSAGES PARAMETER	209
8.21.1	ABOUT PATRON DIAGNOSTIC MESSAGES	211
8.21.2	ADDING PATRON DIAGNOSTIC MESSAGES	212
8.21.3	ADDING TRANSLATIONS FOR PATRON DIAGNOSTIC MESSAGES	214
8.21.4	DELETING PATRON DIAGNOSTIC MESSAGES	215
8.21.5	MODIFYING PATRON DIAGNOSTIC MESSAGES	215
8.21.6	MODIFYING BLOCK CODE LABELS	216
8.22	WORKING WITH PATRON TYPE VALUES	219
8.23	WORKING WITH RECEIPT/SLIP SETUP	221
8.23.1	CONFIGURING THE CHECK-OUT/RENEW RECEIPT	223
8.23.2	CONFIGURING THE CHECK-IN RECEIPT	225
8.23.3	CONFIGURING THE FINE RECEIPT	228
8.23.4	CONFIGURING THE IN TRANSIT SLIP	231
8.23.5	CONFIGURING THE BILLED MATERIAL SLIP	233
8.23.6	CONFIGURING THE REQUESTED IN TRANSIT SLIPS	236
8.23.7	CONFIGURING THE REQUESTED SLIP	239
8.23.8	CONFIGURING THE AGENCY REQUEST SLIP	242
8.23.9	CONFIGURING THE DEPOSIT ACCOUNT SLIP	243
8.23.10	CONFIGURING THE RECEIPT/SLIP FOOTER	245
8.24	WORKING WITH REQUEST GROUPS	247
8.24.1	ADDING REQUEST GROUPS	248

8.24.2	MODIFYING REQUEST GROUPS	250
8.24.3	DELETING REQUEST GROUPS	251
8.25	WORKING WITH THE REQUEST LOCATION ROUTING PARAMETER	252

9. APPENDIX A - PARAMETERS WORKSHEETS **254**

9.1	SYSTEM PARAMETERS	254
9.1.1	GLOBAL REQUEST TRAPPING OPTIONS	254
9.1.2	MINIMUM CIRCULATION QUESTION	254
9.1.3	ITEM CLASS DEFINITIONS	255
9.1.4	BLOCK CODE DEFINITIONS	256
9.1.5	FIXED FIELD BLOCKS	257
9.1.6	FINE CODE DEFINITIONS	258
9.1.7	CHECK-OUT LIMITS MATRIX TYPE	259
9.1.8	AUDIT TRAIL FLAG	265
9.1.9	DELETE/WAIVE FLAGS	265
9.1.10	LONG LOAN FLAG	265
9.1.11	RENEWAL OVERRIDE	265
9.1.12	3M ERROR MESSAGE	265
9.2	PATRON TYPES	266
9.3	LOCATION + PATRON + ITEM MATRIX	267
9.3.1	LOAN RULES TAB	267
9.3.2	FINES/GRACE TAB	268
9.3.3	NOTICES/LIMITS TAB	269
9.4	LOCATION + PATRON MATRIX	270
9.5	LOCATION + ITEM MATRIX	271
9.5.1	ITEM INFO TAB	271
9.5.2	REQUESTS TAB	272
9.6	ALERTS AND BLOCKS MATRIX	273
9.7	LOCATION-SPECIFIC PARAMETERS	274
9.7.1	CLOSED DATES	274
9.7.2	LIBRARY HOURS	275
9.7.3	LIBRARY-DEFINED DATES	276

10. APPENDIX B - CONVERT FINE TO BLOCK WORKFLOW **277**

10.1	WHEN AN OVERDUE ITEM IS CHECKED IN...	277
10.2	BLOCKING PATRONS BEFORE THEY CHECK IN OVERDUE ITEMS	278

11. APPENDIX C - PARAMETERS SPECIFIC TO THE HONG KONG PUBLIC LIBRARY **280**

11.1	ENHANCEMENT TO THE BLOCK CODES DEFINITIONS PARAMETER	280
11.2	PATRON TYPES SETTINGS: HKPL TAB	281
11.3	PATRON DISTRICTS PARAMETER	282

11.4	SCHEDULING THE GENERATION OF THE BLACK LIST	283
11.5	SCHEDULE WHITEList PARAMETER	285
<u>12.</u>	<u>APPENDIX D - CHANGES IN THIS GUIDE</u>	<u>288</u>
12.1	CHANGES FOR VERSION 16.1	288
<u>INDEX</u>		<u>289</u>
<u>INDEX</u>		<u>289</u>

Table of Figures

Figure 1-1. Virtua Profiler Main Window - Circulation Tab	3
Figure 1-2. Circulation Parameters Main Headings Expanded	4
Figure 1-3. Item Class Definitions Window	5
Figure 1-4. Profiler Pop-up Menu	6
Figure 1-5. Global Settings Tab	7
Figure 2-1. Location + Item Parameter Expanded to Show Main Locations	10
Figure 2-2. Location + Item Matrix Expanded to Show Item Classes	11
Figure 2-3. Location + Item Matrix - Item Info Tab	12
Figure 2-4. Location + Item Matrix Window - Item Info Tab	13
Figure 2-5. Location + Item Matrix - Lost/Damaged Tab	23
Figure 2-6. Apply Settings Window for Location + Item Matrix	25
Figure 2-7. Apply Settings window: Additional Location + Item Combinations Chosen	26
Figure 2-8. Applying Single Location + Item Setting to Other Location + Item Combinations	27
Figure 3-1. Location + Patron Parameter Expanded to Show Main Locations	30
Figure 3-2. Location + Patron Parameter Expanded to Show Patron Types	31
Figure 3-3. Location + Patron Matrix Window	32
Figure 3-4. Check Out/Renew Window Displaying Default Date and Time	36
Figure 3-5. Apply Settings Window for Location + Patron Matrix	42
Figure 3-6. Apply Settings window: Additional Location + Patron Combinations Chosen	43
Figure 4-1. Circulation Tab - Location + Patron + Item Parameter Expanded	46
Figure 4-2. Location + Patron + Item Parameter - Location Expanded	47
Figure 4-3. Location + Patron + Item Parameter - Patron Type Expanded	48
Figure 4-4. Location + Patron + Item Matrix Window	49
Figure 4-5. Location + Patron + Item Matrix Window - Loan Rules Tab	54
Figure 4-6. Check Out/Renew Window	55
Figure 4-7. Location + Patron + Item Matrix Window - Fines/Grace Tab	59
Figure 4-8. Override Fines Section of Location + Patron + Item Matrix, Fines/Grace Tab	62
Figure 4-9. Location + Patron + Item Matrix Window - Notices/Limits Tab	67
Figure 4-10. Location + Patron + Item Matrix Window - Requests Tab	70
Figure 4-11. Apply Settings Window for the Location + Patron + Item Matrix	73
Figure 4-12. Apply Settings window: Additional Location + Patron + Item Combinations Chosen	74
Figure 5-1. Library Defined Dates Window - Adding New Date Category	77
Figure 5-2. Circulation Tab - Library Defined Dates Parameter Expanded	79
Figure 5-3. Library Defined Dates Window	80
Figure 6-1. Add Patron Type Window	84
Figure 6-2. Patron Types Heading Expanded	86
Figure 6-3. Modify Patron Type Window	87
Figure 6-4. Patron Type Deletion Confirmation	88
Figure 6-5. Update Patron Type Option	91
Figure 7-1. Scheduled Jobs Parameter	94
Figure 7-2. BlockPat Window	95
Figure 7-3. Scheduler Window	96
Figure 7-4. BlockPat Window, Displaying Schedule	97
Figure 8-1. Circulation Tab - System Parameters Expanded	99
Figure 8-2. Account Adjustment Notes Window	100
Figure 8-3. Account Adjustment Notes Window	101
Figure 8-4. Circulation Tab - Alerts and Blocks Tree Expanded	103
Figure 8-5. Block/Alert Matrix Window	104

Figure 8-6. Apply Settings Window for Alerts and Blocks Matrix	106
Figure 8-7. Block/Alert Matrix Window - An Example	107
Figure 8-8. Alert Message	108
Figure 8-9. Block Message Triggered by a Check-out or Renewal	109
Figure 8-10. Block Message Triggered by a Request	109
Figure 8-11. Schedule Automatic Check-ins	111
Figure 8-12. Billed Patron Note Window	112
Figure 8-13. Block Code Definition Displayed in Error Message	113
Figure 8-14. Block Code Definition Displayed in Error Message	113
Figure 8-15. Block Message Displaying Block Code	115
Figure 8-16. Error Message Displaying Block Code	115
Figure 8-17. Fixed Field Editor	116
Figure 8-18. Block Message Displaying Fixed-field Block Code	116
Figure 8-19. Error Message Displaying Fixed-field Block Code	117
Figure 8-20. Block Code Definitions Window	119
Figure 8-21. Check-Out Limits Window - Patron Type + Item Tab	121
Figure 8-22. Check-out Limits Window - Patron Type + Item Class Tab	124
Figure 8-23. Check-out Limits Window - Patron Type + Location Tab	125
Figure 8-24. Check-out Limits Window - Patron Type + Location Tab	126
Figure 8-25. Circulation Basic Options Window	129
Figure 8-26. Circulation Basic Options Window - Delete/Waive Options Tab	130
Figure 8-27. Circulation Basic Options Window - Request Options Tab	133
Figure 8-28. Agency Request Priority Settings - Request Options Tab of Circulation Basic Options Window	138
Figure 8-29. Circulation Basic Options - Patron Activity...Tab Options	139
Figure 8-30. Patron Account - Recalled Overdue Subtab in Virtua Client	140
Figure 8-31. Circulation Basic Options Window - Item Options Tab	141
Figure 8-32. Circulation Basic Options Window - Item Statuses Tab	145
Figure 8-33. Circulation Basic Options Window - Renewal Options Tab	149
Figure 8-34. Circulation Basic Options Window - Global Request Trapping Options Tab	150
Figure 8-35. Circulation Basic Options Window - 3M Options Tab	153
Figure 8-36. Circulation Basic Options Window - Other Options Tab	155
Figure 8-37. View Bibliographic Record Window Displaying "Recallable by" Date	156
Figure 8-38. Request Wizard Displaying Minimum Period Needed Field	158
Figure 8-39. Library Closed Dates Window	162
Figure 8-40. Closed Dates - Expanded Tree	165
Figure 8-41. Library Closed Dates Window	166
Figure 8-42. Circulation Tab - Controlled Patron Values Parameter Expanded	167
Figure 8-43. Controlled Patron Values - Department Window	168
Figure 8-44. Circulation Tab - Controlled Patron Values Parameter Expanded	171
Figure 8-45. Controlled Patron Values Window	172
Figure 8-46. Patron Editor - Academic Info Tab	173
Figure 8-47. Fine Codes Window	175
Figure 8-48. ILL Options Parameter	179
Figure 8-49. Item Class Definitions Window	181
Figure 8-50. Item Class Deletion Error	184
Figure 8-51. Add Item Class Group Window	185
Figure 8-52. Modify Item Class Group Window	187
Figure 8-53. Delete Item Class Group Confirmation	188
Figure 8-54. Calendar Configuration Window	189
Figure 8-55. Calendar Configuration Window	192
Figure 8-56. Circulation Calendar Apply Settings Window	193
Figure 8-57. Apply Calendar Window	195
Figure 8-58. Library Hours Window	197

Figure 8-59. Library Hours Window, Displaying Second Week Settings	198
Figure 8-60. Library Hours Window	200
Figure 8-61. Library Hours Error Message	202
Figure 8-62. Loans/Pages Setup Window	203
Figure 8-63. Notification Options Window	205
Figure 8-64. Patron Block History Window	207
Figure 8-65. Patron Deposit Accounts Window	208
Figure 8-66. Deposit Account Elements on Patron Information Window in the Virtua Client	208
Figure 8-67. Patron Diagnostic Messages Window	210
Figure 8-68. Patron Diagnostic Messages Window	213
Figure 8-69. Differing Languages on Patron Diagnostic Messages Window	214
Figure 8-70. Save Diagnostic String Confirmation Message	215
Figure 8-71. Save Diagnostic String Confirmation Message	216
Figure 8-72. Patron Diagnostic Messages Window, Block Codes Tab	217
Figure 8-73. Differing Languages on Patron Diagnostic Messages Window	218
Figure 8-74. Circulation Tab - Patron Type Values Expanded	220
Figure 8-75. Patron Type Values Window	220
Figure 8-76. Receipt/Slip Setup Window	222
Figure 8-77. Receipt/Slip Setup Window: Check-in Tab	225
Figure 8-78. Receipt/Slip Setup Window: Fine Tab	228
Figure 8-79. Receipt/Slip Setup Window: In Transit Tab	231
Figure 8-80. Receipt/Slip Setup Window: Billed Material Tab	233
Figure 8-81. Receipt/Slip Setup Window: Requested In Transit Tab	236
Figure 8-82. Receipt/Slip Setup Window: Requested Slip Tab	239
Figure 8-83. Receipt/Slip Setup Window: Agency Request Slip Tab	242
Figure 8-84. Receipt/Slip Setup Window: Deposit Account Tab	244
Figure 8-85. Receipt/Slip Setup Window: Footer Text Tab	246
Figure 8-86. New Request for Bib Window	247
Figure 8-87. Add Request Group Window	248
Figure 8-88. Modify Request Group Window	251
Figure 8-89. Delete Request Group Confirmation	252
Figure 8-90. Location Routing Window	253
Figure 10-1. Patron Information Window - Display of Suspended Until Date	278
Figure 11-1. Block Codes Window	280
Figure 11-2. Modify Patron Type Window	281
Figure 11-3. Patron Districts Parameter	282
Figure 11-4. Blacklist Generation Window	283
Figure 11-5. Scheduler Window	284
Figure 11-6. Blacklist Generation Window, Displaying Schedule	285
Figure 11-7. Whitelist Generation Window	286
Figure 11-8. Scheduler Window	286
Figure 11-9. Whitelist Generation Window, Displaying Schedule	287

1. Introduction and Getting Started

You can use the Virtua Profiler to customize various aspects of the Virtua™ ILS – Integrated Library System. This user’s guide describes how you can use the Virtua Profiler to set parameters related to the Circulation Control subsystem.

Note: From this point on, we refer to the Virtua ILS – Integrated Library System as simply Virtua or the Virtua system in this guide.

This chapter covers the following topics:

- ⇒ [Using this Guide](#)
- ⇒ [Overview of Circulation Parameters](#)
- ⇒ [Recommended Order for Setting Profiler Parameters](#)

1.1 Using this Guide

The *Virtua Profiler/Circulation Parameters User’s Guide* provides instructions for configuring Circulation parameters via the Virtua Profiler. This guide is one of six user’s guides that make up the documentation for the Virtua Profiler. The other guides are . . .

- *Virtua Profiler Getting Started Primer*
- *Virtua Profiler/Global Settings User’s Guide*
- *Virtua Profiler/Cataloging Parameters User’s Guide*
- *Virtua Profiler/OPAC Parameters User’s Guide*
- *Virtua Profiler/Acquisitions Parameters User’s Guide*

Throughout this user’s guide, we assume that you have read the *Virtua Getting Started Primer*, which offers an overview of the Virtua system and an explanation of terminology.

In addition, we assume that you are familiar with the introductory chapters in the *Virtua Profiler/Global Settings User’s Guide*, which describe the tree structure, tabs, windows, menu bar, pop-up menus, and editing features of the Virtua Profiler.

You can use the list below and the [Table of Contents](#) to locate specific information in this user's guide. For your easy reference, this guide also contains a [Table of Figures](#) and an [Index](#). In addition, each chapter begins with a list of topics that are hyperlinked to sections included in the chapter.

For . . .	See . . .
Details on setting the Location + Item Matrix	Chapter 2
Details on setting the Location + Patron Matrix	Chapter 3
Details on setting the Location + Patron + Item Matrix	Chapter 4
Details on setting Location-specific Parameters	Chapter 5
Details on setting the Patron Types parameter	Chapter 6
Details on working with Scheduled Jobs parameters	Chapter 7
Details on setting Circulation System Parameters	Chapter 8
Worksheets that you can use to record the settings for your Circulation parameters before setting them in the Virtua Profiler	Appendix A
Workflow for Convert Fine to Block Functionality	Appendix B
Describes parameters that are specific to the Hong Kong Public Library	Appendix C
Details on the changes that were made to update this user's guide from the last version.	Appendix D

Note: In this user's guide, we discuss Circulation parameters in alphabetical order, the same order in which they appear in the Virtua Profiler tree. The organization of this user's guide does NOT represent a recommended workflow. For details on a recommended workflow, see the section "[Recommended Order for Setting Profiler Parameters](#)" in this chapter.

1.2 Overview of Circulation Parameters

Circulation parameters appear on the Circulation tab of the Virtua Profiler main window (*Figure 1-1*).

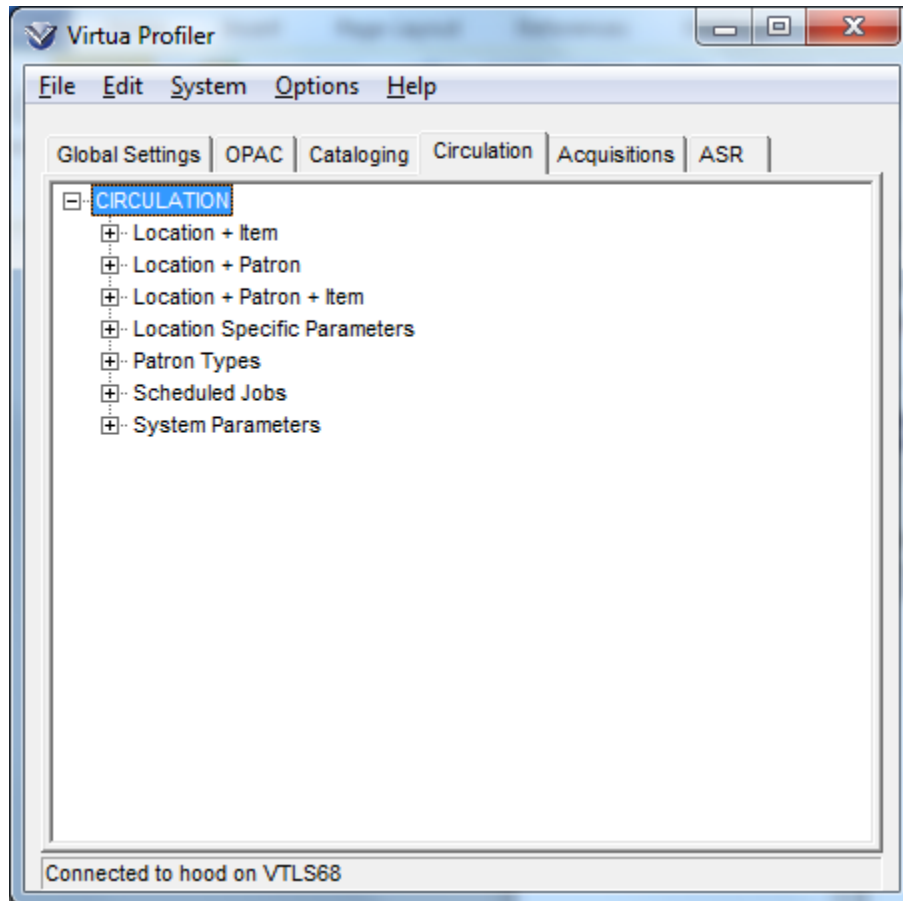


Figure 1-1. Virtua Profiler Main Window - Circulation Tab

Circulation parameters consist of . . .

- Location + Item Matrix
- Location + Patron Matrix
- Location + Patron + Item Matrix
- Location-specific Parameters, which consist of . . .
 - ◆ Library-defined Dates
- Patron Types
- System Parameters, which consist of several location-independent parameters.

Each Circulation parameter appears on a separate window, where you can set appropriate values. For details on accessing the window associated with a particular parameter, see the following sections.

1.2.1 Accessing Circulation Parameters

To access a Circulation parameter in the Virtua Profiler,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION.

The tree structure expands to display a list of Circulation Parameters ([Figure 1-2](#)).

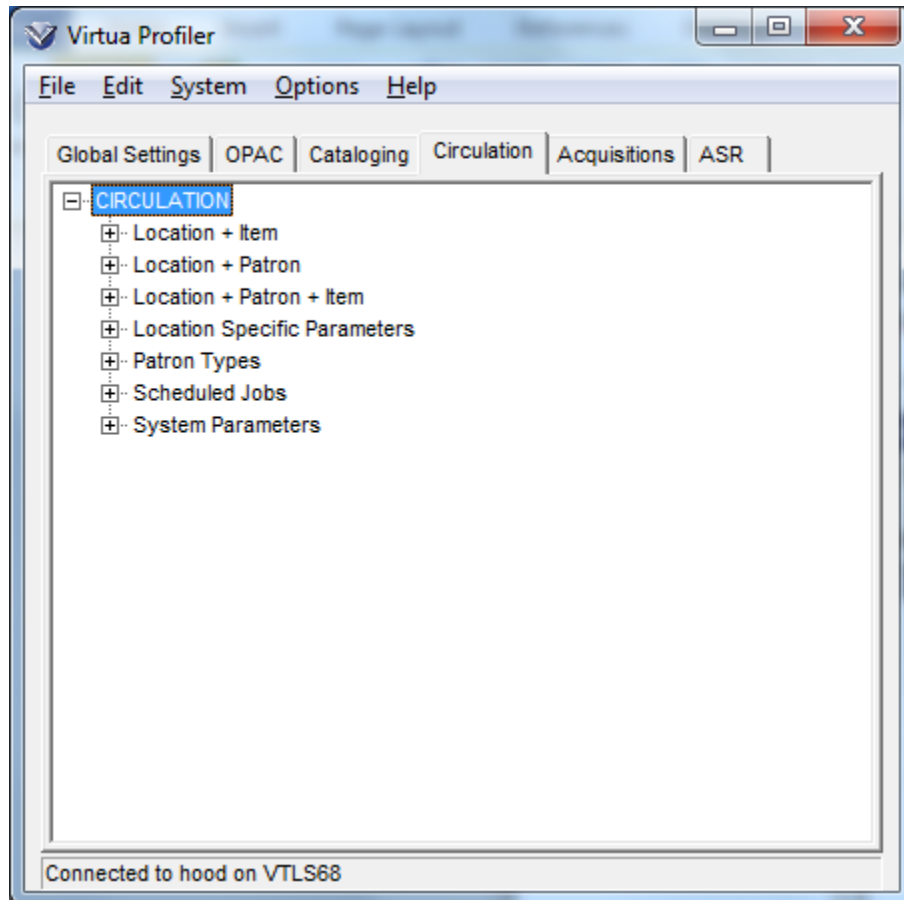


Figure 1-2. Circulation Parameters Main Headings Expanded

3. Double-click the desired heading.

4. Continue expanding the tree structure until you locate an item in the tree that has no subheadings.
5. Double-click the item.

The window associated with the parameter appears, where you can set your parameter values. For example, [Figure 1-3](#) shows the window for the Item Class Definitions parameter, which is located under the System Parameters heading.

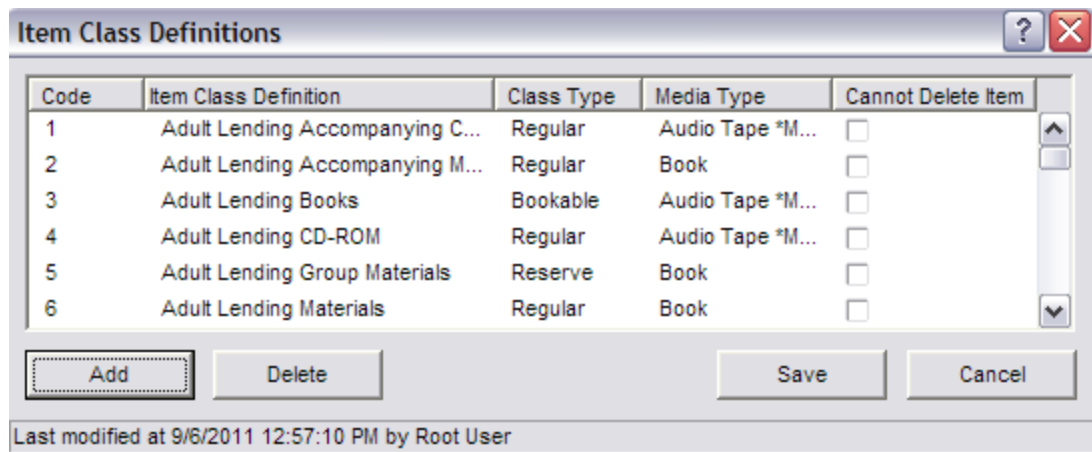


Figure 1-3. Item Class Definitions Window

The status bar at the bottom of the window helps you determine whether the parameter is set or not set.

- If you are setting the parameter for the *first* time, the status bar displays NOT SET. This message appears in the status bar until you save values for the parameter.
-OR-
- If you have already set the parameter, the status bar displays the last modified date and time for the entire parameter, as shown in [Figure 1-3](#).

For details on the different types of windows that appear in the Virtua Profile and for details for standard editing functions available on each window, see the *Virtua Profiler Getting Started Primer*.

1.2.2 A Note About System-assigned Settings

Some parameters have system-assigned settings. In most cases, you cannot modify or delete system-assigned settings because Virtua requires them to function properly. Throughout this guide, where appropriate, system-assigned settings are listed for each parameter. In addition, we specify whether you can re-define certain elements of these settings.

1.2.3 About Adding Items to the Tree

You cannot add Circulation parameters to the Virtua Profiler tree structure. Instead . . .

- You can add values associated with a parameter (when the parameter window contains a table and an Add button). For example, you can add item classes to the Item Class Definitions parameter.

-OR-

- You can add an item listed under a parameter. For example, you can add a patron type under the Patron Types parameter.

Note: In most cases, you cannot add a new item under a parameter directly. Rather, new items appear under parameters when you define other parameters in the Virtua Profiler. For example, main locations appear under each Location-specific Parameter when you add new main locations on the Global Settings tab. For details on adding locations, see the *Virtua Profiler/Global Settings User's Guide*.

When it is possible to add items under a parameter, a pop-up menu ([Figure 1-4](#)) is available and displays options that are appropriate to the selected heading.

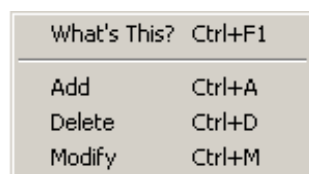


Figure 1-4. Profiler Pop-up Menu

The pop-up menu can have the following options:

- **What's This?** - Displays context-sensitive help for the selected tab.
- **Add** - Lets you add an item to the Profiler tree.

- **Delete** - Lets you delete the selected item from the Profiler tree.
- **Modify** - Lets you modify the selected item.

1.3 Recommended Order for Setting Profiler Parameters

Before you configure your Circulation parameters, you will want to configure the parameters that appear on the Global Settings tab in the Virtua Profiler.

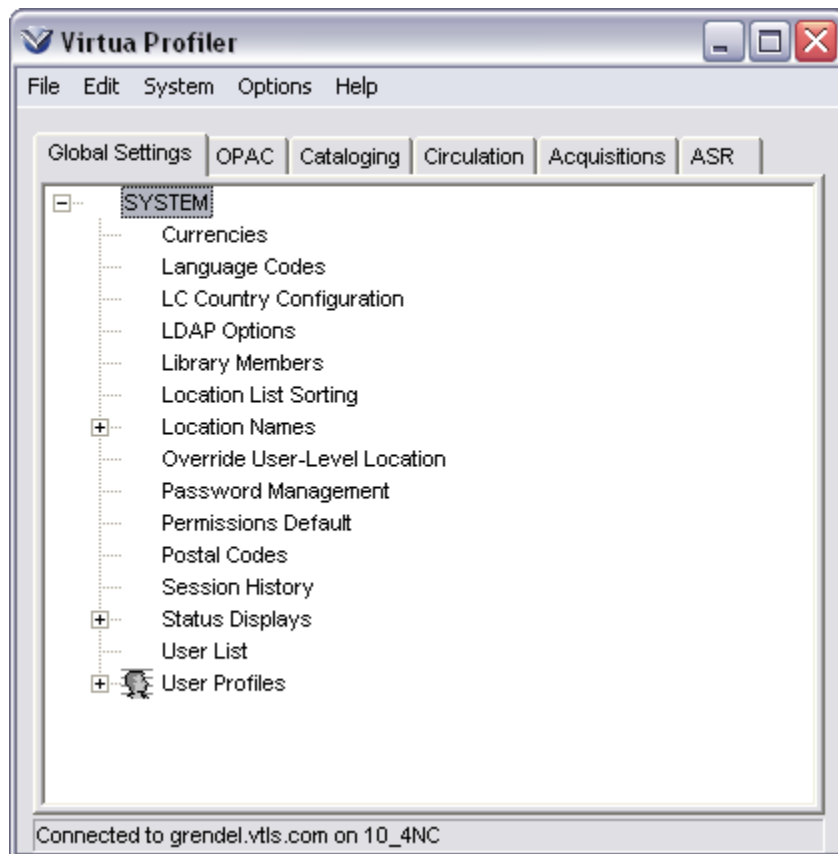


Figure 1-5. Global Settings Tab

For details on configuring these parameters, see the *Virtua Profiler/Global Settings User's Guide*.

Note: Library locations are an integral part of your of your Circulation parameters. Therefore, before you configure your Circulation parameters, it is especially important that you configure the Location Names parameter.

After you have configured your Global Settings, you can configure your Circulation parameters in the order of your choice. We recommend, however, that you set up ALL your item classes and patron types *before* you configure the . . .

- Alerts and Blocks Matrix
- Location + Patron + Item Matrix
- Location + Patron Matrix
- Location + Item Matrix
- Check-out Limits parameter

If you do not configure your item classes and patron types first, each time you add a new item class or patron type to the database, you will also need to set the values in any parameter that uses the new item class or patron type.

Important: In order for your Circulation system to work properly, you *must* set ALL the combinations in each of the Circulation matrices: Location + Patron + Item, Location + Patron, and Location + Item. You can run the script **CheckCircParameters.sh** to determine if any of the combinations in the Circulation matrices have not yet been set. For details, see the *Virtua System Management: Circulation User's Guide*.

- For details on configuring item classes, see the section “[Working with Item Class Definitions](#)” in this guide.
- For details on configuring patron types, see the chapter “[Working with the Patron Types Parameter](#)” in this guide.
- For details on working with the Circulation matrices, see the sections “[Working with the Location + Item Matrix](#),” “[Working with the Location + Patron Matrix](#),” and “[Working with the Location + Patron + Item Matrix](#)” in this guide.

2. Working with the Location + Item Matrix

The Location + Item Matrix lets you define location-specific library policies for each item class that you have defined. Using the Location + Item Matrix, you can set the following values for each Shelving Location/Item Class combination in your library:

- [Library calendar](#)
- [Pickup location for requests](#)
- [Due at closing policies](#)
- [Item replacement cost at billing](#)
- [Default item price](#)
- [Accrual of fines during non-operating hours](#)
- [Amount of time allowed for picking up holds](#)
- [Default preparation, inspection, and booking times for use with item booking](#)
- [Default and minimum booking times for materials](#)
- [Authorization for renewals within X amount of time of due date setting](#)
- [Minimum and maximum floating item count thresholds](#)

Once you have set the desired values in the matrix, you have options for applying those values, singly or in batch, to other location and item combinations

Important: In order for your Circulation system to work properly, you *must* set ALL the combinations in each of the Circulation matrices: Location + Patron + Item, Location + Patron, and Location + Item. You can run the script **CheckCircParameters.sh** to determine if any of the combinations in the Circulation matrices have not yet been set. For details, see the *Virtua System Management: Circulation User's Guide*.

This chapter covers the following topics:

- ⇒ [Accessing Location/Item Combinations](#)
- ⇒ [Settings on the Item Info Tab](#)
- ⇒ [Applying Settings to Other Matrix Combinations](#)

2.1 Accessing Location/Item Combinations

To access a specific location/item class combination in the Location + Item Matrix,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).
3. Double-click Location + Item.

The tree expands to display a list of main locations (*Figure 2-1*).

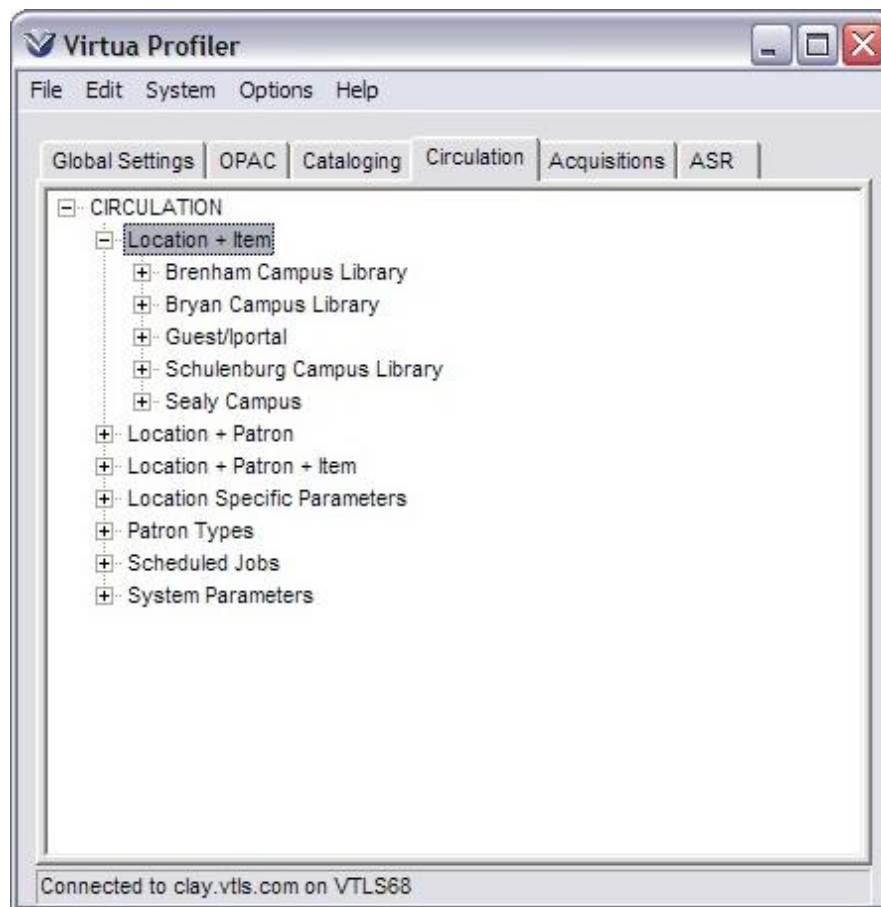


Figure 2-1. Location + Item Parameter Expanded to Show Main Locations

This list of main locations comes from the Location Names parameter, which you configure on the Global Settings tab. For details, see the *Virtua Profiler/Global Settings User's Guide*.

4. Double-click a location.

The tree expands to display a list of item classes configured for that location ([Figure 2-2](#)).

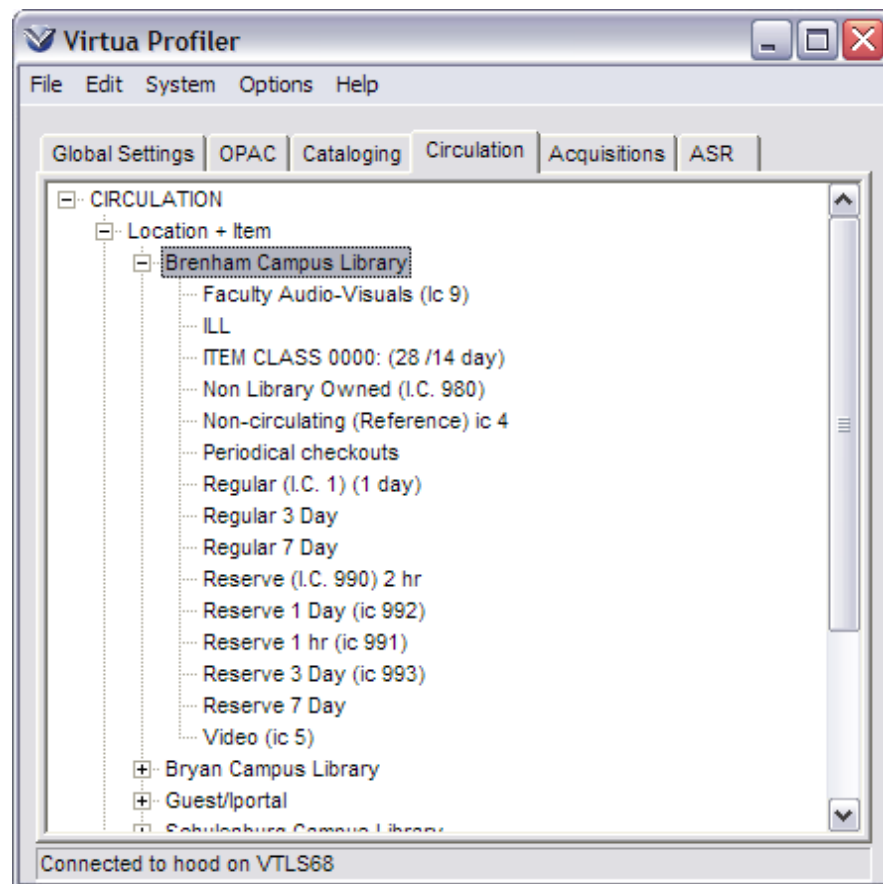


Figure 2-2. Location + Item Matrix Expanded to Show Item Classes

This list of item classes comes from those you defined in the Item Class Definitions parameter. For details, see the section “[Working with Item Class Definitions](#)” in this user’s guide.

5. Double-click an item class.

An appropriate Location + Item Matrix window appears, where you can set your values for that location/item combination ([Figure 2-3](#)).

The screenshot shows a software window titled "Arlington Library + Book Matrix" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window, there are two tabs: "Item Info" (selected) and "Lost/Damaged". The "Item Info" tab contains various configuration options for library items, organized into two columns. The left column lists the settings, and the right column contains the corresponding input fields, which are mostly dropdown menus or text boxes. At the bottom of the window, there are three buttons: "Apply To", "Save", and "Cancel".

Setting	Value
Calendar	Test Calendar
Must Pickup At Shelving Location	No
Items Circulating Less Than One Day Are Due At Closing	Yes
Items Circulating One Day Or More Are Due At Closing	No
Replacement Cost At Billing	Default Item Price (from LI matrix)
Default Item Price	\$30.00
Fines Accrue During Non-Operating Hours	No
Prep Time For Materials	0000 Days
Hold Pickup Time	5 Days
Inspection Time For Materials	15 Minutes
Default Booking Time For Materials	0000 Days
Minimum Booking Time For Materials	0000
<input checked="" type="checkbox"/> Allow Renewal Within	1 Days of Due Date.
Min floating item count threshold	0
Max floating item count threshold	999999999

Figure 2-3. Location + Item Matrix - Item Info Tab

2.2 Settings on the Item Info Tab

Each setting on the Item Info tab is described in detail below ([Figure 2-4](#)).

Arlington Library + Book Matrix

Item Info | Lost/Damaged

Calendar: Test Calendar

Must Pickup At Shelving Location: No

Items Circulating Less Than One Day Are Due At Closing: Yes

Items Circulating One Day Or More Are Due At Closing: No

Replacement Cost At Billing: Default Item Price (from LI matrix)

Default Item Price: \$30.00

Fines Accrue During Non-Operating Hours: No

Prep Time For Materials: 0000 Days

Hold Pickup Time: 5 Days

Inspection Time For Materials: 15 Minutes

Default Booking Time For Materials: 0000 Days

Minimum Booking Time For Materials: 0000

☒ Allow Renewal Within 1 Days of Due Date.

Min floating item count threshold: 0

Max floating item count threshold: 999999999

Buttons: Apply To, Save, Cancel

Figure 2-4. Location + Item Matrix Window - Item Info Tab

The settings on the Item Info window are:

- ⇒ [Library Calendar](#)
- ⇒ [Must Pick Up at Shelving Location Setting](#)
- ⇒ [Items Circulating Less Than One Day Are Due at Closing](#)
- ⇒ [Items Circulating One Day or More Are Due at Closing](#)
- ⇒ [Replacement Cost at Billing](#)
- ⇒ [Default Item Price](#)
- ⇒ [Fines Accrue During Non-Operating Hours](#)
- ⇒ [Prep Time For Materials](#)
- ⇒ [Hold Pickup Time](#)
- ⇒ [Inspection Time For Materials](#)
- ⇒ [Default Booking Time For Materials](#)
- ⇒ [Minimum Booking Time For Materials](#)
- ⇒ [Allow Renewal Within X Days of Due Date](#)
- ⇒ [Min Floating Item Count Threshold](#)
- ⇒ [Max Floating Item Count Threshold](#)

2.2.1 Library Calendar

From the Calendar drop-down list, select a library calendar. This list of library calendars comes from those you defined in the Library Calendars parameter.

A library calendar consists of one or more sets of library hours (as configured in the [Library Hours parameter](#)) and one or more sets of closed dates (as configured in the [Closed Dates parameter](#)). The Calendar setting determines which library calendar applies to this Shelving Location/Item Class combination.

For details on the Library Calendars parameter, see the section “[Working with the Library Calendars Parameter](#)” in this guide.

2.2.2 Must Pick Up at Shelving Location Setting

The Must Pick Up at Shelving Location setting determines whether a requested item must be picked up at its shelving location. When a patron’s request is satisfied, Virtua uses the Must Pick Up at Shelving Location setting to determine whether the item can be picked up at the patron’s selected shelving location, or whether it must be picked up at its shelving location.

From the Must Pick Up at Shelving Location drop-down list, choose either...

- **Yes** - A request for an item with this Shelving Location/Item Class combination must be picked up at the item's shelving location, even if a different Pickup Location was specified when the request was placed.
-OR-
- **No** - A request for an item with this Shelving Location/Item Class combination can be picked up at a location other than the item's shelving locations.

2.2.3 Items Circulating Less Than One Day Are Due at Closing

The setting that you choose for Items Circulating Less Than One Day Are Due at Closing applies to an item with a loan period of *less* than one day AND whose normal loan period would run past the closing time of the location.

This setting lets you determine whether an item circulating less than one day is due at closing on the day the item was checked out, OR one hour after opening on the next business day.

For this setting, you can choose either . . .

- **Yes** - All items with a normal loan period running past closing time are due at closing.
-OR-
- **No** - All items with a normal loan period running past the closing hour are due one hour after opening the next business day.

For example, if your library closes at 11:00 p.m. and an item has a three-hour Circulation period, when a patron checks out that item at 10:00 p.m., if Items Circulating Less Than One Day Are Due at Closing is set to . . .

- **Yes** - The item is due in one hour; that is, at the closing time of 11:00 p.m.
-OR-
- **No** - The item is due one hour after opening on the next business day.

2.2.4 Items Circulating One Day or More Are Due at Closing

The Items Circulating One Day or More Are Due at Closing setting applies to an item that has a normal loan period of one day or more.

This setting lets you determine whether an item circulating more than one day is due by closing on its due date OR on the due date, at the *same* time it was checked out.

For this setting you can choose either . . .

- **Yes** - All items that have a normal loan period of one day or more will be due at closing on their due date.
-OR-
- **No** - All items that have a normal loan period of one day or more will be due at on their due date at the same time they were checked out.

For example, for an item that circulates for 14 days and is checked out at noon on 1 May 2016, if Items Circulating One Day or More Are Due at Closing is set to . . .

- **Yes** - The item is due by closing on 15 May 2016.
-OR-
- **No** - The item is due at noon on 15 May 2016.

Note: If the due date falls on a closed day (as specified by the Closed Dates parameter), the item is due one hour after opening on the next open day. For details on setting the Closed Dates parameter, see the section “[Working with the Closed Dates Parameter](#)” in this user’s guide.

2.2.5 Replacement Cost at Billing

When a patron checks out an item and does not return it within the specified period of time, your library may want to bill the patron for the replacement cost of the item. When your library sends Bill notices to patrons via the Bills Report in InfoStation, Virtua will report the Billed Total Replacement Cost based on the value you choose in the Replacement Cost at Billing setting. You can choose one of three values as the replacement cost:

- **Default Item Price** as specified on the Item Info tab of the Location + Item Matrix.
-OR-

- **Price** of the item as specified in the item record.
-OR-
- **Total Replacement Cost** as calculated using the item price and the settings on the Lost/Damaged tab; see the section [“Setting Values on the Lost/Damaged Tab”](#) for information about these settings. Note also that this value appears on the Process Lost/Damaged Item window, which is displayed from the Activity tab of the Patron Information window.

Important: If Replacement Cost at Billing is set to **Price** but Virtua does NOT find an item price in the item record or the value is 0, Virtua uses the **Default Item Price** when assessing fines. Therefore, even if Replacement Cost at Billing is set to Price, Innovative recommends that you specify a value for the Default Item Price.

2.2.6 Default Item Price

The Default Item Price is used to calculate replacement costs when there is no price specified in the item record, or when the [Replacement Cost at Billing](#) setting is configured to “Default Item Price.”

To define a default item price, type a value in the text box.

2.2.7 Fines Accrue During Non-Operating Hours

The Fines Accrue During Non-Operating Hours setting lets you determine whether overdue fines accrue during the hours and on the days when the library is not open. If you set this value to . . .

- **Yes**, fines accrue while the library is closed.
-OR-
- **No**, fines do NOT accrue while the library is closed.

For details on setting up operating hours, see the section [“Working with the Library Hours Parameter”](#) in this guide. For details on setting up closed dates, see the section [“Working with the Closed Dates Parameter”](#) in this guide.

2.2.8 Prep Time For Materials

The Prep Time For Materials setting lets you define the period of time required to prepare items of a given item class for a scheduled item booking.

The Prep Time For Materials is specified in number of minutes, hours, or days. The Prep Time that you configure for a given item class is used as the default Prep Time when you schedule a booking for an item of that item class.

To configure the Prep Time For Materials, type a number in the text box, and select a unit of time from the drop-down list (Minutes, Hours, or Days).

2.2.9 Hold Pickup Time

The Hold Pickup Time setting specifies how long a particular location will hold an item for a patron after the requested item becomes available (i.e., trapped).

Generally, the longer the loan period, the longer the Hold Pickup Time will be. For example, an item circulating for two hours would have a shorter Hold Pickup Time than an item circulating for six months.

Note that Virtua considers closed dates when calculating the Hold Pickup Time. If the library is scheduled to be closed for one or more days (as specified in the Closed Dates parameter) during the hold pickup period, the hold pickup period is extended by the number of days the library will be closed.

To set the Hold Pickup Time, type a number in the text box and choose a unit of time (Minutes, Hours, Days, Years) from the drop-down list.

The Hold Pickup Time is used in two cases:

- If the *Update request expiration date at check-in* setting is disabled (see the section “[Updating the Request Expiration Date at Check-in](#)”) the request expiration date is reset to the Hold Pickup Time when an availability notice is generated for the requesting patron (via automatic e-mail notification, InfoStation, or **CircReport.exe**. For information on **CircReport.exe**, see the *System Management: Reporting User’s Guide*).
- If the *Update request expiration date at check-in* setting is enabled, when a requested item is checked in,
 - ◆ If the Hold Pickup Time is less than one day AND the new due date falls on a time the library is closed, the adjusted request expiration date will fall at the close of business the day before the new due date.
 - ◆ If the Hold Pickup Time is less than one day AND the new due date falls on a time that the library is open, the adjusted request expiration date will fall at the close of business the day of the new due date.
 - ◆ If the Hold Pickup Time is greater than or equal to one day AND the new due date falls on a time when the library is open, the request expiration date is changed to the next closing time.
 - ◆ If the Hold Pickup Time is greater than or equal to a day AND the new due date falls on a time when the library is closed, the request expiration date is changed to the next closing time, taking into account external closed dates.

2.2.10 Inspection Time For Materials

The Inspection Time For Materials setting lets you define the period of time required to inspect items of a given item class for possible damage after a scheduled item booking.

To configure the Inspection Time For Materials setting, type a number in the text box and select a unit of time from the drop-down list (Minutes, Hours, or Days).

2.2.11 Default Booking Time For Materials

The Default Booking Time For Materials setting lets you define the default period of time for which an item is booked when you schedule an item booking for items of this class.

The Default Booking Time For Materials is specified in number of minutes, hours, or days. This setting must be set to a value other than zero to enable Item Bookings in the Virtua client.

For details on working with Item Booking in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

2.2.12 Minimum Booking Time For Materials

The Minimum Booking Time For Materials setting defines the shortest duration that can be scheduled for a booking. When there is not enough time to place a booking for the Default Booking Time For Materials, the Virtua client will try to schedule a booking period that is shorter than the [Default Booking Time For Materials](#) but at least as long as the Minimum Booking Time For Materials.

To configure the Minimum Booking Time For Materials, type a number in the text box, and select a unit of time from the drop-down list (Minutes, Hours, or Days).

2.2.13 Allow Renewal Within X Days of Due Date

The Allow Renewal Within X Days of Due Date setting lets you define the maximum number of days before a due date that renewals will be allowed. Enabling this setting can ensure that patrons will not renew an item immediately after checking it out.

If the Allow Renewal Within X Days of Due Date check box is . . .

- **Selected**, the number in the text box defines the maximum number of days before which patrons can renew an item. Select your desired number of days by typing a number in the text box.

For instance, if the Allow Renewal Within X Days of Due Date check box is selected and 3 is the number in the text box, a patron will not be allowed to renew an item 4 or more days before the item's due date.

Note: This number only defines the number of days *before* the due date an item can be renewed; it does NOT place a limit on the number of days *after* an item's due date that the item can be renewed.

- **Not selected**, Virtua will follow other existing circulation rules to determine whether a renewal is allowed.

2.2.14 Min Floating Item Count Threshold

The “Min floating item count threshold” defines the minimum number of items of this class that have this location as their shelving location before designated items can “float,” or be assigned their most recent check-in location as their shelving location.

This setting can ensure that the library never has too few items of a given class on its shelves.

To set the Min floating item count threshold, type a number in the text box.

When the number of items of this class that have the current location as their shelving location reaches this minimum threshold, Virtua will not permit any more items to float; i.e., to be assigned new shelving locations with each check-in.

Note that a value of 999 999 999 means that this location will always allow items of the current class to float, and a value of 0 means that this location will never allow items of the current class to float.

Note: While this setting sets limits on items of the specified class, floating items are enabled via the Add/Modify Main Location window on the Global tab in the Virtua Profiler, where there is also an overall limit on the number of floating items permitted at each location. See the *Virtua Profiler/Global Parameters User's Guide* for more information on these settings.

2.2.15 Max Floating Item Count Threshold

The “Max floating item count threshold” setting lets you define the number of floating items of this class that can be shelved at this location. This location will only accept floating items with this item class from other locations if the location has less than the specified number of items of this class on its shelves. When the Max floating item count threshold is reached, this location will no longer allow floating items to be assigned this location as their shelving location.

This setting can ensure that a library branch never has too many items of a given item class on its shelves.

To set the Max floating item count threshold, type a number in the text box.

When this number of items of the current class have the current location as the shelving location, Virtua will route any further floating items to the items' owning location.

Note that a value of 999 999 999 means that this location will always accept floating items of the current class, and a value of 0 means that this location will never accept floating items of the current class.

Note:

- While this setting sets a limit on items of the specified class, there is an overall limit on the number of floating items accepted at each location that is set on the Add/Modify Main Location window on the Global tab in the Virtua Profiler. See the *Virtua Profiler/Global Parameters Settings Guide* for information about this setting.
- If a floating item is checked in to its previous shelving location, the item will always be accepted at that location, even if the “Max floating item count threshold” has been reached.

2.3 Setting Values on the Lost/Damaged Tab

In the client, Virtua will use the values you set on the Lost/Damaged tab of the Location + Item Matrix ([Figure 2-5](#)) to calculate the total price billed to a patron’s account to replace a lost or damaged item.

The default values you configure here will appear on the Process Lost/Damaged Item window that appears when you click the Lost button or Damaged button on the Activity tab of the Patron Information window. You will be able to edit the values on the Process Lost/Damaged Item window. You will also be able to see the values on the Acquisitions tab of the Item Information window in the client.

Bryan Campus Library + Regular 3 Day Matrix

Item Info **Lost/Damaged**

☒ Use Depreciation Rate
 Depreciation Rate: 0.00 % Per Year

Maximum Depreciation: 100.00 %

☒ Use Binding Cost
 Binding Cost: \$0.00

☒ Use Lamination Cost
 Lamination Cost: \$0.00

Surcharge: 0.00 %

Apply To Save Cancel

Last modified at 4/11/2011 10:34:46 AM by Root User

Figure 2-5. Location + Item Matrix - Lost/Damaged Tab

To set the values on the **Lost/Damaged** tab for the location/item class combination, do the following:

1. If you want Virtua to use the default depreciation rate percentage specified in the Depreciation Rate field to calculate the replacement cost of lost or damaged items, select the **Use Depreciation Rate** check box.

Note: If the Use Depreciation Rate check box is not selected, the Depreciation Rate field is considered null, or "not set." Virtua requires a Depreciation Rate value in order for an item to be successfully reported as lost or damaged. If the Use Depreciation Rate check box is not selected, a depreciation rate must be specified by editing the Process Lost/Damaged Item window in the Virtua client.

2. In the **Depreciation Rate: __% Per Year** field, specify the rate per year at which the item depreciates from its original invoice price. A depreciation rate of 0 is allowed.
3. In the **Maximum Depreciation: __%** field, specify the maximum allowed percentage of depreciation for the item. For instance, you could specify that an item will not depreciate beyond 50 percent of its original invoice price. If this value is not set, the Virtua client will use 100 percent.
4. If you want Virtua to use the default binding cost specified in the Binding Cost field to calculate the replacement cost of lost or damaged items, select the **Use Binding Cost** check box.

Note: If the Use Binding Cost check box is not selected, the Binding Cost field is considered null, or "not set." Virtua requires a Binding Cost value in order for an item to be successfully reported as lost or damaged. This value can be zero. If the Use Binding Cost check box is not selected, a binding cost must be specified by editing the Process Lost/Damaged Item window in the Virtua client.

5. In the **Binding Cost** field, specify the cost of the item's binding.
6. If you want Virtua to use the default lamination cost specified in the Lamination Cost field to calculate the replacement cost of lost or damaged items, select the **Use Binding Cost** check box.

Note: If the Use Lamination Cost check box is not selected, the Lamination Cost field is considered null, or "not set." Virtua requires a Lamination Cost value in order for an item to be successfully reported as lost or damaged. This value can be zero. If the Use Lamination Cost check box is not selected, a lamination cost must be specified by editing the Process Lost/Damaged Item window in the Virtua client.

7. In the **Lamination Cost** field, specify the cost of the item's lamination.
8. In the **Surcharge: __%** field, specify the surcharge that will be applied to a lost or damaged item.

2.4 Applying Settings to Other Matrix Combinations

To help you set up your Circulation matrices more easily and efficiently, the Virtua Profiler offers the Apply To feature. Using this feature, you can apply ALL settings for a particular Location + Item Matrix or an individual setting on the Location + Item matrix to other Shelving Location/Item Class combinations that have already been configured.

To apply the configuration for ALL settings in the matrix to other Shelving Location/Item Class combinations,

1. On the Location + Item Matrix window, on each tab, set the values that you want to apply to other Shelving Location/Item Class combinations.
2. Click the Apply To button.

The Apply Settings window appears ([Figure 2-6](#)).

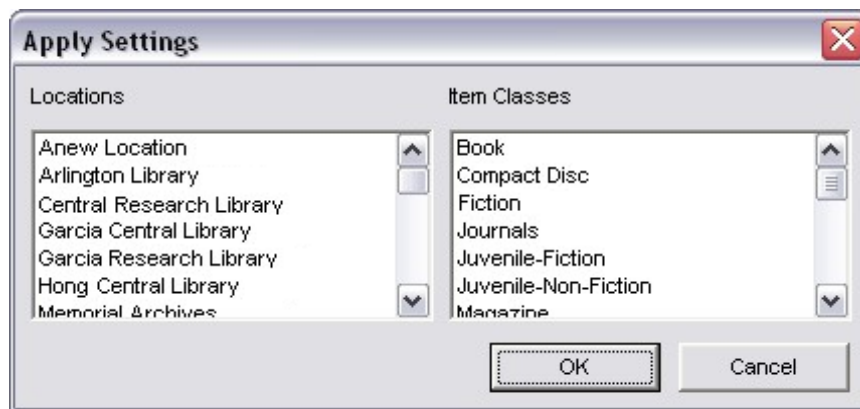


Figure 2-6. Apply Settings Window for Location + Item Matrix

3. Choose the Shelving Location/Item Class combinations to which you want to apply the current settings (see the example below).
 - In the Locations list box select one or more locations.
 - In the Item Classes list box select one or more item classes.

Hints:

- To select a group of adjacent items in a list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in a list, hold down the CTRL key, and highlight the desired items.

4. When you are finished choosing combinations, click OK.

The settings for the current Location + Item Matrix window are applied to the combinations you selected on the Apply Settings window.

Note:

- You do NOT need to save the current matrix values before applying them to other matrix combinations.
- After you apply settings to other Shelving Location/Items Class combinations, you can modify the values as needed.
- Settings on the current Location + Item Matrix window are NOT applied to the current Shelving Location/Item Class combination until you click the Save button.

For example, [Figure 2-7](#) shows the Apply Settings window. In [Figure 2-7](#), notice that additional Location + Item Class combinations have been selected.

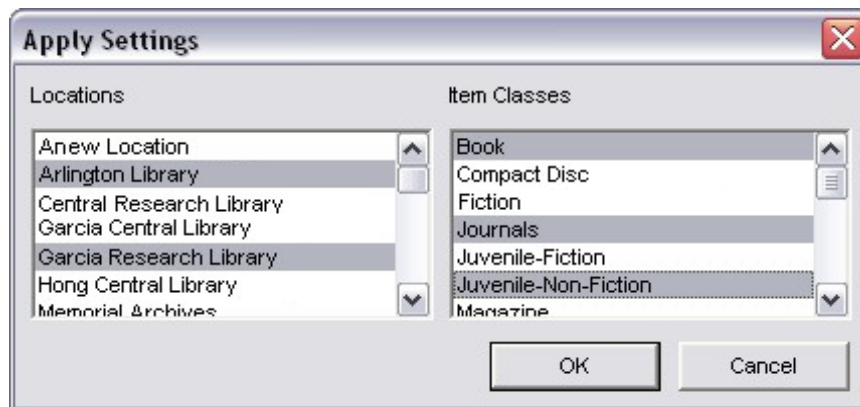


Figure 2-7. Apply Settings window: Additional Location + Item Combinations Chosen

For the example above, when we click OK, the values set on the Location + Item Matrix window will be applied to the following combinations:

- Arlington Library + Books
- Arlington Library + Journals
- Arlington Library + Juvenile Non-Fiction
- Garcia Research Library + Books
- Garcia Research Library + Journals
- Garcia Research Library + Juvenile Non-Fiction

To apply the configuration for a single setting in the matrix to other Shelving Location/Item Class combinations,

- Right-click on the desired setting and select the Apply To link. The Apply Setting window appears.

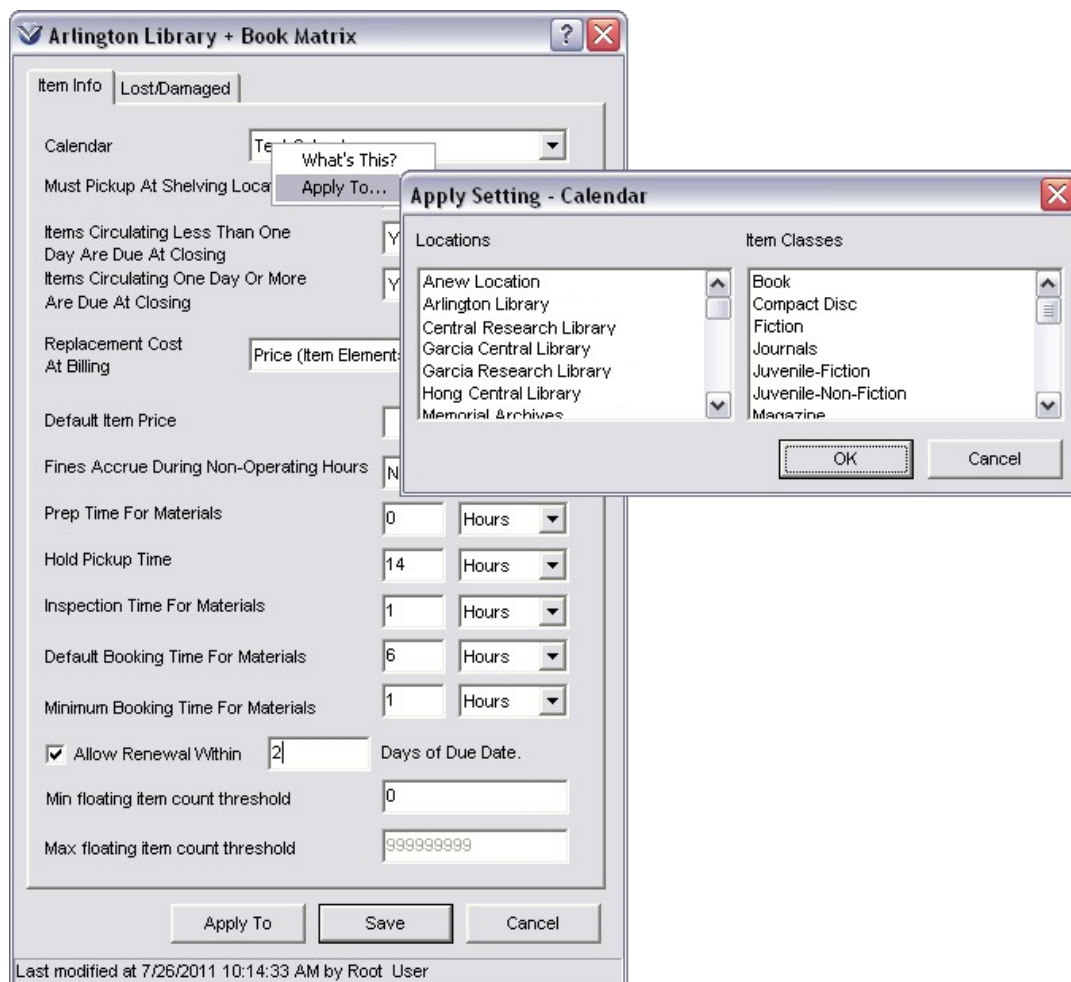


Figure 2-8. Applying Single Location + Item Setting to Other Location + Item Combinations

Use the process described above to select location and item class combinations to which you want to apply the value for the selected setting, and click the OK button.

3. Working with the Location + Patron Matrix

The Location + Patron Matrix gives you the flexibility to reflect local library policies for each patron type that you have defined. Using the Location + Patron Matrix, you can set the following values for each Shelving Location/Patron Type combination in your library:

- [Default date and time for fixed check-outs](#)
- [The default expiration date for the patron record](#)
- [The default delete date for the patron record](#)
- [Values that determine the processing fee](#)
- [The amount of the item price fee that remains at check-in and whether this fee is used to calculated blocks](#)
- [Request-related permissions](#)

This chapter covers the following topics:

- ⇒ [Setting Values in the Location + Patron Matrix](#)
- ⇒ [Descriptions of Location + Patron Matrix Settings](#)
- ⇒ [Applying Settings to Other Matrix Combinations](#)

3.1 Setting Values in the Location + Patron Matrix

This section provides step-by-step instructions for setting values in the Location + Patron Matrix. For detailed descriptions of the settings available in the Location + Patron Matrix, see the section “[Descriptions of Location + Patron Matrix Settings](#)” in this chapter.

Important: In order for your Circulation system to work properly, you *must* set ALL the combinations in each of the Circulation matrices: Location + Patron + Item, Location + Patron, and Location + Item. You can run the script **CheckCircParameters.sh** to determine if any of the combinations in the Circulation matrices have not yet been set. For details, see the *Virtua System Management: Circulation User's Guide*.

To set values in the Location + Patron Matrix,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).
3. Double-click Location + Patron.

The parameter expands to display a list of main locations (*Figure 3-1*).

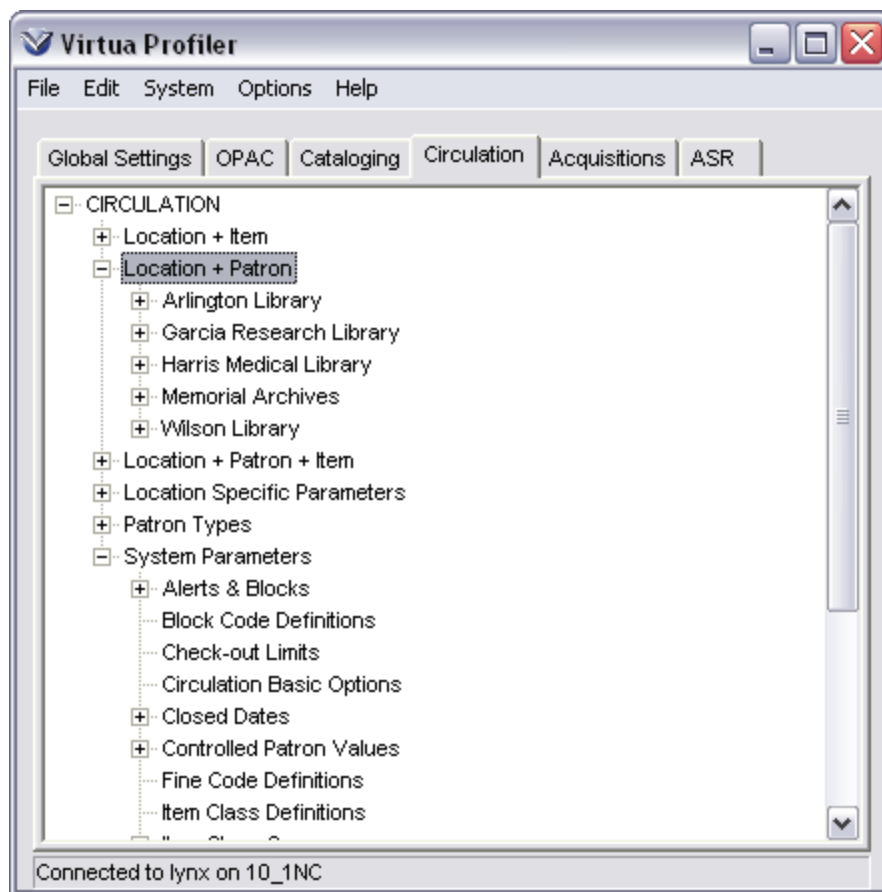


Figure 3-1. Location + Patron Parameter Expanded to Show Main Locations

This list of main locations comes from the Location Names parameter, which you configure on the Global Settings tab. For details, see the *Virtua Profiler/Global Settings User's Guide*.

4. Double-click a location.

The tree expands to display a list of patron types (*Figure 3-2*).

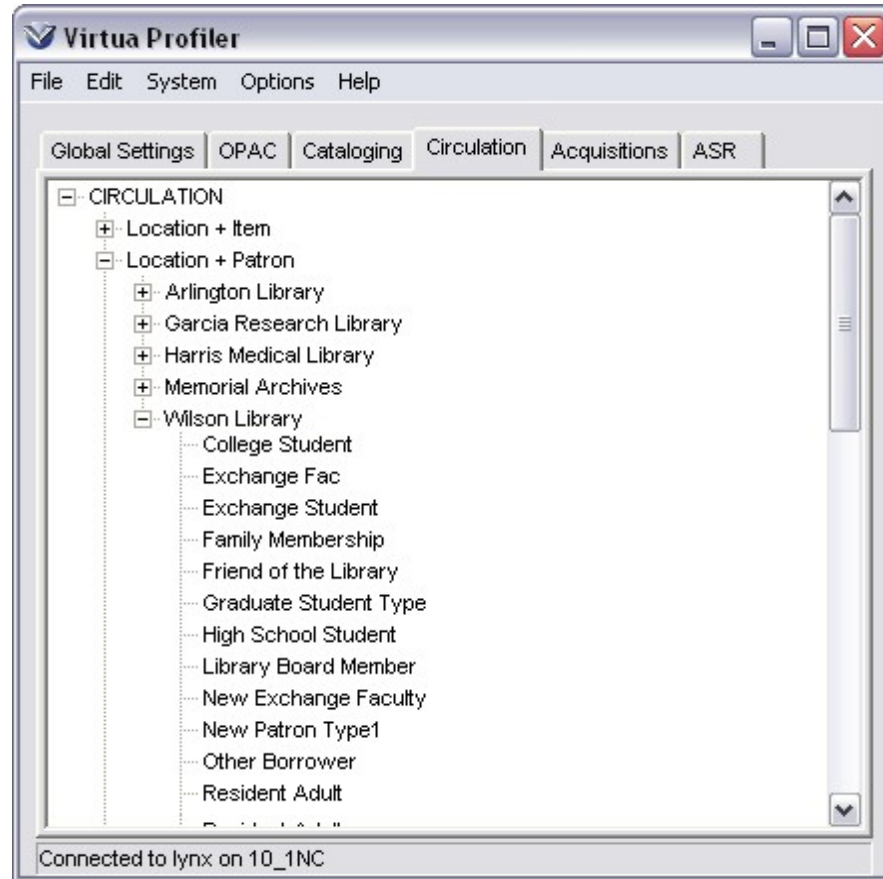


Figure 3-2. Location + Patron Parameter Expanded to Show Patron Types

This list of patron types comes from those you defined in the Patron Types parameter. For details, see the chapter “[Working with the Patron Types Parameter](#)” in this user’s guide.

5. Double-click a patron type.

An appropriate Location + Patron Matrix window appears, where you can set your values. For example, if we double-click College Student under the Wilson Library heading, the Wilson Library + College Student Matrix window appears (*Figure 3-3*).

Wilson Library + College Student Matrix

Default Date: 4/20/2010

Default Time: 2:00:00 PM

Processing Fee
 Fee: 35.00\$
 Canceled At Check-in: 25.00\$
 Used For Block: No

Item Price Fee
 Remains At Check-in: .00\$
 Used For Block: No

Patron Expiration
☒ Period: 5 Years
☐ Fixed Date: 5/ 7/2010
☐ Time of Day: 12:00:00 AM

Patron Delete
☒ Period: 5 Years
☐ Fixed Date: 5/ 7/2010
☐ Time of Day: 12:00:00 AM

Hold Allowed When Available Item Exists At Log-in Location: Yes

Hold Allowed When Available Item Exists At Another Location: Yes

Allow requests for Bibs without Items: Yes, for k

Apply To Save Cancel

Last Modified 3/19/2010 11:32:30 AM

Figure 3-3. Location + Patron Matrix Window

6. Set the Default Date. You can either . . .
 - Type a date in the Default Date text box.
 - OR-
 - Select a date with the pop-up calendar.
7. Set the Default Time. You can either . . .
 - Type a time in the Default Time text box.
 - OR-
 - Select a time using the arrows on the right of the text box.
8. In the Fee text box, type the amount of the processing fee to be used for billing.
9. In the Canceled at Check-in text box, type the amount of processing that you want to be canceled when an overdue item is checked in.

10. In the Processing Fee Used for Block list box, choose either . . .
 - **Yes** - When calculating system blocks, Virtua uses the processing fees charged to a patron.
 - OR-
 - **No** - When calculating system blocks, Virtua does NOT use the processing fees charged to a patron.
11. In the Remains at Check-in text box, type the amount of the item price fee that you want to remain when the patron returns an overdue item.
12. In the Item Price Fee Used for Block drop-down list, choose either . . .
 - **Yes** - When calculating system blocks, Virtua uses the item price fees charged to a patron.
 - OR-
 - **No** - When calculating system blocks, Virtua does NOT use the item price fees charged to a patron.
13. Set a value for the Patron (Record) Expiration Period or the Patron (Record) Expiration Fixed Date.
 - Select the Period radio button.
 - ◆ In the text box, type a value.
 - ◆ From the drop-down list, choose Minutes, Hours, Days, or Years.
 - OR-
 - Select the Fixed Date radio button.
 - ◆ Click the arrow in the drop-down list.
 - ◆ Choose a date on the calendar.
14. If desired, set a value for the Time of Day that applies to the Patron (Record) Expiration Period or the Patron (Record) Expiration Fixed Date.
 - Select the Time of Day check box.
 - Select a time using the arrows on the right of the text box.

Note: The Time of Day setting is optional. If you do not specify a Time of Day,

- The Patron (Record) Expiration Period is calculated by adding the specified period to the date and time when the Location + Patron Matrix is saved.
- OR-
- The Patron (Record) Expiration Fixed Date takes effect at midnight at the start of the date specified.

15. Set a value for the Patron (Record) Delete Period or the Patron (Record) Delete Fixed Date.

- Select the Period radio button.
 - ◆ In the text box, type a value.
 - ◆ From the drop-down list, choose Minutes, Hours, Days, or Years.

-OR-

- Select the Fixed Date radio button.
 - ◆ Click the arrow in the drop-down list.
 - ◆ Choose a date on the calendar.

16. If desired, set a value for the Time of Day that applies to the Patron (Record) Delete Period or the Patron (Record) Delete Fixed Date.

- Select the Time of Day check box.
- Select a time using the arrows on the right of the text box.

17. Set Hold Allowed When Available Item Exists at Log-in Location to either . . .

- **Yes** - A hold request is allowed at the log-in location.
- OR-
- **No** - A hold request is NOT allowed if Virtua finds an available item at the log-in location.

18. Set Hold Allowed When Available Item Exists at Another Location to either . . .

- **Yes** - A hold request is allowed and is placed against an *available* item at a non-log-in location.
- OR-
- **No** - A hold request is NOT allowed if Virtua finds an available item at a non-log-in location.

19. Set Allow Request for Bibs Without Items to either . . .

- **Yes, for all bibs without items** - A hold request is allowed and is placed against incoming items as they are cataloged.

- **Yes, for bibs with an On Order date (369 tag subfield \$b)** - A hold request is allowed for bibliographic records without items ONLY if the 369 tag subfield \$b is populated with an on order date, suggesting that an item has been ordered. The request is placed against the incoming items as they are cataloged.
 - OR-
 - **No** - A hold request is NOT allowed on bibliographic records if there are no attached items.
20. If you like, click the Apply To button to apply these settings to other Shelving Location/Patron Type combinations. For details, see the section “[Applying Settings to Other Matrix Combinations](#)” in this chapter.
21. When you are finished setting matrix values, click the Save button.

Your settings are saved to the database.

3.2 Descriptions of Location + Patron Matrix Settings

In the following sections, we describe each setting that appears on the Location + Patron Matrix ([Figure 3-3](#)), and we offer guidelines for choosing appropriate values. For details on setting values in the Location + Patron Matrix, see the previous section in this chapter.

3.2.1 About Setting the Default Date and Time

The Default Date and Default Time designate the default due date and time for a Fixed Time and Date check-out. The values that you set for the Default Date and Default Time appear in the Fixed Time and Date fields on the Check Out/Renew window ([Figure 3-4](#)) in the Virtua client.

Check Out/Renew - VTLIS Library - Wilson Library - Audiovisuals - 80199 - Retriever ...

Patron Check-outs | Patron Limits

Patron: 80199
 barcode:
 Name: Retriever 19600202
 Patron type: Resident Faculty
 Home library: Wilson Library -- code: 10000
 Registering: Wilson Library -- 10000
 Library:
 Primary: 111 Doghouse Lane, 24153 Salem VA USA
 Address:

Information
 Fines: 7.80\$
 Requested: 0
 Overdue: 2
 Billed: 0
 Last Item:
 Category Limit:

Check-out Type
☒ Regular
☐ Fixed Time: 2:00 PM Date: 4/1/2011
☐ In-house
☐ Selected Time: 2:37:12 PM Date: 5/7/2010

Item Barcode	Title	Due Date/Time	Shelf Location

☐ Print Receipts
☒ After Each Item ☐ When Check-outs Are Complete

☐ Remember Last Check-out Type

Item Barcode:

Print Check Out

Figure 3-4. Check Out/Renew Window Displaying Default Date and Time

Note: For Fixed Time and Date check-outs and renewals, Virtua uses the Location + Patron Matrix for your log-in location.

When you set the Default Date and the Default Time, use the following guidelines:

- Any valid future date is allowed for the Default Date.
- Any valid time entered on the 24-hour clock is allowed for the Default Time.
- The Virtua client uses local regional settings to determine the display of the date and time.

3.2.2 Working With Processing Fees

Via the Location + Patron Matrix, you can set the following processing fee values:

- Processing fee amount.
- Amount of processing fee canceled at check-in.
- Whether the processing fee is used in calculating blocks.

3.2.2.1 About Setting the Processing Fee Amount

In the Fee text box on the Location + Patron Matrix window, you can specify the total processing fee that a patron is assessed when an overdue item is billed for replacement. Generally, the fee is determined by . . .

- The cost in staff time.
- The amount paperwork required to process the bill for the patron.
- The cost of replacing or withdrawing the item.

The processing fee is assessed in addition to the replacement cost of the item. For details on determining the replacement cost of an item, see the section “[About Item Replacement Values](#)” in this user’s guide.

3.2.2.2 Amount of Processing Fee Canceled at Check-in

The Processing Fee Canceled at Check-in specifies the portion of the original processing fee that is deducted from the total fee if the item is returned. Since items are often returned *after* the patron is billed, you can use this setting to recover some of the cost in processing bills.

Note: The amount you specify for the Processing Fee Canceled at Check-in is deducted *only* from processing fees added to patron accounts automatically via a Bill notice. Any processing fee added manually via the Fine Adjustment Wizard must also be deleted manually.

3.2.2.3 Processing Fee Used for Blocks

The Processing Fee Used for Blocks setting determines whether Virtua uses the processing fees charged to a patron when calculating system blocks.

For this setting, you can choose either...

- **Yes** - When calculating system blocks, Virtua uses the processing fees charged to a patron.
- OR-
- **No** - When calculating system blocks, Virtua does NOT use the processing fees charged to a patron.

For more information on system blocks, see the section “[Working with the Alerts and Blocks Matrix](#)” in this user’s guide.

3.2.3 Working with the Item Price Fee Parameters

Via the Location + Patron Matrix, you can define two settings related to item price:

- **Item Price Fee Remains at Check-in** - The amount of the item price fee that remains on the patron’s account even if the item is returned. It is intended to let your library keep some of the replacement cost of the item.

Note: The Item Price Fee Remains at Check-in applies *only* to item price fees added to patron accounts automatically via a Bill notice. Any item price fees added manually via the Fine Adjustment Wizard must also be modified manually.

- **Item Price Fee Used for Blocks?** - Determines whether Virtua uses item price fees charged to a patron in calculating system blocks. For Item Price Fee Used for Blocks, you can choose either . . .
 - ♦ **Yes** - When calculating system blocks, Virtua uses the item price fees charged to a patron.
 - OR-
 - ♦ **No** - When calculating system blocks, Virtua does NOT use the item price fees charged to a patron.

3.2.4 Working with Patron Record Settings

Via the Location + Patron Matrix, you can set values related to the expiration or deletion of patron records.

3.2.4.1 Patron (Record) Expiration Settings

In the Patron Expiration area of the Location + Patron Matrix, you can select one of the following radio button options:

- **Period** - Defines the default period for which a patron record is valid. The Patron Record Expiration Period consists of . . .

- A number.
- A unit of time (minutes, hours, days, or years).
- **Fixed Date** - Specifies a fixed date on which the patron record expires. The Patron Record Expiration Fixed Date consists of a date, which you select from a calendar.

Based on the period or fixed date you specify, Virtua automatically calculates an expiration date for new patron records as they are created. You can modify the expiration date in specific patron records as needed.

Note: In most cases, the Patron Record Expiration Period is added to the record creation date to determine when the patron record expires. For example, if the Patron Record Expiration Period is five years, patron records created in the year 2003 will expire in the year 2008. If you choose a Patron Record Expiration Period that would cause a patron record to expire beyond the year 9999, however, the expiration year is rounded down to 9999.

You can also set the time of day that applies to the Patron Record Expiration Period or the Patron Record Expiration Fixed Date.

- Note:** The Time of Day setting is optional. If you do not specify a Time of Day,
- The Patron Record Expiration Period is calculated by adding the specified period to the date and time when the Location + Patron Matrix is saved.
 - OR-
 - The Patron Record Expiration Fixed Date takes effect at midnight at the start of the date specified.

3.2.4.2 Patron (Record) Delete Settings

In the Patron Delete area of the Location + Patron Matrix, you can select one of the following radio button options:

- **Period** - Defines the period of time before an expired patron record is considered for deletion from the database by a batch program. The Patron Record Delete Period consists of . . .
 - A number.
 - A unit of time (minutes, hours, days, or years).

- **Fixed Date** - Specifies a fixed date on which the patron record is considered for deletion from the database by a batch program. The Patron Record Delete Fixed Date consists of a date, which you select from a calendar.

You can also set the time of day that applies to the Patron Record Delete Period or the Patron Record Delete Fixed Date.

Note: The Time of Day setting is optional. If you do not specify a Time of Day,

- The Patron Record Delete Period is calculated by adding the specified period to the date and time when the Location + Patron Matrix is saved.
- OR-
- The Patron Record Delete Fixed Date takes effect at midnight at the start of the date specified.

3.2.5 Determining If Holds Are Allowed on Items Available at the Log-in Location

The Hold Allowed When Available Item Exists at Log-in Location setting lets you specify whether you allow a hold request when an available item exists at the patron's log-in location (i.e., the location from which the request is being placed). You can set Hold Allowed When Available Item Exists at Log-in Location to either . . .

- **Yes** - A hold request is allowed when an available item exists at the patron's log-in location, and Virtua will place the hold against the *available* item.
- OR-
- **No** - A hold request is NOT allowed if Virtua finds an available item at the patron's log-in location.

3.2.6 Determining If Holds Are Allowed on Items Available at Non-log-in Locations

Using the setting Hold Allowed When Available Item Exists at Another Location setting, you can specify whether a hold request is allowed when an available item (which does not qualify for a page or loan) exists at a location other than the location at which the request is being placed. You can set Hold Allowed When Available Item Exists at Another Location to either. . .

- **Yes** - A hold request is allowed when an available item exists at a non-log-in location, and Virtua will place the hold against the *available* item.

-OR-

- **No** - A hold request is NOT allowed if Virtua finds an available item at the non-log-in location.

3.2.7 Determining If Holds Are Allowed on Bibliographic Records Without Items

Using the setting Allow Request for Bibs Without Items, you can specify whether a user logged in to this location may place a hold request on a bibliographic record that has NO items attached. You can set Allow (Hold) Request for Bibs Without Items to either . . .

- **Yes** - A hold request is allowed and is placed against incoming items as they are cataloged.

-OR-

- **No** - A hold request is NOT allowed on bibliographic records if there are no attached items

Notes:

- If an item is added to the bibliographic record during the Request Period, the item is trapped upon cataloging.
- In order to allow a bibliographic-level request for a title when the item is attached to a holdings record rather than a bibliographic record, this parameter must be set to Yes.

3.3 Applying Settings to Other Matrix Combinations

To help you set up your Circulation matrices more easily and efficiently, the Virtua Profiler offers the Apply To feature. Using this feature, you can apply settings for a particular Location + Patron Matrix to other Shelving Location/Patron Type combinations.

To apply matrix settings to other Shelving Location/Patron Type combinations,

1. On the Location + Patron Matrix window, set the values that you want to apply to other Shelving Location/Patron Type combinations.
2. Click the Apply To button.

The Apply Settings window appears (*Figure 3-5*).

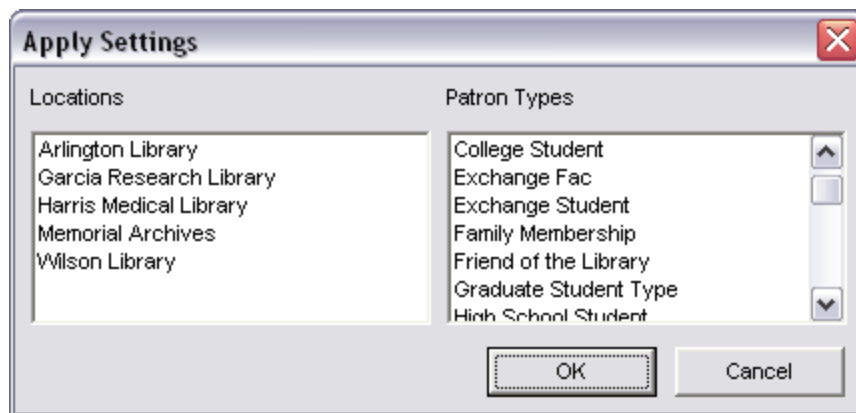


Figure 3-5. Apply Settings Window for Location + Patron Matrix

3. Choose the Shelving Location/Patron Type combinations to which you want to apply the current settings (see below for an example).
 - In the Locations list box, select one or more locations.
 - In the Patron Types list box, select one or more patron types.

Hints:

- To select a group of adjacent items in a list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in a list, hold down the CTRL key, and highlight the desired items.

4. When you are finished choosing combinations, click OK.

The settings for the current Location + Patron Matrix window are applied to the combinations you selected on the Apply Settings window.

Note:

- You do NOT need to save the current matrix values before applying them to other matrix combinations.
- After you apply settings to other Shelving Location/Patron Type combinations, you can modify the values as needed.
- Settings on the current Location + Patron Matrix window are NOT applied to the current Shelving Location/Patron Type combination until you click the Save button.

For example, [Figure 3-6](#) shows the Apply Settings window, which we accessed from the Wilson Library + Resident Faculty Matrix window. In [Figure 3-6](#), notice that we have selected additional Location + Patron Class combinations.

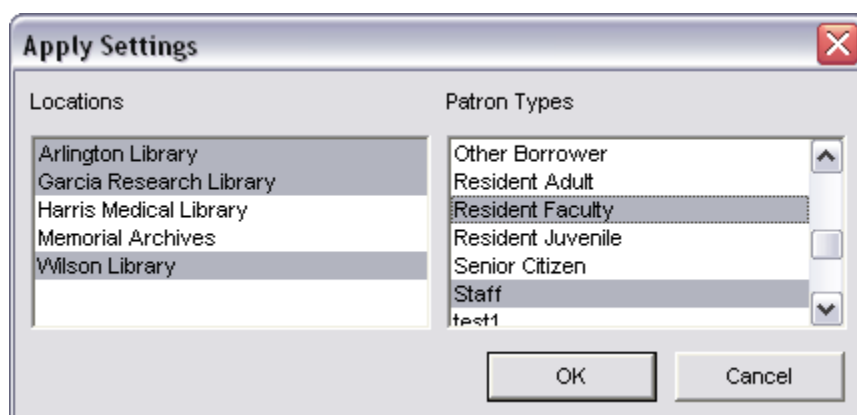


Figure 3-6. Apply Settings window: Additional Location + Patron Combinations Chosen

For the example above, when we click OK, the values we set on the Wilson Library + Resident Faculty Matrix window will be applied to the following combinations:

- Wilson Library + Resident Faculty
- Wilson Library + Staff
- Arlington Library + Resident Faculty
- Arlington Library + Staff
- Garcia Research Library + Resident Faculty
- Garcia Research Library + Staff

4. Working with the Location + Patron + Item Matrix

The values you set up in the Location + Patron + Item Matrix parameter pertain to particular Shelving Location/Patron Type/Item Class combinations. In this chapter we discuss how you can use the Virtua Profiler to set the following Circulation-related values for each of your Shelving Location/Patron Type/Item Class combinations:

- [Loan rules based on check-out type](#)
- [Overdue fines for recalled and non-recalled items](#)
- [Grace periods for overdue fines](#)
- [Conversion of fines to blocks on library privileges](#)
- [Schedules for sending overdue notices](#)
- [Schedules for sending bills for overdue items](#)
- [Renewal limits](#)
- [Types of requests allowed](#)
- [Default expiration period for each type of request](#)

This chapter covers the following topics:

- ⇒ [Setting Values in the Location + Patron + Item Matrix](#)
- ⇒ [About Loan Rules](#)
- ⇒ [About Fines and Grace Periods](#)
- ⇒ [About Notice Schedules and Renewal Limits](#)
- ⇒ [About Requests](#)
- ⇒ [Applying Settings to Other Matrix Combinations](#)

4.1 Setting Values in the Location + Patron + Item Matrix

This section provides step-by-step instructions for setting values in the Location + Patron + Item Matrix. For detailed descriptions of the settings available in the Location + Patron + Item Matrix, see the sections “[About Loan Rules](#),” “[About Fines and Grace Periods](#),” “[About Notice Schedules and Renewal Limits](#),” and “[About Requests](#)” in this chapter.

Important: In order for your Circulation system to work properly, you *must* set ALL the combinations in each of the Circulation matrices: Location + Patron + Item, Location + Patron, and Location + Item. You can run the script **CheckCircParameters.sh** to determine if any of the combinations in the Circulation matrices have not yet been set. For details, see the *Virtua System Management: Circulation User's Guide*.

To access a particular Location + Patron + Item Matrix in the Virtua Profiler,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).
3. Double-click Location + Patron + Item.

The Location + Patron + Item parameter expands to display a list of main locations (*Figure 4-1*).

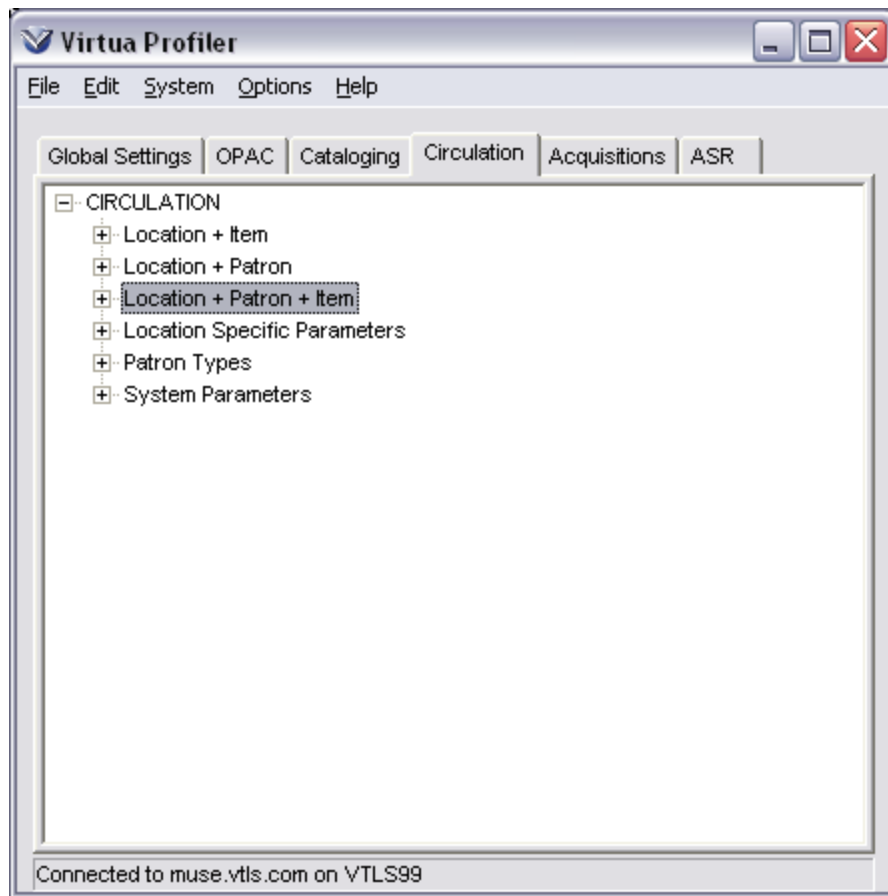


Figure 4-1. Circulation Tab - Location + Patron + Item Parameter Expanded

This list of main locations comes from the Location Names parameter, which you configure on the Global Settings tab. For details, see the *Virtua Profiler/Global Settings User's Guide*.

4. Double-click a location.

The location expands to display a list of patron types ([Figure 4-2](#)).

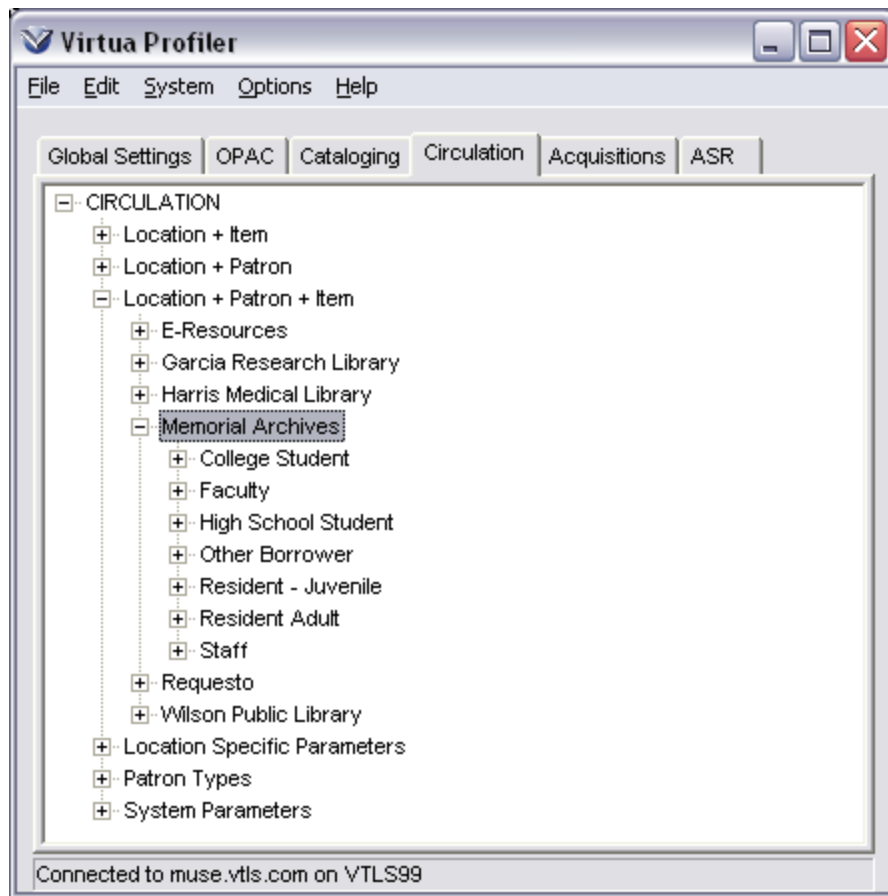


Figure 4-2. Location + Patron + Item Parameter - Location Expanded

This list of patron types comes from those you defined via the Patron Types parameter. For details, see the section [“Working with the Patron Types Parameter”](#) in this user’s guide.

5. Double-click a patron type.

The patron type expands to display a list of item classes ([Figure 4-3](#)).

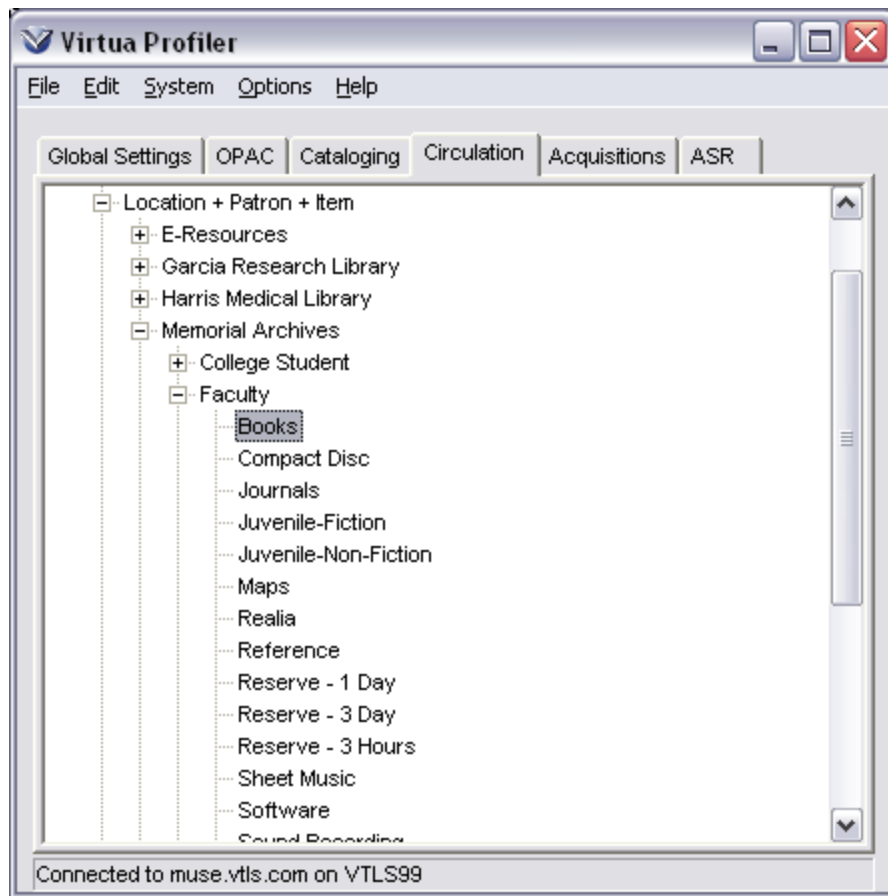


Figure 4-3. Location + Patron + Item Parameter - Patron Type Expanded

This list of item classes comes from those you defined in the Item Class Definitions parameter. For details, see the section “[Working with Item Class Definitions](#)” in this user’s guide.

6. Double-click an item class.

The appropriate Location + Patron + Item Matrix window appears ([Figure 4-4](#)), where you can set your matrix values.

Memorial Archives + Faculty + Books Matrix

Loan Rules | Fines / Grace | Notices / Limits | Requests

Regular Check Out

☐ Fixed or Calculated

☐ Fixed Period

☒ Calculated Period

☐ Protect from recall

☐ Ignore requests

In-House Check Out

☐ Fixed or Calculated

☐ Fixed Period

☒ Calculated Period

☐ Protect from recall

☐ Ignore requests

Renewal

☐ Fixed or Calculated

☐ Fixed Period

☒ Calculated Period

☐ Protect from recall

☐ Ignore requests

☐ Requests per item that trigger a loan rule change

Apply To Save Cancel

Last modified at 1/18/2010 12:28:48 PM by Root User

Figure 4-4. Location + Patron + Item Matrix Window

7. On the Loan Rules tab, in the field labeled Regular Check-out . . .
 - a. Choose a loan period type by selecting the radio button for . . .
 - **Fixed or Calculated**, if you want the loan period to be determined by a Fixed OR a Calculated loan period based on the check-out date. If the check-out date falls *on or between* the start and end date of a Fixed Date period defined in the Library-defined Dates parameter, then the due date is set to the date associated with that period. Otherwise, the due date is calculated using the Calculated Period.
 - OR-
 - **Fixed**, if you want the loan period to be determined by the fixed due date in the Library-defined Dates parameter.
 - OR-
 - **Calculated**, if you want to specify a particular loan period.

b. Choose a Period.

1. If you selected the Fixed or Calculated radio button, complete the information for BOTH periods as described below.
2. If you selected the Fixed radio button, choose a date category from the drop-down list. This Period specifies exactly which fixed due date applies to this Shelving Location/Patron/Item combination.

-OR-

3. If you selected the Calculated radio button, type a specific value, and choose a unit of time (Minutes, Hours, Days, or Years). For example, you might specify a Period of 14 Days.

Note: If you select the Calculated radio button, and set the Period to **0 Days**, items of this Shelving Location/Patron Type/Item Class combination are not allowed to circulate. Items that are designated as non-circulating in this manner can be checked out using the Selected Time and Date option in the client. Alternatively, you can make individual items non-circulating for ALL patrons via the Item Information window in the Virtua client.

- c. If desired, select the *Protect from recall* check box to specify that the “Recallable by” date for the item always be set to the due date when the item is checked out or renewed.
 - d. If desired, select the *Ignore requests* check box to specify that the due date of an item with this particular Shelving Location/Patron Type/Item Class combination not be reduced to the Guaranteed Circulation Period because of existing requests on the item (see the *Requests per item that trigger a loan rule change* check box).
8. In the fields labeled In-house Check-out and Renewal, choose settings for the loan period type and the loan period. Use the guidelines provided for Regular Check-out above.
 9. If you would like to specify a number of requests above which the loan period for the item is automatically set to the Guaranteed Circulation Period . . .
 - Select the *Requests per item that trigger a loan rule change* check box.
- AND-
- Enter a number of requests in the text box.

When the number of requests placed against an item is the *same as* or *more than* the number of requests specified here, the loan period for this item is automatically set to the Guaranteed Circulation Period.

Note: The value of -1 in the *Requests per item that trigger a loan rule change* check box indicates that the parameter will not be used.

10. Click the Fines/Grace tab.
11. Set the Overdue Fine amount for both non-recalled and recalled items.

Note: If your library does not want to charge fines, set the Overdue Fine amount to **0** (zero).
12. If you want to configure fines that vary depending on how long the item is overdue, click the Add button beneath the Override Fines list. For details on setting the Override Fines parameter, see the section “[About Overriding Fines for Overdue Items](#)” in this user’s guide.
13. Set the Fine Period (i.e., the fine accrual rate) for both non-recalled and recalled items.
 - a. In the text box, type a value.
 - b. From the drop-down list, select a unit of time (Minutes, Hours, Days, or Years).
14. Set the Grace Period for both non-recalled and recalled items.
 - a. In the text box, type a value.
 - b. From the drop-down list, select a unit of time (Minutes, Hours, Days, or Years).
15. Set the Mail Grace Period.
 - a. In the text box, type a value.
 - b. From the drop-down list, select a unit of time (Minutes, Hours, Days, or Years).
16. Set the Maximum Fine amount. In order for fines to accrue at all, the value must be greater than 0.
17. Set the Guaranteed Circulation period.
 - a. In the text box, type a value.

- b. From the drop-down list, select a unit of time (Minutes, Hours, Days, or Years).
18. Choose a setting for Does Fine Accrue from Grace Period. Use the drop-down list to answer either . . .
 - **Yes**, the fine begins to accrue after the Grace Period.
 - OR-
 - **No**, the fine begins to accrue after the due date.
19. Set the Period from Recall Letter to Due Date.
 - a. In the text box, type a value.
 - b. From the drop-down list, select a unit of time (Minutes, Hours, Days, or Years).
20. Click the Notices/Limits tab.
21. In the Non-recalled Items area and in the Recalled Items area,
 - a. Set the Maximum Number of Notices by typing a value in the text box.
 - b. Set the Notice Period by typing a value in the text box and choosing a unit of time (minutes, hours, days, or years) from the drop-down list.
 - c. If you want to configure notice periods that override the default value specified in the Notice Period parameter, click the Add button beneath the Override Notices list.
 - d. For each patron communication preference (Paper, E-mail, Text, and Both Text and E-mail), set the Billing Period by typing a value in the text box and choosing a unit of time (minutes, hours, days, or years) from the drop-down list.
22. For Renewals . . .
 - a. Set the Limit by typing a value in the text box.
 - b. Set the Limit Period by typing a value in the text box and choosing a unit of time (minutes, hours, days, or years) from the drop-down list.
23. For Review Notices . . .
 - a. Set “Is First Notice Review Notice?” by choosing either Yes or NO from the drop-down list.
 - b. If you answered Yes to “Is First Notice Review Notice,” set the Review Notice Days Before Due Date. You can configure a different value for each patron communication preference type (Paper, E-mail, Text, and Both Text and E-mail),

24. Click the Requests tab.

24. For each type of request (hold, recall, loan, and page) set . . .

- Request Allowed to either . . .
 - ♦ **Yes** - The request type is allowed for the Shelving Location/Item Class combination.
 - OR-
 - ♦ **No** - The request is NOT allowed for the Shelving Location/Item Class combination.
- The Default Expiration Period by typing a number in the text box and choosing a unit of time (Minutes, Hours, Days, or Years) from the drop-down list.
- The *Assess fee when request is*. . . settings by typing a fee amount in each text box (Placed, Trapped, Picked up, etc.) for which you want to assess a fee.

25. If you like, click the Apply To button to apply these settings to additional Shelving Location/Patron Type/Item Class combinations. For details, see the section “[Applying Settings to Other Matrix Combinations](#)” in this chapter.

26. When you are finished setting matrix values, click the Save button.

Your settings are saved to the database.

4.2 About Loan Rules

You can set Loan Rules on the Loan Rules tab of the Location + Patron + Item Matrix window (*Figure 4-5*).

Figure 4-5. Location + Patron + Item Matrix Window - Loan Rules Tab

Loan Rules let you specify how Virtua determines the due date of checked out and renewed items. On the Loan Rules tab of the Location + Patron + Item Matrix, you can specify the loan period for Regular check-outs, In-house check-outs, and renewals.

The *Protect from recall* and *Ignore requests* check boxes allow you to specify whether the item can be recalled earlier than the due date for the item, and whether the item can be checked out for its full circulation period regardless of outstanding requests.

The *Requests per item that trigger a loan rule change* check box allows you to specify the number of requests at or above which the loan period for the item will change.

When you perform a check-out or renewal in the client, you can specify the check-out type in the Check-out Type area on the Check Out/Renew window ([Figure 4-6](#)).

Check Out/Renew - Virtua Library - Wilson Library - 940 - Steele, James

Patron Check-outs | Patron Limits

Patron: 940
barcode:
Name: Steele, James 19840209
Patron type: Library Board Member
Home library: Wilson Library -- code: 10000
Registering: Wilson Library -- 10000
Library:
Primary: 141 Courthouse Square Blacksburg
Address:

Information
Fines: \$1.20
Requested: 0
Overdue: 0
Billed: 0
Last Item: Book
Category Limit: 4/0

Check-out Type
☒ Regular ☐ Fixed Time
☐ In-house ☐ Selected Time: 5:27:42 PM Date: 5/10/2012

Item Barcode	Title	Due Date/Time	Shelf Location
1000011697	A pictorial guide to American spinning wh...	6/4/2012 5:00:00 PM	Wilson Library

☒ Print Receipts ☐ After Each Item ☒ When Check-outs Are Complete
☒ Remember Last Check-out Type

Item Barcode:

Print Check Out

Figure 4-6. Check Out/Renew Window

- When you perform a *check-out*, if you set the Check-out Type to . . .
 - ♦ **Regular** - Virtua determines the item's due date using the values set in the Regular Check-out field on the Loan Rules tab in the Location + Patron + Item Matrix.
 - ♦ **In-house** - Virtua determines the item's due date using the values set in the In-house Check-out field on the Loan Rules tab in the Location + Patron + Item Matrix.
- When you perform a *renewal*, if you set the Check-out Type to . . .
 - ♦ **Regular** - Virtua determines the item's due date using the values set in the Renewal field on the Loan Rules tab in the Location + Patron + Item Matrix.

Note: If an item is originally checked out as an In-house check-out, all renewals of that item are calculated as In-house as well, even if you select the Regular radio button on the Check Out/Renew window.

- ♦ **In-house** - Virtua determines the item's due date using the values set in the In-house Check-out field on the Loan Rules tab in the Location + Patron + Item Matrix.

Note: For Regular and In-house check-outs and renewals, Virtua uses the Location + Patron + Item Matrix for the item's shelving location.

In the Location + Patron + Item Matrix, for each transaction type (Regular Check-out, In-house Check-out, and Renewal), you can choose one of the following loan periods:

- **Fixed** - Tells Virtua to determine the loan period of an item using the Fixed Period specified in the Location + Patron + Item Matrix AND the due date set in the Library-defined Dates parameter.

For example, if you set the Regular Check-out loan period to Fixed/Quarter, when you perform a Regular check-out, Virtua sets the item's due date to the due date specified in the Library-defined Dates for Quarter Loans.

For details on library-defined due dates, see the section "[Working with Library-defined Dates](#)" in this user's guide.

Note: The meaning of Fixed in the Location + Patron + Item Matrix is different from the meaning of Fixed on the Check Out/Renew window. For details on the meaning of Fixed on the Check Out/Renew window, see the section "[About Setting the Default \(Due\) Date and Time](#)" in this user's guide.

- **Calculated** - Tells Virtua to calculate the loan period of an item using the Calculated loan period you specify in the Location + Patron + Item Matrix.

For example, if you set the Regular Check-out loan period to Calculated/30 Days, when you perform a Regular check-out, Virtua calculates the due date by adding 30 days to the check-out date.

Note: When you check out or renew an item, Virtua checks the calendar. If the due date falls on a closed day, Virtua adjusts the due date *forward* to the first open day (see the section "[Working with the Closed Dates Parameter](#)" in this user's guide).

- **Fixed or Calculated** - Tells Virtua to use the transaction date to determine whether the loan period of an item should be Fixed or Calculated.
 - ◆ If the transaction date falls *on or between* the start and end dates of a Fixed Date period defined in the Library-defined Dates parameter, Virtua uses the Fixed loan period as described above.
 - ◆ If the transaction date does NOT fall on or between the start and end dates of a Fixed Date period, Virtua uses the Calculated loan period as described above.

For example, let's say you have a Fixed Date period defined in the Library-defined Dates parameter for June 1 - June 30. When you perform a Regular check-out *on or between* June 1 and June 30, Virtua sets the item's due date to the due date specified for that Fixed Date period. If you perform a Regular check-out *before* June 1 or *after* June 30, Virtua uses the Calculated loan period you specify in the Location + Patron + Item Matrix.

For details on library-defined due dates, see the section "[Working with Library-defined Dates](#)" in this user's guide.

In the Location + Patron + Item Matrix, for each transaction type (Regular Check-out, In-house Check-out, and Renewal), you can choose to always set an item's "Recallable by" date to the due date, and to ignore requests when calculating an item's due date.

- **Protect from recall** - The *Protect from recall* setting does not prevent an item from being recalled, but instead determines how the "Recallable by" date is calculated.
 - If this check box is selected, the "Recallable by" date for the item is always set to the due date when the item is checked out or renewed.

Note: Remember that the status of the *Ignore requests* setting may affect the calculation of the due date, which, in turn, may affect the calculation of the "Recallable by" date.

- If this check box is NOT selected, the "Recallable by" date for the item is calculated as usual, by combining the Guaranteed Circulation Period and the Mail Grace Period.
- **Ignore requests** -
 - If this check box is selected, the due date of an item with this particular Shelving Location/Patron Type/Item Class combination will not be reduced to the Guaranteed Circulation Period because of existing requests on the item.

Note: This only applies when calculating the due date of an item with this Shelving Location/Patron Type/Item Class combination (i.e., at check out or renewal time).

- If the check box is NOT selected, the due date will be reduced to the Guaranteed Circulation Period if the “Requests per item that trigger a loan rule change” limit has been reached (or, if a recall has been placed on the item).
- **Requests per item that trigger a loan rule change** - If this check box is selected, you will need to specify the number of requests at or above which the loan period for the item is automatically set to the Guaranteed Circulation Period.

4.3 About Fines and Grace Periods

You can set overdue fines and grace periods on the Fines/Grace tab of the Location + Patron + Item Matrix window ([Figure 4-7](#)). The tab also offers an option labeled Convert Fine to Block for libraries that prefer to suspend loan privileges via a block instead of assessing fines for overdue items.

Arlington Library + Family Membership + Books Matrix

Loan Rules | **Fines / Grace** | Notices / Limits | Requests

Non-Recalled Items

Overdue Fine:

Override Fines:

Start	End	Fine
1	5	.10\$
6	10	.25\$
11	100	.75\$

Add Delete

Fine Period: Days

Grace Period: Days

Mail Grace Period: Days

Maximum Fine:

Convert fine to block:

Recalled Items

Overdue Fine:

Override Fines:

Start	End	Fine
1	5	.15\$
6	10	.50\$
11	100	1.00\$

Add Delete

Fine Period: Days

Grace Period: Hours

Guaranteed Circ: Days

Does Fine Accrue From Grace Period:

Period from recall letter to due date: Days

Apply To Save Cancel

Last modified at 6/3/2010 11:55:47 AM by mr Root User

Figure 4-7. Location + Patron + Item Matrix Window - Fines/Grace Tab

Virtua uses overdue fine amounts and grace periods to calculate either the fines to be paid or the number of days that loan privileges are suspended when a patron returns or renews an overdue item.

On the Fines/Grace tab, Virtua lets you set fines for two types of overdue items.

- **Non-recalled Items** - Overdue items that have not been recalled although they may be trapped to satisfy a hold, loan, or page request.
- **Recalled Items** - Overdue items that have been trapped to satisfy a *recall* request.

On the Fines/Grace tab, you can set the following values for both non-recalled and recalled overdue items:

- Overdue Fine
- Fine Period
- Override Fine
- Grace Period

You can also set the following values, which apply to both non-recalled and recalled overdue items:

- Mail Grace Period
- Maximum Fine
- Convert Fine to Block
- Guaranteed Circulation Period
- Does Fine Accrue from Grace Period?
- Period from Recall Letter to Due Date.

These settings are described in detail in the following sections.

4.3.1 About Setting Fines for Overdue Items

On the Fines/Grace tab of the Location + Patron + Item Matrix window, you can set four values that apply to overdue fines for items with a given Shelving Location/Patron Type/Item Class combination:

- **Overdue Fine** - The amount of the overdue fine, which you set for both non-recalled and recalled items. When the Convert Fine to Block option is set, Virtua uses the Overdue Fine value to determine how many fine periods that loan privileges will be suspended. For example, if the Overdue Fine is \$1.50 and the Fine Period is 1 Day, the system will interpret that as one and a half days.
- **Fine Period** - The period of time that elapses between each overdue fine assessment. This setting applies to both non-recalled and recalled items.
- **Override Fine** - The amount of the fine for one or more fine periods that will override the default value specified in the Overdue Fine field. See the section [“About Overriding Fines for Overdue Items”](#) for details.
- **Maximum Fine** - The maximum amount a single overdue fine can be assessed. In order for fines to be assessed, the value must be greater than 0; i.e., if the value is 0, assessment of overdue fines is essentially disabled. This setting applies to *both* recalled overdues and non-recalled overdues.
- **Convert Fine to Block** - This field contains a drop-down list of all the library-defined block codes in the system (see the section [“Library-defined Blocks”](#) in this guide). When you select the particular block code that you have set up to handle days rather than fines, Virtua knows that the values in the Overdue Fine/Fine

Period fields are to be converted to a block on loan privileges. The block is for the number of fine periods specified by the fine amount. In other words, a value in the Convert Fine to Block field tells the system that penalties for overdue materials will be assessed in terms of time rather than fines.

Note: Library-defined blocks are stored in the 043 subfield \$a of the patron record. Normally, the library must add these blocks to the record manually. But in the case of the Convert Fine to Block feature, when an overdue item is checked in, Virtua will automatically add a tag 043 to the patron record. In the 043, the subfield \$a will contain the library-defined block code specified in the Convert Fine to Block field; in addition, the subfield \$d will contain the end date and time of the suspension period (for more information, see [Appendix B](#)).

Consider the following examples:

- If you want overdue fines to accrue at a rate of \$1.00 per day, you would set the Overdue Fine to **1.00** and the Fine Period to **01 Days**. If you set the Maximum Fine to **30.00**, however, the Overdue Fine will stop accruing after 30 days.
- If you want the suspension of loan privileges to accrue at a rate of one day for each day overdue, you would set the Overdue Fine to **1.00** and the Fine Period to **01 Days**; in addition, you would set a value in the Convert Fine to Block option. If you set the Maximum Fine to **30.00**, however, the days of suspended privileges will stop accruing after 30 days.
- If you set the Overdue Fine to **10.00** and the Fine Period to **30 Days**, Virtua will assess an overdue fine of \$10.00 at the beginning of every 30-day period. The first \$10.00 fine will be assessed at the start of the fine period and, if the overdue item is not returned, an additional \$10.00 fine will be assessed every 30 days at the start of each new fine period.

Note: If your library does NOT want to charge fines or suspend privileges for overdue items, set the Overdue Fine, the Fine Period, and the Maximum Fine to zero.

4.3.2 About Overriding Fines for Overdue Items

The Override Fines area of the Fines/Grace tab of the Location + Patron + Item Matrix window lets you vary the amount charged per Fine Period depending on how long an item is overdue.

As illustrated in [Figure 4-8](#) (which shows a portion of the Fines/Grace tab of the Location + Patron + Item Matrix window shown in [Figure 4-7](#)), the Override Fines area lets you define one or more Start periods, End periods, and Fine amounts. Each period is a numeric value from 0 to 9999, and represents the number of fine periods as specified in the Fine Period field on the tab.

For instance, in [Figure 4-8](#), since the Non-recalled Items Fine Period is 1 day, the Non-recalled Items Override Fine values mean that the overdue fine for non-recalled items is:

- \$.10 per day for the first five days (days 1-5),
- \$.25 per day for the next five days (days 6-10), and
- \$.75 per day thereafter for up to 100 days (days 11-100).

Non-Recalled Items

Overdue Fine

Override Fines:

Start	End	Fine
1	5	.10\$
6	10	.25\$
11	100	.75\$

Add Delete

Fine Period Days

Grace Period Days

Figure 4-8. Override Fines Section of Location + Patron + Item Matrix, Fines/Grace Tab

To specify an override fine, click the Add button.

To delete an override fine, select a row and then click the Delete button.

The patron will be charged the regular Overdue Fine amount for that type of item (recalled or non-recalled) for any time an item is overdue beyond the time defined in the Override Fines section.

4.3.3 About Setting the Grace Period for Overdue Items

On the Fines/Grace tab of the Location + Patron + Item Matrix window, you can determine the Grace Period for overdue items.

You can set two values related to the grace period:

- **Grace Period** - An amnesty or “grace” period during which fines are not assessed. You can set a different Grace Period for non-recalled and recalled items.
- **Does Fine Accrue from Grace Period?** - Whether fines accrue from the end of the Grace Period rather than from the due date. This setting applies to both recalled overdues and to non-recalled overdues. You can set this value to either . . .
 - ◆ **Yes**, the fine begins to accrue after the Grace Period.
 - OR-
 - ◆ **No**, the fine begins to accrue after the due date.

For example, if the Grace Period is set to five days . . .

- An item returned up to five days overdue is NOT fined.
- An item returned six (or more) days overdue is fined.
 - ◆ If fines are set to accrue from the due date, the item is fined for six days of overdue charges.
 - ◆ If fines are set to accrue from the end of the Grace Period, the item is fined for one day of overdue charges.

4.3.4 About the Guaranteed Circulation Period, the Mail Grace Period, and the Period from Recall Letter to Due Date

You can set the Guaranteed Circulation Period and the Mail Grace Period on the Fines/Grace tab of the Location + Patron + Item Matrix window. These settings apply to ALL overdue items, both recalled and non-recalled.

- **Guaranteed Circulation Period** - Specifies the number of days that a patron is “guaranteed” a borrowed item before it can be recalled by another patron.
- **Mail Grace Period** - Specifies the number of days required for the delivery of a recall notice.
- **Period from Recall Letter to Due Date** - Specifies the number of days used to recalculate an item’s due date once a recall letter has been generated. A value of 0 means that the recall period will not be used.

These settings are used in various ways throughout the Circulation system to determine an item's new due date in the event of a request.

Together the Guaranteed Circulation Period and the Mail Grace Period are used to calculate an item's earliest possible due date, or the "Recallable by" date. The "Recallable by" date is calculated by adding the sum of the Guaranteed Circulation Period and the Mail Grace Period to an item's check-out date.

Example: If the Guaranteed Circulation Period is 10 days and the Mail Grace Period is five days, the "Recallable by" date is calculated by adding 15 days to an item's check-out date. The time of day an item is due on the "Recallable by" date depends on your Due at Closing settings (see the section "[About the Due At Closing Settings](#)" in this user's guide).

Notes:

- Using the Use Long Loans setting, you can determine whether the "Recallable by" date appears on the Items tab of the View Record window in the Virtua client. This provides Circulation staff with a quick and easy way of determining the earliest day on which a checked-out item can come due if another patron places a recall request on it. For details, see the section "[About Using Long Loans](#)" in this user's guide.
- Virtua takes closed dates into consideration when calculating the "Recallable by" date. If the library is closed on the recallable date, the date is adjusted to the first day the library is open.

The Period from Recall Letter to Due Date is used with the Guaranteed Circulation Period and the Mail Grace period to determine the new due date once a recall letter has been generated. The Guaranteed Circulation Period takes precedence over the Period from Recall Letter to Due Date.

- If both the Guaranteed Circulation Period and Period from Recall Letter to Due Date are set, and the Guaranteed Circulation date is *later* than the Period from Recall Letter to Due Date, the due date will be calculated by adding the Guaranteed Circulation Period and the Mail Grace Period.
- If both the Guaranteed Circulation Period and Period from Recall Letter to Due Date are set, and the Guaranteed Circulation date is *earlier* than the Period from Recall Letter to Due Date, the due date will be calculated by adding the Period from Recall Letter to Due Date and the Mail Grace Period.

Virtua also provides an option that lets you notify patrons automatically via e-mail when their requested items become available. You can enable this feature via the *Send*

e-mail when request item is checked in setting, which appears on the Circulation Basic Options window.

- If you select this check box, when you check in a requested item, Virtua will automatically send an e-mail notice to the requesting patron, provided that the patron has an e-mail address preference and a valid primary e-mail address.
- If you do NOT select this check box, Virtua will not send automatic e-mail notices when requested items are checked in. These patrons will, however, be eligible to receive an availability notice via InfoStation or **CircReport.exe**. For information on **CircReport.exe**, see the *System Management: Reporting User's Guide*.

Note: If you disable automatic e-mail notification, you may want to enable the *Update request expiration date at check-in* setting. For details, see the section “[Updating the Request Expiration Date at Check-in](#)” in this user's guide.

For details on sending availability notices manually, see the *InfoStation/Circulation Reports Reference Guide*.

If a recall request is placed on a checked-out item after the borrowing patron has been allowed to keep the item for the Guaranteed Circulation Period, the item's new due date is calculated by adding the Mail Grace Period to the date on which the recall notice is generated.

In addition, when a patron places an Immediate Recall on a checked-out item, Virtua calculates the new due date using *only* the Mail Grace Period. Regardless of whether the borrowing patron has been allowed to keep the item for the Guaranteed Circulation Period, in the case of an Immediate Recall, the new due is calculated by adding the Mail Grace Period to the request notice date.

Note: The original due date is never extended during the calculation of the new due date. Additionally, when calculating the new due date for a recalled item, Virtua looks at the Due at Closing setting in the Virtua Profiler to determine the time that should be associated with the new due date.

The following table provides examples of how the Mail Grace Period and the Guaranteed Circulation Period can affect the due date of an item. The table does not take into account the Due at Closing settings.

Check-out Date	Original Due Date	Guaranteed Circ Period	Mail Grace Period	Recallable by Date	Request Notice Date	New Calculated Due Date
1 May '15	1 Oct '15	14 days	5 days	20 May '15	1 June '15	6 June '15
1 May '15	1 Oct '15	14 days	5 days	20 May '15	2 May '15	20 May '15
1 May '15	1 Oct '15	0 days	14 days	15 May '15	1 June '15	15 June '15
1 May '15	15 May '15	14 days	5 days	15 May '15	2 May '15	15 May '15
1 May '15	15 May '15	14 days	5 days	15 May '15	17 May '15	15 May '15

Note: If the new due date falls on a day when the library is closed, Virtua adjusts the due date forward to the next open day.

4.4 About Notice Schedules and Renewal Limits

On the Notices/Limits tab of the Location + Patron + Item Matrix window ([Figure 4-9](#)), you can set notice schedules and renewal limits. InfoStation®, Virtua's Web-reporting subsystem, uses these settings to generate overdue notices for patrons.

Memorial Archives + College Student + Book Matrix

Loan Rules | Fines / Grace | **Notices / Limits** | Requests

Non-Recalled Items

Max Number Of Notices: 1

Notice Period: 7 Days

Override Notices:

Number	Period	Units	Type
1	7	Days	Paper

Add Delete

Billing Period:

Paper: 0 Days

E-mail: 0 Days

Text: 0 Days

Both Text and E-mail: 0 Days

Renewal Limit: 15

Review Notice Days Before Due Date:

Paper: 0

E-mail: 0

Text: 0

Both Text and E-mail: 0

Is First Notice a Review Notice: Yes

Apply To Save Cancel

Last modified at 1/25/2011 10:12:11 AM by Root User

Recalled Items

Max Number Of Notices: 1

Notice Period: 3 Days

Override Notices:

Number	Period	Units	Type
--------	--------	-------	------

Add Delete

Billing Period:

Paper: 0 Days

E-mail: 0 Days

Text: 0 Days

Both Text and E-mail: 0 Days

Figure 4-9. Location + Patron + Item Matrix Window - Notices/Limits Tab

Using the Notices/Limits tab, you can set values that let you . . .

- Notify patrons when checked-out items are about to reach their due date.
- Schedule the generation of overdue notices for patrons.
- Determine renewal limits.

On the Notices/Limits tab, you can set the following values for *both* non-recalled and recalled items:

- Max Number of Notices
- Default Notice Period
- Override Notice Period for any numbered notice
- Billing Period

In addition, on the Notices/Limits tab, you can set the following values, which apply *both* to non-recalled and recalled items:

- Renewal Limit, which consists of the number of times an item can be renewed
- Review notice settings, which consist of . . .
 - ♦ Is First Notice Review Notice?
 - ♦ Review Notice Days Before Due Date

These settings are described in detail in the following sections.

4.4.1 About Configuring Notice Generation Schedules

On the Notices/Limits tab of the Location + Patron + Item Matrix window, you can set values that control a patron's eligibility to receive notices. You can set each of these values for non-recalled and recalled items.

- **Max Number of Notices** - The maximum number of overdue notices that a patron can receive for a single item. After a patron receives the Maximum Number of Notices, the patron can become eligible to receive a bill.

Note:

- The Max Number of Notices setting applies only to *overdue* notices. If the Is First Notice a Review Notice setting is configured to send a review notice to the patron, the review notice is NOT counted toward the Max Number of Notices.
 - Once you set the value for the maximum number of notices, you should not change it to a value *less than* the current value.
- **Notice Period** - The default value for the time that must pass between the due date and first overdue notice and between subsequent notices.
 - **Override Notices** - For each numbered notice (first, second, third, etc.), lets you specify a notice period that overrides the default value specified in the Notice Period field. The period is a numeric value from 0 to 9999. The options for units are: minutes, hours, days, and years. To specify an override, click the Add button.
 - **Billing Period** - The amount of time that must pass after the last overdue notice is sent (as determined by Maximum Number of Notices) before a patron becomes eligible to receive a bill. When you run the Bills report, Virtua generates bills for all eligible patrons according to the Billing Period.

Note: You can configure a different billing period to apply to each type of patron communication preference (Paper, E-mail, Text, and Both Text and E-mail).

For details on generating patron notices, see the *InfoStation User's Guide*.

4.4.2 About Setting Renewal Limits

On the Notices/Limits tab of the Location + Patron + Item Matrix window, you can set the renewal limit for the patron type.

Values that affect the renewal limit include:

- **Renewal Limit** - The maximum number of times an item can be renewed for this Location + Patron Type + Item Class combination.

4.4.3 About Review Notices

You can choose settings for review notices on the Notices/Limits tab of the Location + Patron + Item Matrix window. Review notices let your library notify patrons when a checked out item is about to reach its due date.

The Notices/Limits tab contains two review notice values:

- **Is First Notice a Review Notice?** - Determines whether to send a review notice to this Shelving Location/Patron Type/Item Class combination. You can choose either . . .
 - ♦ **Yes**, before the item is due, the patron receives a review notice, which reminds the patron that the item is about to reach its due date.
 - OR-
 - ♦ **No**, patrons do NOT receive a review notice before an item reaches its due date.
- **Review Notice Days Before Due Date** - If you set “Is First Notice Review Notice” to Yes, this value determines how many days before the due date to send the notice.

Note: You can configure a different value to apply to each patron communication preference type (Paper, E-mail, Text, and Both Text and E-mail),

4.5 About Requests

On the Requests tab of the Location + Patron + Item Matrix window ([Figure 4-10](#)), you can choose various request-related settings for a particular Shelving Location/Patron Type/Item Class combination.

		Assess fee when request is...				
Hold						
Request Allowed	No	Placed	Trapped	Picked up	Canceled	Not picked up
Default Expiration Period	365 Days	.00\$	.00\$	.00\$	.00\$	.00\$
Recall						
Request Allowed	No	Placed	Trapped	Picked up	Canceled	Not picked up
Default Expiration Period	60 Days	.00\$	.00\$	.00\$	.00\$	.00\$
Loan						
Request Allowed	Yes	Placed	Trapped	Picked up	Canceled	Not picked up
Default Expiration Period	365 Days	.00\$	.00\$	.00\$	.00\$	.00\$
Page						
Request Allowed	No	Placed	Trapped	Picked up	Canceled	Not picked up
Default Expiration Period	365 Days	.00\$	.00\$	.00\$	.00\$	.00\$

Apply To Save Cancel

Last modified at 6/3/2010 11:56:51 AM by Root User

Figure 4-10. Location + Patron + Item Matrix Window - Requests Tab

On the Requests tab of the Location + Patron + Item Matrix window, you can choose settings that affect whether the following types of requests are allowed:

- **Hold** - Request on a title or an item where no action is taken until the item is checked in.
- **Recall** - Request on a checked-out item, which may result in a shortened due date and a notice to the item's borrower.

- **Loan** - Request on an available item at a location other than the location at which the request is made.
- **Page** - Request on an available item at a location that has been designated a paging location. Generally, pages are used for closed stacks.

In addition, on the Requests tab, you can set the following values for each request type listed above:

- **Request Allowed** - Whether the request type is allowed for a particular Shelving Location/Patron Type/Item Class combination. For each request type, you can set Request Allowed to either . . .
 - ♦ **Yes** - The request type is allowed for the Shelving Location/Patron Type/Item Class combination.
 - OR-
 - ♦ **No** - The request is NOT allowed for the Shelving Location/Patron Type/Item Class combination.
- **Default Expiration Period** - The expiration period for a particular request type when placed by a patron for the Shelving Location/Patron Type/Item Class combination.
 - ♦ Any request that is not filled by the end of the Default Expiration Period becomes eligible for deletion via the Expired Requests report.
 - ♦ For each request type, the Default Expiration Period consists of a number and a unit of time (e.g., 30 Days).
- **Assess fee when request is . . .** - Lets you determine that a fee will be assessed to the patron when a request of a particular type is . . .
 - ♦ **Placed** - When an item-level request is placed on a qualifying item, the Placed fee is assessed to the patron record. When a bib-level request is placed, the Placed fee is assessed *only* when an item is trapped to satisfy it; this fee will be in addition to the Trapped fee, if configured.

Note: For requests placed via SelfCheck, the SelfCheck application must support the feeAcknowledged field.

- ♦ **Trapped** - When a requested item is successfully trapped at the request location, the Trapped fee is assessed to the patron record.
- ♦ **Picked Up** - When a requested item is successfully picked up by the patron and checked out, the Picked Up fee is assessed to the patron record.

Note: This charge is assessed for any request placed via SelfCheck IF the SelfCheck application supports the FeeType and FeeAmount fields in the checkout response.

- ♦ **Canceled** - When a request for an item that is ready for pickup is deleted, a Cancellation fee is assessed to the patron record.

Note: The canceled request fee will work only for requests canceled via the Virtua client or Chamo.

- ♦ **Not Picked Up** - When a request expires because the patron has not picked it up, the Not Picked Up fee is assessed to the patron record.

4.6 Applying Settings to Other Matrix Combinations

To help you set up your Circulation matrices more easily and efficiently, the Virtua Profiler offers the Apply To feature. Using this feature, you can apply settings for a particular Location + Patron + Item Matrix to other matrix combinations.

To apply matrix settings to other Shelving Location/Patron Type/Item Class combinations,

1. On the Location + Patron + Item Matrix window, on each of the three tabs, set the values that you want to apply to other Shelving Location/Patron Type/Item Class combinations.
2. Click the Apply To button.

The Apply Settings window appears ([Figure 4-11](#)).

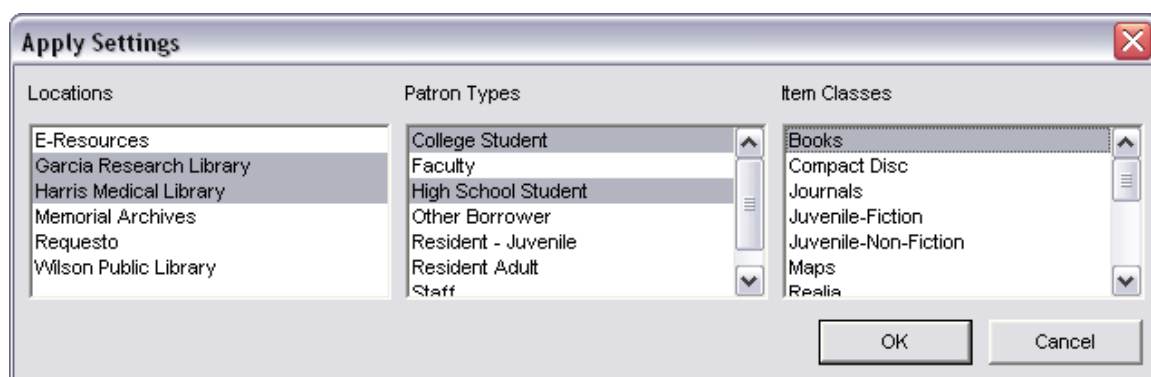


Figure 4-11. Apply Settings Window for the Location + Patron + Item Matrix

3. Choose the Shelving Location/Patron Type/Item Class combinations to which you want to apply the current settings (see below for an example).
 - In the Locations list box select one or more locations.
 - In the Patron Types list box select one or more patron types.
 - In the Item Classes list box select one or more item classes.

Hints:

- To select a group of adjacent items in a list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in a list, hold down the CTRL key, and highlight the desired items.

4. When you are finished choosing combinations, click OK.

The settings for the current Location + Patron + Item Matrix window are applied to the combinations you selected on the Apply Settings window.

Note:

- You do NOT need to save the current matrix values before applying them to other matrix combinations.
- After you apply settings to other Shelving Location/Patron Type/Items Class combinations, you can modify the values as needed.
- Settings on the current Location + Patron + Item Matrix window are NOT applied to the current Shelving Location/Patron Type/Item Class combination until you click the Save button.

For example, [Figure 4-12](#) shows the Apply Settings window, which we accessed from the Location + Patron + Item Matrix window. Notice that in [Figure 4-12](#) we have selected additional Locations, Patron Types, and Item Classes.

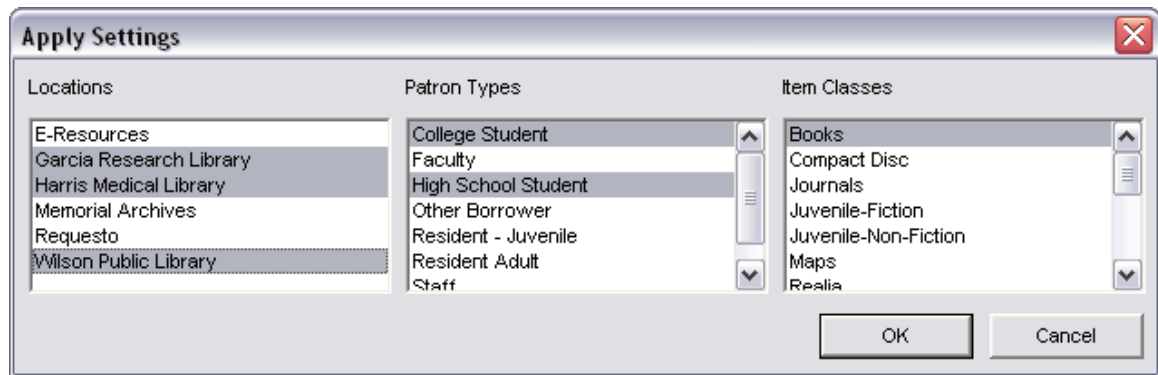


Figure 4-12. *Apply Settings* window: Additional Location + Patron + Item Combinations Chosen

For the example above, when we click OK, the values we set on the Main Library + Faculty + Fiction Matrix window will be applied to the following combinations:

- Garcia Research Library + High School Student + Books
- Harris Medical Library + College Student + Books
- Harris Medical Library + High School Student + Books
- Wilson Public Library + College Student + Books
- Wilson Public Library + High School Student + Books

5. Working with Location-specific Parameters

Location-specific Parameters let you tailor the Circulation subsystem to reflect local policies for specific library locations. In this chapter, we provide details on setting Location-specific Parameters, which consist of . . .

- Library-defined Dates

This chapter covers the following topics:

⇒ [Working with Library-defined Dates](#)

5.1 Working with Library-defined Dates

The Library-defined Dates parameter is located under Location-specific Parameters on the Circulation tab in the Virtua Profiler. Using the Library-defined Dates parameter, you can set fixed due dates for any library-defined period.

Note: Examples might include annual loans, quarter loans, semester loans, etc.

Your library has several options for setting up loan periods for your patrons, which we discuss in the section “[About Loan Rules](#)” in this user’s guide. In the Location + Patron + Item Matrix, on the Loan Rules tab, when you set a loan rules option to Fixed, Virtua uses the due date defined in the Library-defined Dates parameter.

Fixed due dates let you specify that all items checked out during a set date range (for example, Annual, Quarter, Semi-annual, Semester, etc.) are due on the *same* date. Generally, fixed due dates are used by academic libraries, which need the ability for faculty or graduate students to have extended loan periods or to have all items due at the end of a term.

For example, you might choose the following values for the fixed due date for Semester Loans:

Begin Date	End Date	Due Date
1/1/2000	5/6/2000	5/18/2000

For the example above, all items checked out between 1/1/2000 and 5/6/2000 are due on 5/18/2000.

Note: In Virtua releases prior to version 48.0, there were only three library-defined date categories for loan periods, which were supplied by default: Annual, Quarter, and Semi-annual. If you added dates to one of these categories in a previous version of Virtua, that category will appear when you double-click a location. If you did NOT add dates for a category in a previous version, that category will NOT appear when you double-click a location. This means that it is possible for NO date categories to appear when you double-click a location until you have added the first one.

5.1.1 Adding Library-defined Dates

To add Library-defined Dates in the Virtua Profiler,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click Location Specific Parameters.
3. Double-click Library-defined Dates.

The tree structure expands to display a list of main locations.

4. Highlight the location for which you want to set the fixed dues dates.
5. Click your right mouse button and then choose Add.

The Library Defined Dates window appears (*Figure 5-1*).

The screenshot shows a software window titled "Library Defined Dates". It features a "Name:" text input field at the top. Below this is a table with the following headers: "Begin Date", "End Date", "Due Date", and "Due Date Time". The table body is empty. At the bottom of the window, there are four buttons labeled "Add", "Delete", "Save", and "Cancel".

Figure 5-1. Library Defined Dates Window - Adding New Date Category

6. Type a name for the date category in the Name text box.
7. Click the Add button to add a new library-defined date. A blank row appears in the table.
8. In the Begin Date column, choose a begin date using the pop-up calendar.
9. In the End Date column, choose an end date using the pop-up calendar.

Note: The Begin Date and End Date in the same row cannot overlap, and the End Date of one entry cannot overlap the Begin Date of another entry.

10. In the Due Date column, choose a due date using the pop-up calendar.
11. In the Due Date Time column, type the time of day you want items to be due; e.g., the library's closing time.
12. If needed, click the Add button to add another row to the table.
13. After you add all the dates, click the Save button.

The Add Date Category window closes, and your settings are saved to the database.

5.1.2 Modifying Library-defined Dates

To modify Library-defined Dates in the Virtua Profiler,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click Location Specific Parameters.
3. Double-click Library-defined Dates.

The tree expands to display a list of main locations.

4. Double-click the location for which you want to modify the fixed dues dates.

The tree expands to show any date categories for which fixed due dates have been set (*Figure 5-2*).

Note: If you have never added any library-defined, no date categories will appear when you first double-click a location. If you added dates to the Annual, Quarter, or Semi-Annual date categories that were supplied by default in versions of Virtua prior to 48.0, those categories WILL appear with the values set for dates retained.

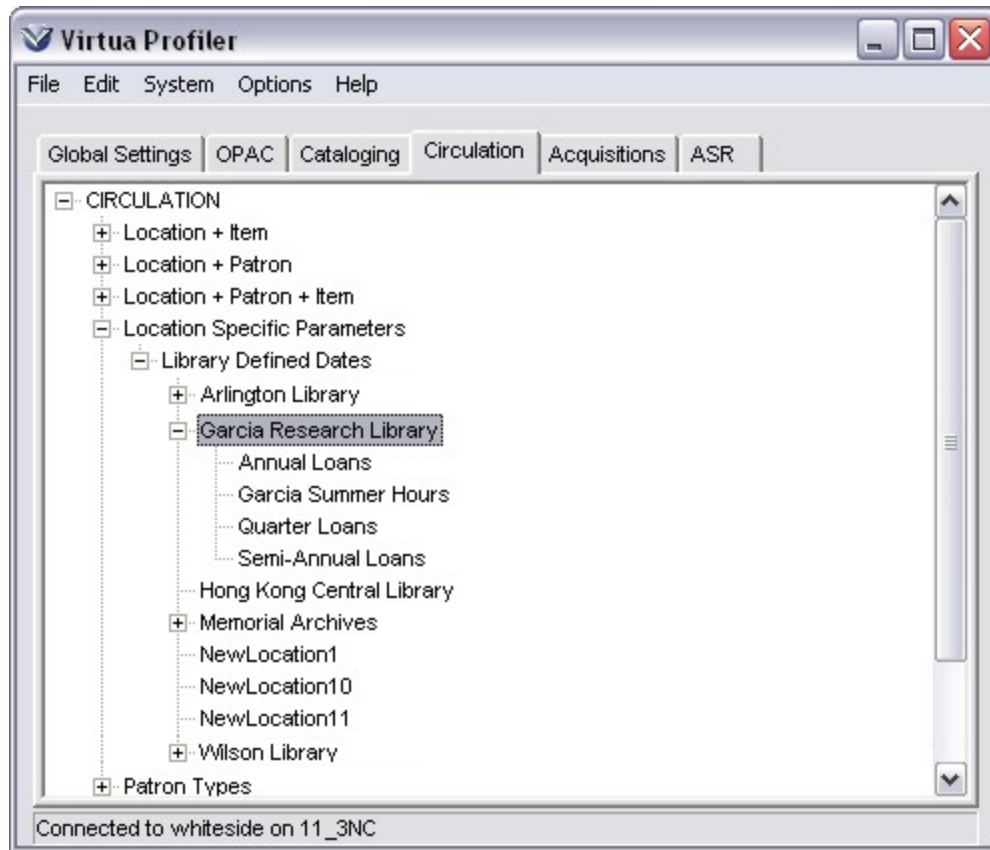


Figure 5-2. Circulation Tab - Library Defined Dates Parameter Expanded

5. Highlight the date category for which you want to modify the fixed dues dates.
6. Click your right mouse button and then choose Modify.

-OR-

Double-click the desired date category.

The Library Defined Dates window appears ([Figure 5-3](#)).

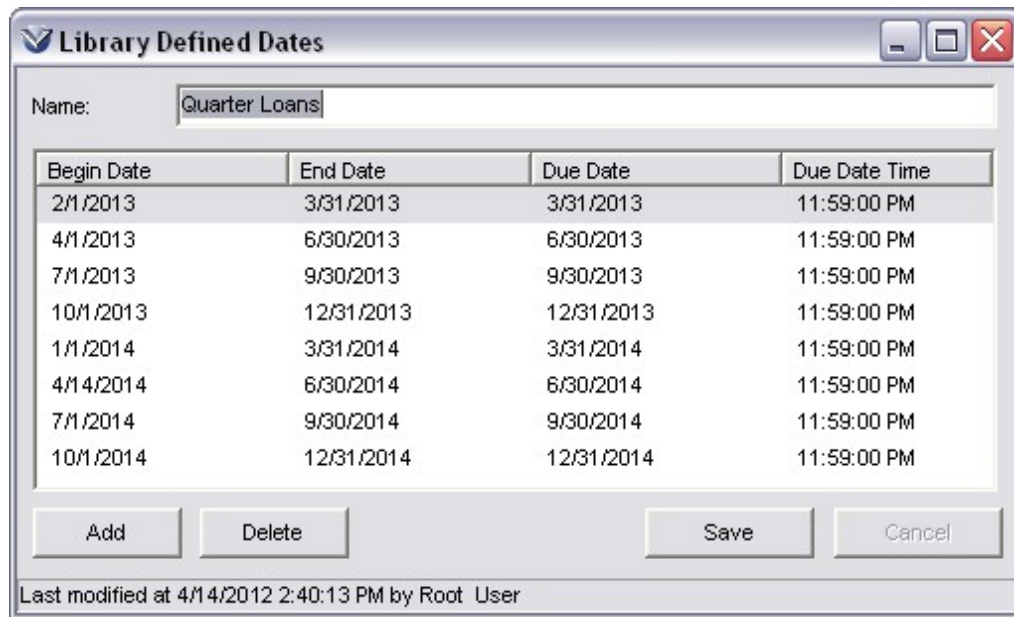


Figure 5-3. Library Defined Dates Window

7. Make any desired adjustments to existing dates by using the pop-up calendars.
8. Add any new dates as desired by using the pop-up calendars as described in the section above.
9. Delete any dates as desired, as described in the section below.
10. Modify the due date time as desired.
11. After you have modified and added all the dates, click the Save button.

The Library Defined Dates Category window closes, and your settings are saved to the database.

5.1.3 Deleting Library-defined Dates

To delete library-defined dates within a Date Category,

1. On the Library Defined Dates window ([Figure 5-3](#)), highlight any cell in the row you want to delete.
2. Click the Delete button.

The row is deleted from the table.

3. Click the Save button.

The deletion is saved to the database.

Note: Although the date is deleted from the list when you click the Delete button, the date is not deleted from the database until you save your changes.

To delete an entire date category,

1. Highlight the date category that you want to delete.
2. Click your right mouse button and then choose Delete.

The date category is deleted from the database.

Note: If a category is currently in use, the category will not be deleted and the following message will display: “Delete not allowed. This date category is currently in use.”

6. Working with the Patron Types Parameter

The Patron Types parameter contains codes and definitions for each patron type that you have defined for your library. Virtua uses patron type codes internally and displays the text of patron type descriptions to let authorized users identify patron types.

In addition to patron type codes and definitions, the Patron Types parameter contains various request-specific and other settings for each patron type. These settings consist of the following:

- Request limits for holds, loans, recalls, and pages.
- Request limit on the same Bib-ID.
- Priority setting for the different types of requests.
- Limits on concurrent scheduled item bookings.
- Values used to update a patron type automatically.
- Maximum overdue fine value
- Thresholds for the number of disputes and lost items.

This chapter provides instructions for setting definitions, codes, and request settings for each patron type in your library.

This chapter covers the following topics:

- ⇒ [Adding New Patron Types](#)
- ⇒ [Modifying Patron Types](#)
- ⇒ [Deleting Patron Types](#)
- ⇒ [Details of Patron Type Settings](#)

6.1 Adding New Patron Types

Below are brief instructions for adding a new patron type and configuring all the settings associated with that patron type. For details about patron type settings, see the section “[About Patron Type Settings](#)” in this chapter.

To add a new patron type,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).
3. Highlight the Patron Types heading.
4. Click your right mouse button, and then choose Add.

The Add New Patron Type window appears (*Figure 6-1*).

Add Patron Type

Patron Type

Patron Type Code

General | **ASR**

Hold Limit
Limit
Period Overall

Recall Limit
Limit
Period Overall

Loan Limit
Limit
Period Overall

Page Limit
Limit
Period Overall

☐ Total dispute threshold

☐ Total lost threshold

☐ Expiration Alert (Days)

Request Placement Order
Hold
Recall
Loan
Page

☐ Update Patron Type
Age:
Next Patron Type:

Number of Requests on Same Bib-ID
☐ Include item-level requests in that number

Item booking limit
Max hold, recall, loan, page limit
Max Overdue Fine:

NOT SET!

Figure 6-1. Add Patron Type Window

Note: The status bar at the bottom of the window displays NOT SET! until you save the new patron type.

5. In the **Patron Type** text box, type the name of the patron type.
6. In the **Patron Type Code** text box, type an alphanumeric code to identify the patron type.
7. Set the **Hold Limit and Period**.

8. Set the [Recall Limit and Period](#).
9. Set the [Loan Limit and Period](#).
10. Set the [Page Limit and Period](#).
11. Define the [Maximum Overdue Fine](#).
12. Define the [Request Placement Order](#) for this patron.
13. Select the [Update Patron Type](#) option, if desired, and then specify the Age and Next Patron Type values.
14. Specify the [Number of Requests Allowed on Same Bib-ID](#).
15. Select or de-select the [Include Item-level requests in that number](#) check box.
16. Set the [Item Booking Limit](#).
17. Set the [Maximum Hold, Recall, Loan, and Page Limit](#).
18. Set the [Total Dispute Threshold](#) for disputed items.
19. Set the [Total Lost Threshold](#) for lost items.
20. Set the [Expiration Alert \(Days\)](#) for expiring patron records.
21. When you are finished configuring the new patron type, click the Save button.

Note: The Save button is enabled only after you supply both the patron type and a patron type code.

The patron type is saved to the database. The Add Patron Type window closes, and the new patron type appears under the Patron Types heading on the Circulation tab.

6.2 Modifying Patron Types

To modify the settings for an existing patron type,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION.
3. Double-click Patron Types to see a list of patron types that are defined for your database.

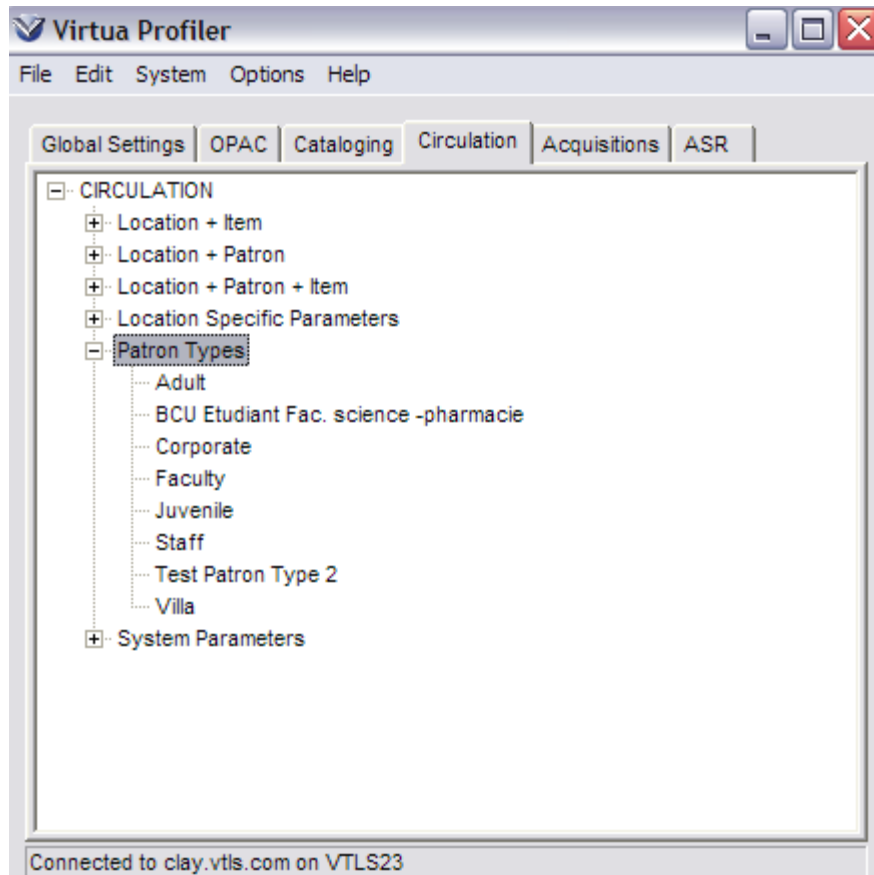


Figure 6-2. Patron Types Heading Expanded

4. Double-click the patron type that you want to modify.

The Modify Patron Type window appears ([Figure 6-3](#)).

Modify Patron Type - Faculty

Patron Type

Patron Type Code

General | ASR

Hold Limit
Limit
Period Overall

Recall Limit
Limit
Period Overall

Loan Limit
Limit
Period Overall

Page Limit
Limit
Period Overall

☐ Total dispute threshold

☐ Total lost threshold

Request Placement Order
Hold
Recall
Loan
Page

☐ Update Patron Type
Age:
Next Patron Type:

Number of Requests on Same Bib-ID
☐ Include item-level requests in that number
Item booking limit
Max hold, recall, loan, page limit
Max Overdue Fine:

Save Cancel

Last modified at 8/30/2012 8:56:09 AM by Root User

Figure 6-3. Modify Patron Type Window

5. Modify the settings as needed. For details, see the section “[About Patron Type Settings](#)” in this chapter.
6. When you are finished making changes, click the Save button.

Virtua saves your changes to the database.

6.3 Deleting Patron Types

To delete a patron type from the database,

1. On the Circulation tab, expand the Patron Types heading.
2. Highlight the patron type that you want to delete.
3. Click the right mouse button, and then choose Delete from the pop-up menu.

A confirmation message appears (*Figure 6-4*).

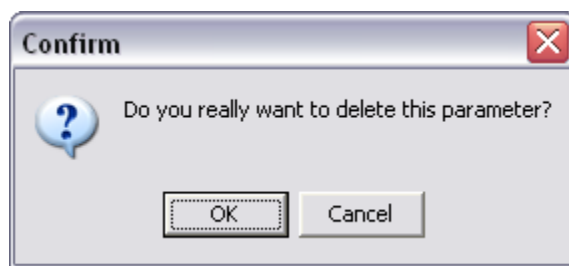


Figure 6-4. Patron Type Deletion Confirmation

4. Click OK.

The patron type is deleted from the database.

Note: You cannot delete a patron type that is currently in use. If you attempt to delete a patron type that is in use, Virtua will display an error message.

6.4 Details of Patron Type Settings

The following sections provide descriptions of the settings that you can configure for each patron type via the Patron Types parameter.

6.4.1 About the Patron Type and Patron Type Code

On the Add/Modify Patron Type window (*Figure 6-1*), for each patron type you want to use in your library, you must specify . . .

- **Patron Type** - A brief description of the patron type, which appears to authorized users throughout the system (e.g., Faculty, Student, or Library Staff). You specify this description in the Patron Type text box on the Add/Modify Patron Type window.
- **Patron Type Code** - A code of at least two characters that contains *only* alphanumeric characters, spaces, and dashes. (Any non-valid character that existed in a patron type code prior to version 2014.1 has been removed as of 2014.1.) Patron Type Codes are case-sensitive. For example, **FC** is different than **fc**. You specify this code in the Patron Type Code text box on the Add/Modify Patron Type window.

Important:

- When you add a new patron type, you must specify *both* the patron type description and patron type code before you can save the patron type to the database.
- When you modify an existing patron type, you CANNOT modify the patron type code.

6.4.2 About Request Limits

On the Add/Modify Patron Type window ([Figure 6-1](#)), you can set request limits for each patron type. For each type of request, you can limit the number of requests that a patron can place during a given period of time. The limit applies at the time the request is placed for all locations.

You can set limits for the following request types:

1. Hold
2. Recall
3. Loan
4. Page

For each request type, you can set the following two values:

- **Limit** - For a particular request type, the maximum number of requests a patron can place. The Limit can be any number up to four digits in length.
- **Period** - The period of time during which the Limit applies. You can set the Period to . . .

- ♦ A specific amount of time, consisting of a number and a unit of time (i.e., minutes, hours, days, or years). For example, if you set the Limit to 10 and the Period to 14 days, then the patron can place a maximum of 10 requests in a two-week period.
- OR-
- ♦ Overall, which means that the Limit applies at any given time. For example, if you set the Limit to 10 and the Period to Overall, then the patron can have a maximum of 10 requests available or pending at any one time.

Hint: If you choose Overall, set the value in the Period text box to zero.

6.4.3 About the Max Overdue Fine

You can set a maximum fine amount for a patron type on the Patron Type window. This maximum overdue fine is the maximum value allowed for the *sum* of all of a patron's overdue fines of any type (including billed overdue and late renewal fees).

Note that while this setting sets an upper limit on the overdue fines that Virtua will automatically assign to a patron, a staff member can *manually* assign overdue fines beyond this amount via the Patron Information window in the Virtua client.

6.4.4 About the Request Placement Order

You can set values for the Request Placement Order on the Add/Modify Patron Type window ([Figure 6-1](#)). When you place an Auto request in the client, if an item qualifies for more than one type of request, the Request Placement Order determines which type of request is placed.

The Request Placement Order lets you establish the placement order of first through fourth by assigning the numbers 1, 2, 3, or 4 to each request type (hold, loan, page, and recall).

Note: You can assign each number only once.

For example, consider the following Request Placement Order:

- Hold - 3
- Recall - 4
- Loan - 2
- Page - 1

In this example . . .

- Virtua first checks to see if the item qualifies for a page request. If so, Virtua places a page request on the item.
- If the item does NOT qualify for a page request, Virtua checks to see if the item qualifies for a loan request. If so, Virtua places a loan request on the item.
- If the item does not qualify for a page request or a loan request, Virtua checks to see if the item qualifies for a hold request. If so, Virtua places a hold request on the item.
- If the item does not qualify for a page request, a loan request, or a hold request, Virtua checks to see if the item qualifies for a recall request. If so, Virtua places a recall request on the item.
- If the item does not qualify for *any* type of request, Virtua cancels the request.

6.4.5 About the Update Patron Type Settings

The Update Patron Type option ([Figure 6-5](#)) lets you determine whether Virtua will automatically update the current patron type to another patron type when patrons of that type reach a specified age, for example, when Juveniles become Adult patrons.

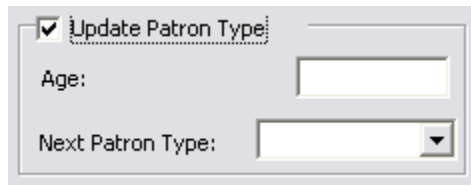


Figure 6-5. Update Patron Type Option

To utilize the Update Patron Type option,

1. Click the Update Patron Type check box.
2. Type the age at which the change will take place.
3. From the Next Patron Type drop-down list, select the succeeding patron type.

The setting works in conjunction with the script **UpdatePatronTypeByAge.sh**, which finds patrons that are set to be updated automatically and then perform the update.

6.4.6 About the Number of Requests Allowed on Same Bib-ID

You can restrict the number of requests (except Auto requests) allowed on the same bib-ID by setting the Number of Requests on Same Bib-ID parameter on the Add/Modify Patron Type window (*Figure 6-1*). The value for Number of Requests on Same Bib-ID specifies the number of bibliographic-level requests that a patron can make on the same Bib-ID, which is the unique system-assigned number for a bibliographic record. Virtua makes this check only on records having the bib level value of **m**.

Note:

- Auto requests are exempt from any limit set in this parameter.
- Although a patron can place only ONE item-level request against the same item, a patron can place any number of bibliographic-level requests.

6.4.7 About the Include Item-Level Requests in that Number Setting

You can set the Include Item-Level Requests in that Number on the Add/Modify Patron Type window (*Figure 6-1*). The Include Item-Level Requests in that Number setting determines whether item-level requests count towards the limit set in the Number of Requests Allowed on Same Bib-ID.

- Select the check box if you want item-level requests to count towards the limit set in the Number of Requests Allowed on Same Bib-ID.
- De-select the check box if you do NOT want item-level requests to count towards the limit set in the Number of Requests on Same Bib-ID.

6.4.8 About the Item Booking Limit

The Item Booking Limit setting on the Add/Modify Patron Type window (*Figure 6-1*) lets you determine the total number of scheduled item bookings that a patron of this type can have at any one time.

For details on working with Item Booking in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

6.4.9 About the Maximum Hold, Recall, Loan, Page Limit

The Maximum Hold, Recall, Loan, Page Limit setting on the Add/Modify Patron Type window ([Figure 6-1](#)) lets you determine the total number of requests (holds, recalls, loans, and pages) a patron of this type can have outstanding at any one time.

6.4.10 About the Total Dispute Threshold

The Total Dispute Threshold setting on the Add/Modify Patron Type window ([Figure 6-1](#)) defines the total number of disputes, including outstanding and settled disputes, that a patron of this type can have. Virtua keeps track of the disputed items in tag 036 subfield \$a of the patron record, which you, as authorized staff, can edit to adjust the count. If a patron reaches or exceeds the defined disputed items limit upon trying to dispute another item, Virtua will display the message “Patron has disputed too many check-outs. Do you wish to override?” If you have the proper operational security permission, you can do an override.

6.4.11 About the Total Lost Threshold

The Total Lost Threshold setting on the Add/Modify Patron Type window ([Figure 6-1](#)) defines the total number of lost items, including outstanding and settled lost items, that a patron of this type can have. Virtua keeps track of the lost items in tag 036 subfield \$b of the patron record, which you, as authorized staff, can edit to adjust the count. If a patron reaches or exceeds the defined lost items limit upon claiming to lose another item, Virtua will display the message “Patron has claimed too many items as lost. Do you wish to override?” If you have the proper operational security permission, you can do an override.

6.4.12 About the Expiration Alert (Days)

The Expiration Alert (Days) setting on the Add/Modify Patron Type window ([Figure 6-1](#)) defines the number of days prior to the expiration of the patron record that will trigger an alert to the user when retrieving the patron record in the Virtua client, Chamo or through the Self Check station. Specifically, the alert will appear in the Virtua client when accessing patron information, checking out to the patron, or placing a renewal or request.

The InfoStation report Patron Expiration Reminders reads the value of this setting to determine which patrons to report on.

7. Working with the Schedule Circ Backup Job Parameter

The Schedule Circ Backup Job parameter lets you schedule the creation of the blocked patrons list files **ptmblok** and **ptmblok.txt**. These files are used to ensure that blocked patrons cannot check out items via Virtua's Circulation Backup System.

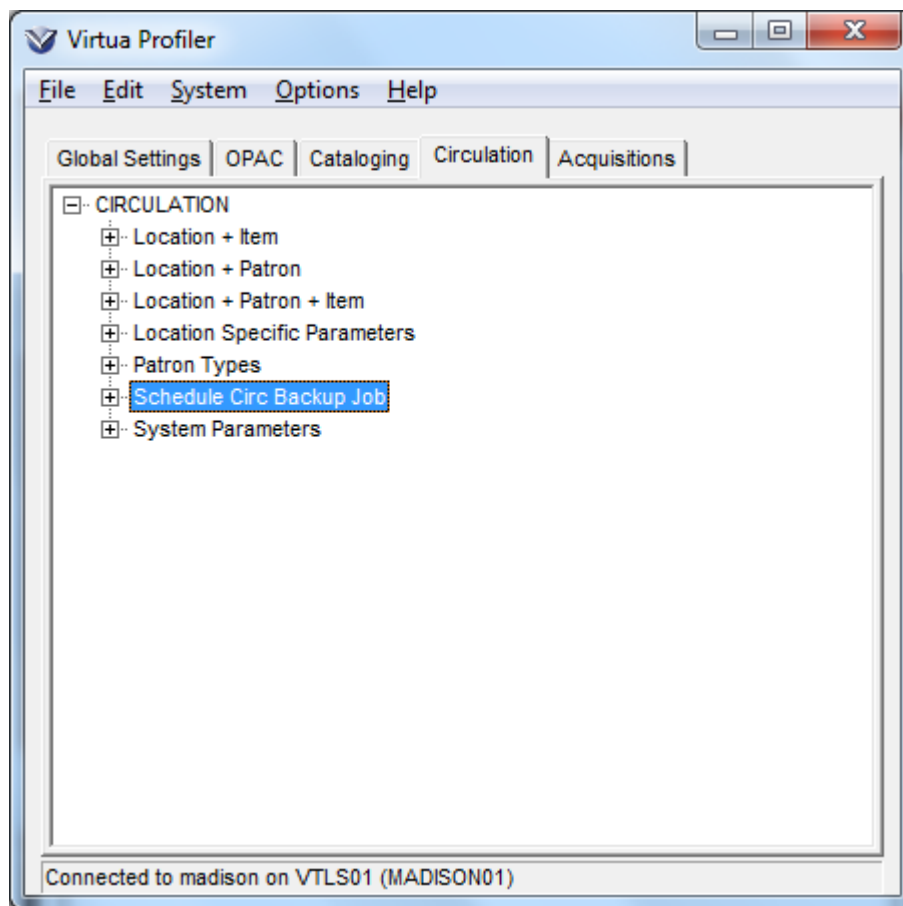


Figure 7-1. Scheduled Jobs Parameter

For more information on the Circulation Backup System, see the *Virtua Circulation Control/Circulation Backup User's Guide*.

7.1 Scheduling the Generation of the BlockPat File

The Schedule BlockPat parameter allows you to specify when Virtua creates the blocked patrons list files **ptnblok** and **ptnblok.txt**. These files contain a list of blocked patrons, including the amount of money each blocked patron owes, and up to 10 associated block codes. The Circulation Backup System uses the black list to verify that a patron is not blocked before allowing a circulation backup transaction.

To schedule the generation of the blocked patrons list file,

1. Click the Schedule Circ Backup Job heading in the Circulation tree, and then click the Schedule BlockPat parameter.

The BlockPat window ([Figure 7-2](#)) appears.

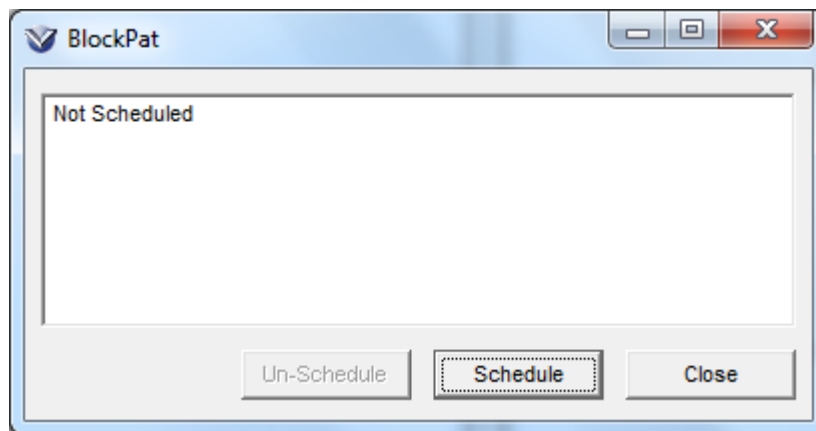


Figure 7-2. BlockPat Window

2. Click the Schedule button.

The Scheduler window appears ([Figure 7-3](#))

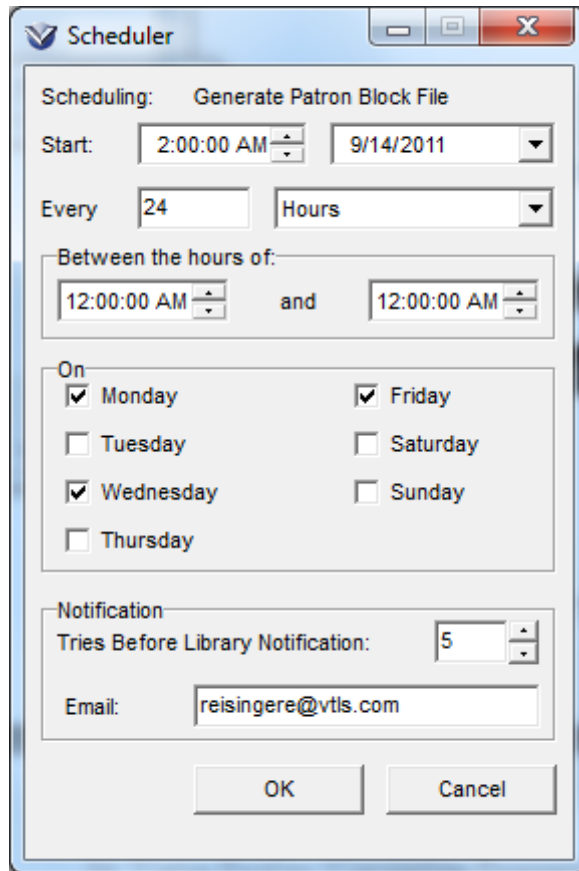


Figure 7-3. Scheduler Window

3. On the Scheduler window, specify the time of day and days of the week on which you would like the block patrons list file to be generated.
4. In the Notification area, specify the number of scheduled download or update attempts the system is allowed to make before sending a generic notification to the library.
5. Click the OK button.

The Scheduler window is closed, and the BlockPat window ([Figure 7-4](#)) is updated to display the schedule you have configured.

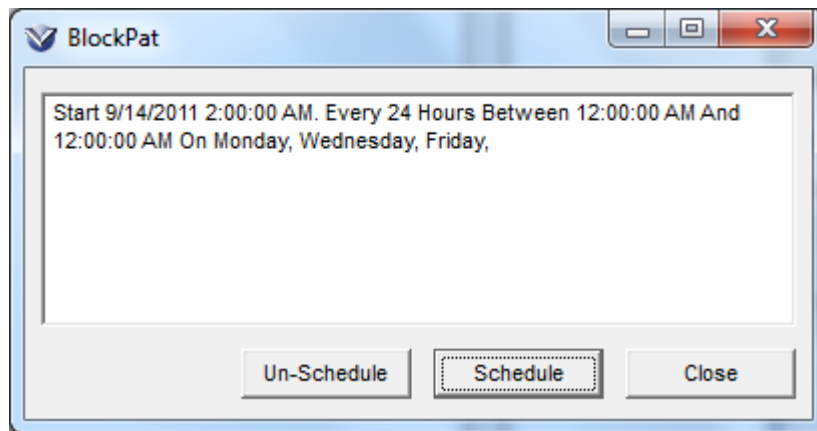


Figure 7-4. BlockPat Window, Displaying Schedule

Virtua will update the **ptrnblok** and **ptrnblok.txt** files using the schedule you defined.

8. Working with Circulation System Parameters

Circulation System Parameters create the foundation of the Circulation subsystem. This chapter provides details on setting Circulation System Parameters. This chapter also contains information on the relationship between System Parameters and other parameters in the Virtua Profiler.

This chapter covers the following topics:

- ⇒ [Accessing Circulation System Parameters](#)
- ⇒ [Working with the Account Adjustment Notes](#)
- ⇒ [Working with the Alerts and Blocks Matrix](#)
- ⇒ [Working with Automatic Check-ins](#)
- ⇒ [Working with the Billed Patron Note Parameter](#)
- ⇒ [Working with Block Code Definitions](#)
- ⇒ [Working with Check-out Limits](#)
- ⇒ [Working with Circulation Basic Options](#)
- ⇒ [Working with the Closed Dates Parameter](#)
- ⇒ [Working with Controlled Patron Values](#)
- ⇒ [Working with Fine Code Definitions](#)
- ⇒ [Working with ILL Options](#)
- ⇒ [Working with Item Class Definitions](#)
- ⇒ [Working with Item Class Groups](#)
- ⇒ [Working with the Library Calendars Parameter](#)
- ⇒ [Working with the Library Hours Parameter](#)
- ⇒ [Working with Loans/Pages Setup](#)
- ⇒ [Working with the Notification Options Parameter](#)
- ⇒ [Working with the Patron Block History Parameter](#)
- ⇒ [Working with Patron Diagnostic Messages Parameter](#)
- ⇒ [Working with Patron Type Values](#)
- ⇒ [Working with Receipt/Slip Setup](#)
- ⇒ [Working with Request Groups](#)
- ⇒ [Working with the Request Location Routing Parameter](#)

8.1 Accessing Circulation System Parameters

To access Circulation System Parameters,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).
3. Double-click System Parameters.

The tree structure expands to show the list of System Parameters (*Figure 8-1*).

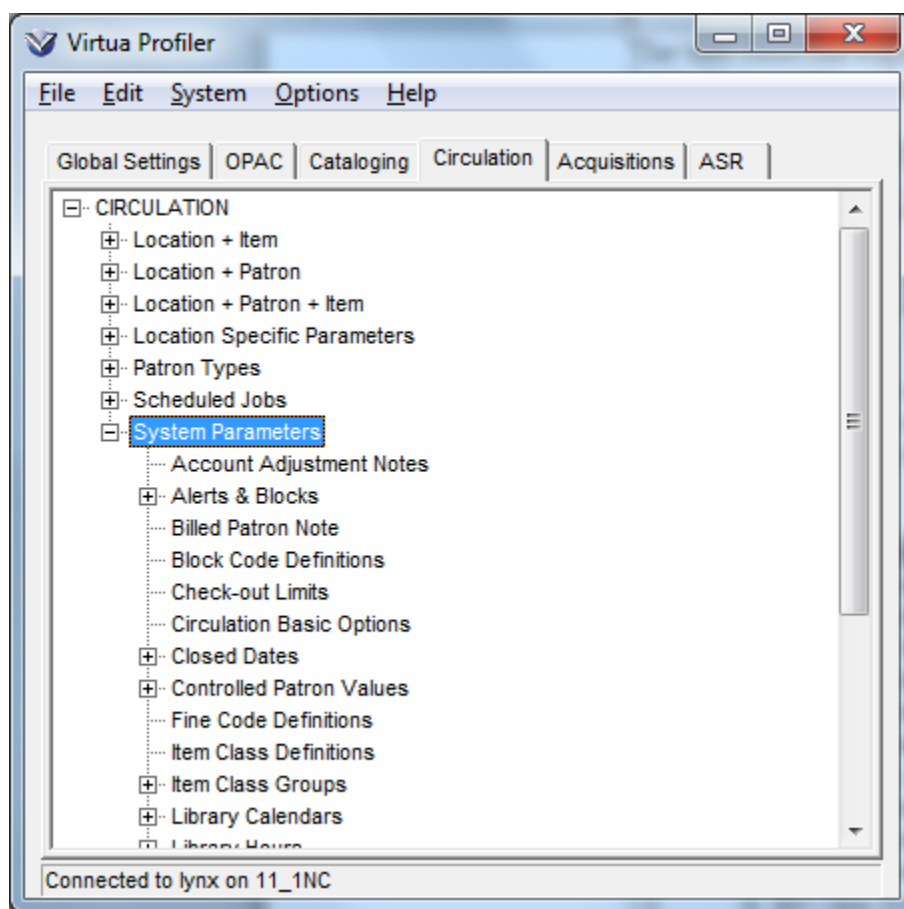


Figure 8-1. Circulation Tab - System Parameters Expanded

4. Double-click the desired parameter or heading.

The appropriate window or list of headings appears, where you can set values for the parameter. The following sections provide details on accessing and setting each of the Circulation System Parameters.

8.2 Working with the Account Adjustment Notes

Using the Account Adjustment Notes parameter (*Figure 8-2*), you can define a set of “canned” messages that will serve as account adjustment notes, or reasons for an adjustment to a patron account. Notes created here and marked as active will be available in a drop-down list in the Virtua client. The first note in the parameter will be the default and will appear first in the drop-down list.

The Account Adjustment Notes parameter contains a Require Adjustment Note check box. If the check box is selected, the Virtua client will automatically prompt you to select an option from the adjustment note drop-down list when you adjust an account or dispute, waive, delete or reinstate a fine or fee.

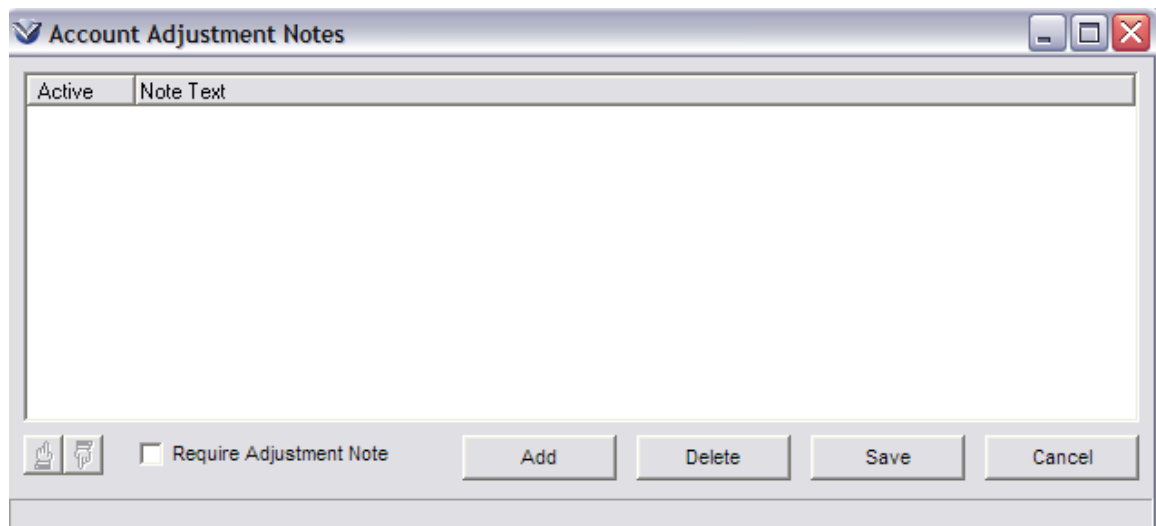


Figure 8-2. Account Adjustment Notes Window

To create an account adjustment note,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters (*Figure 1-2*).

3. Double-click System Parameters.
4. Double-click Account Adjustment Notes.
5. On the Account Adjustment Notes window, click the Add button ([Figure 8-3](#)).

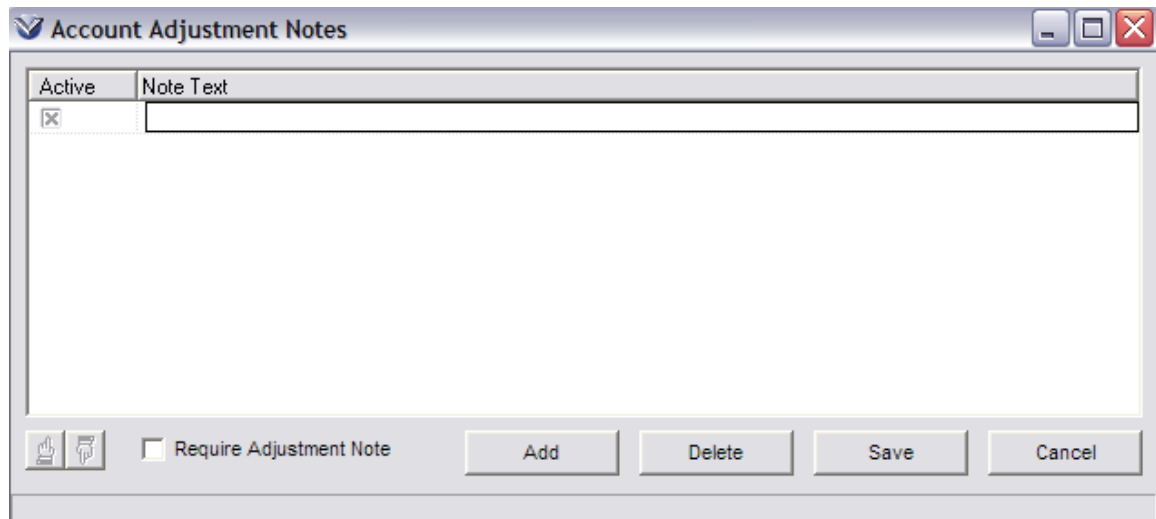


Figure 8-3. Account Adjustment Notes Window

6. Type the text of a note that will serve as a reason for an account adjustment.
7. Accept the Active check box selection for the note.
-OR-
If you do not want the note to be available to select in the drop-down list in the client, de-select the check box in the Active column.
8. If you want the Virtua client to prompt you with this drop-down list of reasons when you make an adjustment to a patron account, select the Require Adjustment Note check box.
9. Click the Save button.

To delete an account adjustment note,

1. Highlight the note you want to delete.
2. Click the Delete button.

Note: You cannot delete notes that are marked as active.

8.3 Working with the Alerts and Blocks Matrix

In the Alerts and Blocks Matrix, you can define a series of system-calculated alerts and blocks. Via the Alerts and Blocks Matrix, your library can set for each patron type the values that will trigger alerts and blocks when you initiate various circulation transactions.

This section discusses the following topics:

- ⇒ [Setting Values in the Alerts and Blocks Matrix](#)
- ⇒ [Applying Settings to Other Patron Types](#)
- ⇒ [Understanding the Alerts and Blocks Matrix](#)
- ⇒ [Viewing Alerts and Blocks in the Virtua Client](#)

8.3.1 Setting Values in the Alerts and Blocks Matrix

This section provides step-by-step instructions for setting up the Alerts and Blocks Matrix. For an overview of the Alerts and Blocks Matrix and for guidelines on setting appropriate values, see the section “[Understanding the Alerts and Blocks Matrix](#)” in this chapter.

To set up the Alerts and Blocks Matrix in the Virtua Profiler,

1. On the Virtua Profiler main window, click the Circulation tab.
2. Double-click CIRCULATION to see the expanded list of Circulation parameters ([Figure 1-2](#)).
3. Double-click System Parameters.
4. Double-click Alerts & Blocks.

The tree expands to display a list of available patron types ([Figure 8-4](#)).

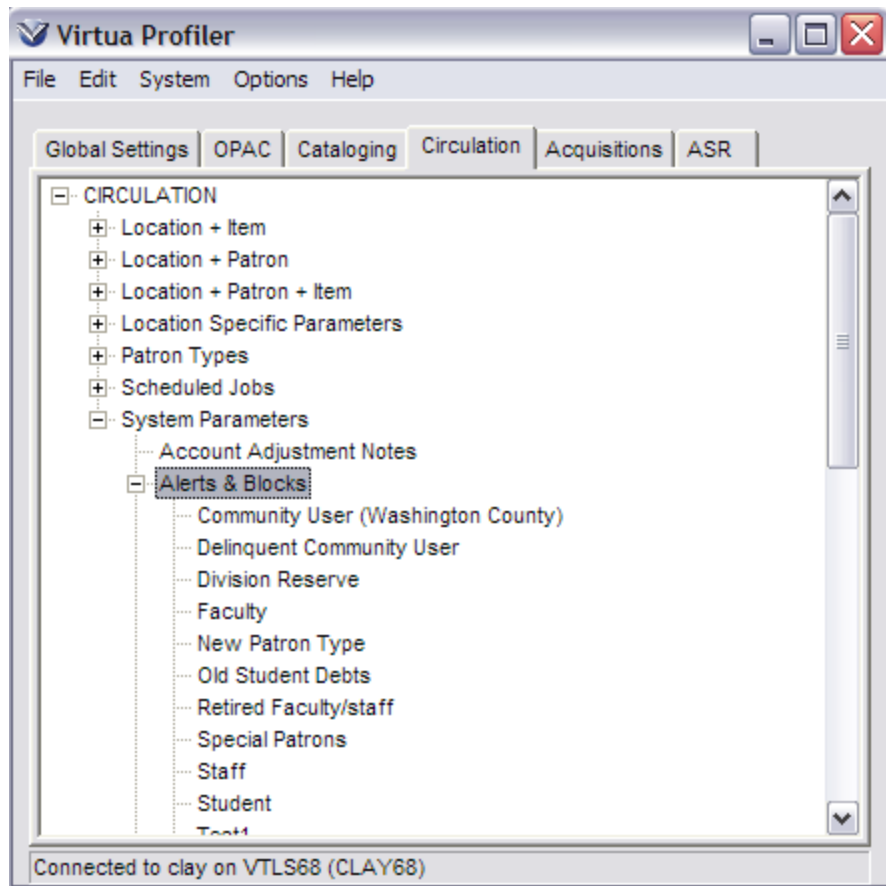


Figure 8-4. Circulation Tab - Alerts and Blocks Tree Expanded

5. Double-click the patron type for which you want to set up the matrix.

The Block/Alert Matrix window appears for the selected patron type ([Figure 8-5](#)).

Alert/Block	Overdue	Recalled Overdue	Billed	Reserve Overdue	Owed Amount	Days Overdue	Fee Age	Delinquent Owed Amount
CheckOut Alert	1	1	1	1	1.00	3	0	0.00
CheckOut Block	3	1	1	1	10.00	14	0	0.00
Renewal Alert	1	1	1	1	1.00	3	0	0.00
Renewal Block	3	1	1	1	10.00	14	0	0.00
Hold Alert	1	1	1	1	1.00	3	0	0.00
Hold Block	3	1	1	1	10.00	14	0	0.00
Recall Alert	1	1	1	1	1.00	3	0	0.00
Recall Block	3	1	1	1	10.00	14	0	0.00
Loan Alert	1	1	1	1	1.00	3	0	0.00
Loan Block	3	1	1	1	10.00	14	0	0.00
Page Alert	1	1	1	1	1.00	3	0	0.00
Page Block	3	1	1	1	10.00	14	0	0.00

Apply To Save Cancel

Last Modified 8/11/2003 2:02:50 PM

Figure 8-5. Block/Alert Matrix Window

- In the Overdue column, for each transaction type that appears in the first column, type the number of overdue items that will trigger an alert or a block.

Note: Recalled overdue items are also counted towards the Overdue totals when calculating alerts and blocks.

- In Recalled Overdue column, for each transaction that appears in the first column, type the number of recalled overdue items that will trigger an alert or a block.

Note:

- Recalled overdue items are counted toward both the Overdue and Recalled Overdue totals for calculating alerts and blocks.
- If you want all *requested* overdue items to be considered as recalled overdue items for this count, run **SetConsiderAllRequestedItemsFlag.sh** (see the *System Management: Circulation User's Guide*).

- In the Billed column, for each transaction that appears in the first column, type the number of billed items that will trigger an alert or a block.

Note: After an item is billed, Virtua ignores the Days Overdue setting and uses only the Billed setting for calculating alerts and blocks.

- In the Reserve Overdue column, for each transaction that appears in the first column, type the number of billed items that will trigger an alert or a block.
- In the Owed Amount column, for each transaction that appears in the first column, type the amount of money that the patron type may owe before the system responds with an alert or a block.

11. In the Days Overdue column, for each transaction that appears in the first column, type the number of days that an item can be overdue before it will trigger an alert or a block. A *single* item overdue for the specified Days Overdue triggers an alert or a block.

Hint: Choose the Days Overdue setting in careful combination with the (Number) Overdue setting. If the Days Overdue is set to zero, Virtua uses only the (Number) Overdue to determine delinquencies.

12. In the Fee Age column, type a value to define a threshold for the age (in days) of a fine or fee. Defining a fee age enables the alert or block based on the time threshold you enter. For example, if you set the fee age for a CheckOut Alert to 14, then a check-out alert will appear when a check-out is attempted for a patron with an unpaid fee that is 14 or more days old.
13. In the Delinquent Owed Amount column, type a value to define a threshold for the amount of a fine or fee that will trigger an alert or a block for a delinquent patron. A patron is flagged as delinquent by the InfoStation Delinquent Patron Account report. Until the patron qualifies as delinquent via this report, the alert or block will not be applied.
14. If desired, click the Apply To button to apply these settings to other patron types. For details, see the section “[Applying Settings to Other Patron Types](#)” in this chapter.
15. When you are finished setting the matrix values for the patron type, click the Save button.

Your settings are saved to the database.

8.3.2 Applying Settings to Other Patron Types

To help you configure your Alerts and Blocks Matrix settings more easily and efficiently, the Virtua Profiler offers the Apply To feature. Using this feature, you can apply the Alerts and Blocks Matrix settings you have configured for a particular patron type to other patron types.

To apply Alerts and Blocks Matrix settings to other patron types,

1. On the Block/Alert Matrix window, set the values that you want to apply to other patron types.
2. Click the Apply To button.

The Apply Settings window appears ([Figure 8-6](#)).



Figure 8-6. Apply Settings Window for Alerts and Blocks Matrix

3. Choose the patron types to which you want to apply the current settings.

Hints:

- To select a group of adjacent items in the list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in the list, hold down the CTRL key, and highlight the desired items.

4. When you are finished selecting patron types, click OK.

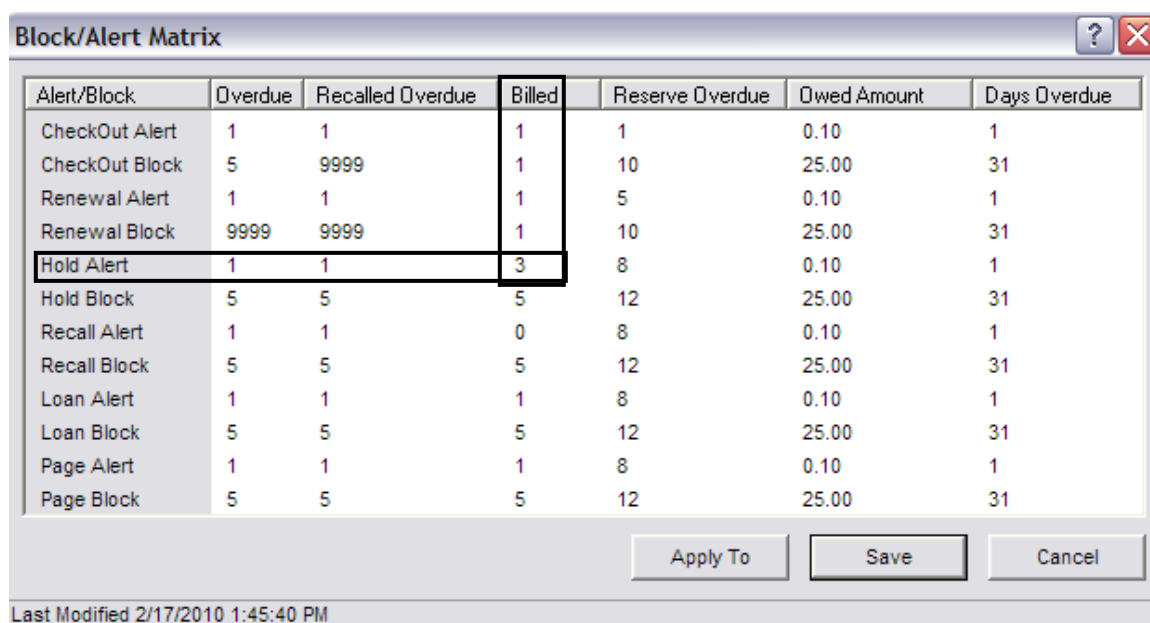
The settings for the current Block/Alert Matrix window are applied to the combinations you selected on the Apply Settings window.

Note:

- You do NOT need to save the current matrix values before applying them to other patron types.
- After you apply settings to other patron types, you can modify the values as needed.
- Settings on the current Block/Alert Matrix window are NOT applied to the current patron type until you click the Save button.

8.3.3 Understanding the Alerts and Blocks Matrix

In each cell of the Block/Alert Matrix, you can specify a value that will trigger an alert or a block for a specific transaction type when it is initiated for a patron of a given type. For example, consider the Resident Faculty Block/Alert Matrix in [Figure 8-7](#).



Alert/Block	Overdue	Recalled Overdue	Billed	Reserve Overdue	Owed Amount	Days Overdue
CheckOut Alert	1	1	1	1	0.10	1
CheckOut Block	5	9999	1	10	25.00	31
Renewal Alert	1	1	1	5	0.10	1
Renewal Block	9999	9999	1	10	25.00	31
Hold Alert	1	1	3	8	0.10	1
Hold Block	5	5	5	12	25.00	31
Recall Alert	1	1	0	8	0.10	1
Recall Block	5	5	5	12	25.00	31
Loan Alert	1	1	1	8	0.10	1
Loan Block	5	5	5	12	25.00	31
Page Alert	1	1	1	8	0.10	1
Page Block	5	5	5	12	25.00	31

Buttons: Apply To, Save, Cancel

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Figure 8-7. Block/Alert Matrix Window - An Example

In [Figure 8-7](#), the cell at which the Hold Alert row intersects with the Billed column is highlighted. In this example, the number **3** specifies that when a patron initiates a hold request of the type Resident Faculty, an alert will be triggered if the patron has at least three billed items.

In the cell directly below the Hold Alert/Billed cell, you can specify the number of billed items that trigger a Hold *block* for the patron type. In [Figure 8-7](#), the Hold Block/Billed value is set to **5**. This means that if the patron has at least five billed items, a block will be triggered when the patron initiates a hold request.

Note: In the Block/Alert Matrix, the number **0** is treated as a null value. That is, a value of **0** will never trigger an alert or a block to be issued. For example, in [Figure 8-7](#), the Recall Alert/Billed value is set to **0**. This means that regardless of the number of billed items that the patron has, an alert will NOT be triggered if the patron initiates a recall request.

For details on the difference between an alert and a block, see the section, “[Viewing Alerts and Blocks in the Virtua Client](#)” in this guide.

The Hold Alert and Hold Block values specified in [Figure 8-7](#) produce the following results when the patron initiates a Hold request:

1. If the patron has one or two billed items, neither an alert nor a block is triggered.
2. If the patron has three or four billed items, an alert is triggered.
3. If the patron has five or more billed items, a block is triggered.

In addition to these system-calculated alerts and blocks, Virtua lets you define a series of manual blocks that you can enter into the patron record. For details, see the section “[Working with Block Code Definitions](#)” in this user’s guide.

8.3.4 Viewing Alerts and Blocks in the Virtua Client

When you initiate a Circulation transaction, Virtua responds with an alert or block if . . .

- The patron’s current account or activity values meet or exceed the limits set in the Alerts and Blocks Matrix.
- A given transaction will cause the patron to exceed the limits defined in the Alerts and Blocks Matrix.

An alert simply notifies you of a condition that exists when you perform a given transaction. For example, you might configure the Alerts and Blocks matrix to trigger an alert when you perform a check-out for a patron who has five overdue items. In this way, when you perform a check-out for a patron who has at least five items overdue, Virtua displays an alert in a pop-up window ([Figure 8-8](#)).

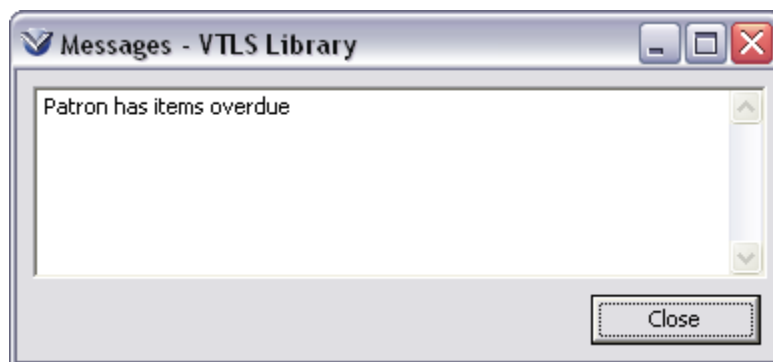


Figure 8-8. Alert Message

When you close the Messages window, Virtua proceeds with the transaction.

A block, on the other hand, notifies you of a condition that exists when you perform a given transaction, and it may cancel the transaction.

Blocks that are triggered by check-outs and renewals give you the option of overriding the block or canceling the transaction. For example, you might configure the Alerts and Blocks matrix to trigger a block when you perform a check-out for a patron who has 10 items overdue. In this way, when you perform a check-out for a patron who has 10 or more items overdue, Virtua displays a block in a pop-up window ([Figure 8-9](#)).

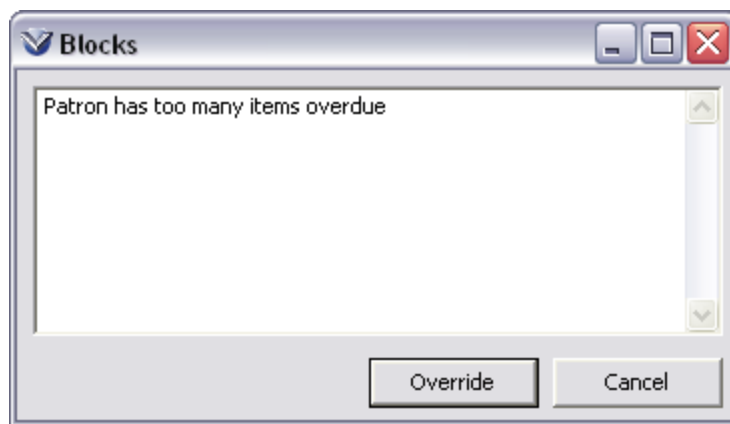


Figure 8-9. Block Message Triggered by a Check-out or Renewal

Authorized users can click the Override button to override the block and proceed with the transaction. If you want to cancel the transaction, you can click the Cancel button. For additional information on overriding blocks, see the *Circulation Workflow-Based Reference Guide*.

Blocks that are triggered by requests appear in a pop-up Error message ([Figure 8-10](#)).

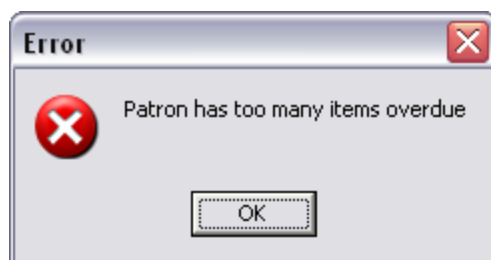


Figure 8-10. Block Message Triggered by a Request

You cannot override blocks that are triggered by requests. When you click OK, Virtua cancels the request transaction.

8.4 Working with Automatic Check-ins

The Automatic Check-ins parameter lets you schedule automatic check-ins for specific item classes. The automatic check-in function uses the current due date and automatically backdates check-ins for overdue items of a particular item class. In this way, no fees are assessed. No user ID or operator ID is captured in the Circulation Transaction Log.

On the Schedule Automatic Check-ins window (*Figure 8-11*), you can specify the item classes that you want to be checked in automatically, and you can schedule when the automatic check-in should take place. To perform the check-ins, the JobScheduler process on the server will use a new executable **AutoCheckIn.exe**.

Note: For automatic check-ins to take place as scheduled, you must run the program **JobScheduler.exe** in the background. The program requires one parameter—the wait time in seconds between jobs. **JobScheduler.exe** reads the timetable in the database where job schedules are stored and executes the scheduled activity at the specified intervals.

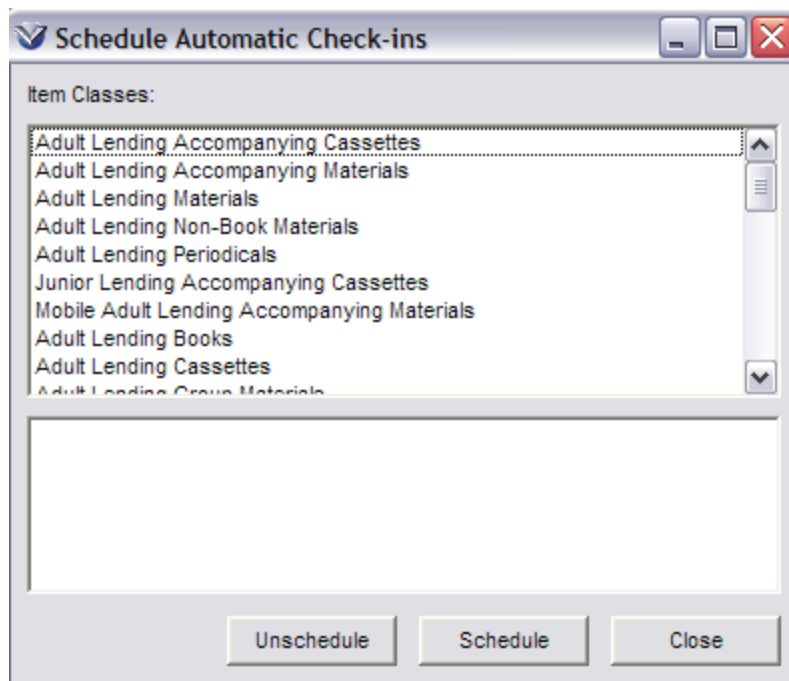


Figure 8-11. Schedule Automatic Check-ins

To schedule/unschedule automatic check-ins for a particular item class,

1. Navigate to the Schedule Automatic Check-ins window via the Circulation tab > System Parameters > Automatic Check-ins.
2. Select the desired item class from the list at the top of the window.
 - If that item class has not already been scheduled, the words *Not Scheduled* will appear in the text box at the bottom of the window and the Schedule button will be enabled.
 - If that item class has already been scheduled, the details of the schedule will appear in the text box at the bottom of the window and both the Unschedule and Schedule buttons will be enabled.
3. Click the Schedule button to see the Scheduler window for Automatic Check-ins. Configure or edit the window as desired (for details, see the section [“Working with the Scheduled Jobs Parameter”](#)).

-OR-

Click the Unschedule button to be prompted: “Are you sure you want to delete this schedule for Automatic Check-ins?”

4. Repeat these steps for each item class for which you want to schedule/unscheduled Automatic Check-ins.

8.5 Working with the Billed Patron Note Parameter

The Billed Patron Note parameter lets you define a text note that will be automatically added to the patron record when a patron is billed for an item (either when the Bills report is run or when a patron is billed manually). If the patron is being billed for multiple items, only one note will be added to the patron record.

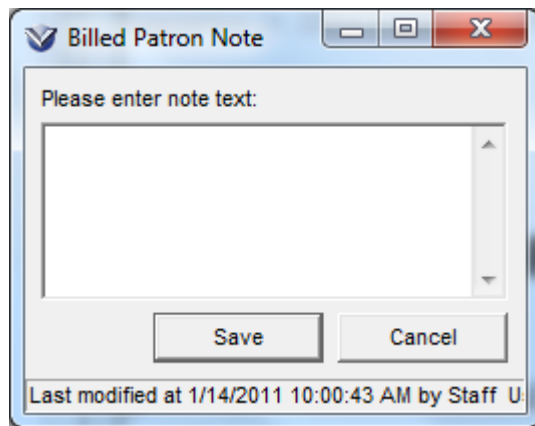


Figure 8-12. Billed Patron Note Window

8.6 Working with Block Code Definitions

By manually inserting block codes into the 043 tag and the 007 fixed fields of patron records, you can block patrons from Circulation transactions, such as check-outs, check-ins, and renewals. The Block Code Definitions parameter lets you create definitions for the codes that your library uses to block patrons.

When you initiate a check-out or a renewal for a manually blocked patron (i.e., a patron whose record contains a block code), Virtua will display a Blocks message in a pop-up window ([Figure 8-13](#)).

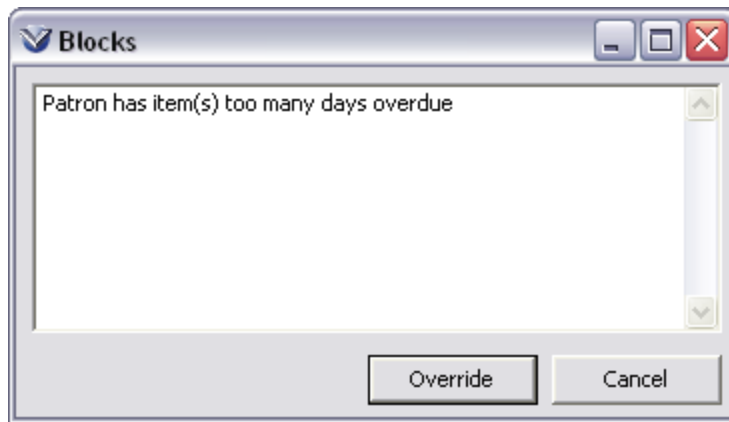


Figure 8-13. Block Code Definition Displayed in Error Message

When you initiate a request for a blocked patron, Virtua displays a pop-up Error message ([Figure 8-14](#)).

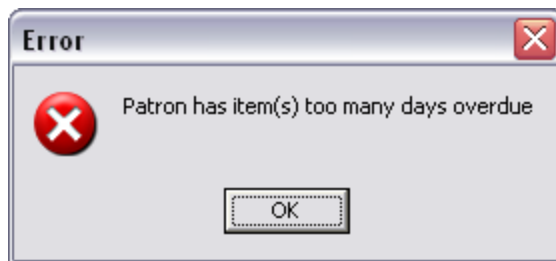


Figure 8-14. Block Code Definition Displayed in Error Message

Note: Authorized users can override blocks that appear during check-out and renewal transactions. You cannot override blocks that appear when you initiate a request. For details on overriding blocks, see the *Circulation Workflow-Based Reference Guide*.

Whenever Virtua displays a manual block, either when you initiate a check-out or renewal or when you initiate a request, if the block code is defined via the Block Code Definitions parameter, the pop-up message displays the corresponding definition. In both [Figure 8-13](#) and [Figure 8-14](#), the block is defined as *Owes Fines from a Previous Semester*.

In this way, the Block Code Definitions parameter lets you create the *text* for the messages that appear in the client when you initiate transactions for manually blocked patrons.

For details on manually entering blocks into the patron record, see the *Circulation Workflow-Based Reference Guide*.

For information on system-calculated alerts and blocks, see the chapter “[Working with the Alerts and Blocks Matrix](#)” in this user’s guide.

For details on patron blocks, see the *Circulation Workflow-Based Reference Guide*.

8.6.1 About Block Code Definitions

When configuring the Block Code Definitions parameter, keep in mind that . . .

- Each block consists of . . .
 - ◆ A block code.
 - ◆ A block code definition (i.e., a brief description of the Block Code, which will serve as the text of the error message).
- Each block code . . .
 - ◆ Must be alphanumeric and contain two characters.
 - ◆ Is case sensitive, which means **AA** is different than **aa**.
 - ◆ Must be *manually* added to and deleted from patron records.

8.6.2 About Library-defined and Fixed-field Blocks

Using the Block Code Definitions parameter, you can create your own definitions for 1) library-defined block codes and 2) predefined block codes that correspond to 007 fixed field positions.

8.6.2.1 Library-defined Blocks

A library-defined block is any two-character block code that you manually insert into the 043 tag of the patron record. Via the [Block Code Definitions parameter](#), you can create definitions for your library-defined block codes.

If you insert into the 043 tag a block code that is NOT defined in the Block Code Definitions parameter, when you initiate a Circulation transaction for the patron, Virtua displays only the *code* in the error message. For example, in [Figure 8-15](#) and [Figure 8-16](#), the block code is FP.

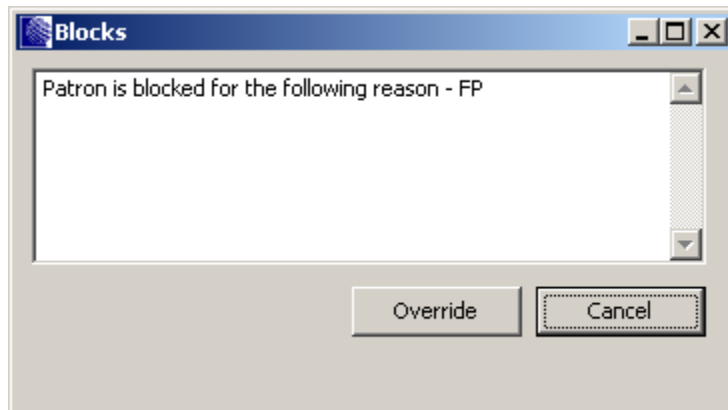


Figure 8-15. Block Message Displaying Block Code

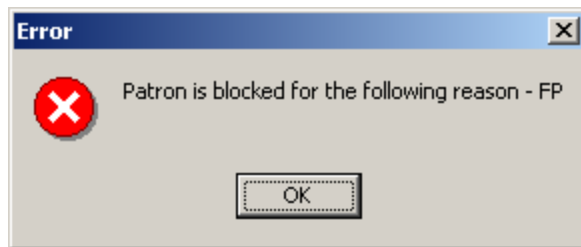


Figure 8-16. Error Message Displaying Block Code

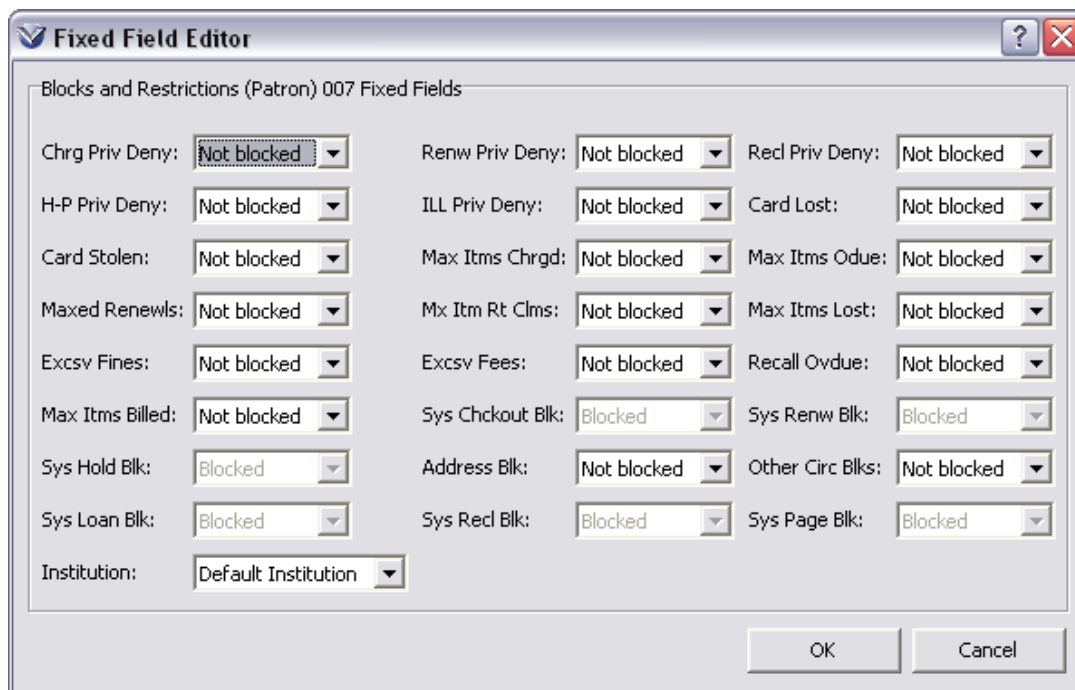
Virtua reserves two block codes for address blocks: **aa** and **AA**. If the code **aa** or **AA** exists in 043 \$a of the patron record, the patron is blocked from receiving Circulation notices. Innovative recommends that in the Block Code Definitions parameter you define the codes **aa** and **AA** as *Address Block*.

Additionally, Virtua reserves the block code **27** to block delinquent patrons via InfoStation's Delinquent Patron Accounts report. This block code is pre-defined in the Block Code Definitions parameter.

8.6.2.2 Fixed-field Blocks

A fixed-field block is a block that you set manually via the 007 fixed fields of the patron record. Each 007 fixed-field block has a *predefined* block code that corresponds to its fixed-field position. For example, the block *Charging Privileges Denied* is in the 01 position of the 007 fixed fields. Thus the block code for *Charging Privileges Denied* is **01**. These predefined block codes appear by default in the Block Codes Definitions parameter.

You can view all the patron fixed-field blocks in the 007 Fixed Field Editor ([Figure 8-17](#)). Notice that Charging Privileges Denied is in the first position.



Fixed Field Editor

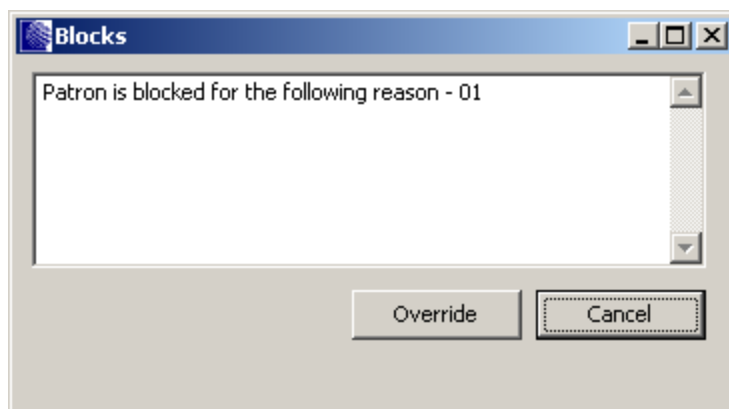
Blocks and Restrictions (Patron) 007 Fixed Fields

Chrg Priv Deny: <input type="text" value="Not blocked"/>	Renw Priv Deny: <input type="text" value="Not blocked"/>	Redl Priv Deny: <input type="text" value="Not blocked"/>
H-P Priv Deny: <input type="text" value="Not blocked"/>	ILL Priv Deny: <input type="text" value="Not blocked"/>	Card Lost: <input type="text" value="Not blocked"/>
Card Stolen: <input type="text" value="Not blocked"/>	Max Itms Chrgd: <input type="text" value="Not blocked"/>	Max Itms Odue: <input type="text" value="Not blocked"/>
Maxed Renewls: <input type="text" value="Not blocked"/>	Mx Itm Rt Clms: <input type="text" value="Not blocked"/>	Max Itms Lost: <input type="text" value="Not blocked"/>
Excsv Fines: <input type="text" value="Not blocked"/>	Excsv Fees: <input type="text" value="Not blocked"/>	Recall Ovdue: <input type="text" value="Not blocked"/>
Max Itms Billed: <input type="text" value="Not blocked"/>	Sys Chkout Blk: <input type="text" value="Blocked"/>	Sys Renw Blk: <input type="text" value="Blocked"/>
Sys Hold Blk: <input type="text" value="Blocked"/>	Address Blk: <input type="text" value="Not blocked"/>	Other Circ Blks: <input type="text" value="Not blocked"/>
Sys Loan Blk: <input type="text" value="Blocked"/>	Sys Redl Blk: <input type="text" value="Blocked"/>	Sys Page Blk: <input type="text" value="Blocked"/>
Institution: <input type="text" value="Default Institution"/>		

OK Cancel

Figure 8-17. Fixed Field Editor

Only the *codes* for fixed-field blocks are predefined. You must create your own *definitions* for fixed-field block codes via the Block Code Definitions parameter. Otherwise, when you initiate a transaction for a blocked patron, Virtua displays the fixed field *code* in the pop-up message (Figure 8-18 and Figure 8-19).



Blocks

Patron is blocked for the following reason - 01

Override Cancel

Figure 8-18. Block Message Displaying Fixed-field Block Code

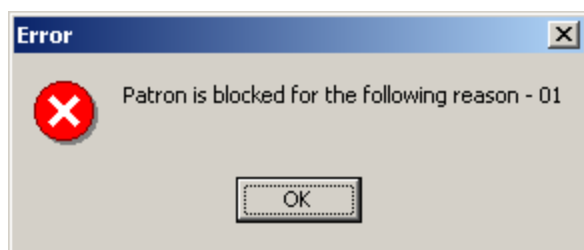


Figure 8-19. Error Message Displaying Fixed-field Block Code

The following fixed-field blocks ([Figure 8-17](#)) appear in the Block Code Definitions parameter by default. The codes appear highlighted in red, and they *cannot* be deleted. However, you can modify each definition as needed, keeping in mind that the definition is the message that will appear in the Blocks window in the client.

Fixed Field Position/ Block Code	Fixed Field Description/Block Code Definition
01	Charging privileges denied
02	Renewal privileges denied
03	Recall privileges denied
04	Hold-placing privileges denied
05	ILL privileges denied
06	Card reported lost
07	Card reported stolen
08	Too many items charged
09	Too many items overdue
10	Has made too many renewals
11	Too many claims of items returned
12	Too many items lost
13	Excessive outstanding fines
14	Excessive outstanding fees
15	Has recall overdue
16	Too many items billed
20	Address block
21	Other Circulation-related blocks (specified in field 043)
26, 28-55	Consortium only: Institution symbol for the institution at which the blocks apply.

The following fixed-field block codes are system generated. The labels for the codes appear in the 007 fixed-field layout in the Fixed Field Editor, but you *cannot* set them manually. Neither can you see/define them in the Block Code Definitions parameter. Virtua assigns these blocks as appropriate, often in conjunction with a diagnostic message. All diagnostic messages are available for translation in the Virtua language table.

The block code **27**, which is used by the Delinquent Patron Accounts report to add a block in the patron record 043 tag, also appears in the Block Code Definitions parameter by default.

Note: For customers using the HKPL Patron Editor in version 2011.2, the description of each of the following block codes will be displayed as appropriate but will not be editable. The text strings will be available for translation in the Language Editor.

Fixed Field Position/ Block Code	Fixed Field Description/Block Code Definition
17	System Check-out Block
18	System Renewal Block
19	System Hold Block
22	System Loan Block
23	System Recall Block
24	System Page Block

For details about translating strings in the Language Editor, see the *Virtua Translation and String Customization Guide*.

8.6.3 Configuring the Block Code Definitions Parameter

To configure the Block Code Definitions parameter,

1. On the Circulation tab, under System Parameters, double-click Block Code Definitions.

The Block Codes window appears (*Figure 8-20*), displaying the predefined block codes that correspond to the blocks and restrictions in the 007 fixed field, and the **27** block code that is used by the Delinquent Patron Accounts report to add a block in the patron record 043 tag. These fixed-field block codes are highlighted in red and cannot be removed.

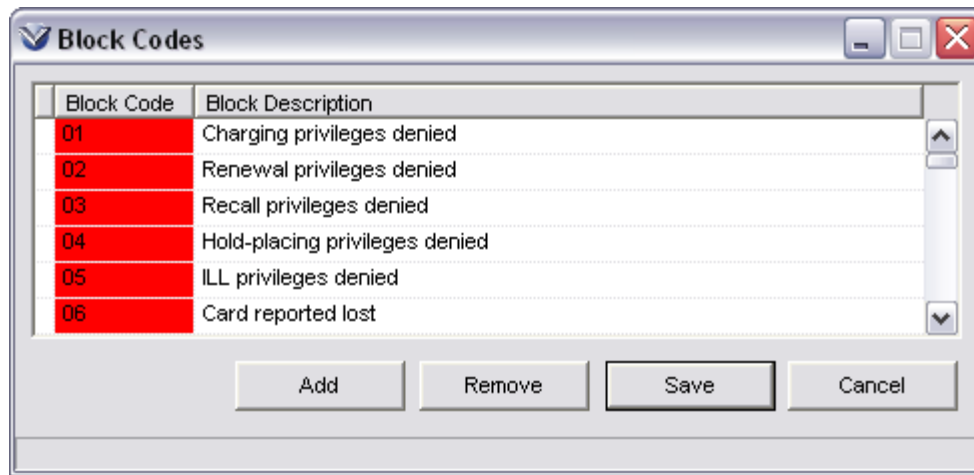


Figure 8-20. Block Code Definitions Window

2. **To add and define a new block**, click the Add button.

A blank row appears in the table.

- i. In the Block Code column, type a new code in the empty cell.
- ii. In the Block Code Definition column, type a definition for the new code.
- iii. If needed, click the Add button to add another block code definition.

Note: You must complete all the entries in a single row before you can add another row.

3. **To modify an existing block code definition**, highlight the block code or definition that you wish to modify, and then type over the existing text.
4. **To delete a block from the list**, highlight the desired row, and then click the Remove button. Note that you cannot remove system-defined blocks.
5. After you have finished adding, modifying, and deleting codes and definitions, click the Save button.

Your block code settings are saved to the database.

Note: To change strings or add translations for the block code definitions, use the [Block Codes tab](#) of the [Patron Diagnostic Messages](#) window.

8.7 Working with Check-out Limits

The Check-out Limits parameter lets you define limits on the number of items that a patron can check out. When a patron has the maximum number of items checked out, an alert will appear at check-out, indicating to library staff that the check-out limit has been reached. Staff can then cancel or proceed with the transaction as desired. Check-out limits consist of two parts:

- **Check-out Limits Types** - The levels at which to impose limits on the number of items a patron can check out. For details, see the section “[Understanding Check-out Limits Types](#).”
- **Check-out Limits** - For each component of the check-out limits *type or types* you choose, the threshold, or value, at which staff will be alerted that the check-out limit has been reached. For details, see the section “[Determining Which Check-Out Limits Types to Use](#).”

8.7.1 Understanding Check-out Limits Types

Check-Out Limits Types allow you to specify the check-out limits that apply to various patron, item class, and location combinations. For example, the Patron Type + Item Check-Out Limits Type allows you to specify check-out limits that apply to each possible Patron Type/Item Class combination. There are five Check-Out Limits Types, and each corresponds to a tab on the Check-Out Limits window ([Figure 8-21](#)):

- Patron Type - Check-out limits are set based on patron type alone.
- Patron Type + Item - Check-out limits are set based on patron type and item class.
- Patron Type + Location - Check-out limits are set based on patron type and location.
- Patron Type + Item + Location - Check-out limits are set based on patron type, item class, and location.
- Patron Type + Item Class Group - Check-out limits are set based on patron type and item class group. See the section “[Working with Item Class Groups](#)” in this guide for more information about item class groups.

Patron Type	Check-Out Limit	Limit Period	Period Type
Faculty	25	0	Overall
Other/Misc.	10	0	Overall
Staff	20	0	Overall
Student	20	0	Overall

Figure 8-21. Check-Out Limits Window - Patron Type + Item Tab

You can configure check-out limits for as few or as many of the Check-out Limits Types as you wish. Virtua uses the following rules when determining how to impose check-out limits in the client:

- Check-out limits may be configured and saved on any tab of the Check-out Limits window, but they are not used in the client unless the Use These Limits check box is selected. A Use These Limits check box appears on every tab of the Check-out Limits window, allowing you to enable or disable check-out limits for individual Check-out Limits Types.
- If no check-out limits are enabled (i.e., the Use These Limits check box is not selected on any tab of the Check-out Limits window), no check-out limits are imposed in the client.
- If check-out limits for several Check-out Limits Types are in use, Virtua will observe the lowest check-out limit configured for the patron type/item class/location combination that applies to the transaction. Consider the following example: a patron with the patron type Faculty attempts to check out an item with the item class DVD. If the check-out limit that corresponds to this patron type/item class combination is set to 5 on the Patron Type + Item tab, but the check-out limit for Faculty is set to 25 on the Patron Type tab, Virtua uses the lower check-out limit of 5 when processing the check-out transaction.

8.7.2 Determining Which Check-Out Limits Types to Use

The Check-out Limits Types you choose to use on the Check-out Limits window determine the number of check-out limits values you will need to set. The following table indicates the check-out limits values you should set, according to the Check-Out Limits Types you choose to use:

CHECK-OUT LIMITS TYPE	RESULT
None	<ul style="list-style-type: none"> • There is NO limit on the number of items patrons can check out. • You do NOT need to set values on the Check-out Limits window.
Patron Type	<ul style="list-style-type: none"> • Check-out limits are based on patron type alone. • You should set check-out limits values for each patron type on the Patron Type tab of the Check-out Limits window.
Patron Type + Item	<ul style="list-style-type: none"> • Check-out limits are based on patron type and item class. • On the Patron Type + Item tab, you should set check-out limits values for <i>every</i> item class your library allows to circulate, setting values for <i>each</i> patron type. • For example, if your library uses six item classes, you should define <i>six</i> sets of limits, one for <i>each</i> item class. Use the Item drop-down list to select each item class.
Patron Type + Location	<ul style="list-style-type: none"> • Check-out limits are based on patron type and location. • On the Patron Type + Location tab, you should set check-out limits values for <i>every</i> location from which you circulate items, setting values for <i>each</i> patron type. • For example, if your library uses three locations, you should define <i>three</i> sets of limits, one for <i>each</i> location. Use the Location drop-down list to select each location.

CHECK-OUT LIMITS TYPE	RESULT
Patron Type + Item + Location	<ul style="list-style-type: none"> • Check-out limits are based on patron type, item class, AND location. • On the Patron Type + Item + Location tab, you should set check-out limits values for <i>every</i> item class + location combination in your library. • For example, if you use six item classes and three location, you should define 18 matrices, one for <i>each</i> item class + location combination.
Patron Type + Item Class Group	<ul style="list-style-type: none"> • Check-out limits are based on patron type and item class group. • On the Patron Type + Item Class Group tab, you should set check-out limits values for <i>every</i> item class group. If some item classes do not belong to an item class group, you should set check-out limits for those item classes using one of the other Check-out Limits Types described above.

8.7.3 Aspects of the Check-out Limits Window

The Check-out Limits window ([Figure 8-21](#)) can contain the following columns:

- **Patron** - The list of patron types that have been defined for your library. This column is read-only and provides a label for each row of data in the table.
- Columns that define check-out limits for regular items:
 - ♦ **Check-out Limit** - The maximum number of regular items that a patron can check out.

Note: Virtua counts a partial or full check-out of grouped items as ONE check-out, and a patron must return ALL items from a group before Virtua reduces the check-out limit count.

 - ♦ **Limit Period** - The period of time during which the regular Check-out Limit applies.
 - ♦ **Period Type** - A unit of time, which defines the regular Limit Period.
- Three columns that define check-out limits for reserve items:
 - ♦ **Reserve Check-out Limit** - The maximum number of reserve items that a patron can check out.

- ◆ **Reserve Limit Period** - The period of time during which the Reserve Check-out Limit applies.
- ◆ **Period Type** - A unit of time, which defines the Reserve Limit Period.

When item class is a component of the Check-out Limits Type tab you are viewing (i.e., either the Patron Type + Item tab, the Patron Type + Item + Location tab, or the Patron Type + Item Class Group tab), the Reserve columns do NOT appear in the table. Rather, the Check-out Limits window displays only four columns, as shown in [Figure 8-22](#).

Patron Type	Check-Out Limit	Limit Period	Period Type
Faculty	25	0	Overall
Other/Misc.	10	0	Overall
Staff	20	0	Overall
Student	20	0	Overall

Figure 8-22. Check-out Limits Window - Patron Type + Item Class Tab

Via the Item Class Definitions parameter, you can define a Class Type (either regular or reserve) for each item class you define for your database. In this way, when item class is a component of the Check-out Limits Type tab you are viewing, Virtua does not need to use the Reserve columns in the table because each item class itself specifies whether the limits apply to regular items or reserve items.

When item class is NOT a component of the Check-out Limits Type tab you are setting, at check out, Virtua uses the limit from either the regular columns or reserve columns of the table ([Figure 8-23](#)) as appropriate, depending on whether a patron is checking out a regular item or a reserve item. For example . . .

- If you are setting the check-out limits for Patron Type, Virtua uses the settings in the three Regular columns when a patron checks out an item with a Class Type of Regular.

- If you are setting check-out limits on the Patron + Location tab, Virtua uses the settings in the three Reserve columns when a patron checks out an item with a Class Type of Reserve.

Patron Type	Check-Out Limit	Limit Period	Period Type	Reserve Check-Out Limit	Limit Period	Period Type
Adult	0	0	Overall	0	0	Overall
Banned All	0	0	Overall	0	0	Overall
Banned Computer	0	0	Overall	0	0	Overall
FLC ILL	0	0	Overall	0	0	Overall
FLC Subscription	0	0	Overall	0	0	Overall
Juvenile All FCA...	0	0	Overall	0	0	Overall
Juvenile CCO-LA	0	0	Overall	0	0	Overall
Juvenile-do not ...	0	0	Overall	0	0	Overall

Figure 8-23. Check-out Limits Window - Patron Type + Location Tab

Note: For the Patron Type and the Patron + Location Check-out Limits Types, you must set values in *both* the Regular and the Reserve columns. At check out, Virtua uses the appropriate values, based on the Class Type of the item being checked out.

8.7.4 Setting Check-out Limits

To set values on the Check-out Limits window,

1. Navigate to the tab that corresponds to the Check-Out Limits Type for which you want to set check-out limits. For example, [Figure 8-24](#) shows the Location + Patron tab, where the location selected is the Main Library.

Patron Type	Check-Out Limit	Limit Period	Period Type	Reserve Check-Out Limit	Limit Period	Period Type
Faculty	25	0	Overall	5	1	Overall
Other/Misc.	10	0	Overall	5	1	Overall
Staff	20	0	Overall	5	1	Overall
Student	20	0	Overall	5	1	Overall

Figure 8-24. Check-out Limits Window - Patron Type + Location Tab

- For each patron type listed in the Patron column on the left, set the following values as appropriate. For details on determining the columns in which you need to set values, see the section [“Determining Which Check-Out Limits Types to Use”](#) in this chapter.

- **Check-out Limit** - The number of regular items the patron can check out within the specified Limit Period.
- **Limit Period** - The period during which the Check-out Limit applies. This number determines for how many minutes, hours, days, or years the Check-out Limit applies. If, in the Period Type column, you choose Overall, this field is ignored.
- **Period Type** - Defines the number in the Limit Period field. You can select Minutes, Hours, Days, Years, or Overall. For example, if you select Days, the patron can check out the number of items defined in the Check-out Limit field over the period of days defined in the Limit Period field.

Note:

- If you select Minutes, Hours, Days, or Years, the Check-out Limit determines how many items a patron can check out over the Limit Period.
 - If you select Overall, the Check-out Limit determines how many items a patron can have checked out at any one time.
- **Reserve Check-out Limit** - The number of reserve items the patron can check out within the specified Limit Period.

- **Reserve Limit Period** - The period during which the Reserve Check-out Limit applies. This number determines for how many minutes, hours, days, or years the Reserve Check-out Limit applies. If, in the Reserve Period Type field, you choose Overall, this field is ignored.
- **Period Type** - Defines the number in the Reserve Limit Period field. You can select Minutes, Hours, Days, Years, or Overall. For example, if you select Days, the patron can check out the number of items on reserve defined in the Reserve Check-out Limit field over the period of days defined in the Reserve Limit Period field.

Note:

- If you select Minutes, Hours, Days, or Years, the Check-out Limit determines how many items a patron can check out over the Limit Period.
- If you select Overall, the Check-out Limit determines how many items a patron can have checked out at any one time.

3. When you are finished setting all the values for this Check-out Limits Type, click the Save button.

Your settings are saved to the database.

8.8 Working with Circulation Basic Options

Circulation Basic Options consist of a variety of circulation settings that control various aspects of the Circulation subsystem:

- [Delete/Waive Options](#)
- [Request Options](#)
- [Item Options](#)
- [Item Statuses](#)
- [Renewal Options](#)
- [Global Request Trapping Options](#)
- [3M Options](#)
- [Other Options](#)

The following sections provide instructions for configuring these settings in the Virtua Profiler.

8.8.1 Setting Circulation Basic Options

To set the Circulation Basic Options,

1. On the Circulation tab of the Virtua Profiler tree, under the System Parameters heading ([Figure 8-1](#)), double-click Circulation Basic Options.

The Circulation Basic Options window appears ([Figure 8-25](#)).

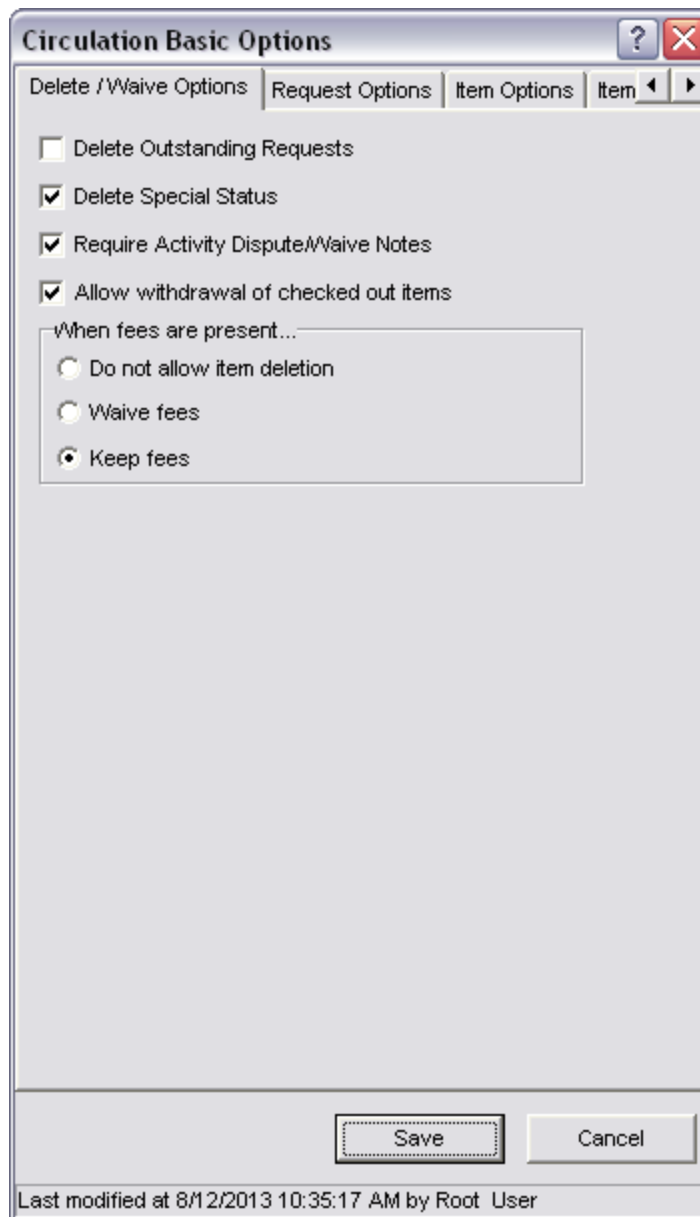


Figure 8-25. Circulation Basic Options Window

8.8.2 About Circulation Basic Options

The following sections describe in detail the settings that you can configure on the Circulation Basic Options window, and provide guidelines for setting them.

8.8.2.1 About Delete/Waive Options

On the Delete/Waive Options tab of the Circulation Basic Options window, you can set options that govern how Virtua treats requests.

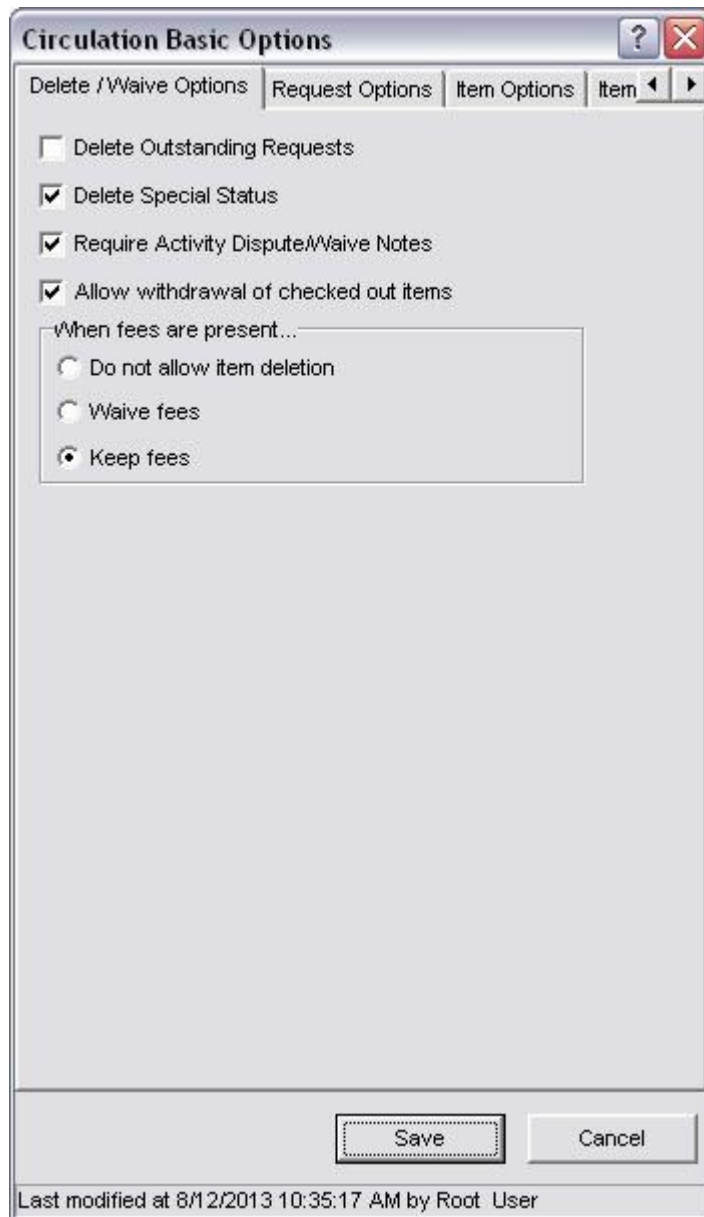


Figure 8-26. Circulation Basic Options Window - Delete/Waive Options Tab

- **Delete Outstanding Requests** - Relates to patron records and item records.
 - ◆ If you select this check box, when you attempt to delete an item record or a patron record associated with outstanding requests, Virtua deletes all requests and then deletes the record.
 - OR-
 - ◆ If you do NOT select this check box, when you attempt to delete an item record or a patron record associated with outstanding requests, Virtua prevents the deletion.

Note: Even if the Delete Outstanding Requests option is enabled, an item with outstanding requests cannot be deleted if no other item attached to the bibliographic record is available to fulfill the request.

- **Delete Special Status** - Relates to item records.
 - ◆ If you want Virtua to allow the deletion of item records that have a special status, select this check box.
 - ◆ If you do NOT want Virtua to allow the deletion of item records that have a special status, de-select this check box.
- **Require Activity Dispute/Waive Notes** - Relates to patron records.
 - ◆ If you want Virtua to require Virtua staff to select or add a note when disputing or waiving a patron fee, select this check box.
 - ◆ If you do NOT want Virtua to require Virtua staff to select or add a note when disputing or waiving a patron fee, de-select this check box.
- **Allow Withdrawal of Checked Out Items** - Relates to item and patron records.
 - ◆ If you want Virtua to allow the deletion of checked out items (e.g., items with the status Long Overdue) via Withdrawal lists in the Batch Item Editor, select this check box. For this feature to work properly, the Delete Special Status check box should also be selected.

Hint: The deletion of items with the status Long Overdue (status code 4600) via Withdrawal lists (specifically the “WD-LongOverdue” saved list) in the Batch Item Editor will be recorded in the Circulation Transaction Log with the transaction type Long Overdue Withdrawn.

- ◆ If you do NOT want Virtua to allow the deletion of checked out items via Withdrawal lists in the Batch Item Editor, de-select this check box.

Note: If you want fines, fees and/or replacement costs associated with the item to remain on the patron’s Account tab after the items are deleted, select the Keep Fees radio button, which is discussed below.

- In the Delete/Waive Options area you can also set three radio buttons to designate Virtua's appropriate action with regard to item records *When fees are present...*
 - ♦ **Do not allow item deletion** – Select this radio button if you do not want Virtua to allow items that have associated fees to be deleted.
 - ♦ **Waive fees** – Select this radio button if you want Virtua to allow the deletion of item records with associated fines or fees and to waive those fines or fees on the patron record.
 - ♦ **Keep fees** – Select this radio button if you want Virtua to allow the deletion of item records with associated fines or fees and to keep those fines or fees on the patron record.

8.8.2.2 About Request Options

The Request Options tab on the Circulation Basic Options window ([Figure 8-27](#)) contains settings that determine how Virtua handles requests.

The screenshot shows the 'Circulation Basic Options' window with the 'Request Options' tab selected. The window has a title bar with a question mark and a close button. Below the title bar are three tabs: 'Delete / Waive Options', 'Request Options' (which is active), and 'Item Options'. To the right of the tabs is an 'Item' dropdown menu with left and right arrow buttons. The main area contains several settings:

- ☐ Send e-mail when requested item is checked in
- ☒ Allow renewal of items with outstanding requests
 - ☐ Always
 - ☐ Only when at least one available item exists
 - ☒ Only when at least one qualifying item is available
- ☒ Update request expiration date at check-in
- ☒ Show total requests with request queue position
- ☐ Bookings take priority over satisfied requests
- ☒ Allow loans at requesting location
- ☒ Request Clear Notification
- ☒ Allow patrons to request items they have checked out
- ☒ Deny request when status added disallows loan/page
- ☒ Check patron eligibility before trapping an item

There are two grouped sections at the bottom:

- Agency Request Priority**
 - ☐ Check for agency requests last
 - ☒ Check for agency requests first
- Patron Activity Requested/Recalled tab options**
 - ☐ Recalls on Recalled tab, no Requested tab
 - ☐ All requests on Requested tab, no Recalled tab
 - ☒ Recalls on Recalled tab, others on Requested tab

At the bottom right are 'Save' and 'Cancel' buttons. At the bottom left, a status bar reads: 'Last modified at 8/12/2013 10:35:17 AM by Root User'.

Figure 8-27. Circulation Basic Options Window - Request Options Tab

8.8.2.2.1 Enabling Availability Notification

Virtua provides an option that lets you notify patrons automatically via e-mail when their requested items become available. You can enable this feature via the *Send e-mail when requested item is checked in* setting, which appears on the Circulation Basic Options window.

- If you select the *Send e-mail when requested item is checked in* check box, when you check in a requested item, Virtua will automatically send an e-mail notice to the requesting patron, provided that the patron has an e-mail address preference and a valid primary e-mail address.
- If you do NOT select the *Send e-mail when requested item is checked in* check box, Virtua will not send automatic e-mail notices when requested items are checked in. These patrons will be eligible, however, to receive an availability notice via InfoStation or **CircReport.exe**. For information on **CircReport.exe**, see the *System Management: Reporting User's Guide*.

For details on sending availability notices manually, see the *InfoStation/Circulation Reports Reference Guide*.

8.8.2.2.2 Allowing Renewals with Outstanding Requests

The setting labeled *Allow renewal of items with outstanding requests* lets you specify whether requested items can be renewed.

When you try to renew a requested item, Virtua notifies you that another patron has requested the item. The value of this setting determines whether you can proceed with the renewal.

- If you select the *Allow renewal of items with outstanding requests* check box, Virtua will let you proceed with the renewal of an item when it has an outstanding request, according to the following settings . . .
 - ◆ Select the *Always* radio button if you want to allow items with outstanding requests to be renewed regardless of the availability of other items.
 - ◆ Select the *Only when at least one available item exists* radio button if you want to allow items with outstanding requests to be renewed ONLY when another item is available, even if that item does not qualify to satisfy the request.

Hint: Most users will NOT want to use this option.

- ◆ Select the *Only when at least one qualifying item is available* radio button if you want to allow items with outstanding requests to be renewed ONLY when another item is available that can be used to satisfy the request.
- If you do NOT select the *Allow renewal of items with outstanding requests* check box, Virtua will cancel a renewal transaction if there is an outstanding request on the item.

8.8.2.2.3 Updating the Request Expiration Date at Check-in

The setting *Update request expiration date at check-in* on the Request Options tab of the Circulation Basic Options window lets you specify whether the request expiration date will be automatically updated according to the [Hold Pickup Time](#) when a requested item is checked in. The Hold Pickup time is usually shorter than the original request expiration date.

- If you select the *Update request expiration date at check-in* check box, when a requested item is checked in, the request expiration date will be reset to the [Hold Pickup Time](#). If an availability notice is later generated for the requesting patron, the request expiration date is NOT updated again.

Note: If the trapped item is checked out to a patron *other than* the requestor for whom the item was trapped, the Request Expiration Date is instead reset to the expiration date chosen by the requesting patron. If no such date exists, then the Request Expiration Date is recalculated according to the Default Expiration Period setting in the Location + Patron + Item matrix in the Profiler.

- If you do NOT select the *Update request expiration date at check-in* check box, the request expiration date will NOT be updated at check-in. Instead, the expiration date will only be reset to the Hold Pickup Time when an availability notice is generated for the requesting patron (via automatic e-mail notification, InfoStation, or **CircReport.exe**. For information on **CircReport.exe**, see the *System Management: Reporting User's Guide*).

Note: If the [Send e-mail when requested item is checked in](#) setting is enabled, patrons will receive a notice when their requested item is checked in, and will NOT receive a notice when notices are generated according to the *Update request expiration date at check-in* setting.

8.8.2.2.4 Determining the Display of Request Queue Data

The setting *Show total requests with request queue position* on the Request Options tab of the Circulation Basic Options window controls the display of data in the Queue column on the Pending page of the Patron Information window Activity tab.

- If you select the *Show total requests with request queue position* check box, the Queue column will display the request queue position **x/y**, where **x** represents the patron's current position and **y** represents the total number of requests in the queue.
- If you do NOT select the *Show total requests with request queue position* check box, the Queue column will display only a number that represents the patron's position in the request queue.

8.8.2.2.5 Specifying Whether Bookings or Satisfied Requests Take Priority

The setting *Bookings take priority over satisfied requests* on the Request Options tab of the Circulation Basic Options window lets you specify whether scheduled item bookings take priority over satisfied requests (i.e., requested items that have been trapped but have not yet been picked up by the requestor).

- If you select the *Bookings take priority over satisfied requests* check box, an item booking will take priority over a satisfied request. If you attempt to schedule an item booking for a satisfied request, the item booking is allowed even if it occurs before the request expiration date.
- If you do NOT select the *Bookings take priority over satisfied requests* check box, an item booking will NOT take priority over a satisfied request. If you attempt to schedule an item booking for a satisfied request, the item booking is not allowed if it occurs before the request expiration date.

For details on working with Item Booking in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.8.2.2.6 Allowing Loans at Requesting Locations

The setting *Allow loans at requesting location* on the Request Options tab of the Circulation Basic Options window lets you specify whether loans can be satisfied by items at the requesting location.

- If you select the *Allow loans at requesting location* check box, Virtua will allow a loan request to be satisfied by an item at the requesting location. (The other locations that can be used to satisfy a loan, and the order in which the locations are checked, will continue to be determined by the [Global Request Trapping Options](#) settings, the [Request Groups](#) parameter, and the [Request Location Routing](#) parameter.)
- If you do NOT select the *Allow loans at requesting location* check box, Virtua uses its normal loan request trapping logic, which states that a loan request cannot be satisfied by an item at the requesting location.

8.8.2.2.7 Clearing an Item's Request Queue

The setting *Request Clear Notification* on the Request Options tab of the Circulation Basic Options window lets you specify whether Virtua notifies a user when the user is about to change the status of an item to a status that will cause all requests for that item to be removed when the Unsatisfied Request Cancellation report is run in InfoStation.

- If you select the *Request Clear Notification* check box, Virtua will notify users when they attempt to change an item status to a status that will cause the item's request queue to be cleared.
- If you de-select the *Request Clear Notification* check box, Virtua will NOT notify users when the user changes an item's status to a status that will cause the item's request queue to be cleared.

8.8.2.2.8 Allowing Requests on Checked Out Items

The setting *Allow patrons to request items they have checked out* on the Request Options tab of the Circulation Basic Options window lets you specify whether a patron may place a request on an item that they currently have checked out.

- If you select the *Allow patrons to request items they have checked out* check box, Virtua will allow a patron to place a request on an item that they currently have checked out. This setting also enables a patron to place a bibliographic request on another item attached to the same bibliographic record as an item they have checked out, such as a request for another volume of the same series.
- If you de-select the *Allow patrons to request items they have checked out* check box, Virtua will NOT allow a patron to place a request on an item that they currently have checked out.

8.8.2.2.9 Denying Requests When an Item's Status Disallows Loans and Pages

The setting *Deny request when status added disallows loan/page* on the Request Options tab of the Circulation Basic Options window allows you to deny a loan or page request by adding a status to the item that is flagged to satisfy the request.

- If you select the *Deny request when status added disallows loan/page* check box, a Deny By Status button appears on the Loans/Pages window in the Virtua client. Clicking the Deny By Status button opens an Add New Status window, where you can assign a new status to the selected request. If the selected request is a loan request, only those statuses that disallow loan requests will be displayed on the Add New Status window. If the selected request is a page request, then only those statuses that disallow page requests will be displayed on the Add New Status window. When you select a new status and click the OK button, a warning message appears asking you to confirm that applying the status will cause one or more requests to be denied and cleared from the request queue.
- If you de-select the *Deny request when status added disallows loan/page* check box, Virtua will NOT display a Deny By Status button on the Loans/Pages window.

8.8.2.2.10 Checking Patron Eligibility before Trapping a Requested Item

On the Circulation Basic Options window, selecting the setting labeled *Check patron eligibility before trapping an item* specifies the following: Prior to trapping an item to satisfy a request, Virtua will perform the same validation against the patron and the item as it performs before a check-out transaction. If the patron is blocked, the request will not be trapped, and Virtua will check to see if the item should be trapped for the next patron in the request queue. The failed request trapping will be recorded in the Transaction Log.

8.8.2.2.11 Agency Request Priority Options

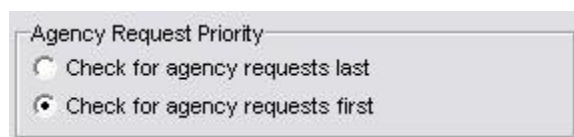


Figure 8-28. Agency Request Priority Settings - Request Options Tab of Circulation Basic Options Window

Agency requests are a way for one branch of a library to request multiple copies of a book from other branches. This might be for special events, such as a reading club or a special exhibition. The Agency Request Priority settings let you determine whether to prioritize agency requests ahead of other requests, or whether patron requests take priority over agency requests.

- If you want patron requests to take precedence over agency requests, select the *Check for agency requests last* radio button.
- If you want agency requests to take priority over patron requests, select the *Check for agency requests first* radio button.

8.8.2.2.12 Display of Requested Items on Patron Account Screen

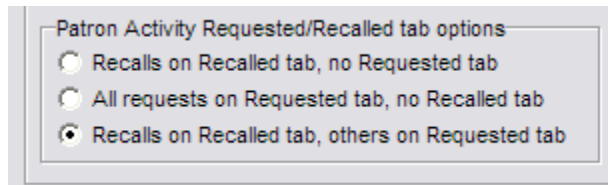


Figure 8-29. Circulation Basic Options - Patron Activity...Tab Options

The settings in the *Patron Activity Requested/Recalled tab options* offer three options for the display of requested/recalled items on the Activity tab:

- **Recalls on Recalled tab, no Requested tab** - Recalled items will be displayed on a Recalled page tab, and items requested for a hold, loan or page will appear on the Checked Out page tab (with request information available via a right click). If the recalled items are overdue, they will be displayed on a Recalled Overdue page tab.
- **All requests on Requested tab, no Recalled tab** - Requested items of any type, including recalls, will be displayed on a Requested page tab, and there will be no Recalled page tab. If the requested items are overdue, they will be displayed on a Requested Overdue page tab.
- **Recalls on Recalled tab, others on Requested tab** - Recalled items will be displayed on a Recalled page tab (overdue items on a Recalled Overdue page tab), and items requested for a hold, loan or page will appear on the Requested page tab (overdue items on a Requested Overdue page tab).

Patron Information - Documentation

Card Format | MARC Format | **Activity** | Account

Total Items: 1

Due Date	Call Number	Title	Date Placed	Location
5/1/2013 10:00:00...		American economic history bef...		

Summary | Checked Out | **Recalled Overdue** | Pending | In Transit

Bill | Check In | Renew | Dispute | Info

☐ Print Receipt | Update | Renew All | Refresh | Close

Figure 8-30. Patron Account - Recalled Overdue Subtab in Virtua Client

8.8.2.3 About Item Options

The Item Options tab of the Circulation Basic Options window contains circulation settings that are particular to items.

The screenshot shows a window titled "Circulation Basic Options" with a standard Windows-style title bar (minimize, maximize, close buttons). Below the title bar is a tabbed interface with four tabs: "Request Options", "Item Options" (which is selected and highlighted), "Item Statuses", and "Renewal Opt". The "Item Options" tab contains several settings, each with a checkbox:

- ☒ Restrict check-outs to owned items
- ☐ Restrict staff mediated renewals to owned items
- ☒ Do not trap new items
- ☐ Disallow new status for checked out items
- ☐ Prohibit item fine payments at non-assessed locations

Below these is a sub-section titled "Check-Out Messages/Fines" enclosed in a box:

- ☒ No message or fines at check-out
 - ☒ Also apply to non-staff check-outs

Below the sub-section is another checkbox:

- ☐ Use transaction location for due date calculations

At the bottom of the window are two buttons: "Save" and "Cancel". Below the buttons is a status bar that reads: "Last modified at 8/12/2013 10:35:17 AM by Root User".

Figure 8-31. Circulation Basic Options Window - Item Options Tab

8.8.2.3.1 Specifying Whether to Restrict Check-outs to Owned Items

On the Item Options tab of the Circulation Basic Options window, the setting labeled *Restrict checkouts to owned items* lets you specify whether staff can check out items belonging to any location or items belonging only to the current log-in location.

- If this setting is disabled, staff can check out items belonging to any location.
- If this setting is enabled, staff can check out an item only if its owning location is the same as the current log-in location.

Note: In a consortium environment, enabling this setting means that an item may be checked out only if its owning location is associated with the current *institution*.

For details on working with check-outs and other circulation transactions in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.8.2.3.2 Specifying Whether to Restrict Staff Mediated Renewals to Owned Items

On the Item Options tab of the Circulation Basic Options window, the setting labeled *Restrict staff mediated renewals to owned items* lets you specify whether staff can renew items belonging to any location or items belonging only to the log-in location.

- If this setting is disabled, staff can renew items belonging to any location.
- If this setting is enabled, staff can renew an item only if its owning location is the same as the current log-in location.

For details on working with item renewals in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.8.2.3.3 Specifying Whether to Trap New Items

The *Do not trap new items* setting on the Item Options tab of the Circulation Basic Options window lets you determine the behavior of Virtua in response to creating new items.

- If this check box is unchecked, when a new item is created manually that could satisfy a request, the item will be trapped for the request. If the item would satisfy a

request, then its initial status will be either In Transit as it is sent to the appropriate pickup location or On Hold if the pickup location is the current location.

- If this check box is checked, when a new item is created manually that could satisfy a request, the item will NOT be trapped and used to satisfy the request and will NOT be designated In Transit or On Hold, but instead will appear as Available. However, a warning will be displayed if the item could satisfy a pending request.

Note:

The *Do not trap new items* setting does NOT...

- Affect Virtua's behavior at check-in. At check-in, items are always trapped to satisfy requests.
- Apply to items created upon receipt in acquisitions.

8.8.2.3.4 Disallowing New Statuses on Checked Out Items

The *Disallow new status for checked out items* setting on the Item Options tab of the Circulation Basic Options window lets you disable the Add button on the Statuses tab of the Item Information window.

- If this check box is selected, the Add button on the Statuses tab of the Item Information window will be disabled for checked out items.
- If this check box is not selected, the Add button on the Statuses tab of the item Information window will be enabled for checked out items.

8.8.2.3.5 Specifying Where Patrons Can Pay Fines

On the Item Options tab of the Circulation Basic Options window, the setting labeled *Prohibit item fine payments at non-assessed locations* lets you specify whether patrons can pay fines for items at any location or only at the location where the fine was assessed.

- If this setting is disabled, patrons can pay fines for items at any location, regardless of whether that location is the location where the fine was assessed.
- If this setting is enabled, patrons can pay fines ONLY at the location where the fine was assessed.

For details on accepting payments for fines in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.8.2.3.6 Enabling or Disabling Messages and Fines at Check-out

On the Item Options tab of the Circulation Basic Options window, the setting labeled *No message or fines at check-out* lets you determine how Virtua behaves when an item that is already checked out to patron A is checked out to patron B.

- If the *No message or fines at check-out* check box is selected, Virtua will . . .
 - Not display a pop-up message warning that the item is already checked out.
 - Not assess an overdue fine to patron A's account, if the item is overdue.
 - Delete any existing overdue fines (assessed by running **UpdateOverdueFines.exe**) or billing fees that may have been applied against patron A's check-out. All deletions will be recorded in the Audit Trail, provided it is turned on.
- If the *No message or fines at check-out* check box is NOT selected, Virtua will display a pop-up message prompting you to click the Accept All button to proceed with the transaction. Clicking Accept All charges patron A's account for any fines that apply.

8.8.2.3.6.1 ***Also Apply to Non-Staff Check-outs***

On the Item Options tab, the setting labeled *Also apply to non-staff check-outs* lets you apply the functionality of the *No message or fines at check-out* setting (see above) to *non-staff* library members. When the *Also apply to non-staff check-outs* check box is selected, if a patron checks out an item that is already checked out to another patron, no alert message will be displayed, no fines will be assessed, and existing fines and fees will be deleted.

8.8.2.3.7 Specifying Whether to Use Transaction Location for Due Date Calculations

The setting labeled *Use transaction location for due date calculations* on the Item Options tab of the Circulation Basic Options window lets you specify whether Virtua uses the transaction location or the item's shelving location to determine the loan rules and fine calculation rules that apply to check-outs and renewals.

- If this check box is selected, Virtua will . . .
 - ◆ Calculate due dates according to the location at which the transaction takes place.
 - ◆ Calculate fines using the circulation rules for the location at which the item was checked out.

- If this check box is NOT selected, Virtua will use the circulation rules configured for the item's shelving location to calculate all due dates and fines.

8.8.2.4 About Item Statuses

The Item Statuses tab of the Circulation Basic Options window ([Figure 8-32](#)) contains circulation settings that are particular to item statuses.

Circulation Basic Options

Request Options | Item Options | **Item Statuses** | Renewal Opt

☒ Paid for replacement status
Paid For Replacement

☒ Deleted billed for replacement dispute status
Billed For Replacement (Long Overdue)

☒ Not available until street date status
Street Date Not Reached

☒ Agency request satisfied status
Shelving

☒ Lost and paid status
Paid For Replacement

☒ Damaged and paid status
Paid For Replacement

Save Cancel

Last modified at 8/12/2013 10:35:17 AM by Root User

Figure 8-32. Circulation Basic Options Window - Item Statuses Tab

8.8.2.4.1 Specifying the Paid for Replacement Status

The setting labeled *Paid for replacement status* on the Item Statuses tab of the Circulation Basic Options window lets you determine how Virtua handles a billed item (i.e., an item that appears on the Billed page of the patron's Activity tab) once the fees associated with the item have been paid.

- If the *Paid for replacement status* check box is selected, then once the fees for a billed item are paid, Virtua will remove the item from the Billed page, remove the item's Billed for Replacement status (4600), and assign the status specified in this parameter.
- If the *Paid for replacement status* check box is NOT selected, then when the fees for a billed item are paid, the item will remain on the Billed page until the item is checked in (or until you delete the check-out from the patron's activity list).

8.8.2.4.2 Specifying the Disputed Billed for Replacement Deleted Status

On the Item Statuses tab of the Circulation Basic Options window, the setting labeled *Deleted billed for replacement dispute status* determines the new status that is assigned to the item when an item with the status Billed For Replacement is deleted from the Disputed page of the Patron Information window.

- If you select this check box, then an item with the status Billed for Replacement that is deleted from the Patron Information window, Activity tab, Disputed sub-tab will be changed to the status you define in the drop-down list box.
- If you do NOT select this check box, an item with the status Billed for Replacement that is deleted from the Patron Information window, Activity tab, Disputed sub-tab will have its circulation status removed, and all associated fines and fees will be deleted.

For details on deleting disputes, see the *Circulation Workflow-Based Reference Guide*.

8.8.2.4.3 Determining Availability Based on Street Date and Assigning Status

The setting labeled *Not available until street date status* on the Item Statuses tab of the Circulation Basic Options window lets you determine whether Virtua automatically assigns a selected status to an item when it is added to a bibliographic record that

contains a street date in the future. The street date is defined in YYYYMMDD format in the 369 tag subfield \$a of the bibliographic record. The setting lets you choose a status that will prohibit circulation until the street date is reached.

When the street date is reached, you can run the script **RemoveStreetDateStatus.sh** to remove the assigned status from all items attached to bibliographic records with a street date in the past.

- If you select this check box, then items attached to bibliographic records with a date in the 369 tag subfield \$a that is in the future will be assigned the status you select in the drop-down list box. Once the date in the 369 tag subfield \$a is reached, you can run the script **RemoveStreetDateStatus.sh** to remove the status from the item record.
- If you do NOT select this check box, then Virtua ignores the value in the 369 tag subfield \$a and does not automatically assign the selected status to item records.

For information on running the **RemoveStreetDateStatus.sh** script, see the *System Management: Circulation User's Guide*.

8.8.2.4.4 Enabling Agency Requests and Assigning a Status

The setting labeled *Agency request satisfied status* on the Item Statuses tab of the Circulation Basic Options window lets you determine whether agency requests are enabled in Virtua, and lets you assign a status to agency requested items when a requested item is checked in to a requesting location. Agency requests are requests that one branch of a library makes of other library branches for multiple copies of an item to use for a book club or other special event.

- If the *Agency request satisfied status* check box is selected, then libraries will be able to place agency requests from the View Bibliographic Record window, and agency requested items will be assigned the selected status when the item is checked in at the requesting location.
- If you do NOT select this check box, agency request functionality will not be available.

8.8.2.4.5 Determining the Lost and Paid Status

The setting labeled *Lost and paid status* on the Item Statuses tab of the Circulation Basic Options window lets you determine the status that is assigned to an item after the item has been reported lost and the patron has paid a replacement fee.

- If this check box is selected, lost items will be assigned the selected status when the patron pays the replacement fee.
- If this check box is NOT selected, lost items will not have a status change when the patron pays the replacement fee.

8.8.2.4.6 Determining the Damaged and Paid Status

The setting labeled *Damaged and paid status* on the Item Statuses tab of the Circulation Basic Options window lets you determine the status that is assigned to an item after the item has been reported damaged and the patron has paid a replacement fee.

- If this check box is selected, damaged items will be assigned the selected status when the patron pays the replacement fee.
- If this check box is NOT selected, damaged items will not have a status change when the patron pays the replacement fee.

8.8.2.5 About Renewal Options

The Renewal Options tab on the Circulation Basic Options window ([Figure 8-33](#)) contains settings that let you define how the due date of renewed items is calculated. You can select only one of the options for calculating the due date of renewed options.



Figure 8-33. Circulation Basic Options Window - Renewal Options Tab

- Selecting the *Use current date for renewals* radio button means the due date of a renewed item is calculated by adding the renewal period to the date on which the renewal occurs.
- Selecting the *Use due date for renewals* radio button means the due date of a renewed item is calculated by adding the renewal period to the item's original due date.

8.8.2.6 About Global Request Trapping Options

When a patron requests an item via the Virtua client or Chamo, Virtua uses the Global Request Trapping Options parameter to determine, via location-related restrictions, which items qualify for the request. In this parameter, you set a trapping option for each type of request (for details on request workflows in the Virtua client, see the *Circulation Workflow-Based Reference Guide*).

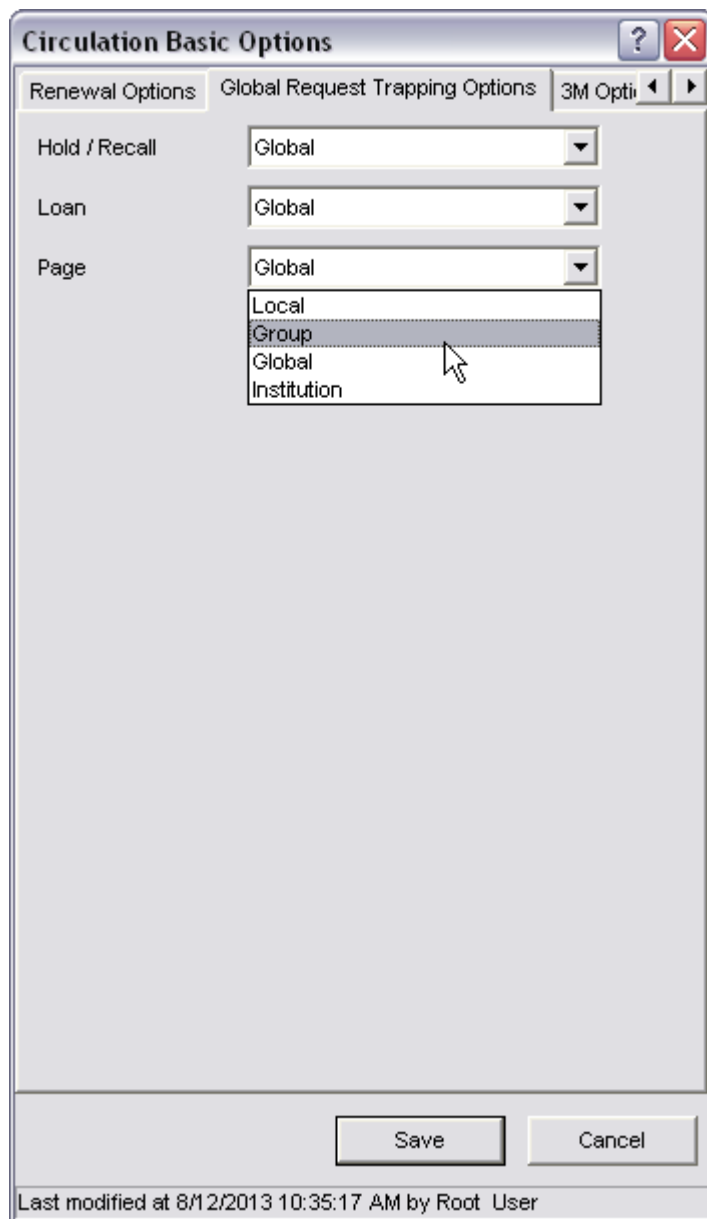


Figure 8-34. Circulation Basic Options Window - Global Request Trapping Options Tab

To set the Global Request Trapping Options parameter,

- For each type of request—Holds/Recalls, Loans, and Pages—select an option in the drop-down list:
 - ◆ **Local** - Requests are allowed on items belonging to the log-in location only.
 - ◆ **Group** - Requests are allowed on items belonging to any of the locations defined within the specified Request Group. If you select this option, when staff members place a request in the Virtua client, they will be able to specify a request group that will be used for trapping. For details on Request Groups, see the section “[Working with Request Groups](#)” in this chapter.
 - ◆ **Global** - Requests are allowed on items regardless of owning or log-in location. If you select this option, when a request is placed, Virtua log-in location, effect attempts to satisfy the request with an item from the location that is assigned the highest priority in the Request Location Routing parameter. For details on the Request Location Routing parameter, see the section “[Working with the Request Location Routing Parameter](#)” in this user’s guide.
 - ◆ **Institution** - For use by consortium database users only.

The table below provides examples of how the Global Request Trapping Options parameter affects whether a particular type of request is allowed, depending on . . .

- The Request Group specified when the request is placed.
- The owning location of the requested item.
- The log-in location of the patron placing the request.

Request Group A: Main Library, South Branch, North Branch

Request Group B: East Branch, West Branch

Request Type	Setting	Log-in Location	Owning Location	Request Group	Result: Request is . . .
Hold/Recall	Local	Main Library	Main Library	-	Allowed
Hold/Recall	Local	Main Library	South Branch	-	Not Allowed
Hold/Recall	Group	Main Library	East Branch	Group A	Not Allowed
Hold/Recall	Global	Main Library	West Branch	-	Allowed
Loan	Group	Main Library	East Branch	Group A	Not Allowed
Loan	Global	Main Library	West Branch	-	Allowed
Page	Group	Main Library	North Branch	Group A	Allowed
Page	Local	Main Library	Main Library	-	Allowed
Page	Global	Main Library	East Branch	-	Allowed

8.8.2.7 About the 3M Options

On the 3M Options tab of the Circulation Basic Options window (*Figure 8-35*), you can set options specific to the 3M SelfCheck machine.

Circulation Basic Options

Global Request Trapping Options | **3M Options** | Other Options

3M Error Message

Could not complete transaction. See library staff for assistance.

Recallable date on 3M receipt

Recallable date is:

Save Cancel

Last modified at 8/12/2013 10:35:17 AM by Root User

Figure 8-35. Circulation Basic Options Window - 3M Options Tab

3M Error Message - The text you type in this field lets you define a message to appear on the 3M SelfCheck Interface when a patron performs an unsuccessful transaction. The error message can be up to 2000 characters in length.

Recallable date on 3M receipt - The text in this field appears on the 3M receipt along with the item's "Recallable by" date. Adding the "Recallable by" date to the 3M receipt will not affect the display of the due date on the receipt.

Hint: The "Recallable by" date is generated by combining the Guaranteed Circulation period with the Mail Grace period, which you can set via the [Location + Patron + Item Matrix](#). If the "Recallable by" date falls on a day the library is closed, Virtua sets the "Recallable by" date to the next day the library is open.

- If this text box is blank, the "Recallable by" date will not appear on the 3M receipt.
- If this text box contains a label, the label AND the "Recallable by" date will appear on the 3M receipt.

8.8.2.8 About Other Options

The Other Options tab on the Circulation Basic Options window (*Figure 8-36*) contains miscellaneous circulation settings.

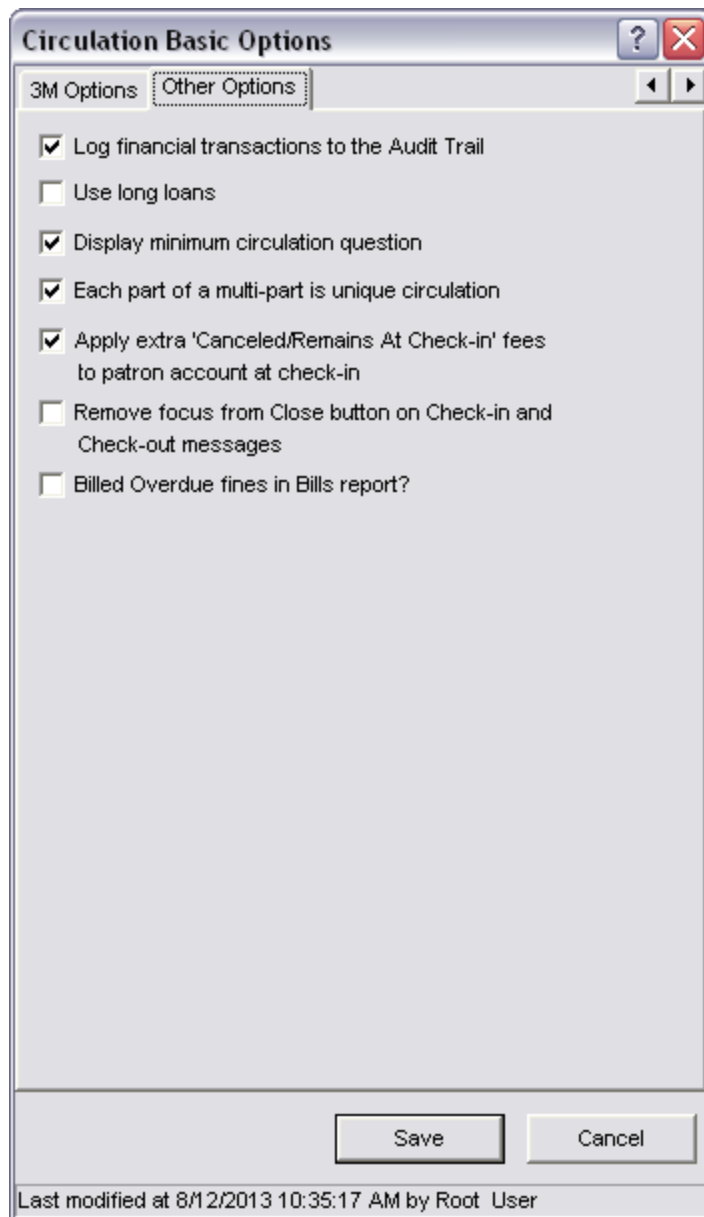


Figure 8-36. Circulation Basic Options Window - Other Options Tab

8.8.2.8.1 Logging Financial Transactions

On the Other Options tab of the Circulation Basic Options window, the setting labeled *Log financial transactions to the Audit Trail* determines whether financial transactions are logged and available for search using the Audit Trail feature in the Virtua client.

- If you select this check box, financial transactions will be logged, and Virtua will keep a history of paid fees.
If you do NOT select this check box, financial transactions will NOT be logged, and Virtua will NOT keep a history of paid fees.

There is no way to find transaction data retroactively. For example, if on January 1st you switch the flag from disabled to enabled, you will be able to search only the transactions that occurred on or after January 1st.

Note: If you choose to disable this setting, Innovative recommends that you also remove all permissions to access the Audit Trail in the client via buttons or menu items.

8.8.2.8.2 Using Long Loans

On the Circulation Basic Options window, the Use Long Loans setting lets you specify, for checked-out items, whether Virtua displays the “Recallable by” date on the Items tab of the View Bibliographic Record window (*Figure 8-37*). With the “Recallable by” date, staff can quickly identify items that have a long due date but that can be recalled at an earlier date.

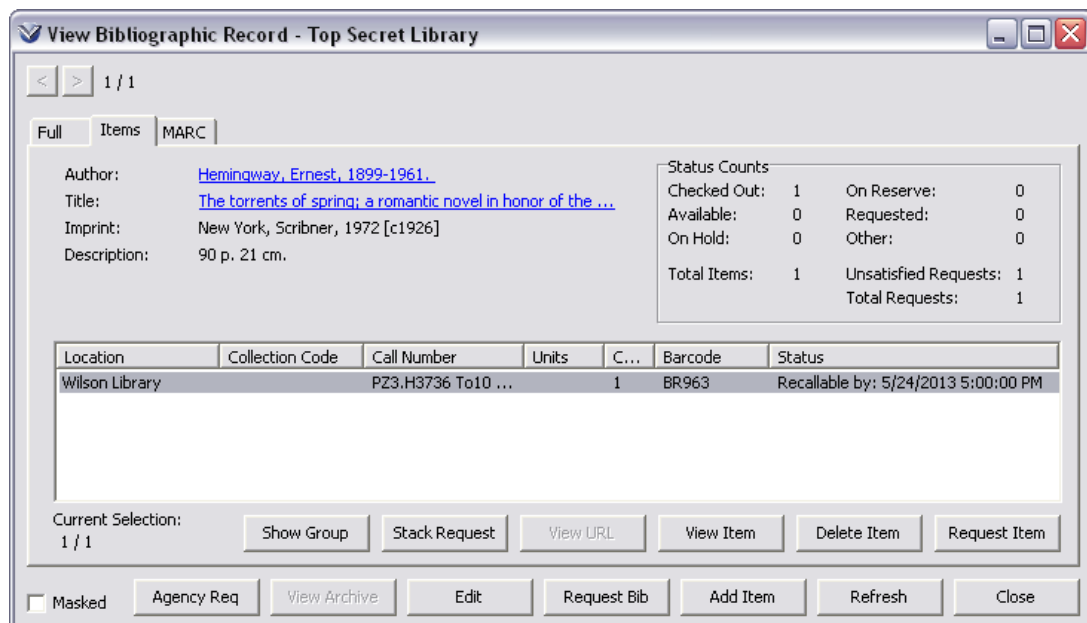


Figure 8-37. View Bibliographic Record Window Displaying “Recallable by” Date

When the Use Long Loans check box is selected, Virtua will calculate the “Recallable by” date for checked-out items and display the date on the View Bibliographic Record window if it is *earlier* than the item’s due date. If the “Recallable by” date is the same as or later than the due date, Virtua will display the due date.

Important: Even if the Use Long Loans check box is selected, the “Recallable by” date will NOT appear on the View Record window if the patron record of the borrowing patron contains a 1 (one) in position 17 of the 008 fixed field. Instead, the View Record window displays [Patron Name], Due: [date] (e.g., Smith, John, Due: 1/11/2015 9:30:00 AM).

The “Recallable by” date is generated by combining the Guaranteed Circulation period with the Mail Grace period, which you can set via the Location + Patron + Item Matrix. If the recallable date falls on a day the library is closed, Virtua sets the recallable date to the next day the library is open. For details on setting the Guaranteed Circulation period and the Mail Grace period, see the section “[About the Guaranteed Circulation Period and the Mail Grace Period](#)” in this user’s guide.

The Use Long Loans setting only affects the display of the “Recallable by” date on the Items tab of the View Bibliographic Record window. If the Use Long Loans setting is...

- **Selected** - The patron’s notice-generation schedule is uninterrupted. Note that if the item is *overdue* or *billed*, Virtua will not generate a recall notice.
- **De-selected** - The patron’s next notice will be a recall notice or a *recalled* overdue or *recalled* bill notice, depending on the notice count. The patron will continue to receive notices according to the notice-generation schedule for recalled items, which is specified in the Location + Patron + Item Matrix.

For details on recall requests, see the *Circulation Workflow-Based Reference Guide*. For details on generating circulation notices, see the *InfoStation/Circulation Reports Reference Guide*.

8.8.2.8.3 Displaying the Minimum Circulation Question

On the Circulation Basic Options window, the setting labeled *Display minimum circulation question* determines whether, during a request, Virtua will display the Minimum Period Needed field. [Figure 8-38](#) shows the Minimum Period Needed field in the Request Wizard in the Virtua client.

New Request for Item: 11111111 - VTLS Li...

Author: Hewett, Joan.
 Title: [A kangaroo joey grows up / by Joan Hewett ; photogra](#)
 Imprint: Minneapolis, MN : Carolrhoda Books, c2002.
 Description: 32 p. : col. ill. ; 20 x 22 cm.

Request Options

☒ Only This Item ☐ Any Item of This Volume

Pickup location: Garcia Research Library

Not needed after: ☐ Use date: 5/ 4/2010

Request From Group:

Minimum period needed (days): 0

Number of items in database: 1

Calculate the number of qualifying items:

Number of items that qualify for this request: ?

< Back Next > Cancel

Figure 8-38. Request Wizard Displaying Minimum Period Needed Field

The Minimum Period Needed field lets you specify the minimum amount of time the requested material is needed. If an item's loan period is shorter than the Minimum Period Needed, it will not qualify for the request.

If you select the check box labeled *Display minimum circulation question*, when you place a request, Virtua will display the Minimum Period Needed field, where you can specify the minimum amount of time the requested material is needed. If you do NOT select this check box, Virtua will not display the Minimum Period Needed field.

8.8.2.8.4 Specifying Whether Multi-part Items are Unique Circulation Transactions

On the Circulation Basic Options window, the setting labeled *Each part of a multi-part is unique circulation* lets you specify whether each individual part of a multi-part item is counted as a unique circulation transaction for the purpose of statistical counts (such as the Circ Count, Temp Circ Count, etc.).

- If this setting is disabled, performing a circulation transaction on a multi-part item results in the appropriate circulation count being incremented by one.
- If this setting is enabled, performing a circulation transaction on a multi-part item results in the appropriate circulation count being incremented by the number of pieces associated with the item.

8.8.2.8.5 Specifying Whether to Apply Extra ‘Canceled/Remains At Check-in’ Fees to the Patron at Check-in

On the Circulation Basic Options window, the setting labeled *Apply extra ‘Canceled/Remains At Check-in’ fees to patron account at check-in* lets you specify whether, when a billed item is checked in, a credit is applied to the patron's account if the . . .

- Canceled At Check-in amount (defined in the Location + Patron Matrix) is greater than the current balance of the processing fee.
-OR-
- Original Item Price Fee minus the Remains At Check-in amount (defined in the Location + Patron matrix) is greater than the current balance of the Item Price Fee.

If the *Apply extra ‘Canceled/Remains At Check-in’ fees to patron account at check-in* check box is . . .

- **Disabled** - At check-in, the Canceled At Check-in amount is deducted from the balance of the Processing Fee. If the Canceled At Check-in amount is *greater* than the current balance of the Processing Fee, the Processing Fee is reduced to zero.

Also at check-in, Virtua looks at the current balance of the Item Price Fee. If the Item Price Fee balance is . . .

- *Greater* than the Remains At Check-in amount, the balance of the Item Price Fee is reduced to the Remains At Check-in amount.
- *Less* than the Remains At Check-in amount, the balance of the Item Price Fee remains the same.

- **Enabled** - At check-in, the Canceled At Check-in amount is deducted from the balance of the Processing Fee. If the Canceled At Check-in amount is *greater* than the current balance of the Processing Fee, the Processing Fee is reduced to zero and the difference is applied to the patron's account as a credit.

Also at check-in, Virtua calculates the original Item Price Fee minus the Remains At Check-in amount, and deducts the resulting amount from the balance of the Item Price Fee. If the calculated amount to deduct is *greater* than the current balance of the Item Price Fee, the Item Price Fee is reduced to zero and the difference is applied to the patron's account as a credit.

8.8.2.8.6 Removing the Focus from the Close Button on Check-in and Check-out Messages

On the Circulation Basic Options window, the setting labeled *Remove focus from Close button on Check-in and Check-out messages* lets you specify whether, when a check-in or check-out message is displayed,

- The focus is on the Close button by default.
- OR-
- The message window opens without any elements of the window in focus.

If the *Remove focus from Close button on Check-in and Check-out messages* check box is . . .

- **Disabled** - When a check-in or check-out message is displayed, the focus is on the Close button by default.
- **Enabled** - When a check-in or check-out message is displayed, the message window opens without any elements of the window in focus. The user must use the mouse or keyboard to select the Close button before closing the window.

8.8.2.8.7 Displaying Overdue Fines in the Bills Report

On the Circulation Basic Options window, the setting labeled *Billed Overdue fines in Bills report?* lets you specify whether, when the Bills report is run, you want Virtua to assess overdue fines and display the data element “Billed Overdue Fines” for every item listed in the Bills report.

When this setting is enabled, overdue fines will NOT continue to accrue after the bills report is run. This ensures that if a patron receives a bill notice with overdue fines, the overdue fine amount the patron must pay a few days after the notice date will be the same as the overdue fine amount specified in the notice.

8.9 Working with the Closed Dates Parameter

The Closed Dates parameter allows you to create, define, and name a set of library closed dates, which you can then assign to a particular Shelving Location/Item Class combination. You can create as few or as many different sets of closed dates as needed for your different library locations.

Note: The Closed Dates parameter is no longer location specific. The names given to sets of closed dates are user-defined and are *associated with* locations via the Closed Dates parameter settings. If your database has been migrated from an old version of the software, it might be confusing to see a list of Location Names appear when you first expand the Closed Dates tree in your Profiler. If this is your situation, Innovative recommends that you delete all the existing sets of closed dates and set up new ones with new labels.

When an item is checked out or renewed, Virtua checks the closed dates so that no item will come due on a date that the library is closed. If the due date falls on a closed day, Virtua adjusts the due date *forward* to the first open day.

If you want, Virtua can also check the closed dates when calculating fines. For details, see the section “[About Fine Accrual During Non-operating Hours](#)” in this user’s guide.

The Closed Dates parameter, the [Library Calendars parameter](#), and the [Location + Item Matrix](#) all work together to determine which set of closed dates applies to a particular Shelving Location/Item Class combination. These parameters interact as follows:

- Closed Dates parameter – Allows you to configure sets of closed dates. The sets of closed dates that you configure here will be available to be selected in the Library Calendars parameter.
- Library Calendars parameter – Allows you to configure library calendars. A library calendar consists of one or more sets of library hours (as configured in the [Library Hours parameter](#)) and one or more sets of closed dates (as configured in the Closed Dates parameter). The library calendars you configure here will be available to be selected in the Location + Item Matrix.
- Location + Item Matrix – Allows you to configure settings that apply to particular combinations of locations and item classes. Here, you will be asked to select a library calendar to apply to the Shelving Location/Item Class combination. The

library closed dates specified in the calendar will apply to this Shelving Location/Item Class combination.

Hint: Use the Closed Dates parameter to define irregular closed days, such as holidays. To incorporate closed days into your regular operating hours, use the Library Hours parameter. For example, you can use the Library Hours parameter to specify that your library is closed on Sundays. For details, see the section “[Working with the Library Hours Parameter](#)” in this chapter.

8.9.1 Adding Closed Dates

To create a new set of closed dates,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Select Closed Dates.
4. Click your right mouse button and then choose Add.

Note: The Add menu option is enabled only when you are logged in as the Root User.

The Library Closed Dates window appears ([Figure 8-39](#)).

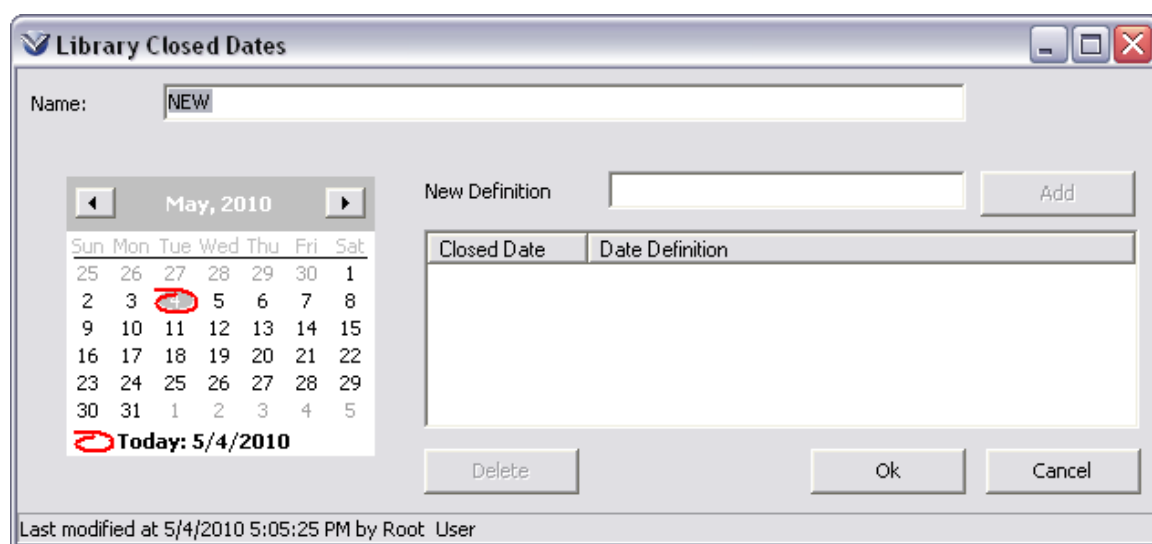


Figure 8-39. Library Closed Dates Window

5. In the Name field, type the name you wish to associate with this set of library closed dates.
6. Using the calendar interface, navigate to the desired month and year, and select the day you wish to specify as a closed date. To select a range, hold down the shift key to select multiple days.
7. In the New Definition field, type the name (i.e., “New Year’s Day” or “Labor Day”) you wish to associate with the closed date you have selected.
8. Click the Add button.

A new row containing the closed date and its definition is added to the table. There will be one row for each day the library is closed.

Note: A given date can exist in the list only once. If you create duplicate entries, Virtua will return an error message when you attempt to save the parameter.

9. Repeat steps 5-8 to add as many rows to the table as needed.
10. After you add all the desired closed dates, order them in ascending or descending order by clicking the title of the Closed Date column.
11. Click the OK button to save your configuration.

The Library Closed Dates window closes, and your new set of closed dates is saved to the database.

8.9.2 *Deleting Closed Dates*

To delete an existing set of closed dates,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Closed Dates.

The tree structure expands to display a list of all of the sets of closed dates that have already been configured.

4. Highlight the set of closed dates you wish to delete.
5. Click your right mouse button and then choose Delete.

Note: The Delete menu option is only enabled when you are logged in as the Root User.

The set of closed dates is deleted from the database.

Note: If this set of closed dates has been assigned to a calendar in the Library Calendars parameter, it is also deleted from calendar. For details on configuring library calendars, see the section “[Working with the Library Calendar Parameter](#)” in this user’s guide.

8.9.3 *Modifying Closed Dates*

To modify an existing set of closed dates,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Closed Dates.

The tree structure expands to display a list of all of the sets of closed dates that have already been configured ([Figure 8-40](#)).

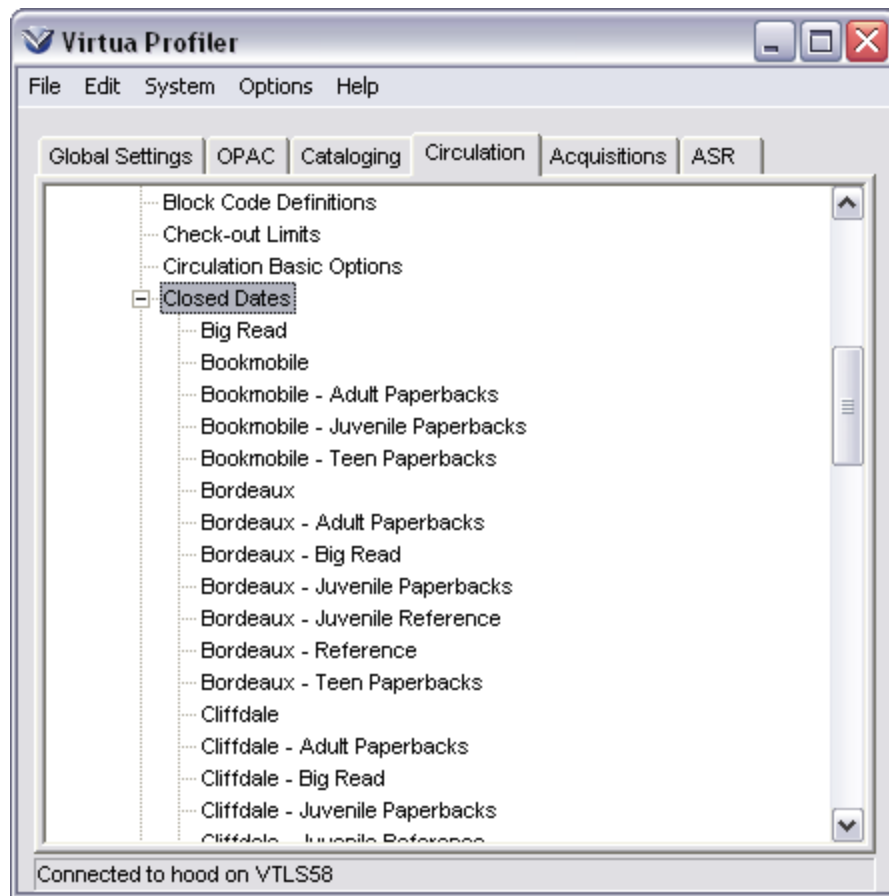


Figure 8-40. Closed Dates - Expanded Tree

4. Double-click the set of closed dates you wish to modify.

The Library Closed Dates window appears, with the current closed date settings displayed ([Figure 8-41](#)).

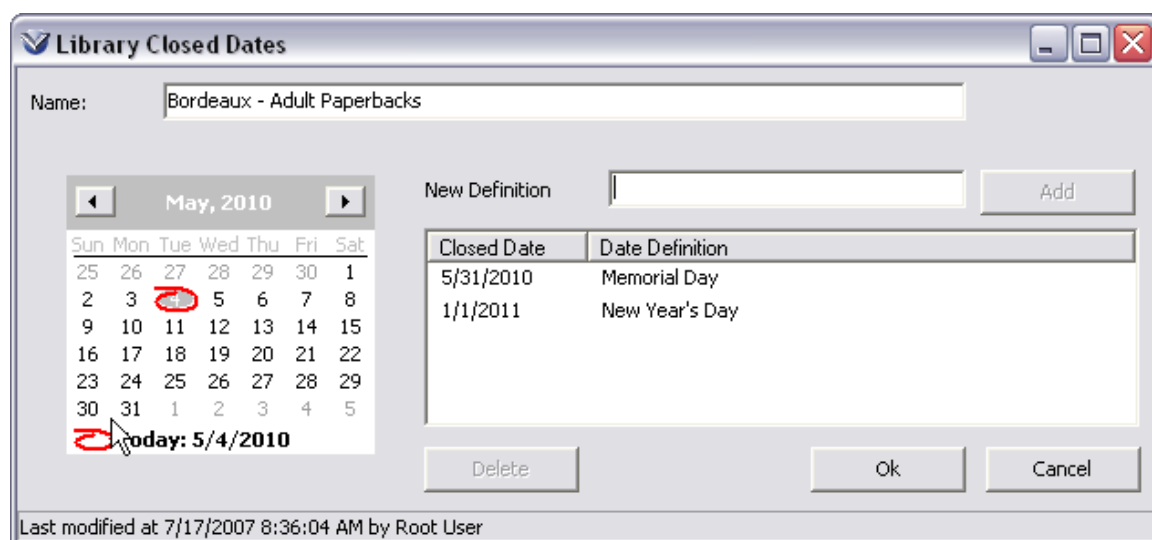


Figure 8-41. Library Closed Dates Window

5. Edit the closed dates as necessary:
 - In the Name field, edit the name you wish to associate with this set of library closed dates.
 - Using the calendar interface, change the day you wish to specify as a closed date. To select a range, hold down the shift key to select multiple days.
 - In the New Definition field, edit the name (i.e., “New Year’s Day” or “Labor Day”) you wish to associate with the closed date you have selected.
6. When you have finished modifying the list of closed dates, order them in ascending or descending order by clicking the title of the Closed Date column.
7. Click the OK button to save your changes to the database.

8.10 Working with Controlled Patron Values

The Controlled Patron Values parameter allows you to configure controlled patron value codes and corresponding text descriptions. The codes you configure here can be used to make the process of cataloging the patron record 301 and 302 tags more efficient.

There are different workflows for configuring patron controlled values depending on your Patron Cataloging Options settings. See the *Virtua Profiler/Cataloging Parameters User's Guide* for information on settings that affect controlled patron values.

8.10.1 Legacy Controlled Patron Value Settings

When you double-click on the Controlled Patron Values parameter, the tree structure expands to display a list of the controlled patron values categories ([Figure 8-42](#)).

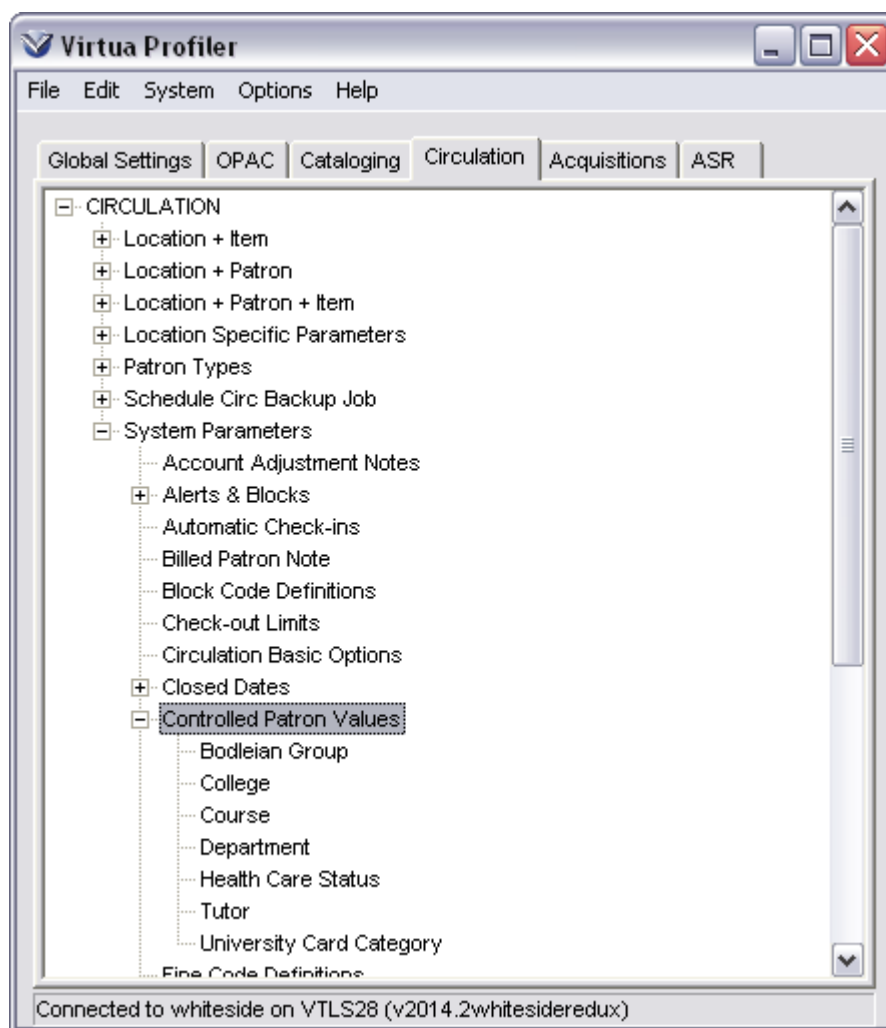


Figure 8-42. Circulation Tab - Controlled Patron Values Parameter Expanded

The controlled patron values categories, listed below, correspond to subfields in the patron record 301 and 302 tags:

- College (301/302 tag subfield \$c)
- Course (301/302 tag subfield \$j)
- Department (301/302 tag subfield \$d)
- Health Care Status (301/302 tag subfield \$m)
- Tutor (301/302 tag subfield \$k)
- University Card Category (301/302 tag subfield \$n)

You can configure controlled patron values (codes and corresponding text descriptions) for each of the categories listed above. When you catalog patron records, you can enter a controlled patron value code in the appropriate subfield of the patron record tag 302. When the record is saved to the database, the text description that applies to that code is populated in the corresponding subfield in the 301 tag.

Note: The Patron Cataloging Options window has a parameter *Support selection of controlled values in patron record* that you can select to enable an auxiliary pop-up editor that allows you to edit patron record 302 tag data more easily. For details, see the *Virtua Profiler/ Cataloging Parameters User's Guide*.

Consider the following example, which explains how you might use the Controlled Patron Values parameter in cataloging the Department field (301/302 tag subfield \$d) in the patron record:

Figure 8-43 shows the Controlled Patron Values - Department window. Several controlled patron value codes have already been configured: ENG, HIST, and MTH. Each code corresponds to the text description listed opposite it in the Department Description column.

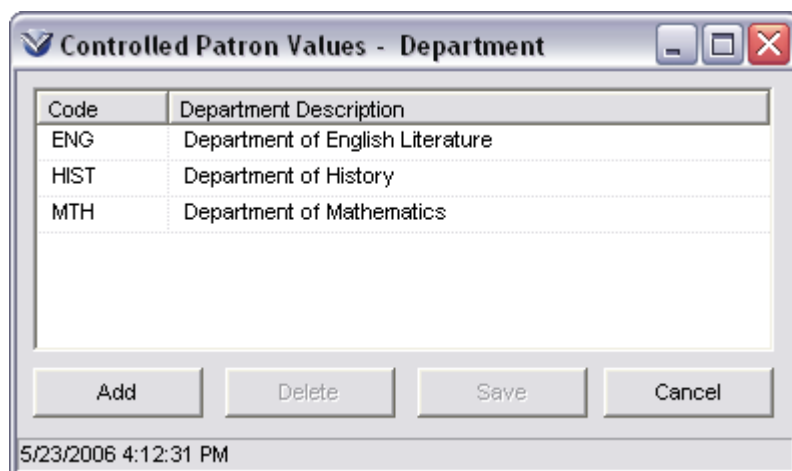


Figure 8-43. Controlled Patron Values - Department Window

In the Virtua client, open a patron record for editing. In the 302 tag subfield \$d, enter the controlled patron value code you wish to assign to the patron. When you save the patron record to the database, the 301 tag subfield \$d is populated with the text description that corresponds to the code.

8.10.1.1 Adding Controlled Patron Values

To add controlled patron values to the database,

1. On the Circulation tab, under System Parameters, double-click Controlled Patron Values.

The tree structure expands to display a list of the controlled patron values categories (*Figure 8-42*).

2. Double-click the desired controlled patron values category.

The Controlled Patron Values window for the category appears (*Figure 8-43*).

3. Click the Add button.

An empty row appears in the table.

4. In the Code column, type an alphanumeric code in the empty cell.
5. In the Description column, type the text description that corresponds to the new code.
6. To add another code, click the Add button again.
7. Continue adding codes and descriptions as needed.
8. After you enter all codes and descriptions you need, click the Save button.

The controlled patron values settings are saved to the database.

8.10.1.2 Modifying Controlled Patron Values

To modify an existing controlled patron values code or definition,

1. On the Controlled Patron Values window (*Figure 8-43*), highlight the code or the description you want to modify.

2. Type over the existing text.
3. Click the Save button.

Your changes are saved to the database.

8.10.1.3 Deleting Controlled Patron Values

To delete controlled patron values from the database,

1. On the Controlled Patron Values window ([Figure 8-43](#)), place your cursor somewhere in the row that you want to delete.
2. Click the Delete button.

The row is deleted from the table.

3. Click the Save button.

The controlled patron value is deleted from the database.

8.10.2 Alternate Controlled Patron Value Settings

When you have the “Also support selection of alternate controlled values” check box selected on the Patron Cataloging Options window (see the *Virtua Profiler/Cataloging Parameters User’s Guide*), the options available as the Controlled Patron Values window will be different than when this option is not selected ([Figure 8-44](#)).

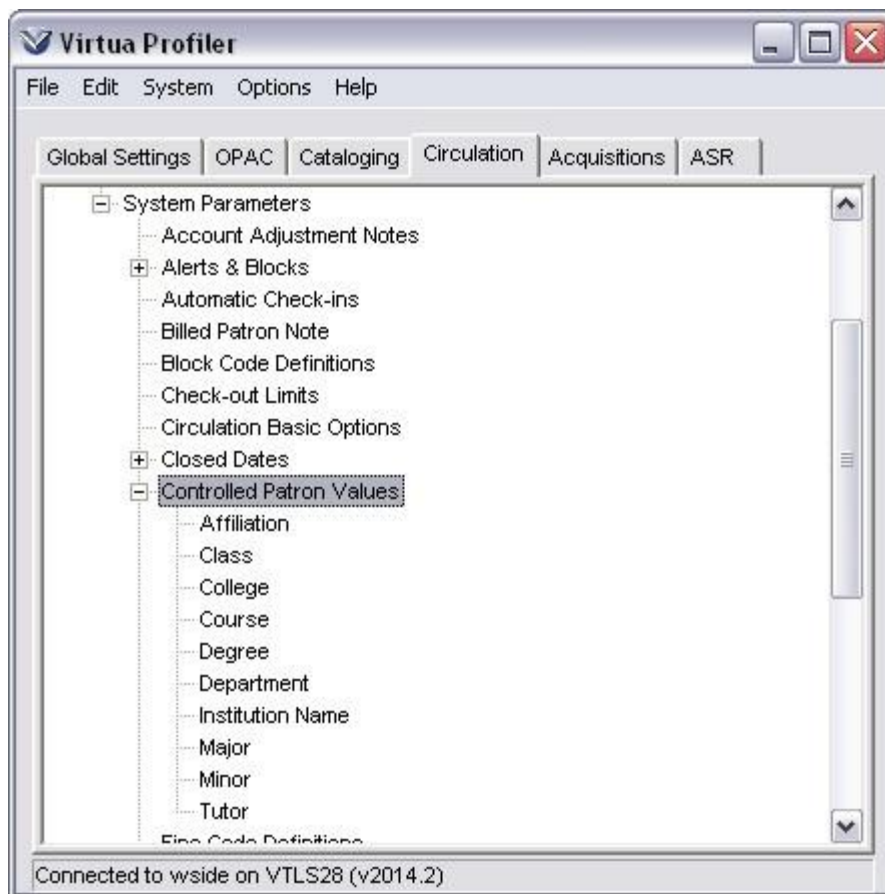


Figure 8-44. Circulation Tab - Controlled Patron Values Parameter Expanded

The controlled patron values categories correspond to subfields in the patron record 301 and 302 tags:

- Affiliation (301/302 tag subfield \$a)
- Class (301/302 tag subfield \$e)
- College (301/302 tag subfield \$c)
- Course (301/302 tag subfield \$j)
- Degree (301/302 tag subfield \$i)
- Department (301/302 tag subfield \$d)
- Institution Name (301/302 tag subfield \$b)
- Major (301/302 tag subfield \$f)
- Minor (301/302 tag subfield \$g)
- Tutor (301/302 tag subfield \$k)

You can configure controlled patron values (codes and corresponding text descriptions) for each of the categories listed above. These categories will appear in the drop-down lists of the Academic Info tab on the Patron Editor.

Hint: When you catalog patron records manually, you can enter a controlled patron value code in the appropriate subfield of the patron record tag 302. When the record is saved to the database, the text description that applies to that code is populated in the corresponding subfield in the 301 tag. Do NOT modify the 301 tag of patron records directly.

Figure 8-45 shows a Controlled Patron Values window. The value in the Code column corresponds to the text description listed next to it in the Description column.

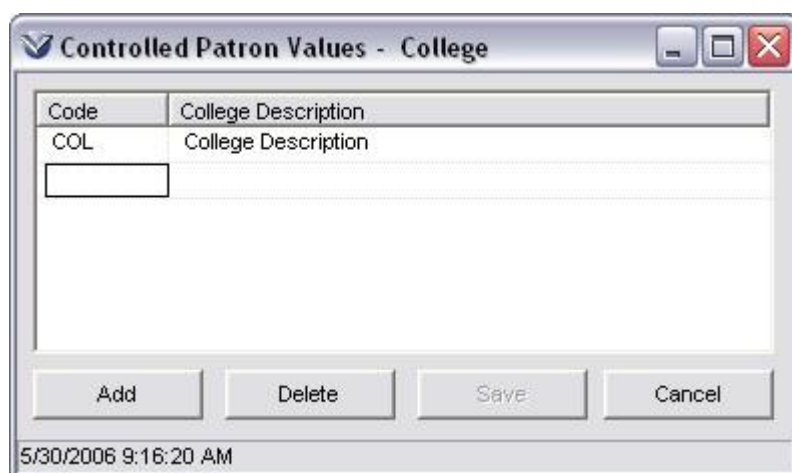


Figure 8-45. Controlled Patron Values Window

When you open a patron record for editing in the Virtua client, you will be able to see the value that appears in the Description column as a value available on the Academic Info tab of the Patron Editor (Figure 8-46).

Patron Editor - VTLS Library

Name:	Documentation	Cell Phone:	
Address:	1701 Kraft Dr	Email:	chamo@vtls.com
City:	Blacksburg	Patron Type:	BM
State:	VA	Birthdate:	19750112
Zip:	24060	Barcode:	456978
Primary Phone:	5405571200	Password:	*****
Alternate Phone:			

[Email/Phone](#) | [Birthdate](#) | [Card Number/Password](#) | [Notes](#) | [Blocks](#) | [Passport](#) | **[Academic Info](#)** | [Corporate N](#)

Institution Affiliation:	Class:	Expected Degree Date:
<input type="text"/>	<input type="text"/>	<input type="text" value="2/24/2016"/>
Institution Name:	Major:	
<input type="text"/>	<input type="text"/>	
College or School:	Minor:	
<input type="text"/>	<input type="text"/>	
College Description	Degree To Be Awarded:	
<input type="text"/>	<input type="text"/>	
Course:	Miscellaneous:	
<input type="text"/>	<input type="text"/>	

Figure 8-46. Patron Editor - Academic Info Tab

When you select that value in the Patron Editor, the patron record will be updated to have the value that appears in the Code column in the 302 tag that corresponds to that volume, and the text description of that code will appear in the corresponding subfield of the 301 tag.

Note that while these alternate controlled patron value settings differ from the legacy controlled patron value settings, the processes for [Adding](#), [Modifying](#), and [Deleting](#) controlled patron values remain the same.

8.11 Working with Fine Code Definitions

In addition to describing various system-defined fine codes, the Fine Code Definitions parameter contains the descriptions for fines that are specific to your library. Note that you must add and resolve library-defined fines *manually* in the Virtua Circulation subsystem. For details, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

8.11.1 Setting the Fine Code Definitions Parameter

Via the Fine Code Definitions parameter, you can . . .

- [Add new library-defined fine code definitions to the database.](#)
- [Modify both library-defined and system-defined fine code definitions.](#)
- [Delete library-defined fine code definitions.](#)

8.11.1.1 Adding New Fine Code Definitions

To add new library-defined fines in the Virtua Profiler,

1. On the Circulation tab, under System Parameters, double-click Fine Code Definitions.

The Fine Codes window appears ([Figure 8-47](#)).

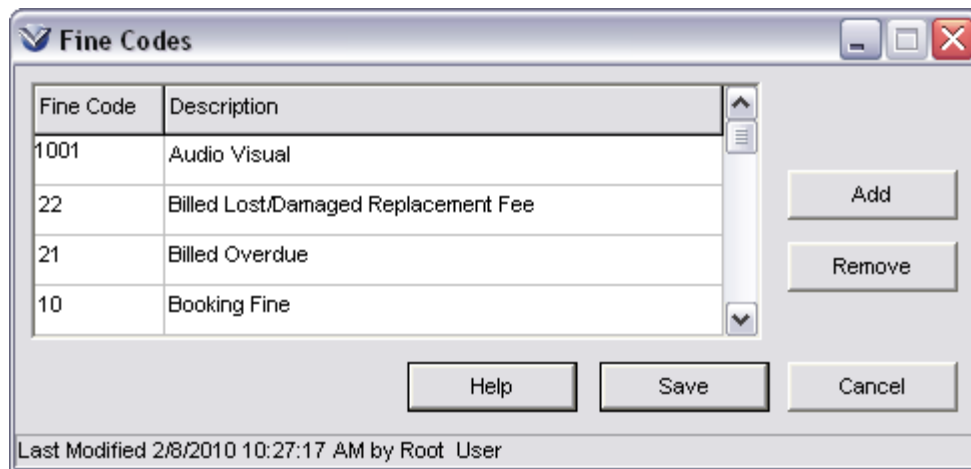


Figure 8-47. Fine Codes Window

2. Click the Add button.

A blank row appears at the bottom of the table.

3. Type a definition for the new fine code.
4. To add another fine code definition, click the Add button again.
5. Continue adding definitions as needed.
6. After you enter all the definitions you need, click the Save button.

The fine code settings are saved to the database.

8.11.1.2 Modifying Fine Code Definitions

To modify an existing Fine Code Definition,

1. On the Fine Codes window, highlight the Fine Code Definition you want to modify.
2. Type over the existing text.
3. Click the Save button.

Your changes are saved to the database.

8.11.1.3 Deleting Fine Code Definitions

Note: If you try to delete a Fine Code Definition where the fine code is currently in use or is system-defined, you will receive an error message, and the Fine Code Definition will NOT be deleted from the database.

To delete a library-defined fine code from the database,

1. Place your cursor in the row containing the definition you want to delete.
2. Click the Delete button.

The row is deleted from the table.

3. Click the Save button.

The Fine Code Definition is deleted from the database.

8.11.2 Guidelines for Setting the Fine Code Definitions Parameter

Here are the guidelines for working with the Fine Code Definitions parameter:

- For each fine your library wants to use, you must specify a Fine Code Definition (i.e., a brief description of the fine).
- You may define as many fine codes as you need.
- The text of the Fine Code Definition appears on the Account tab of the Patron Information window.
- Certain Fine Code Definitions are system-assigned. You can modify the definitions, but you cannot delete them.
- You cannot delete Fine Code Definitions where the fine code is currently in use (i.e., assigned to a patron).

The codes listed in the following table are defined by Virtua and are required for the system to function properly. You can modify the definitions, but you cannot delete them.

Important: If the system-defined code definitions listed below do not appear on your Fine Codes window ([Figure 8-47](#)), contact Innovative Customer Service. Not having these fines defined can prevent some Circulation transactions from processing correctly. Do NOT try to add these fines yourself, however. Only Innovative staff can add them.

Fine Code <i>(stored but not visible to the user)</i>	Fine Code Definition
0	Summary
1	Dispute
2	Waive
3	Item Price Fee
4	Late Renewal
5	Materials Booking
6	Overdue
7	Recalled Overdue
8	Processing Fee
9	Collection Fee
10	Booking Fine
11	Checked Out Overdue
12	Checked Out Requested
13	Request Placed
14	Request Trapped
15	Request Picked Up
16	Request Not Picked Up
17	Request Canceled
18	Lost Item Replacement Fee - Virtua uses this fine code when it charges the Total Replacement Cost fee to the patron's account.
19	Replacement Card
20	Miscellaneous Fee
21	Billed Overdue
22	Billed Lost/Damaged Replacement Fee
23	Damaged Item Replacement Fee - Virtua uses this fine code when it charges the Total Replacement Cost fee to the patron's

	account.
--	----------

Note: When the Lost Item Replacement fine code or Damaged Item Replacement fine code is attached to a fee, Virtua will require that the fee be paid in FULL. If you try to make a partial payment on the Account Payment window, Virtua will display an error message and will not allow the payment.

8.12 Working with ILL Options

The ILL Options parameter ([Figure 8-48](#)) lets you configure circulation parameters to accommodate interlibrary loans.

Note: Virtua's current ILL implementation is designed to accommodate the Relais ILL service. Contact Innovative Customer Support to inquire about supporting other interlibrary loan services.

Virtua's ILL configuration has two main components:

- Configuring item information to assign to the temporary item records that will be created in Virtua when your library borrows an item from another library system via interlibrary loan.
- Configuring patron information to assign to borrowing libraries when another library borrows items from your system via interlibrary loan (*not yet fully implemented*).

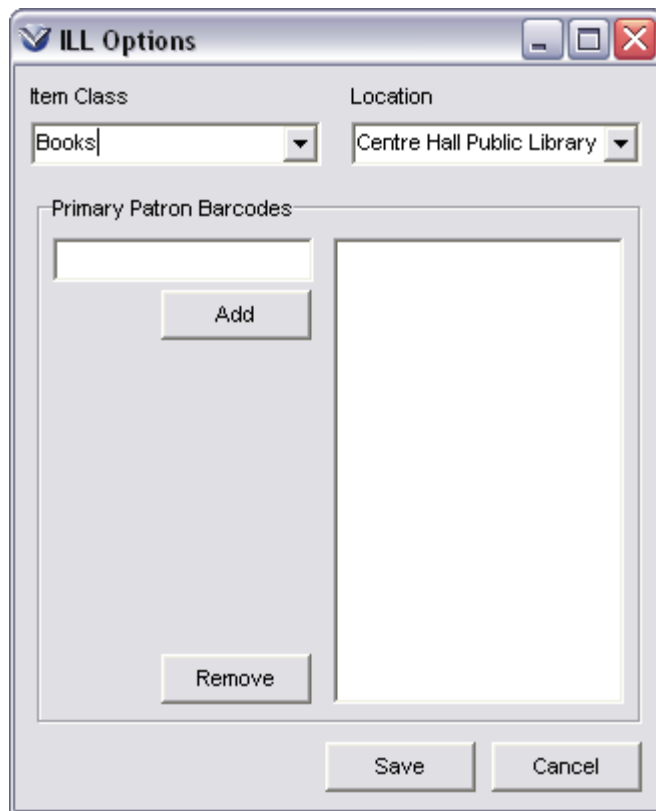


Figure 8-48. ILL Options Parameter

8.12.1 Configuring Item Information

The Item Class and Location values are assigned to the temporary item records that are created in Virtua when your library borrows an item from another library system via interlibrary loan.

- **Item Class** - Defines the item class that will be assigned to items your library system borrows from another via interlibrary loan.

Select an item class from the drop-down list. The classes that appear in this list are those defined by the [Item Class Definitions](#) parameter in the Virtua Profiler.

- **Location** - Defines the shelving location that will be assigned to items your library system borrows from another via interlibrary loan.
Select a location from the drop-down list. The locations that appear in this list are those defined by the Location Names parameter in the Virtua Profiler (see the *Virtua Profiler/Global Parameters User's Guide* for information about library locations).

Click the Save button to save your changes.

8.12.2 Configuring Patron Information

Important: While your settings for the Primary Patron Barcodes settings will be saved by the Profiler, these settings are currently not used by Virtua. There are plans to use these settings in a future release.

Primary Patron Barcodes - Defines the patron barcodes that will be assigned to the borrowing library when another library system borrows one of your library's items via interlibrary loan.

- To add a patron record, type the patron record's primary patron barcode in the text box, and click the Add button. Note that the patron barcode(s) you type in the text box **MUST** be the primary barcode of a patron record that already exists in your database.
- To remove a patron barcode, highlight the barcode and click the Remove button.

Click the Save button to save your changes.

8.13 Working with Item Class Definitions

Using the Item Class Definitions parameter, you can define the following settings for each item class used in your library:

- Code.
- Definition.
- Class Type (regular, reserve, or bookable).
- Media Type.
- Cannot Delete Item flag

Virtua uses the Item Class Definitions parameter in the following ways:

- When processing holds, loans, recalls, and pages, since the rules vary for different types of items.
- In reserves, so that authorized users can select from reserve item classes when adding items to reserves.

- During check-outs, check-ins, and renewals to establish the appropriate loan rules and to apply the correct fine amounts.
- In scheduling item bookings, to determine whether items of a certain class can be booked.
- In the following Virtua Profiler parameters:
 - ◆ Check-out Limits
 - ◆ Location + Patron + Item Matrix
 - ◆ Location + Item Matrix

8.13.1 Adding New Item Class Definitions

To add a new item class via the Virtua Profiler,

1. On the Circulation tab, under System Parameters, double-click Item Class Definitions.

The Item Class Definitions window appears ([Figure 8-49](#)).

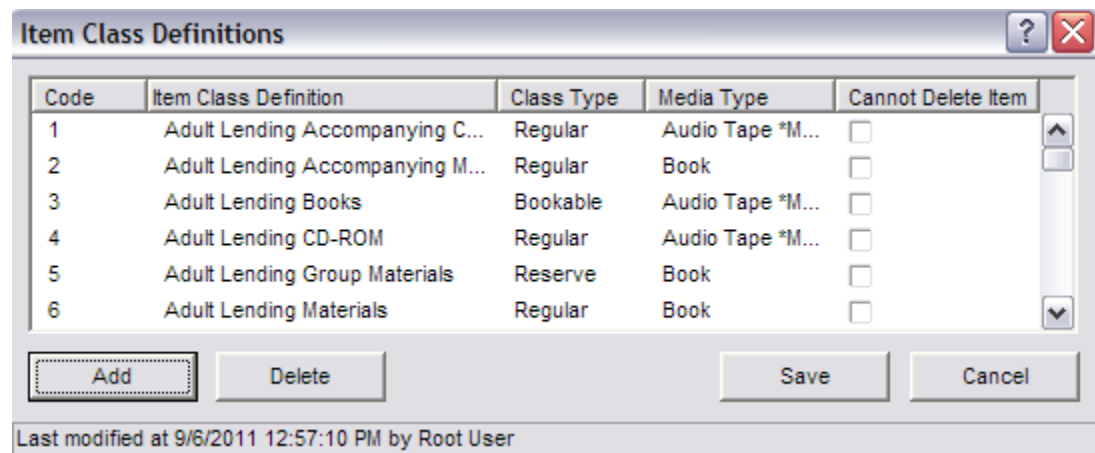


Figure 8-49. Item Class Definitions Window

2. Click the Add button.

A blank row appears in the table.

3. In the Code column, type a unique, numeric item class code in the empty cell. The item class code is used internally to identify the item class. This code must be five digits or less.

4. In the Item Class Definition column, type a unique description of the new item class. This is the description that will appear to identify the item class throughout the system.

Note: For each item class, you must specify *both* the code and the definition; otherwise, Virtua will not save the item class to the database.

5. Choose a Class Type for the new item class. To do so,
 - a. In the new row, click twice in the Class Type cell.
 - b. Choose Regular, Reserve, or Bookable from the drop-down list.
6. Choose a Media Type for the new item class. To do so,
 - a. In the new row, click twice in the Media Type cell.
 - b. Choose the desired media type from the list.

Note: The 3M SelfCheck machine reads the Media Type associated with an item so that sensitive media, such as audiotapes and computer diskettes, can be protected from the desensitization process used for regular materials. Sensitive media types are designated as *MAGNETIC* in the drop-down list. As long as the word MAGNETIC is present, the exact media type category you choose doesn't really matter.

7. (*Optional*) If you want items that belong to this item class to be protected from deletion, select the Cannot Delete Item check box. Selecting this check box will prevent the item from being deleted via the Batch Item Editor.
8. If needed, click the Add button to add another item class.

Note: Before you can add another row, the item class you entered in the previous row must pass the appropriate validation checks.

9. After adding all the desired item classes, click the Save button.

The Item Class Definitions window closes, and your new item class settings are saved to the database.

8.13.2 Modifying Item Class Definitions

To modify an existing item class,

1. On the Item Class Definitions window, for the desired item class, modify any or all of the following settings:
 - Item Class Definition
 - Class Type
 - Media Type
 - Cannot Delete Item

Important: Innovative recommends that you NOT modify the item class codes associated with your Item Class Definitions. Doing so can corrupt information in your database. If you need to modify an item class code, delete the existing item class, and then add a new one with the modified code.

2. Click the Save button.

The Item Class Definitions window closes, and your changes are saved to the database.

8.13.3 Deleting Item Classes

You can delete any item class that is NOT currently in use by the system.

To delete an item class from the database,

1. On the Item Class Definitions window, highlight any cell for the item class you want to delete.
2. Click the Delete button.
 - If the item class is currently in use, you receive the following message ([Figure 8-50](#)):

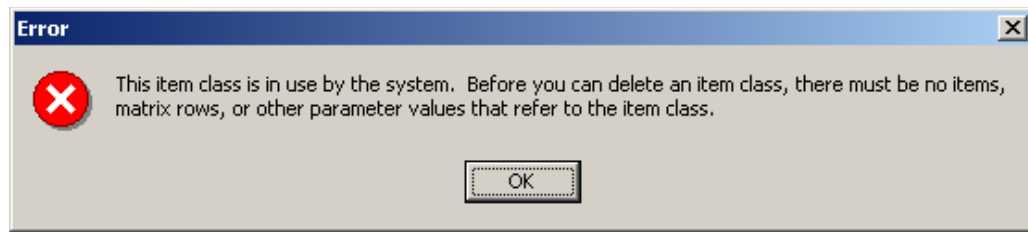


Figure 8-50. Item Class Deletion Error

- If the item class is NOT currently in use, Virtua does not display a pop-up message.
3. Click the Save button.

The deletion is saved to the database.

8.14 Working with Item Class Groups

The Item Class Groups parameter allows you to create groups of item classes, which may then be used to configure check-out limits for patron type/item class group combinations. This allows you the flexibility to limit the number of items belonging to a particular item class *group* that a patron can check out.

For example, creating an item class group that contains the item classes DVD, Audio Cassette, and Audio CD would allow you to set limits on the total number of items belonging to any of these item classes that a patron can check out.

For details on working with item class groups in conjunction with the Check-out Limits parameter, see the section “[Working with Check-out Limits](#)” in this user's guide.

When setting the Item Class Groups parameter, keep in mind that an item class can belong to only one item class group.

8.14.1 Adding Item Class Groups

To add an item class group in the Virtua Profiler,

1. On the Circulation tab, under System Parameters, highlight Item Class Groups.
2. Click the right mouse button, and then choose Add.

The Add Item Class Group window appears (*Figure 8-51*).

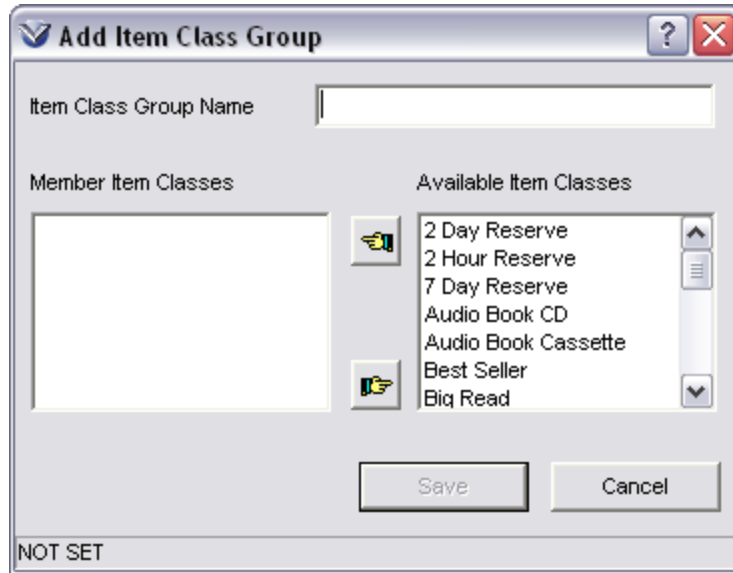




Figure 8-51. Add Item Class Group Window

3. In the Item Class Group Name text box, type a concise, descriptive name for the new item class group.

Note: The Item Class Group Name must be unique. If it is not, upon saving, Virtua returns an error message.

5. In the Member Item Classes list box, add the item class(es) that you want to belong to this item class group. To do this,
 - a. Highlight an item class in the Available Item Classes list box.
 - b. Click the hand pointing left .

Hint: To select more than one item class at a time, hold down the CTRL key (for non-adjacent selection) or the SHIFT key (for adjacent selection) while clicking the desired item classes.

6. If you need to remove an item class from the Member Item Classes list box,
 - a. Highlight the item class you want to reorder.
 - b. Click the hand pointing right .

Notes:

- The Available Item Classes list box displays all item classes that are not assigned to the current item class group or any other item class group. Once an item class has been added to the item class group, it is removed from the Available Item Classes list box to keep you from adding the same item class twice.
- Virtua checks, upon saving, that at least ONE item class has been added to the item class group. If not, Virtua returns an error message. You must add at least one item class or cancel the Add function.

7. Click the Save button.

Note: The Save button becomes active only *after* you type an Item Group Name.

The item class group is added to the database.

8.14.2 Modifying Item Class Groups

To modify an Item Class Group,

1. Under System Parameters, double-click Item Class Groups.

The tree structure expands to display a list of item class groups.

2. Double-click the desired item class group name.

The Modify Item Class Group window appears ([Figure 8-52](#)).

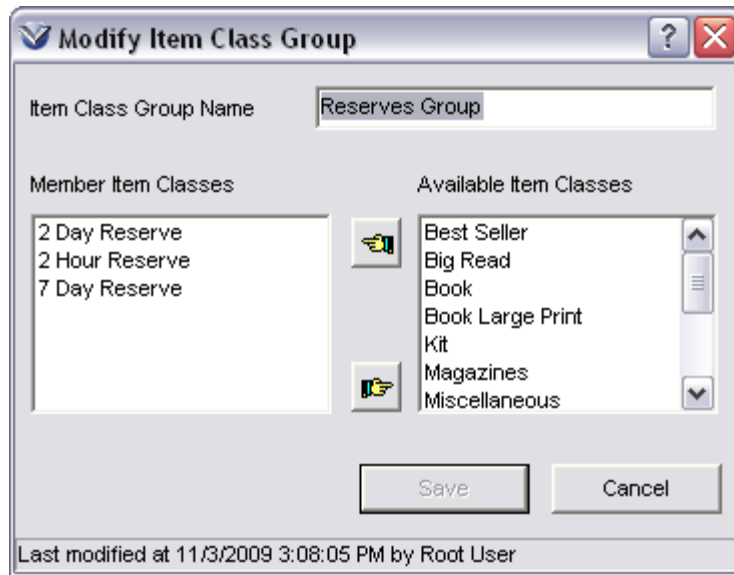


Figure 8-52. Modify Item Class Group Window

3. Modify the Item Class Group Name. You can use cut, copy and paste functions.
4. Modify the Item Class Group Code. You can use cut, copy and paste functions.
5. Add locations to or remove locations from the Member Item Classes list. To do this, select the desired item class and click the hand button that points left or right as appropriate.
6. Click the Save button.

Your changes are saved to the database.

8.14.3 Deleting Item Class Groups

To delete an item class group,

1. Under System Parameters, expand the Item Class Groups heading.
2. Highlight the desired item class group name.
3. Click the right mouse button, and then choose Delete.

Virtua asks you if you really want to delete the item class group ([Figure 8-53](#)).

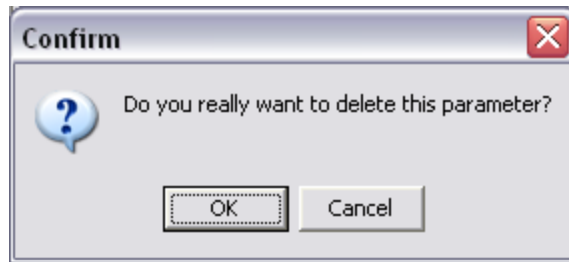


Figure 8-53. Delete Item Class Group Confirmation

4. Click OK.

The item class group is deleted from the database.

8.15 Working with the Library Calendars Parameter

A library calendar consists of one or more sets of library hours (as configured in the [Library Hours parameter](#)) and one or more sets of closed dates (as configured in the [Closed Dates parameter](#)).

The Library Calendars parameter allows you to create different calendars, which you can then assign to particular Shelving Location/Item Class. The library calendars you configure here will be available to be selected in the [Location + Item Matrix](#).

You can create as few or as many different library calendars as are needed for your different library locations.

8.15.1 Adding a Library Calendar

To create a new library calendar,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Select Library Calendars.
4. Click your right mouse button and then choose Add.

Note: The Add menu option is only enabled when you are logged in as the Root User.

The Calendar Configuration window appears (*Figure 8-54*).

Figure 8-54. Calendar Configuration Window

5. In the Name field, type the name you wish to associate with this library calendar.
6. In the Hours area of the window, click the Add button to add a new row to the table.
7. In the new row, modify the column values as needed:
 - a. In the Start Date column, choose a start date from the calendar interface.
 - b. In the End Date column, choose an end date from the calendar interface.
 - c. In the Hours column, choose a set of library hours from the drop-down list.

Note: The drop-down list contains the library hours configured in the Library Hours parameter. For details, see the section “[Working with the Library Hours Parameter](#)” in this chapter.

8. Repeat steps 6 and 7 to add as many rows to the Hours table as needed.

9. In the Closed Dates area of the window, click the Add button to add a new row to the table.
10. In the new row, choose a set of closed dates from the drop-down list box.

Note: The drop-down list box contains the closed dates configured in the Closed Dates parameter. For details, see the section “[Working with the Closed Dates Parameter](#)” in this guide.

11. Repeat steps 9 and 10 to add as many rows to the Closed Dates table as needed.
12. If desired, click the Set Circ button to apply these calendar settings to particular Shelving Location/Item Class combinations. For details, see the section “[Applying Calendar Settings to Location and Item Class Combinations](#)” in this chapter.
13. After you add all the desired library hours and closed dates, click the Save button.

The Calendar Configuration window closes, and your new library calendar is saved to the database.

8.15.2 *Deleting a Library Calendar*

Library calendars that are not currently in use should be deleted.

To delete an existing library calendar,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Library Calendars.

The tree structure expands to display a list of all of the library calendars that have already been configured.

4. Highlight the library calendar you wish to delete.
5. Click your right mouse button and then choose Delete.

Note: The Delete menu option is only enabled when you are logged in as the Root User.

The library calendar is deleted from the database.

Note: If this library calendar is currently assigned to a Shelving Location/Item Class combination in the Location + Item Class Matrix, an error message is displayed and the calendar is NOT deleted from the database.

8.15.3 *Modifying Library Calendars*

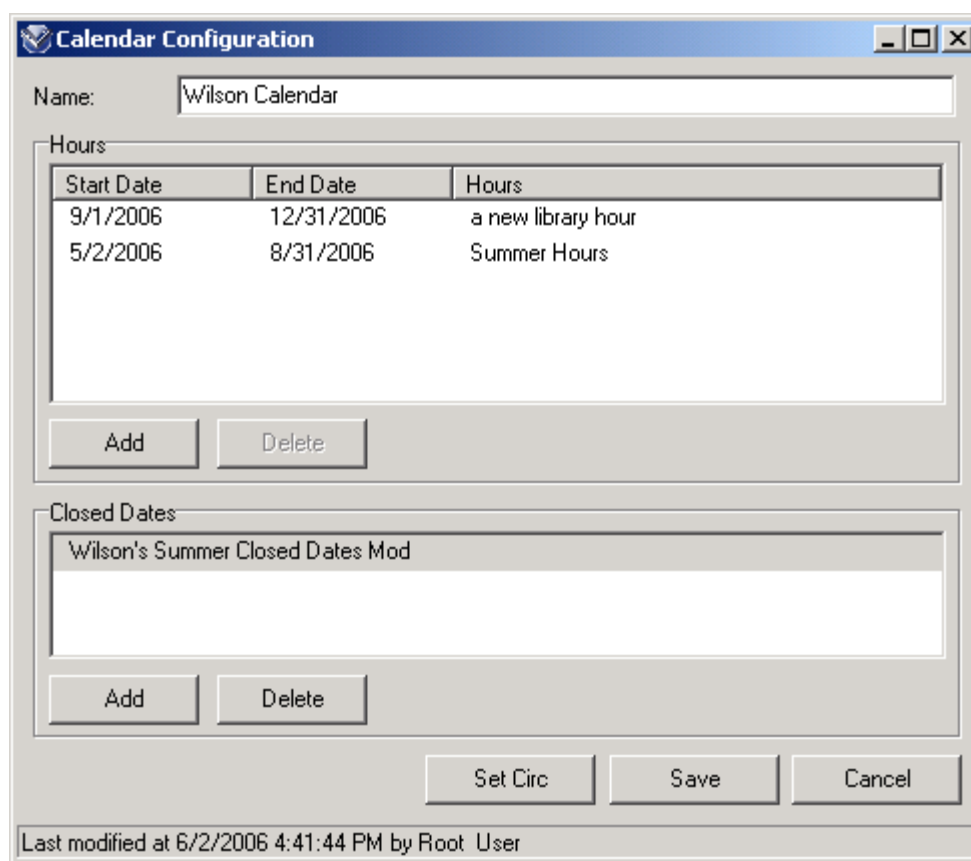
To modify an existing library calendar,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Library Calendars.

The tree structure expands to display a list of all of the library calendars that have already been configured.

4. Double-click the library calendar you wish to modify.

The Calendar Configuration window appears, with the current library calendar settings displayed ([Figure 8-55](#)).



The image shows a 'Calendar Configuration' window. At the top, there is a 'Name:' label followed by a text box containing 'Wilson Calendar'. Below this is a section titled 'Hours' which contains a table with three columns: 'Start Date', 'End Date', and 'Hours'. The table has two rows of data. Below the table are 'Add' and 'Delete' buttons. Underneath the 'Hours' section is a section titled 'Closed Dates' which contains a text box with the text 'Wilson's Summer Closed Dates Mod'. Below this text box are also 'Add' and 'Delete' buttons. At the bottom of the window are three buttons: 'Set Circ', 'Save', and 'Cancel'. A status bar at the very bottom reads 'Last modified at 6/2/2006 4:41:44 PM by Root User'.

Start Date	End Date	Hours
9/1/2006	12/31/2006	a new library hour
5/2/2006	8/31/2006	Summer Hours

Figure 8-55. Calendar Configuration Window

5. In the Hours table,
 - Add a new row by clicking the Add button.
 - OR-
 - Delete an existing row by highlighting it and then clicking the Delete button.
 - OR-
 - Modify a row by highlighting it and then editing the Start Date, End Date, or Hours.

6. In the Closed Dates list,
 - Add a new row by clicking the Add button and selecting a set of closed dates from the drop-down list.
 - OR-
 - Delete a set of closed dates by highlighting a row and then clicking the Delete button.

7. When you have finished modifying the list of library calendars, click the OK button.

Your changes are saved to the database.

8.15.4 Applying Calendar Settings to Location and Item Class Combinations

To help you set up your library calendars more easily and efficiently, the Virtua Profiler offers the Set Circ feature. Using this feature, you can apply library calendar settings to particular Shelving Location/Item Class combinations.

Note: Alternately, you can specify a library calendar for a Shelving Location/Item Class combination using the Calendar setting in Location + Item Matrix. For details, see the chapter “[Working with the Location + Item Matrix](#)” in this user’s guide.

To use the Set Circ feature,

1. On the Calendar Configuration window, set the hours and closed dates that you want to apply to other Shelving Location/Item Class combinations.
2. Click the Set Circ button.

The Circulation Calendar Apply Settings window ([Figure 8-56](#)) appears.

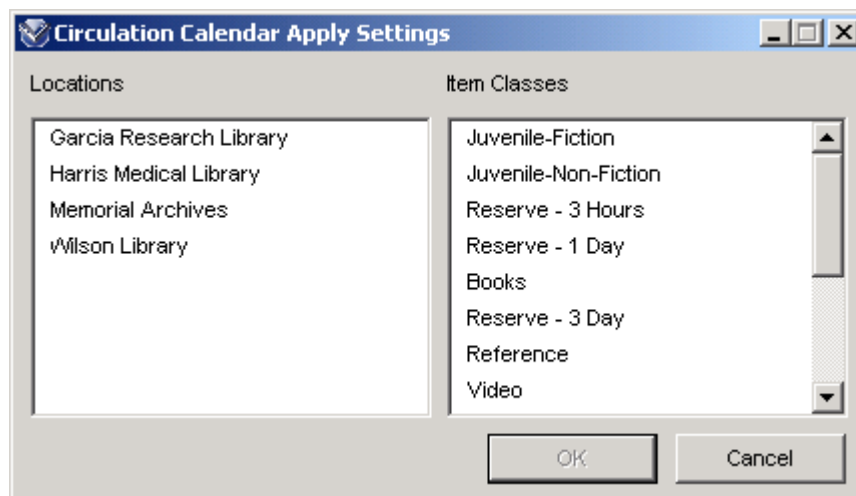


Figure 8-56. Circulation Calendar Apply Settings Window

3. Choose the Shelving Location/Item Class combinations to which you want to apply the current settings:
 - In the Locations list box, select one or more locations.
 - In the Item Classes list box, select one or more item classes.

Hints:

- To select a group of adjacent items in a list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in a list, hold down the CTRL key, and highlight the desired items.

4. When you are finished choosing combinations, click OK.

The settings for the current Library Calendars parameter are applied to the combinations you selected on the Circulation Calendar Apply Settings window.

8.15.5 Applying Calendar Settings to Locations

To help you set up your library calendars more easily and efficiently, the Virtua Profiler offers the Set Location feature. Using this feature, you can apply library calendar settings to particular library locations.

Note: Alternately, you can specify a library calendar for a Shelving Location/Item Class combination using the Calendar setting in Location + Item Matrix. For details, see the chapter “[Working with the Location + Item Matrix](#)” in this user’s guide.

To use the Set Location feature,

1. On the Calendar Configuration window, set the hours and closed dates that you want to apply to other library locations.
2. Click the Set Location button.

The Apply Calendar window ([Figure 8-57](#)) appears.

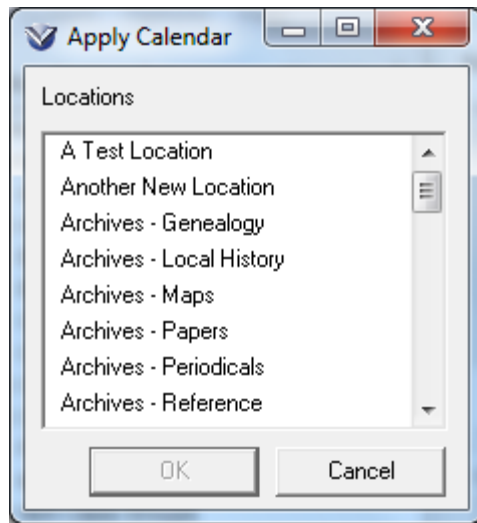


Figure 8-57. Apply Calendar Window

3. Choose the Locations to which you want to apply the current settings:

Hints:

- To select a group of adjacent items in a list, hold down the SHIFT key, and highlight the desired items.
- To select multiple, non-adjacent items in a list, hold down the CTRL key, and highlight the desired items.

4. When you are finished choosing locations, click OK.

The settings for the current Library Calendars parameter are applied to the locations you selected on the Apply Calendar window.

8.16 Working with the Library Hours Parameter

You can use the Library Hours parameter ([Figure 8-58](#)) to create a set of operating hours, which you can then assign to a particular Shelving Location/Item Class combination.

The Library Hours parameter, the [Library Calendars parameter](#), and the [Location + Item Matrix](#) all work together to determine which set of operating hours applies to a

particular Shelving Location/Item Class combination. These parameters work together as follows:

- Library Hours parameter – Allows you to configure sets of operating hours. The sets of library hours that you configure here will be available to be selected in the Library Calendars parameter.
- Library Calendars parameter – Allows you to configure library calendars. A library calendar consists of one or more sets of library hours (as configured in the Library Hours parameter) and one or more sets of closed dates (as configured in the [Closed Dates parameter](#)). The library calendars you configure here will be available to be selected in the Location + Item Matrix.
- Location + Item Matrix – Allows you to configure settings that apply to particular combinations of locations and item classes. Here, you will be asked to select a library calendar to apply to the Shelving Location/Item Class combination. The library hours specified in the calendar will apply to this Shelving Location/Item Class combination.

You can create as few or as many different sets of operating hours as needed for your different library locations.

8.16.1 Adding Library Hours

To create a new set of library hours,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Select Library Hours.
4. Click your right mouse button and then choose Add.

Note: The Add menu option is only enabled when you are logged in as the Root User.

The Library Hours window appears ([Figure 8-58](#)).

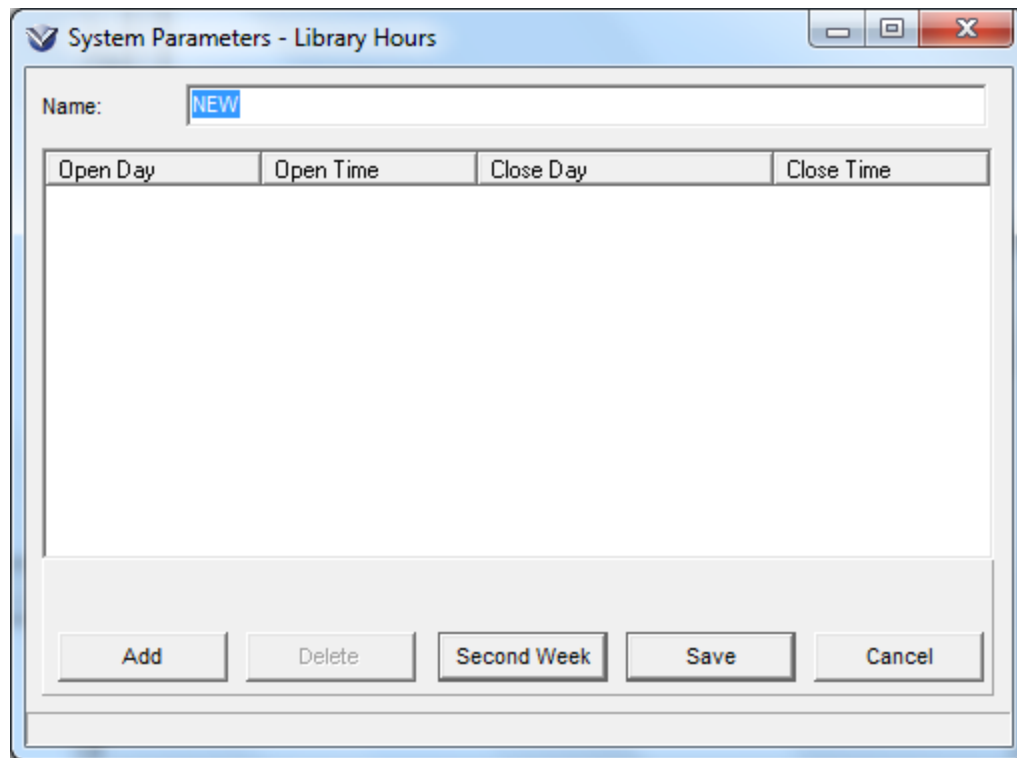


Figure 8-58. Library Hours Window

5. In the Name field, type the name you wish to associate with this set of library hours.
6. Click the Add button to add a new row to the table.
7. In the new row, modify the day and time entries as needed:
 - a. In the Open Day column, choose an open day from the drop-down list.
 - b. In the Open Time column, select an opening time.
 - c. In the Close Day column, choose a close day from the drop-down list.
 - d. In the Close Time column, select a closing time.
8. Repeat steps 6 and 7 to add as many rows to the table as needed.
9. If you want to configure a two-week cycle (i.e., biweekly hours) for this set of library hours, click the Second Week button.

Note: Two-week cycles may be necessary in order for some libraries to accommodate stops on a mobile library's route.

The Library Hours window expands to display a table of Second Week hours (*Figure 8-59*).

System Parameters - Library Hours

Name:

Start Week

First Week

Open Day	Open Time	Close Day	Close Time
Sunday	12:00:00 AM	Sunday	12:00:00 AM

Add Delete

Second Week

Open Day	Open Time	Close Day	Close Time
----------	-----------	-----------	------------

Add Delete

Save Cancel

Figure 8-59. Library Hours Window, Displaying Second Week Settings

10. Configure the Second Week library hours using the same workflow you used to configure hours for the first week (see steps 6 and 7).
11. After you add all the desired operating hours, click the Save button.

The Library Hours window closes, and your new set of operating hours is saved to the database.

Important: Libraries that use biweekly Library Hours should review their Library Hours configurations at the beginning of each year to verify that the Start Week setting is set to an appropriate calendar date. Depending on how your institution has configured library hours, it may be necessary to adjust the library hours Start Week setting from year to year.

8.16.2 *Deleting Library Hours*

To delete an existing set of library hours,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Library Hours.

The tree structure expands to display a list of all of the sets of library hours that have already been configured.

4. Highlight the set of library hours you wish to delete.
5. Click your right mouse button and then choose Delete.

Note: The Delete menu option is only enabled when you are logged in as the Root User.

The set of library hours is deleted from the database.

Note: If this set of library hours has been assigned to a calendar in the Library Calendars parameter, it is also deleted from calendar. For details on configuring library calendars, see the section “[Working with the Library Calendar Parameter](#)” in this user’s guide.

8.16.3 Modifying Library Hours

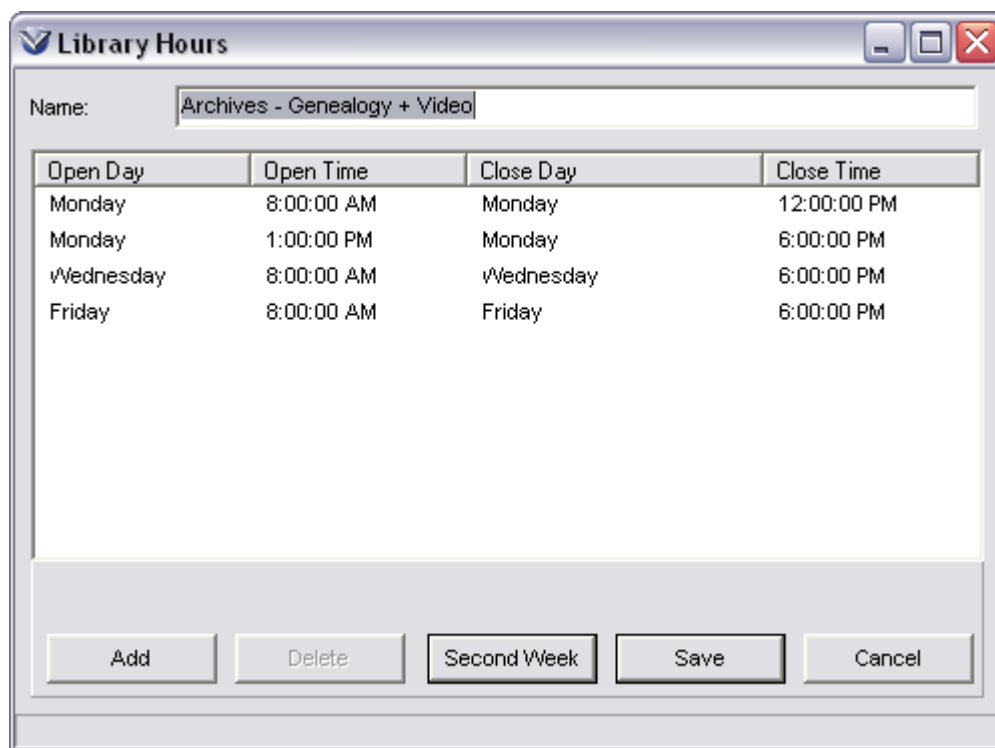
To modify an existing set of library hours,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Library Hours.

The tree structure expands to display a list of all of the sets of library hours that have already been configured.

4. Double-click the set of library hours you wish to modify.

The Library Hours window appears, with the current day and time settings displayed (*Figure 8-60*).



Open Day	Open Time	Close Day	Close Time
Monday	8:00:00 AM	Monday	12:00:00 PM
Monday	1:00:00 PM	Monday	6:00:00 PM
Wednesday	8:00:00 AM	Wednesday	6:00:00 PM
Friday	8:00:00 AM	Friday	6:00:00 PM

Figure 8-60. Library Hours Window

5. Highlight the row you wish to modify.
6. In the selected row, modify the day and time entries as needed:
 - a. In the Open Day column, choose an open day from the drop-down list.

- b. In the Open Time column, select an opening time.
 - c. In the Close Day column, choose a close day from the drop-down list.
 - d. In the Close Time column, select a closing time.
7. Repeat steps 5 and 6 to modify as many rows in the table as needed.
8. Click the Save button.

Your changes are saved to the database.

8.16.4 Guidelines for Setting the Library Hours Parameter

The Library Hours parameter lets you set up your operating hours to be as simple or as complex as needed. The Library Hours window ([Figure 8-58](#)) contains four columns of information:

- **Open Day** - For a given period of operation, the day on which the library opens. Using the drop-down list, you can set the Open Day to any day of the week.
- **Open Time** - For a given period of operation, the time at which the library opens.
- **Close Day** - For a given period of operation, the day on which the library closes. Using the drop-down list, you can set the Close Day to any day of the week.
- **Close Time** - For a given period of operation, the time at which the library closes.

Below are some hints that you can use when setting up your library hours.

- For each day of the week, you can create as many entries as you need. For example, if your library is open on Mondays from 8:00 a.m. until 11:00 a.m., closes for lunch, and then is open again from 1:00 p.m. until 5:00 p.m., you would create two entries for Monday:

Open Day	Open Time	Close Day	Close Time
Monday	8:00:00 AM	Monday	11:00:00 AM
Monday	1:00:00 PM	Monday	5:00:00 PM

- The Open Day and the Close Day do not have to be the same. For example, you might want to specify that your library is open from 8:00 a.m. until 2:00 a.m. the on the *following* day:

Open Day	Open Time	Close Day	Close Time
Monday	8:00:00 AM	Tuesday	2:00:00 AM
Tuesday	8:00:00 AM	Wednesday	2:00:00 AM
Wednesday	8:00:00 AM	Thursday	2:00:00 AM
Thursday	8:00:00 AM	Friday	2:00:00 AM

- You can specify a closed day by omitting an entry for that day of the week. For example, if your library is closed on Sundays, you would omit Sunday from the Library Hours parameter.

Note: Specifying a closed day in this way is NOT the same as specifying a closed date via the Closed Dates parameter. When you define a closed day via the Library Hours parameter, you are indicating that your library is regularly closed on a given day of the week.

- For a given entry, the Close Time must be *after* the Open Time. Additionally, your hours of operation cannot overlap. If Virtua finds a problem with your Library Hours, an error message will appear when you attempt to save the parameter. You will need to modify your settings before you can save your Library Hours to the database.

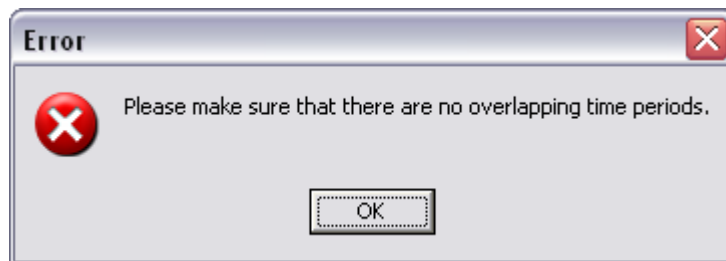


Figure 8-61. Library Hours Error Message

Hint: Keep in mind that midnight is the first minute of a given day, not the last. If your library closes at midnight, be sure to set the Close Time to midnight on the day following the Open Day (e.g., Saturday, 8:00 a.m. - Sunday, 12:00 a.m.).

8.17 Working with Loans/Pages Setup

The Loans/Pages Setup window lets you customize the printout that is generated when you right click on the Loans/Pages window and select Print. Via the Loans/Pages Setup window, you can specify which data elements are printed on the loans/pages printout, and modify the corresponding labels. These settings apply to all locations, and override the Loans/Pages Setup settings in the Virtua client.

To configure the Loans/Pages Setup settings,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Loans/Pages Setup.

The Loans/Pages Setup window appears (*Figure 8-62*).

Loans/Pages Setup	
Patron Name:	<input type="text"/>
Author:	<input type="text"/>
Title:	<input type="text"/>
Call Number:	<input type="text"/>
Second Call Number:	<input type="text"/>
Item Barcode:	<input type="text"/>
Copy Number:	<input type="text"/>
Copies:	<input type="text"/>
Collection Code:	<input type="text"/>
Edition:	<input type="text"/>
Bib Id:	<input type="text"/>
Units:	<input type="text"/>
Shelving Location:	<input type="text"/>
Pickup Location:	<input type="text"/>
Non-Parameterized Shelf Location:	<input type="text"/>
Request Date:	<input type="text"/>
AV Accession Number:	<input type="text"/>
Group Request Indicator:	<input type="text"/>
Item Class:	<input type="text"/>
(Only named fields will be printed.)	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 8-62. Loans/Pages Setup Window

4. Choose which data elements you want to include on the loans/pages printout, and specify how you want them to be labeled. Each available data element has a default label, which appears in a text box to the right of the data element name. For each data element, you can . . .

- Accept the default label.
-OR-
- Edit the default label to create your own customized label.
-OR-
- For any data element that you do NOT want to include on the loans/pages printout, delete the label entirely.

Note: If you leave all fields blank, the loans/pages setup settings in the Virtua client will determine the labels for the loans/pages printout. For more information on configuring loans/pages printouts in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on loans/pages printouts:

- **Patron Name** - The name of the patron who placed the loan or page request, taken from the 100 tag, subfield \$a of the patron record.
- **Author** - The author of the requested item, taken from the bibliographic record.
- **Title** - The title of the requested item, taken from the bibliographic record.
- **Call Number** - The call number of the requested item, taken from the item record.
- **Second Call Number** - The second call number of the requested item, taken from the item record.
- **Item Barcode** - The item barcode of the requested item, taken from the item record.
- **Copy Number** - The copy number of the requested item, taken from the item record.
- **Copies** - The number of copies of the requested item.
- **Collection Code** - The Collection Code for the collection to which the item belongs.
- **Edition** - The edition of the requested item, taken from the bibliographic record.
- **Bib-ID** - The bib-ID of the requested item, taken from the bibliographic record.
- **Units** - The units of the requested item, taken from the item record.
- **Shelving Location** - The shelving location of the requested item, taken from the item record.
- **Pickup Location** - The pickup location for the requested item, as specified when the request was placed.
- **Non-Parameterized Shelf Location** - The non-parameterized shelf location of the requested item, taken from the item record.
- **Request Date** - The date on which the loan or page request was placed.

- **AV Accession Number** - The AV Accession number assigned to the item when the item was cataloged.
- **Group Request Indicator** - A Yes/No indication of whether the request is a group request.
- **Item Class** - The class of the item, as defined in the item record.

Important: If a text box is *blank*, that data element is not printed on the loans/pages printout.

5. Click the Save button to save your changes.

8.18 Working with the Notification Options Parameter

The Notification Options parameter ([Figure 8-63](#)) lets you set two values for failed notifications. You can set the...

- Number of times Virtua should send a failed notification.
- Period of time (in terms of days or weeks) within which those notifications should be sent.

To access the Notification Options window,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Notification Options.

The Notification Options window appears ([Figure 8-63](#)).

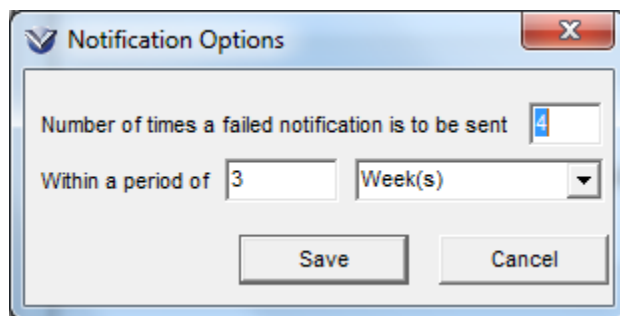


Figure 8-63. Notification Options Window

4. Specify the number of times a failed notification is to be sent by typing a number in the *Number of times a failed notification is to be sent* field.
5. Specify the period within which the notifications should be sent by typing a number in the *Within a period of* text field and selecting a period (Day(s) or Week(s)) from the drop-down list.
6. When you have finished configuring the Notification Options parameter, click the Save button.

Your changes are saved to the database.

For more information about failed notices, see the description of the Failed Notices report in the *InfoStation/Circulation Reports Reference Guide*.

8.19 Working with the Patron Block History Parameter

The Patron Block History parameter ([Figure 8-64](#)) lets you specify whether Virtua records information about patron blocks in the Transaction Log. If you choose to log data about patron blocks, you can also define how long the block history will be kept.

To access the Patron Block History window,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Patron Block History.

The Patron Block History window appears ([Figure 8-64](#)).

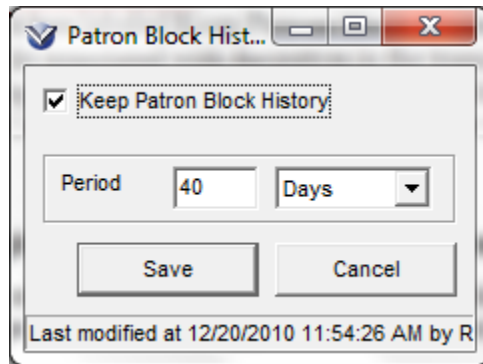


Figure 8-64. Patron Block History Window

4. Select the Keep Patron Block History check box to enable logging information about patron blocks.
-OR-
De-select the check box to specify that patron block information *not* be stored in the Transaction Log.
5. If you have chosen to store the patron block history, specify a period by typing a number in the Period text box and selecting a unit of time. Virtua will delete expired patron block history entries via a batch job.
6. When you have finished configuring the Patron Block History parameter, click the Save button.

Your changes are saved to the database.

For information about viewing the patron block history in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.20 Working with the Patron Deposit Accounts Parameter

The Patron Deposit Accounts parameter lets you determine whether the library lets patrons create deposit accounts, where they can store funds for use in paying library funds and fees.

To access the Patron Deposit Account window,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Patron Deposit Account

The Patron Deposit Account window appears ([Figure 8-65](#)).

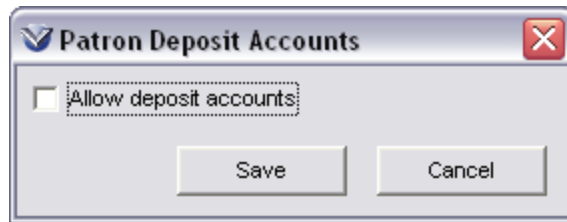


Figure 8-65. Patron Deposit Accounts Window

To enable patron deposit accounts, select the “Allow deposit accounts” check box, and click the Save button.

When the “Allow deposit accounts” check box is selected, the Patron Information window in the Virtua client displays a Deposit Acct button, which opens a window where you can add or withdraw funds from the patron deposit account ([Figure 8-66](#)).

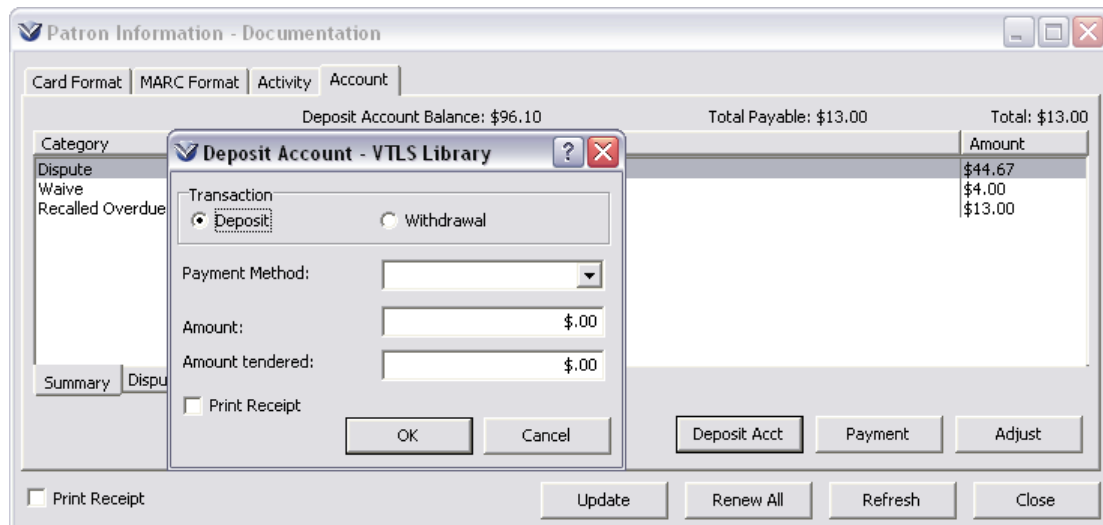


Figure 8-66. Deposit Account Elements on Patron Information Window in the Virtua Client

In addition, the patron's deposit account will be available as a payment option when the patron pays fines or fees through the Virtua client or a SelfCheck station.

8.21 Working with the Patron Diagnostic Messages Parameter

The Patron Diagnostic Messages parameter lets you modify and/or translate into multiple languages error strings that appear when a patron encounters a circulation block.

- The Diagnostics Messages tab lets you modify or translate the messages that appear at a SelfCheck station when a patron is blocked from a circulation transaction.
- The Block Codes tab lets you modify or translate the messages that appear at the circulation desk when a patron is blocked from a circulation transaction.

To access the Patron Diagnostic Messages window,

4. On the Circulation tab, double-click CIRCULATION.
5. Double-click System Parameters.
6. Double-click Patron Diagnostic Messages

The Patron Diagnostic Messages window appears (*Figure 8-67*).

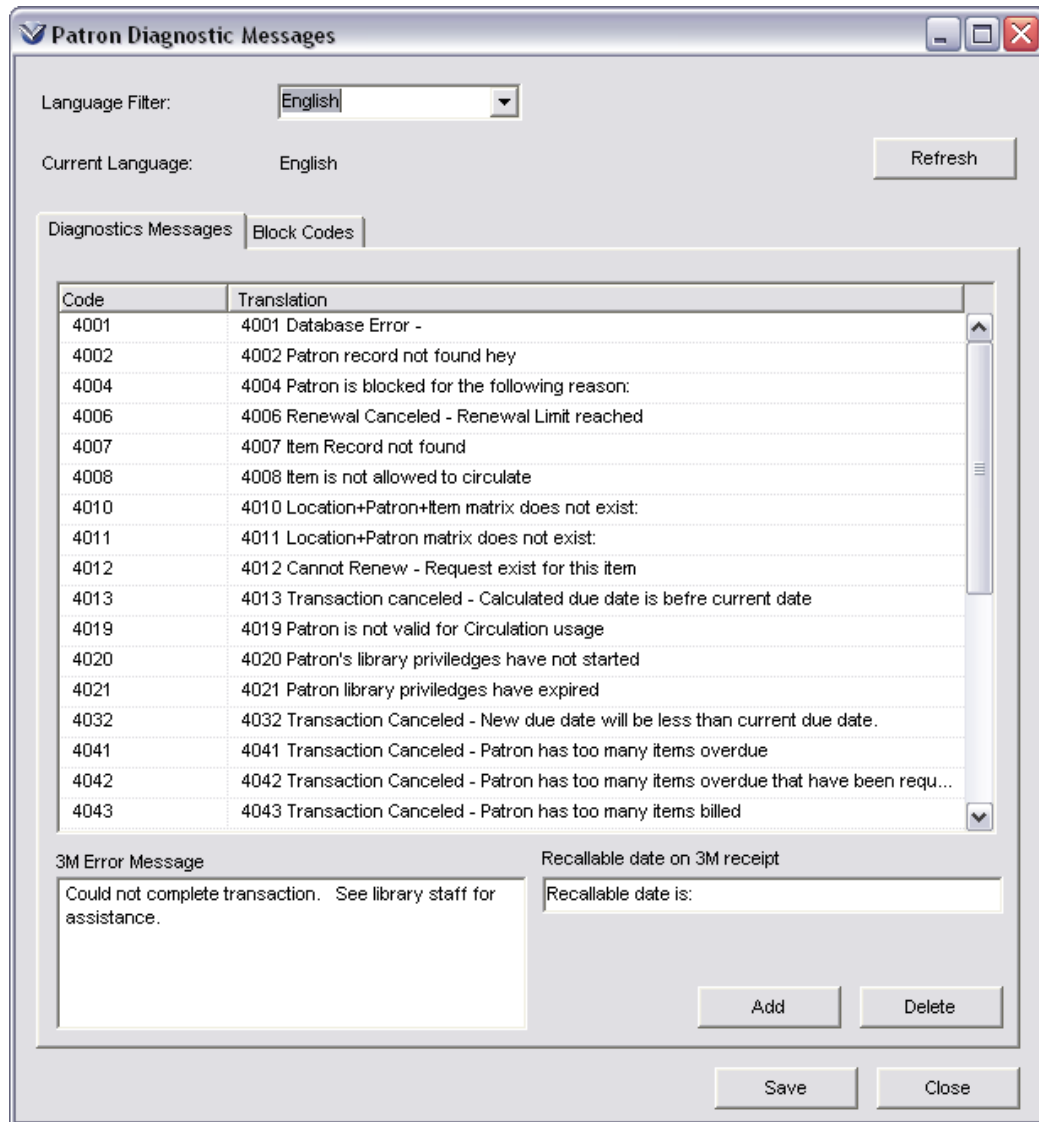


Figure 8-67. Patron Diagnostic Messages Window

- Click on the [Diagnostics Messages](#) tab to modify diagnostic messages that appear at SelfCheck stations.

-OR-

Click on the [Block Codes](#) tab to modify block codes that appear at the circulation desk.

8.21.1 About Patron Diagnostic Messages

In the [Circulation Basic Options parameter](#), you can specify one generic 3M error message that will appear in the 3M Patron SelfCheck System for a myriad of error conditions.

In the Patron Diagnostic Messages parameter, you can add the diagnostic code and customize the text of a number of messages that the 3M Patron SelfCheck System generates to explain specific error conditions preventing a patron from checking out or renewing an item.

Note: If an error is generated in the 3M Patron SelfCheck System and Virtua is not able to find a translation for the error in the Patron Diagnostic Messages parameter, the system will default to the generic message specified in the Circulation Basic Options parameter.

The 3M Patron SelfCheck System supports a number of error messages that explain why a patron is prevented from performing a check-out or renewal. You can add any or all of the available messages by typing the message code and a description (see below) in the Patron Diagnostic Messages window. Although you must use specific message codes, you can customize the description as needed and provide multiple translations. In this way, when a patron encounters an error, they can see an error message that explains precisely what the problem is.

The following is a list of some of the supported message codes and corresponding messages that you can use in the Patron Diagnostic Messages parameter:

24051 (Alert only) This item is part of a group. All related items should be returned together. Renewals will not be allowed on group items still out on loan.
 4001 Database Error - [table name]
 4002 Patron record not found
 4004 Patron is blocked for the following reason - [block code and [corresponding definition](#)]
 4006 Renewal canceled - Renewal limit reached
 4007 Item record not found
 4008 Item is not allowed to circulate
 4010 Location + Patron + Item matrix does not exist: [location/patron type/item class]
 4011 Location + Patron matrix does not exist: [location/patron type]
 4012 Cannot renew - Requests exists for this item
 4013 Transaction canceled - Calculated due date is before current date
 4019 Patron is not valid for circulation usage
 4020 Patron's library privileges have not started
 4021 Patron's library privileges have expired
 4032 Transaction canceled - New due date will be less than current due date
 4041 Transaction canceled - Patron has too many items overdue
 4042 Transaction canceled - Patron has too many items overdue that have been requested

4043 Transaction canceled - Patron has too many items billed
 4044 Transaction canceled - Patron owes too much money
 4045 Transaction canceled - Patron has too many reserve items overdue
 4046 Patron has item(s) too many days overdue
 4049 Transaction canceled - Item is being prepared for reserves
 4062 Library defined date code/location combination does not exist: [code/location]
 4067 Patron has already checked out this title in the past. Patron is designated as a non-duplicate-check-out patron.
 4073 Location + Item matrix does not exist: [location/item class]
 4087 Check-in time and date cannot be set to before the check-out time.
 4092 Transaction canceled - Patron record is in error state.
 4102 The next scheduled booking does not allow enough time for the guaranteed circulation period.
 4104 The number of pieces must be specified.
 4110 This item is not allowed to be checked in at this location. It should be returned to [location]
 4140 This item belongs to a group and must be checked out with other items in that group. Please visit the service counter.
 4141 This item is part of a group and can only be renewed out as a set. Not all items are available for renewal; therefore this item cannot be renewed. Please see a librarian for assistance.
 4143 This item is part of a group. Additional accompanying materials may be checked out at the service counter
 4166 Incorrect PIN/Password provided

If there are additional circulation error messages that you would like to appear in the SelfCheck interface, contact Innovative Customer Support for assistance.

8.21.2 Adding Patron Diagnostic Messages

To add a diagnostic message code and message,

1. On the Patron Diagnostic Messages window, select the language for which you would like to add a diagnostic code.
2. Click the Refresh button.
3. Click the Add button.

In the Code column of the display area, a new line with a highlighted “0” appears (*Figure 8-68*).

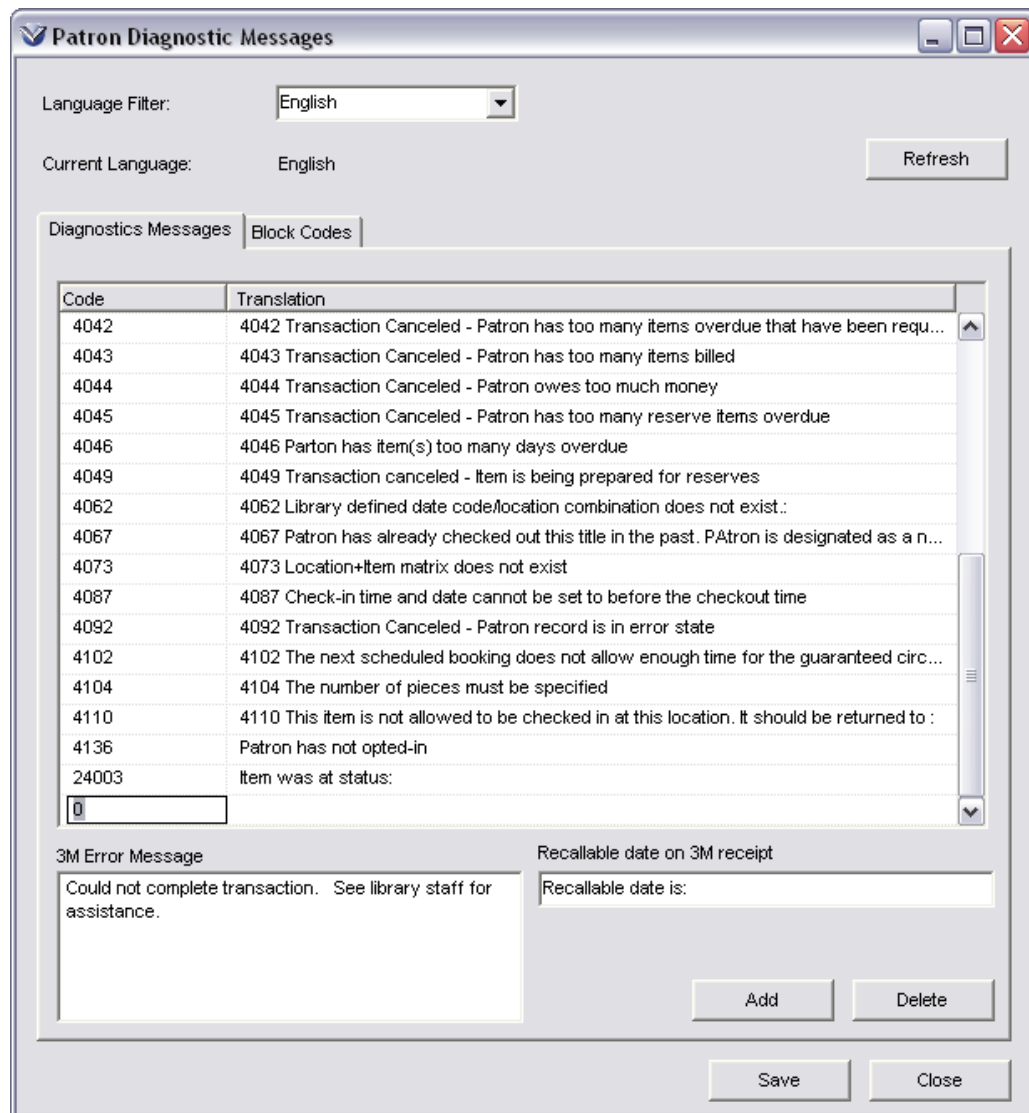


Figure 8-68. Patron Diagnostic Messages Window

4. In the Code column, type the message code you want to add.
5. Click twice in the Description column, and type the message that corresponds to the message code.
6. When you are finished adding all the messages, click the Save button.

The Profiler adds the message(s) to the current language.

8.21.3 Adding Translations for Patron Diagnostic Messages

To add translations for Patron Diagnostic Messages,

1. On the Patron Diagnostic Messages window, select the language for which you would like to add a translation.
2. To add a new set of diagnostic codes to translate, click the Refresh button. The Diagnostic Messages tab is updated to show any codes already configured for that language.

-OR-

To translate an existing set of diagnostic codes to a different language, do NOT click the Refresh button. This will let you edit the strings that already exist for the Current Language, and save them to the language set in the Language Filter ([Figure 8-69](#)).



The screenshot shows a window with two labels: 'Language Filter:' and 'Current Language:'. The 'Language Filter:' is followed by a dropdown menu currently showing 'French'. The 'Current Language:' is followed by the text 'English'. To the right of these fields is a button labeled 'Refresh'.

Figure 8-69. Differing Languages on Patron Diagnostic Messages Window

3. Select the row containing the information you want to modify.
4. Click the text of the message you want to modify.
5. Type the new translation, and click the Save button.

The Profiler saves your changes to the language indicated by the Language Filter drop-down list.

If the language in the Language Filter field is different from the language in the Current Language field, the Profiler displays a confirmation message when you click the Save button ([Figure 8-70](#)).

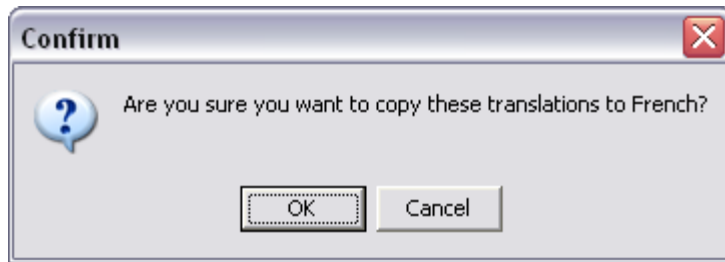


Figure 8-70. Save Diagnostic String Confirmation Message

8.21.4 Deleting Patron Diagnostic Messages

To delete a diagnostic message code and message,

1. On the Patron Diagnostic Messages window, select the row containing the message you want to delete.
2. Click the Delete button, and then click the Save button.

The Profiler deletes the row.

8.21.5 Modifying Patron Diagnostic Messages

To modify a diagnostic message code and/or message,

1. On the Patron Diagnostic Messages window, select the language for which you would like to modify the diagnostic code.
2. Click the Refresh button. The Diagnostics Messages pane is updated.

Note: If you do not click the Refresh button, the Profiler will save the diagnostic messages that are displayed for the currently-displayed language to the language you select in the drop-down list in the drop-down list. You will receive a warning message when you try to save the changes:



Figure 8-71. Save Diagnostic String Confirmation Message

3. Select the row containing the information you want to modify.
4. Click the code or the text of the message you want to modify.
5. Type the new information, and click the Save button.

The Profiler saves your changes.

8.21.6 Modifying Block Code Labels

The Block Codes tab of the Patron Diagnostic Messages window ([Figure 8-72](#)) lets you modify existing patron block codes. While the strings on the Diagnostic Messages tab appear at SelfCheck stations, the strings on the Block Codes tab appear at the circulation desk.

The Block Codes tab displays all block codes defined in the database. If a translation is available, it will be displayed in the Translation column. If no translation is available, the Translation column will be populated with the description provided in the Block Code Definitions parameter and an asterisk (*) will be placed after the block code. Once a translation is provided and saved, the asterisk (*) will be removed.

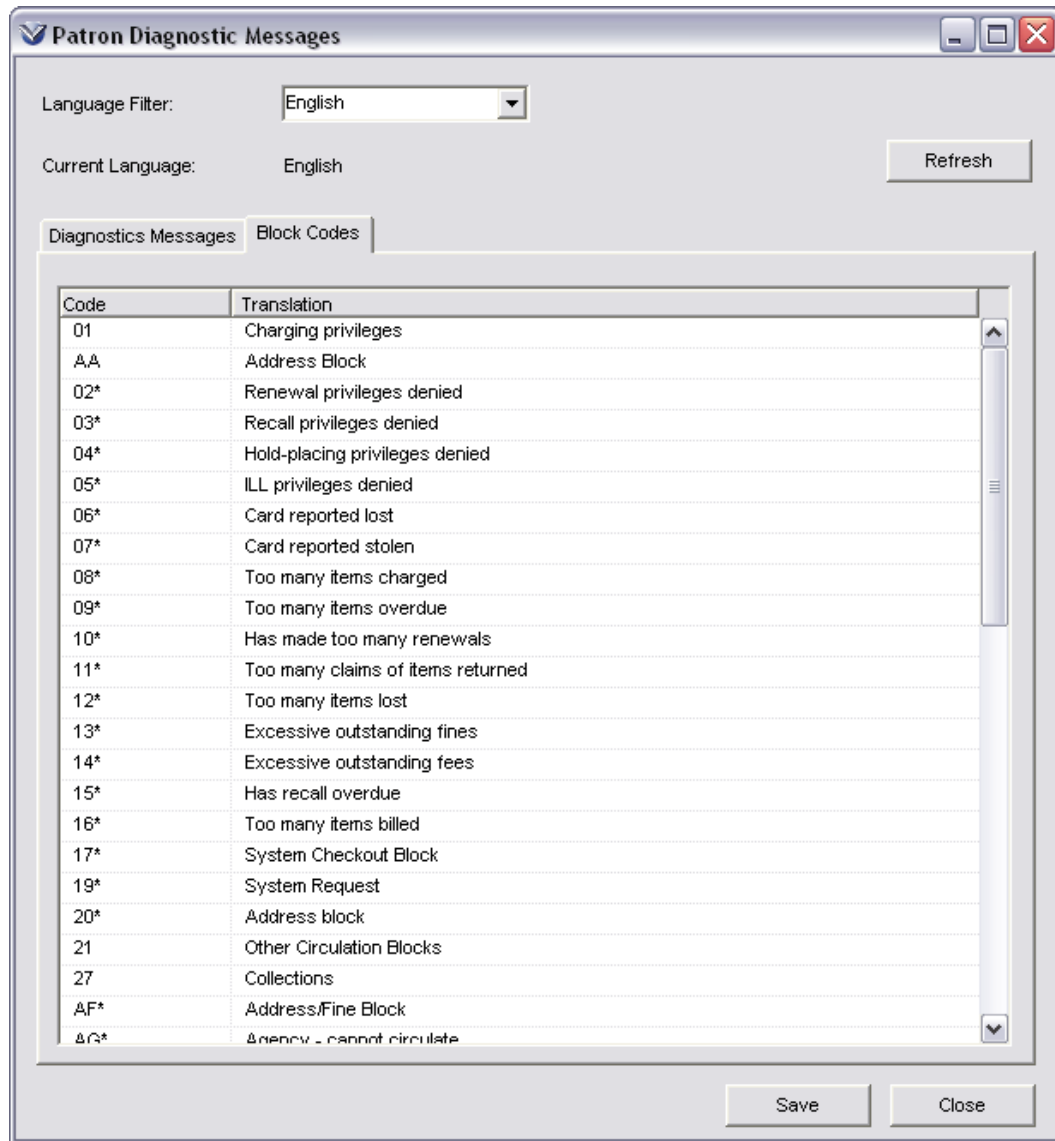


Figure 8-72. Patron Diagnostic Messages Window, Block Codes Tab

Note: This window lets you change the *strings* for block codes. If you want to add, delete, or modify the block codes themselves, use the [Block Codes Definitions](#) parameter.

To add translations for Block Codes,

1. On the Patron Diagnostic Messages window, click on the Block Codes tab.
2. Select the language for which you would like to add a translation.

3. Click the Refresh button.

-OR-

To translate an existing set of diagnostic codes to a different language, do NOT click the Refresh button. This will let you edit the strings that already exist for the Current Language, and save the strings to the language set in the Language Filter ([Figure 8-73](#)).



Figure 8-73. Differing Languages on Patron Diagnostic Messages Window

4. Select the row containing the information you want to modify.
5. Click the text of the block code translation you want to modify.
6. Type the new translation, and click the Save button.

The Profiler saves your changes to the language indicated by the Language Filter drop-down list.

Note: Asterisks appear next to the block codes that have not yet been translated; i.e., the Translation column still shows the default text for those codes as defined in the [Block Codes Definitions](#) parameter.

8.22 Working with Patron Type Values

For each patron type in your system, the Patron Type Values parameter lets you set a value for the Request Queue Priority Number on the Patron Type Values window (*Figure 8-75*).

Important: The Request Queue Priority Number parameter **MUST** be set in order for a patron to place a request. If this parameter is not set (i.e., if the Patron Types window displays NOT SET!) for a particular patron type, then a request placed by a patron of this type will fail.

To access the Patron Type Values window,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Patron Type Values.

The tree expands to display a list of available patron types (*Figure 8-74*).

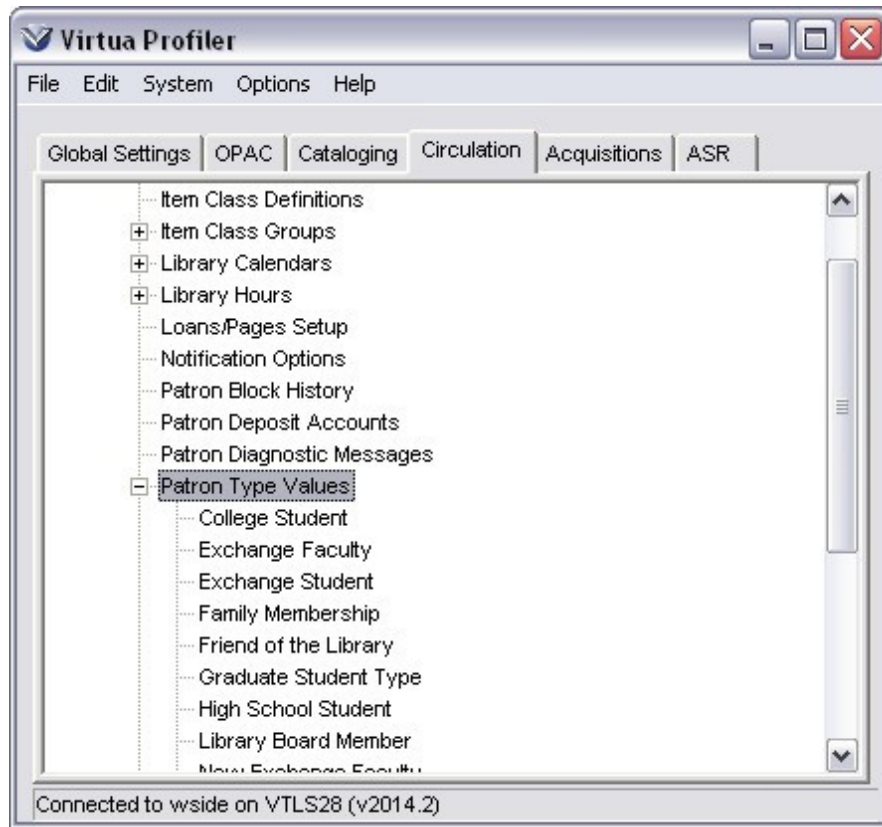


Figure 8-74. Circulation Tab - Patron Type Values Expanded

4. Double click the patron type for which you want to set Patron Type Values.

The Patron Type Values window appears for the selected patron type ([Figure 8-75](#)).

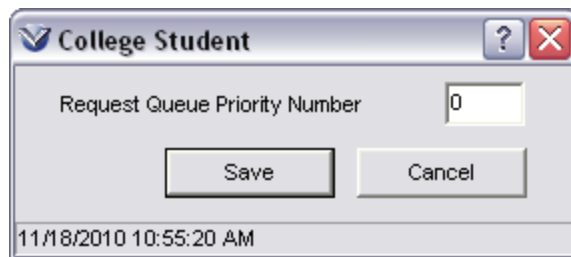


Figure 8-75. Patron Type Values Window

The Request Queue Priority Number specifies the ranking of requests placed by this patron type in comparison to requests placed by other patron types.

Note: The Request Queue Priority Number applies to *unsatisfied* requests only. This setting does not affect satisfied requests.

Requests are filled first in, first out. Request Queue Priority Number, however, lets your library establish priority levels for requests from each patron type, so requests from patrons with the highest priority filter to the top of the requests queue. In this way, unsatisfied requests are filled as illustrated in the following example:

Patron A: Request Queue Priority Number = 1

Patron B: Request Queue Priority Number = 2

If Patron A places a request *after* Patron B places a request, Patron A's request is filled *before* Patron B's.

Hint: A patron with a Request Queue Priority Number of zero has a *higher* priority than a patron with a Request Queue Priority Number of one. If you want ALL patrons to have the *same* request priority, Innovative recommends that you give each patron type a Request Queue Priority Number of 5555. In this way, it will be easy to adjust the priority up or down if necessary.

8.23 Working with Receipt/Slip Setup

The Receipt/Slip Setup settings let you configure the labels for data elements and other information, such as starting and ending text, that are printed on different types of receipts and slips. These settings apply to all locations and override receipt and slip setup settings in the Virtua client.

To access the Receipt/Slip Setup settings,

1. On the Circulation tab, double-click CIRCULATION.
2. Double-click System Parameters.
3. Double-click Receipt/Slip Setup.

The Receipt/Slip Setup window appears ([Figure 8-76](#)).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Check-out/Renew' tab selected. The window contains several input fields and checkboxes for configuring receipt and slip data.

Check-out/Renew Tab Fields:

- Patron Name:
- Patron Barcode:
- Patron Phone:
- Author:
- Title:
- Call Number:
- Item Barcode:
- Transaction Reference Number:
- Checked Out Date:
- ☒ Include Checked Out Time
- Due Date:
- ☒ Include Due Time
- Location:
- Location Selection:
 - ☐ Show Owning Location
 - ☐ Show Shelving Location
 - ☒ Show Both
- Patron Barcode Characters:
 - ☒ Show All Patron Barcode Characters
 - ☐ Show: Patron Barcode Characters
- Starting Text:
- Ending Text:

At the bottom, there is a note: (Only named fields will be printed.) and two buttons: Save and Cancel.

Figure 8-76. Receipt/Slip Setup Window

Each tab on the window contains the data elements for a different receipt or slip. To modify the labels or other text that appear on a receipt or slip, click the appropriate tab; type in your desired text, and then click the Save button. Explanations of the fields on each tab appear below.

Note: If a receipt or slip does not have any fields defined, Virtua will use the receipt or slip setup settings in the Virtua client to determine how to print the slip. For more information on configuring receipts and slips in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

8.23.1 Configuring the Check-out/Renew Receipt

To configure the check-out/renew receipt,

1. Click the Check-out/Renew receipt tab of the Receipt/Slip Setup window ([Figure 8-76](#)).
2. Choose which data elements you want to include on the receipt, and specify how you want them to be labeled. Each available data element has a default label, which appears in a text box to the right of the data element name. For each data element, you can . . .
 - Accept the default label.
 - OR-
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the receipt settings in the Virtua client will determine the labels for the Check-out/Renew receipt. For information on configuring receipts in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on check-out and renewal receipts:

- **Patron Name** - The name of the patron checking out or renewing the item, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Barcode** - The patron barcode of the patron checking out or renewing the item.
- **Patron Phone** - The patron's telephone number, taken from the 270 tag, subfield \$k where the first indicator is 1 (one).
- **Author** - The author of the item being checked out or renewed, taken from the bibliographic record.
- **Title** - The title of the item being checked out or renewed, taken from the bibliographic record.
- **Call Number** - The call number of the item being checked out or renewed, taken from the item record.
- **Item Barcode** - The item barcode of the item being checked out, taken from the item record.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the check-out.

- **Patron Barcode** - The barcode of the patron who is checking out or renewing the item. If you choose to include the patron barcode on the receipt, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Patron Barcode Characters** - The entire patron barcode will appear on the Check-out/Renew receipt.
 - ♦ **Show X Characters** - The Check-out/Renew receipt will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Check-out/Renew receipt will display only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Checked Out Date** - The date the check-out or renewal transaction was performed. If you select the Include Checked Out Time check box, the receipt also includes the time at which the check-out or renewal was performed.
- **Due Date** - The due date of the checked-out item. If you select the Include Due Time check box, the receipt also includes the time at which the item is due.
- **Location** - The shelving and/or owning location of the checked-out item, depending on which radio button you select.
- **Starting Text** - The text that will appear at the top of the receipt, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the receipt, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the receipt.

3. Click the Save button to save your changes.

8.23.2 Configuring the Check-in Receipt

To configure the check-in receipt,

1. Click the Check-in receipt tab of the Receipt/Slip Setup window ([Figure 8-77](#)).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Check-in' tab selected. The window contains several input fields and checkboxes for configuring the receipt. The fields are organized into two main columns. The left column includes fields for Patron Name, Patron Barcode, Author, Title, Call Number, Item Barcode, and Transaction Reference Number. The right column includes fields for Checked Out Date, Due Date, Check In Date, and Location. There are checkboxes for 'Include Checked Out Time', 'Include Due Time', and 'Include Checked In Time'. Below these, there are radio buttons for 'Show All Patron Barcode Characters', 'Show: 0 Patron Barcode Characters', 'Show Owning Location', 'Show Shelving Location', and 'Show Both'. At the bottom, there are two large text boxes for 'Starting Text' and 'Ending Text'. The window has a title bar with standard Windows controls and a status bar at the bottom that says '(Only named fields will be printed.)'.

Figure 8-77. Receipt/Slip Setup Window: Check-in Tab

2. Choose which data elements you want to include on the receipt, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the receipt settings in the Virtua client will determine the labels for the Check-in receipt. For information on configuring receipts in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on check-in receipts:

- **Patron Name** - The name of the patron checking in the item, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Barcode** - The patron barcode of the patron checking in the item.
- **Author** - The author of the item being checked in, taken from the bibliographic record.
- **Title** - The title of the item being checked in, taken from the bibliographic record.
- **Call Number** - The call number of the item being checked in, taken from the item record.
- **Item Barcode** - The barcode of the item being checked in, taken from the item record.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the check-in.
- **Patron Barcode** - The barcode of the patron who is checking in the item. If you choose to include the patron barcode on the receipt, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Patron Barcode Characters** - The entire patron barcode will appear on the Check-in receipt.
 - ♦ **Show X Characters** - The Check-in receipt will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Check-in receipt will display only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Checked Out Date** - The date the item was checked out. If you select the Include Checked Out Time check box, the receipt also includes the time at which the item was checked out
- **Due Date** - The due date of the checked-out item. If you select the Include Due Time check box, the receipt also includes the time at which the item is due.
- **Check-in Date** - The date the check-in transaction was performed. If you select the Include Checked In Time check box, the receipt also includes the time at which the check-in was performed.
- **Location** - The shelving and/or owning location of the item, depending on which radio button you select.

- **Starting Text** - The text that will appear at the top of the receipt, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the receipt, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the receipt.

3. Click the Save button to save your changes.

8.23.3 Configuring the Fine Receipt

To configure the fine receipt,

1. Click the Fine tab on the Receipt/Slip Setup window (*Figure 8-78*).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Fine' tab selected. The window has a tabbed interface with tabs for 'Check-out/Renew', 'Check-in', 'Fine', 'In Transit', 'Billed Material', 'Requested In Transit', 'Requested Slip', 'Agency Request Slip', and 'Deposit Ac.'. The 'Fine' tab is active, displaying the following fields and options:

- Payment Type:** payment type:
- Patron Name:** patron name:
- Patron Barcode:** patron barcode:
- Author:** author:
- Title:** title:
- Call Number:** call number:
- Item Barcode:** item barcode:
- Item's Due Date:** items due date
- Amount Paid (For Item):** amount paid for item
- New Balance (For Item):** new balance for item
- Receipt Number:** receipt number
- Fine:** fine:
- Location:** location:
 - ☐ Show Owning Location
 - ☐ Show Shelving Location
 - ☒ Show Both
- Payment Date:** payment date:
- ☒ Include Payment Time
- Amount Paid:** amount paid:
- New Balance:** new balance:
- ☒ Print Detailed Item Information
- Transaction Reference Number:** trn:
- Reprint Text:** reprint text:
- ☒ Show All Patron Barcode Characters
- ☐ Show: 0 Patron Barcode Characters
- Starting Text:** fine starting text
- Ending Text:** fine ending text

At the bottom of the window, there is a status bar that reads '(Only named fields will be printed.)' and two buttons: 'Save' and 'Cancel'.

Figure 8-78. Receipt/Slip Setup Window: Fine Tab

2. Choose which data elements you want to include on the receipt, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the fine receipt settings in the Virtua client will determine the labels for the fine receipt. For information on configuring fine receipts in the Virtua client, see the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on fine receipts:

- **Payment Type** - The category, such as Overdue or Late Renewal, to which the payment is being credited.
- **Patron Name** - The name of the patron making the payment, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Barcode** - The patron barcode of the patron making the payment.
- **Author** - The author of the item with which the payment is associated (if applicable).
- **Title** - The title of the item with which the payment is associated (if applicable).
- **Call Number** - The call number of the item with which the payment is associated (if applicable).
- **Item Barcode** - The item barcode of the item with which the payment is associated (if applicable).
- **Item's Due Date** - The due date of the item with which the payment is associated (if applicable). Data is printed only if the Print Detailed Item Information check box is checked.
- **Amount Paid (For Item)** - The amount paid for an item (if applicable). Data is printed only if the Print Detailed Item Information check box is checked.
- **New Balance (For Item)** - The amount still due for an item (if applicable). Data is printed only if the Print Detailed Item Information check box is checked.
- **Receipt Number** - The number of the fine payment receipt (only available when the Next Receipt Number option is configured in the Location Names parameter (see the *Virtua Profiler/Global Settings User's Guide*).
- **Fine** - The fine code description (see the Fine Codes Definition parameter) for the fine that was paid. Data is printed only if the Print Detailed Item Information check box is checked.
- **Location** - The shelving and/or owning location of the item with which the payment is associated, depending on which radio button you select.
- **Payment Date** - The date of the payment. If you select the Include Payment Time check box, the payment time will also be printed.
- **Amount Paid** - The amount of the payment.
- **New Balance** - The new account balance after the payment is subtracted.
- **Print Detailed Item Information** - When selected, the payment receipt will include all item data elements (i.e., Item's Due Date, Amount Paid for Item,

and New Balance for Item) specified for *all* items associated with the fine(s) and toward which a payment or partial payment has been made.

- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the fine payment.
- **Reprint Text** - A notice that appears on the receipt when the receipt is a reprint of a fine receipt.
- **Patron Barcode** - The barcode of the patron who is paying the fine. If you choose to include the patron barcode on the receipt, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Patron Barcode Characters** - The entire patron barcode will appear on the Fine receipt.
 - ♦ **Show X Characters** - The Fine receipt will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Fine receipt will display only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Starting Text** - The text that will appear at the top of the receipt, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the receipt, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the receipt.

3. Click the Save button to save your changes.

8.23.4 Configuring the In Transit Slip

To configure the In Transit slip,

1. Click the In Transit tab on the Receipt/Slip Setup window (*Figure 8-79*).

The screenshot shows the 'Receipt/Slip Setup' window with the 'In Transit' tab selected. The window has a title bar with a checkmark icon and standard window controls. Below the title bar is a tabbed interface with the following tabs: 'Check-out/Renew', 'Check-in', 'Fine', 'In Transit' (selected), 'Billed Material', 'Requested In Transit', 'Requested Slip', 'Agency Request Slip', and 'Deposit Ac'. The main area contains two columns of input fields. The left column has labels and text boxes for 'Author:', 'Title:', 'Part Title:', 'Call Number:', and 'Units:'. The right column has labels and text boxes for 'Copy Number:', 'Item Barcode:', 'Logon Location:', 'Shelving Location:', and 'Transaction Reference Number:'. Below these fields are two larger text boxes labeled 'Starting Text:' and 'Ending Text:'. At the bottom, there is a note '(Only named fields will be printed.)' and two buttons: 'Save' and 'Cancel'.

Figure 8-79. Receipt/Slip Setup Window: In Transit Tab

2. Choose which data elements you want to include on the slip, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the slip, delete the label entirely.

Note: If you leave all fields blank, the In Transit slip settings in the Virtua client will determine the labels for the In Transit slip.

You can include the following data elements on In Transit slips:

- **Author** - The author of the item, taken from the bibliographic record.
- **Title** - The title of the item, taken from the bibliographic record.
- **Part Title** - The name and number of a part or section of the item (e.g., the title and volume number of a separately cataloged volume in a multi-volume set).

Note: The source of the data for the part title depends on your MARC format.

- For MARC 21 records, data is taken from the 245 tag subfields \$n and \$p.
- For UNIMARC records, data is taken from the 200 tag subfields \$h and \$i.
- For other MARC formats, data is taken from the 248 tag subfields \$v, \$h, and \$g.

- **Call Number** - The call number of the item, taken from the item record.
- **Units** - The number of units associated with the item, taken from the item record.
- **Copy Number** - The copy number of the item, taken from the item record.
- **Item Barcode** - The barcode of the item, taken from the item record.
- **Logon Location** - The log-in location at which the transaction is performed.
- **Shelving Location** - The shelving location to which the item should be routed, taken from the item record.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the in transit transaction.
- **Starting Text** - The text that will appear at the top of the slip, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the slip, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the slip.

3. Click the save button to save your changes.

8.23.5 Configuring the Billed Material Slip

To configure the Billed Material slip,

1. Click the Billed Material tab of the Receipts/Slips window ([Figure 8-80](#)).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Billed Material' tab selected. The window contains several input fields for configuring the slip. The fields are organized into two columns. The left column includes: Author (author:), Title (title:), Part Title (part title:), Call Number (call number:), Units (units:), Copy Number (copy number:), and Transaction Reference Number (trn:). The right column includes: Item Barcode (item barcode:), Logon Location (logon location:), Patron Name (patron name:), Patron Barcode (patron barcode:), a radio button for 'Show All Characters' (which is selected), a radio button for 'Show: 0 Characters', and Bill Date (bill date:). At the bottom, there are two text areas: 'Starting Text' (billed material starting text) and 'Ending Text' (billed material ending text). Below these text areas, a note states '(Only named fields will be printed.)'. At the bottom right, there are 'Save' and 'Cancel' buttons.

Figure 8-80. Receipt/Slip Setup Window: Billed Material Tab

2. Choose which data elements you want to include on the slip, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the slip, delete the label entirely.

Note: If you leave all fields blank, the Billed Material slip settings in the Virtua client will determine the labels for the Billed Material slip. For information on configuring receipts and slips in the Virtua client, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on Billed Material slips:

- **Author** - The author of the item, taken from the bibliographic record.
- **Title** - The title of the item, taken from the bibliographic record.
- **Part Title** - The name and number of a part or section of the item (e.g., the title and volume number of a separately cataloged volume in a multi-volume set).

Note: The source of the data for the part title depends on your MARC format.

- For MARC 21 records, data is taken from the 245 tag subfields \$n and \$p.
- For UNIMARC records, data is taken from the 200 tag subfields \$h and \$i.
- For other MARC formats, data is taken from the 248 tag subfields \$v, \$h, and \$g.

- **Call Number** - The call number of the material, taken from the item record.
- **Units** - The number of units associated with the material being checked in, taken from the item record.
- **Copy Number** - The copy number of the item, taken from the item record.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the billed transaction.
- **Item Barcode** - The barcode of the item, taken from the item record.
- **Logon Location** - The log-in location at which the transaction is performed.
- **Patron Name** - The name of the patron who has requested the item, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Barcode** - The barcode of the patron being billed. If you choose to include the patron barcode on the slip, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Characters** - The entire patron barcode will appear on the Billed Material slip.
 - ♦ **Show X Characters** - The Billed Material slip will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Billed Material slip will display only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Bill Date** - The date that the bill notice was generated for the item.

- **Starting Text** - The text that will appear at the top of the slip, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the slip, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the slip.

3. Click the Save button to save your changes.

8.23.6 Configuring the Requested In Transit Slips

To configure Requested In Transit slips,

1. Click the Requested In Transit tab of the Receipt/Slip Setup window (*Figure 8-81*).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Requested In Transit' tab selected. The window contains two columns of input fields for configuring a receipt. The left column includes fields for Author, Root Title, Title, Part Title, Call Number, Units, Copy Number, Item Barcode, Item Class, Prep Start Time, Start Time, End Time, Transaction Reference Number, Starting Text, and Ending Text. The right column includes fields for Inspection End Time, Log-in Location, Check-in Date, Restrictions, Notes, Patron Name, Patron Address, Patron Phone, Pickup Location, Patron Barcode, and a section for showing patron barcode characters. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that only named fields will be printed.

Field	Field
Author:	Inspection End Time:
Root Title:	Log-in Location:
Title:	Check-in Date:
Part Title:	Restrictions:
Call Number:	Notes:
Units:	Patron Name:
Copy Number:	Patron Address:
Item Barcode:	Patron Phone:
Item Class:	Pickup Location:
Prep Start Time:	Patron Barcode:
Start Time:	<input checked="" type="radio"/> Show All Patron Barcode Characters
End Time:	<input type="radio"/> Show: <input type="text" value="0"/> Characters
Transaction Reference Number:	
Starting Text:	Ending Text:
requested in transit starting text	requested in transit ending text

(Only named fields will be printed.)

Save Cancel

Figure 8-81. Receipt/Slip Setup Window: Requested In Transit Tab

2. Choose which data elements you want to include on the receipt, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the Requested In Transit slip settings in the Virtua client will determine the labels for the Requested In Transit slip. For information on configuring receipts and slips in the Virtua client, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on Requested In Transit slips:

- **Author** - The author of the item, taken from the bibliographic record.
- **Root Title** [for archival collections only] - The top-level title of the archival tree.
- **Title** - The title of the item, taken from the bibliographic record.
- **Part Title** - The name and number of a part or section of the material (e.g., the title and volume number of a separately cataloged volume in a multi-volume set).

Note: The source of the data for the part title depends on your MARC format.

- For MARC 21 records, data is taken from the 245 tag subfields \$n and \$p.
- For UNIMARC records, data is taken from the 200 tag subfields \$h and \$i.
- For other MARC formats, data is taken from the 248 tag subfields \$v, \$h, and \$g.

- **Call Number** - The call number of the item, taken from the item record.
- **Units** - The number of units associated with the item, taken from the item record.
- **Copy Number** - The copy number of the item, taken from the item record.
- **Item Barcode** - The barcode of the item, taken from the item record.
- **Item Class** - The class of the item, taken from the item record.
- **Prep Start Time** - Only printed for items with booking requests. The prep start time of a booking for the item being checked in, taken from the Bookings for Item window.
- **Start Time** - Only printed for items with booking requests. The start time of a booking for the item being checked in, taken from the Bookings for Item window.
- **End Time** - Only printed for items with booking requests. The end time of a booking for the item being checked in, taken from the Bookings for Item window.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the requested, in transit transaction.
- **Inspection End Time** - Only printed for items with booking requests. The inspection end time of a booking for the item being checked in, taken from the Bookings for Item window.

- **Log-in Location** - The log-in location at which the check-in is performed.
- **Check-in Date** - The date of the check-in transaction.
- **Restrictions** - Further privacy restrictions associated with the requesting patron, taken from the 506 tag, subfield \$a of the patron record. Note that the 506 tag must have an indicator of 1 to be printed on slips.
- **Notes** - Only printed for items with booking requests. Item bookings notes, taken from the notes field of the Bookings for Item window.
- **Patron Name** - The name of the patron who has requested the item, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Address** - The address of the patron who requested the item, from the 270 tag, subfield \$a of the patron record where the first indicator is 1 (one).
- **Patron Phone** - The patron's telephone number, taken from the 270 tag, subfield \$k where the first indicator is 1 (one).
- **Pickup Location** - The location at which the requested item is to be picked up, taken from the request record.
- **Patron Barcode** - The barcode of the patron who has requested the item. If you choose to include the patron barcode on the slip, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Patron Barcode Characters** - The entire patron barcode will appear on the Requested In Transit slip.
 - ♦ **Show X Characters** - The Requested In Transit slip will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Requested In Transit slip displays only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Starting Text** - The text that will appear at the top of the slip, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the slip, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the slip.

3. Click the Save button to save your changes.

8.23.7 Configuring the Requested Slip

To configure Requested Slips,

1. Click the Requested Slip tab of the Receipts/Slips Setup window ([Figure 8-82](#)).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Requested Slip' tab selected. The window is divided into two main columns of input fields. The left column includes fields for Author, Root Title, Title, Part Title, Call Number, Units, Copy Number, Item Barcode, Item Class, Prep Start Time, Start Time, End Time, Transaction Reference Number, and Starting Text. The right column includes fields for Inspection End Time, Log-in Location, Request Expiration Date, Check-in Date, Restrictions, Notes, Patron Name, Patron Address, Patron Phone, Pickup Location, Patron Barcode, and Ending Text. Below the right column, there are radio buttons for 'Show All Patron Barcode Characters' (selected) and 'Show: 0 Characters'. At the bottom, there are 'Save' and 'Cancel' buttons, and a note that '(Only named fields will be printed.)'.

Figure 8-82. Receipt/Slip Setup Window: Requested Slip Tab

2. Choose which data elements you want to include on the slip, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the Requested slip settings in the Virtua client will determine the labels for the Requested slip. For information on configuring

receipts and slips in the Virtua client, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on Requested slips:

- **Author** - The author of the item, taken from the bibliographic record.
- **Root Title** [for archival collections only] - The top-level title of the archival tree.
- **Title** - The title of the item, taken from the bibliographic record.
- **Part Title** - The name and number of a part or section of the material (e.g., the title and volume number of a separately cataloged volume in a multi-volume set).

Note: The source of the data for the part title depends on your MARC format.

- For MARC 21 records, data is taken from the 245 tag subfields \$n and \$p.
- For UNIMARC records, data is taken from the 200 tag subfields \$h and \$i.
- For other MARC formats, data is taken from the 248 tag subfields \$v, \$h, and \$g.

- **Call Number** - The call number of the item, taken from the item record.
- **Units** - The number of units associated with the item, taken from the item record.
- **Copy Number** - The copy number of the item, taken from the item record.
- **Item Barcode** - The barcode of the item, taken from the item record.
- **Item Class** - The class of the item, taken from the item record.
- **Prep Start Time** - Only printed for items with booking requests. The prep start time of a booking for the item being checked in, taken from the Bookings for Item window.
- **Start Time** - Only printed for items with booking requests. The start time of a booking for the item being checked in, taken from the Bookings for Item window.
- **End Time** - Only printed for items with booking requests. The end time of a booking for the item being checked in, taken from the Bookings for Item window.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the request transaction.
- **Inspection End Time** - Only printed for items with booking requests. The inspection end time of a booking for the item being checked in, taken from the Bookings for Item window.
- **Log-in Location** - The log-in location at which the check-in is performed.
- **Request Expiration Date** - The date on which the request expires.

- **Check-in Date** - The date of the check-in transaction.
- **Restrictions** - Further privacy restrictions associated with the requesting patron, taken from the 506 tag, subfield \$a of the patron record. Note that the 506 tag must have an indicator of 1 to be printed on slips.
- **Notes** - Only printed for items with booking requests. Item bookings notes, taken from the notes field of the Bookings for Item window.
- **Patron Name** - The name of the patron who has requested the item, taken from the 100 tag, subfield \$a of the patron record.
- **Patron Address** - The address of the patron who requested the item, from the 270 tag, subfield \$a of the patron record where the first indicator is 1 (one).
- **Patron Phone** - The patron's telephone number, taken from the 270 tag, subfield \$k where the first indicator is 1 (one).
- **Pickup Location** - The location at which the requested item is to be picked up, taken from the request record.
- **Patron Barcode** - The barcode of the patron who has requested the item. If you choose to include the patron barcode on the slip, use the radio buttons below the Patron Barcode field to determine whether you want to . . .
 - ♦ **Show All Patron Barcode Characters** - The entire patron barcode will appear on the Requested slip.
 - ♦ **Show X Characters** - The Requested slip will display only part of the patron barcode, according to the number that you type in the text box. For example, if you type a 4 in the text box, the Requested slip displays only the *last* four characters of the barcode; asterisks will appear in place of any other characters in the barcode (e.g., *****6789).
- **Starting Text** - The text that will appear at the top of the slip, beneath the Receipt Header defined on the Modify Location window. For information on the Receipt Header, see the *Virtua Profiler: Global Settings User's Guide*.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

- **Ending Text** - The text that will appear at the bottom of the slip, above the Footer Text defined on the [Footer Text](#) tab of the Receipt/Slip Setup window.

Note: Lines that extend beyond your printer or paper margins will NOT wrap.

Important: If a text box is *blank*, that data element will not be printed on the slip.

4. Click the Save button to save your changes.

8.23.8 Configuring the Agency Request Slip

Note: An agency request is a special type of request where a library/agency needs one or more copies of an item for a specified length of time. Agency requests can be useful when one branch is hosting a book club or providing a special exhibit and wishes to have all of the library system's copies of a title at that branch.

To configure the Agency Request Slip,

1. Click the Agency Request Slip tab of the Receipts/Slips Setup window ([Figure 8-83](#)).

The screenshot shows the 'Receipt/Slip Setup' window with the 'Agency Request Slip' tab selected. The window contains several input fields for configuring the slip. The fields are organized into two columns. The left column includes: Author, Root Title, Title, Part Title, Call Number, Units, Copy Number, Item Barcode, and Item Class. The right column includes: Log-in Location, Request Expiration Date, and Requesting Location. Below these columns are two large text areas for 'Starting Text' and 'Ending Text'. At the bottom, there is a note '(Only named fields will be printed.)' and 'Save' and 'Cancel' buttons.

Field	Label
author:	author:
Log-in Location:	log in location:
Root Title:	
Request Expiration Date:	request expiration date:
Title:	title:
Requesting Location:	requesting location:
Part Title:	part title:
Call Number:	call number:
Units:	units:
Copy Number:	copy number:
Item Barcode:	item barcode:
Item Class:	item class:
Starting Text:	Ending Text:
agency request starting text	agency request ending text

(Only named fields will be printed.)

Save Cancel

Figure 8-83. Receipt/Slip Setup Window: Agency Request Slip Tab

2. Choose which data elements you want to include on the slip, and specify how you want them to be labeled. For each data element, you can . . .

- Edit the default label to create your own customized label.
- OR-
- For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the Agency Request slip settings in the Virtua client will determine the labels for the Agency Request slip. For information on configuring receipts and slips in the Virtua client, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

The Agency Request Slip tab has many of the same fields as the [Requested Slip](#) except that it does not include any fields related to booking requests or patron information, and it contains one additional field:

- **Requesting Location** - The location/agency making the request.

Important: If a text box is *blank*, that data element will not be printed on the receipt.

3. Click the Save button to save your changes.

8.23.9 Configuring the Deposit Account Slip

Note: A library can provide a Deposit Account where patrons can deposit and withdraw funds. A withdrawal from the account can be used as a payment method to handle library fees.

To configure the Deposit Account Slip,

1. Click the Deposit Account tab of the Receipt/Slip Setup window ([Figure 8-83](#)).

Receipt/Slip Setup

Check-in | Fine | In Transit | Billed Material | Requested In Transit | Requested Slip | Agency Request Slip | **Deposit Account** | Footer Text

Patron Name:

Patron Barcode:

Transaction Type:

Transaction Date:

☐ Include Time

Payment Method:

Amount:

New Balance:

Withdrawal Reason:

Transaction Reference Number:

Starting Text:

Ending Text:

(Only named fields will be printed.)

Save Cancel

Figure 8-84. Receipt/Slip Setup Window: Deposit Account Tab

2. Choose which data elements you want to include on the slip, and specify how you want them to be labeled. For each data element, you can . . .
 - Edit the default label to create your own customized label.
 - OR-
 - For any data element that you do NOT want to include on the receipt, delete the label entirely.

Note: If you leave all fields blank, the Deposit Account slip settings in the Virtua client will determine the labels for the Deposit Account slip. For information on configuring receipts and slips in the Virtua client, see the fine receipt example in the *Circulation Workflow-Based Reference Guide*.

You can include the following data elements on deposit account slips:

- **Patron Name** - The name of the patron making the deposit/withdrawal, taken from the 100 tag, subfield \$a of the patron record.

- **Patron Barcode** - The patron barcode of the patron making the deposit.
- **Transaction Type** - The type of the transaction, whether a deposit or withdrawal.
- **Transaction Date** - The date of the transaction. If you select the Include Time check box, the time of the transaction will also be printed.
- **Payment Method** - The method by which a deposit was made.
- **Amount** - The amount of the deposit or withdrawal.
- **New Balance** - The balance in the account after the deposit or withdrawal is made.
- **Withdrawal Reason** - The reason funds were withdrawn from the account.
- **Transaction Reference Number** - The transaction reference number, or tracking number, assigned to the deposit or withdrawal.

Important: If a text box is *blank*, that data element will not be printed on the receipt.

3. Click the Save button to save your changes.

8.23.10 Configuring the Receipt/Slip Footer

The Footer Text tab on the Receipt/Slip Setup window ([Figure 8-85](#)) lets you type a footer that will appear on *all* receipts and slips.

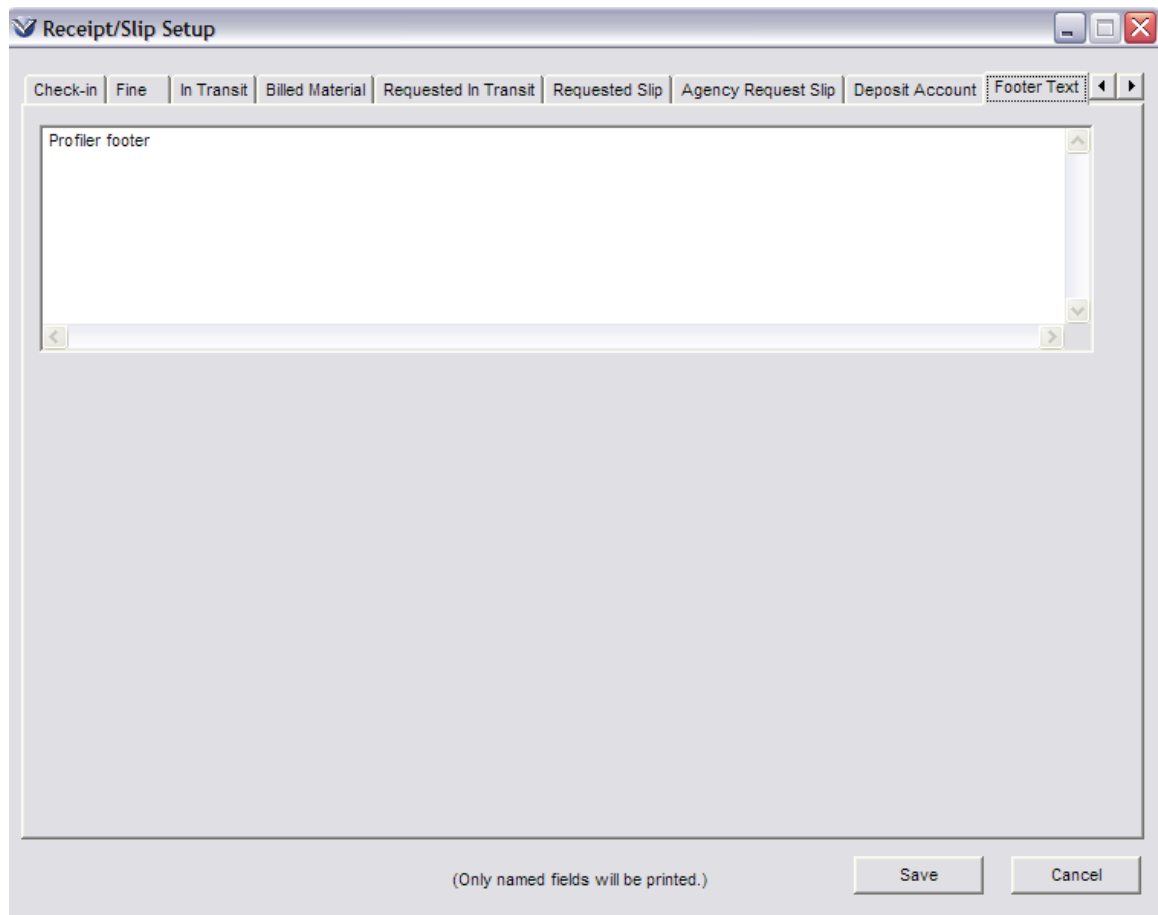


Figure 8-85. Receipt/Slip Setup Window: Footer Text Tab

To define the text that will appear at the end of each receipt and slip,

1. Type your desired message in to Footer Text window.

Note:

- Lines that extend beyond your printer or paper margins will NOT wrap.
- If you leave the field blank, the Ending Text defined in the Virtua client will be printed at the bottom of the slip or receipt.

2. Click the Save button to save your changes.

Note: The header text for receipts and slips is defined per location. For information on configuring header text on receipts and slips, see the *Virtua Profiler/Global Settings User's Guide*.

8.24 Working with Request Groups

Request groups represent the physical and/or virtual grouping of locations used for processing requests. The Request Groups parameter works in conjunction with the Global Request Trapping Options parameter, where one of the choices for the scope of the parameter is Group.

Setting the Global Request Trapping Option to Group means that the Request From Group setting will be available when you add a request in the Virtua client (*Figure 8-86*). The Request From Group setting allows you to select a request group. If the *Select a request group for this pickup location* option is set (see the Location Names parameter), the Request From Group setting is populated automatically and cannot be modified. Only items belonging to one of the locations in your specified request group will be able to satisfy the request.

New Request for Bib: 000000402 - Virtua ...

Author: Alcott, Louisa May, 1832-1888.
 Title: Little women; or, Meg, Jo, Beth, and Amy / with a new
 Edition: Centennial ed.
 Imprint: Boston : Little, Brown, 1968.

Request Options

☒ Only This Item ☐ Any Item of This Volume

Pickup location: Arlington Library

Not needed after: ☐ Use date: 5/15/2012

Request From Group:

☐ Fee Exempt

Minimum period needed (days): 0

Number of items in database: 2

Calculate the number of qualifying items: Calculate

Number of items that qualify for this request: ?

< Back Next > Cancel

Figure 8-86. New Request for Bib Window

For details on setting the Global Request Trapping Options parameter, see the section [“About the Global Request Trapping Options”](#) in this user's guide.

When setting the Request Groups parameter, keep in mind that . . .

- Both main locations and sublocations can be used as member locations in request groups.
- Adding a main location to the Member Locations list does not mean that a request can be satisfied by an item from the main location OR from any of its sublocations. For a request to be satisfied by an item at a sublocation when request groups are in use, the sublocation must be present in the Member Locations list.
- A location can belong to multiple request groups.
- The ability to make requests is controlled through the Patron Types parameter. For details, see the chapter [“Working with the Patron Types Parameter”](#) in this user's guide.

8.24.1 Adding Request Groups

To add a request group in the Virtua Profiler,

1. On the Circulation tab, under System Parameters, highlight Request Groups.
2. Click the right mouse button, and then choose Add.

The Add Request Group window appears ([Figure 8-87](#)).

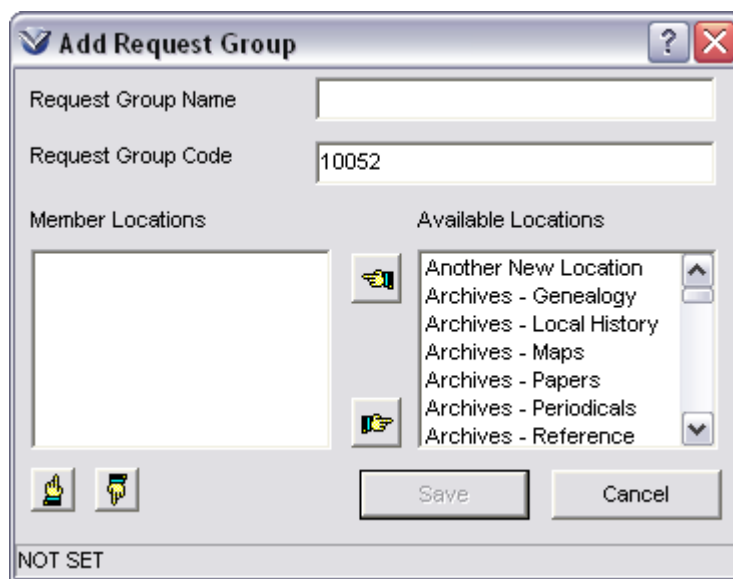


Figure 8-87. Add Request Group Window

3. In the Request Group Name text box, type a concise, descriptive name for the new request group.

Note: The Request Group Name must be unique. If it is not, upon saving, Virtua returns an error message.


4. Accept the preset Request Group Code, a five-digit code that is padded with zeros from the left and indicates the last code used plus one.

Note:

- The Request Group Code must be unique. If it is not, upon saving, Virtua returns an error message stating that the code already belongs to an existing request group.
- You may edit the code if you like, but Innovative recommends that you accept the default, as it is always unique.

5. In the Member Locations list box, add the location(s) that you want to belong to this request group. To do this,

- c. Highlight a location in the Available Locations list box.

- d. Click the hand pointing left .

Hint: To select more than one location at a time, hold down the CTRL key (for non-adjacent selection) or the SHIFT key (for adjacent selection) while clicking the desired locations.

6. If you need to remove a location from the Member Locations list box,

- c. Highlight the location you want to reorder.

- d. Click the hand pointing right .

Notes:

- The Available Locations list box displays all locations that are not assigned to the current request group. Once a location has been added to the request group, it is removed from the Available Locations list box to keep you from adding the same location twice.
- Virtua checks, upon saving, that at least ONE location has been added to the request group. If not, Virtua returns an error message. You must add at least one location or cancel the Add function.

7. If you need to re-order the locations listed in the Member Locations list box,
 - a. Highlight the location.
 - b. Click the hand pointing up or hand pointing down button.

Note:

- The order of locations in a request group is a factor only for loans. When a loan request is placed in the Virtua client against a particular request group, Virtua attempts to satisfy the request with an item from the first location in the Member Locations list. If the request cannot be satisfied with an item from the first location, Virtua attempts to satisfy it with an item from the second location, and so on.
- Hold requests are satisfied by the first item that is checked in at one of the locations in the request group.
- Page requests are not affected since they are placed against a particular item instead of a bibliographic record.

8. Click the Save button.

Note: The Save button becomes active only *after* you type a Request Group Name.

The request group is added to the database.

8.24.2 Modifying Request Groups

To modify a Request Group,

3. Under System Parameters, double-click Request Groups.

The tree structure expands to display a list of request groups.

4. Double-click the desired request group name.

The Modify Request Group window appears (*Figure 8-88*).

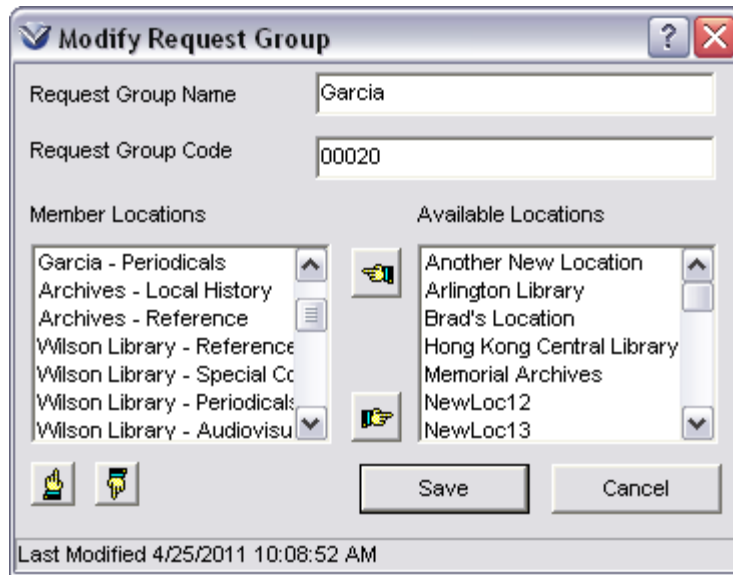


Figure 8-88. Modify Request Group Window

7. Modify the Request Group Name. You can use cut, copy and paste functions.
8. Modify the Request Group Code. You can use cut, copy and paste functions.
9. Add locations to or remove locations from the Member Locations list. To do this, select the desired location and click the hand button that points left or right as appropriate.
10. Click the Save button.

Your changes are saved to the database.

8.24.3 Deleting Request Groups

To delete a request group,

1. Under System Parameters, expand the Request Groups heading.
2. Highlight the desired request group name.
3. Click the right mouse button, and then choose Delete.

Virtua asks you if you really want to delete the request group ([Figure 8-89](#)).

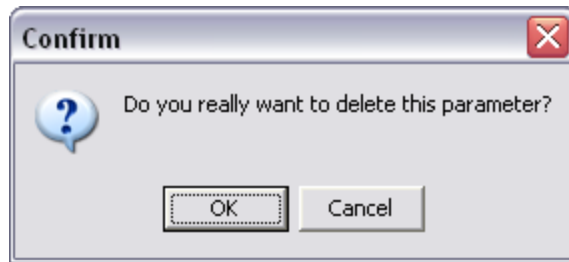


Figure 8-89. Delete Request Group Confirmation

4. Click OK.

The request group is deleted from the database.

8.25 Working with the Request Location Routing Parameter

The Request Location Routing parameter works in conjunction with the [Global Request Trapping Options](#). The Request Location Routing parameter allows you to define a prioritized list of locations that is used when Virtua traps an item to satisfy a *global* request, i.e., a hold/recall, loan or page request for which the corresponding Global Request Trapping Option is set to Global.

When a global request is placed, Virtua attempts to satisfy the request with an item from the first location listed in the Request Location Routing parameter. If the request cannot be satisfied with an item from this location, Virtua attempts to satisfy the request with an item from the second location in the list, and so on.

To configure the Request Location Routing parameter,

1. On the Circulation tab, double-click System Parameters and then double-click Request Location Routing.

The Location Routing window appears ([Figure 8-90](#)).

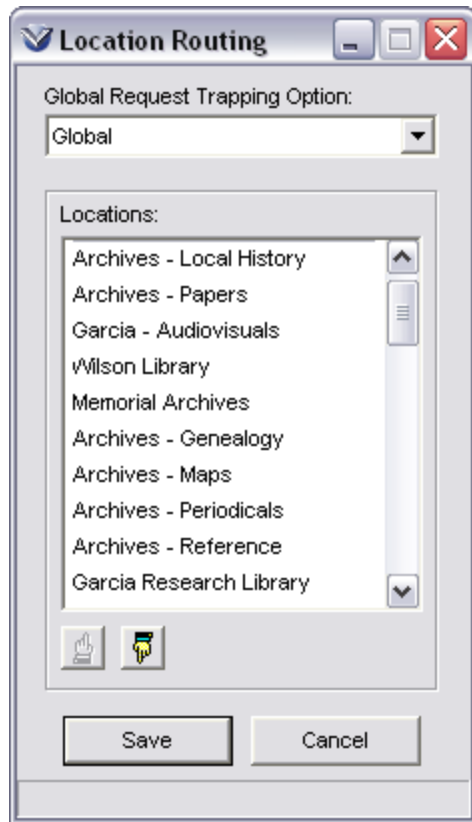


Figure 8-90. Location Routing Window

2. In the Global Request Trapping Option drop-down list, select Global.

Note: The choice of Institution in this drop-down list may appear ONLY to consortium database users.

The Locations list box displays a list of all the main locations and sublocations that your library has configured.

3. Re-order the locations in the Locations list box as needed. To do this,
 - a. Highlight a location.
 - b. Click the hand pointing up or hand pointing down button.
5. Click the Save button.

Your Request Location Routing settings are saved to the database.

9. Appendix A - Parameters Worksheets

You can use worksheets provided in this appendix to record the settings for your Circulation parameters before setting them in the Virtua Profiler. For a description of each parameter, see the appropriate chapter in this user's guide.

This appendix contains worksheets for setting the following parameters:

- ⇒ [System Parameters](#)
- ⇒ [Patron Types](#)
- ⇒ [Location + Patron + Item Matrix](#)
- ⇒ [Location + Patron Matrix](#)
- ⇒ [Location + Item Matrix](#)
- ⇒ [Alerts and Blocks Matrix](#)
- ⇒ [Location-specific Parameters](#)

9.1 System Parameters

9.1.1 Global Request Trapping Options

Hold/Recall Flag:	<input type="checkbox"/> Group	<input type="checkbox"/> Global	<input type="checkbox"/> Local
Loan Flag:	<input type="checkbox"/> Group	<input type="checkbox"/> Global	
Page Flag:	<input type="checkbox"/> Group	<input type="checkbox"/> Global	<input type="checkbox"/> Local

9.1.2 Minimum Circulation Question

☐ Yes ☐ No

9.1.5 Fixed Field Blocks

You can use the following table to record your *fixed field* Block Code Definitions.

Block Code	Fixed Field Definition	Your Customized Definition
01	Charging privileges denied	
02	Renewal privileges denied	
03	Recall privileges denied	
04	Hold-placing privileges denied	
05	ILL privileges denied. Note: Currently, this block code is not supported.	
06	Card reported lost	
07	Card reported stolen	
08	Too many items charged	
09	Too many items overdue	
10	Has made too many renewals	
11	Too many claims of items returned	
12	Too many items lost	
13	Excessive outstanding fines	
14	Excessive outstanding fees	
15	Has recall overdue	
16	Too many items billed	
20	Address block	
21	Other Circulation-related blocks (specified in field 043)	
25	[To be defined]	
26	[To be defined]	

9.1.7 Check-out Limits Matrix Type

Important: In the Virtua Profiler, the Check-out Limits Matrix contains seven columns rather than the four shown in the tables below. We have created these worksheets so that you need to fill only three columns of data, in addition to the Patron Type, in any one table.

For details on the columns in which to enter your values, see the section [“Working with the Check-out Limits Matrix”](#) in this user’s guide.

Matrix Level: _____ Patron Type _____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Check-out Limit	Limit Period	Period Type

Matrix Level: _____ **Patron Type + Location** _____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Check-out Limit	Limit Period	Period Type

Matrix Level: _____ Patron Type _____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Reserve Check-out Limit	Reserve Limit Period	Reserve Period Type

Matrix Level: _____ Patron Type + Location _____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Reserve Check-out Limit	Reserve Limit Period	Reserve Period Type

Matrix Level: _____ Patron Type +Item _____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Check-out Limit	Limit Period	Period Type

Matrix Level: __Patron Type + Item + Location_____

Matrix Location: _____

Matrix Item Class: _____

Patron Type	Check-out Limit	Limit Period	Period Type

9.1.8 Audit Trail Flag

☐ On ☐ Off

9.1.9 Delete/Waive Flags

Waive Fees Flag: ☐ On ☐ Off

Delete Outstanding Requests Flag: ☐ On ☐ Off

Delete Special Status Flag: ☐ On ☐ Off

9.1.10 Long Loan Flag

☐ On ☐ Off

9.1.11 Renewal Override

☐ On ☐ Off

9.1.12 3M Error Message

9.2 Patron Types

Patron Type: _____

Patron Type Code: _____

Request Limits

Hold Limit: _____ Period: _____

Recall Limit: _____ Period: _____

Loan Limit: _____ Period: _____

Page Limit: _____ Period: _____

Request Placement Order

Hold _____ Recall _____ Loan _____ Page _____

Number of Requests on Same Bib-ID: _____

9.3 Location + Patron + Item Matrix

Location: _____

Patron Type: _____

Item Class: _____

9.3.1 Loan Rules Tab

Regular Check-out

☐ Fixed Period: ☐ Annual ☐ Quarter ☐ Semi-annual

-OR-

☐ Calculated Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

In-house Check-out

☐ Fixed Period: ☐ Annual ☐ Quarter ☐ Semi-annual

-OR-

☐ Calculated Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Renewal

☐ Fixed Period: ☐ Annual ☐ Quarter ☐ Semi-annual

-OR-

☐ Calculated Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

9.3.2 *Fines/Grace Tab*

For Non-recalled Items

Overdue Fine Amount: _____

Fine Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Grace Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

For Recalled Items

Overdue Fine Amount: _____

Fine Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Grace Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

For Any Overdue Item

Mail Grace Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Maximum Fine Amount: _____

Circ Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Does Fine Accrue from Grace Period? ☐ Yes ☐ No

9.3.3 Notices/Limits Tab

For Non-recalled Items

Period from Due

Date to First Notice: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

Max Number of Notices: _____

Notice Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

Billing Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

For Recalled Items

Period from Due

Date to First Notice: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

Max Number of Notices: _____

Notice Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

Billing Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐
Years

For Any Overdue Item

Renewal Limit: _____

Is First Notice Review Notice? ☐ Yes ☐ No

Review Notice Days Before Due Date: _____

9.4 Location + Patron Matrix

Location: _____

Patron Type: _____

Default Due Date: _____

Time: _____

Account Statement

Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Processing Fee: _____

Amount of Processing Fee Canceled at Check-in: _____

Processing Fee Used for Block? ☐ Yes ☐ No

Item Price Fee that Remains at Check-in: _____

Item Price Fee Used for Block? ☐ Yes ☐ No

Patron Record

Expiration Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Patron Record

Delete Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Hold Allowed When Available

Item Exists at Log-in Location? ☐ Yes ☐ No

Hold Allowed When Available

Item Exists at Another Location? ☐ Yes ☐ No

Allow Request for Bibs without Items? ☐ Yes ☐ No

9.5 Location + Item Matrix

Location: _____

Item Class: _____

9.5.1 Item Info Tab

Must Pick Up at Shelving Location? ☐ Yes ☐ No

Items Circulating Less than One Day
Are Due at Closing? ☐ Yes ☐ No

Items Circulating One Day or More
Are Due at Closing? ☐ Yes ☐ No

Use Item Record Price at Billing? ☐ Yes ☐ No

Default Item Price: _____

Fines Accrue During
Non-operating Hours? ☐ Yes ☐ No

Prep Time for
Materials: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Hold Pickup
Time: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Inspection Time
for Materials: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

9.5.2 *Requests Tab*

Hold

Request Allowed? ☐ Yes ☐ No

Default Expiration
Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Recall

Request Allowed? ☐ Yes ☐ No

Default Expiration
Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Loan

Request Allowed? ☐ Yes ☐ No

Default Expiration
Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

Page

Request Allowed? ☐ Yes ☐ No

Default Expiration
Period: _____ ☐ Minutes ☐ Hours ☐ Days ☐ Years

9.6 Alerts and Blocks Matrix

Patron Type: _____

Alert/ Block	Overdue	Recalled Overdue	Billed	Reserve Overdue	Owed Amount	Days Overdue	Delinquent Owed Amt.
Check-out Alert							
Check-out Block							
Renewal Alert							
Renewal Block							
Hold Alert							
Hold Block							
Recall Alert							
Recall Block							
Loan Alert							
Loan Block							
Page Alert							
Page Block							

9.7.3 Library-defined Dates

Location: _____

Annual Loans

Begin Date	End Date	Due Date

Quarter Loans

Begin Date	End Date	Due Date

Semi-annual Loans

Begin Date	End Date	Due Date

10. Appendix B - Convert Fine to Block Workflow

This appendix provides more information about the workflow involved when the Convert Fine to Block field is set in the Location + Patron + Item matrix (see the section “[About Fines and Grace Periods](#)” in this guide).

10.1 When an Overdue Item Is Checked in...

When the Convert Fine to Block is set and the overdue item is checked into Virtua, the system will see that a library-defined block exists for fine calculation as defined in Location + Patron + Item matrix. So instead of calculating fines, the system will calculate the number of days that loan privileges will be suspended based on the values specified in the Overdue Fines and Fine Period fields in the matrix..

In addition, the system will automatically add a 043 tag to the patron record, inserting the library-defined block code in the subfield \$a and the end date and time of the suspension period in the subfield \$d:

043			\$a 80 \$d 200706141105
-----	--	--	-------------------------

If multiple overdue items are checked in, the system will use the item that is overdue the longest to determine the date in the 043 tag.

If tag 043 already exists when the overdue item is checked in, the system will compare the potential “suspend until” date for the new overdue check-in to the existing date in the 043 tag.

- If the new overdue check-in would increase the “suspend until” date in the 043 tag, the system will adjust the existing date to the new date.
- If the new overdue check-in would fall within or be equal to the “suspend until” date in the 043 tag, the system will make no changes to the existing date.

To remove expired suspension blocks (i.e., 043 tags) from patron records, run the server script **DeleteExpiredPatronBlocks.sh** (for details, see the *System Management: Circulation User's Guide*).

Because the block is controlled by a special library-defined block code, which resides in its own 043 tag, and no fines are assessed, the patron account window is not populated with any information. Furthermore, because the blocking is controlled by the library-defined block code in its own 043 tag, you can map the 043 \$d date field to the Card Format tab of the patron record to see the “suspended until” date (*Figure 10-1*).

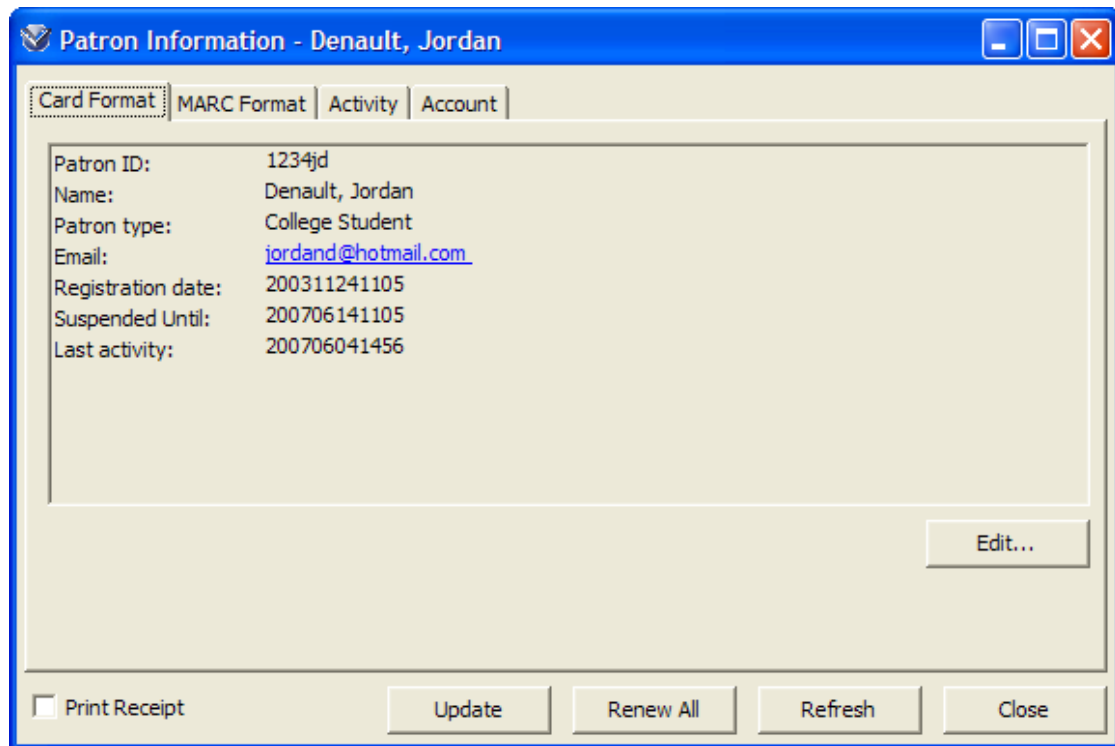


Figure 10-1. Patron Information Window - Display of Suspended Until Date

The description of the library-defined block code (as defined in the Block Code Definitions parameter) controls the text that appears in the Blocks message in the client and in the Error message that appears when the patron tries to place a request.

10.2 Blocking Patrons Before They Check in Overdue Items

If you want to block a patron before their overdue item is checked in (which would, for example, trigger the calculation of a one-day block per day overdue), you can set the Days Overdue column in the Alerts and Blocks matrix to a value of 1. As a result, if the patron has one checked-out item that is overdue for more than one day, they will

be blocked from being able to check-out, renew or request material in the library until that item is returned. Once the item is returned, that block (or alert) would go away and the suspension by days would be activated.

11. Appendix C - Parameters

Specific to the Hong Kong Public Library

11.1 Enhancement to the Block Codes Definitions Parameter

The Block Codes Definitions parameter has an added feature, the Use in Editor check box, which is available to the Hong Kong Public Library only (*Figure 11-1*).

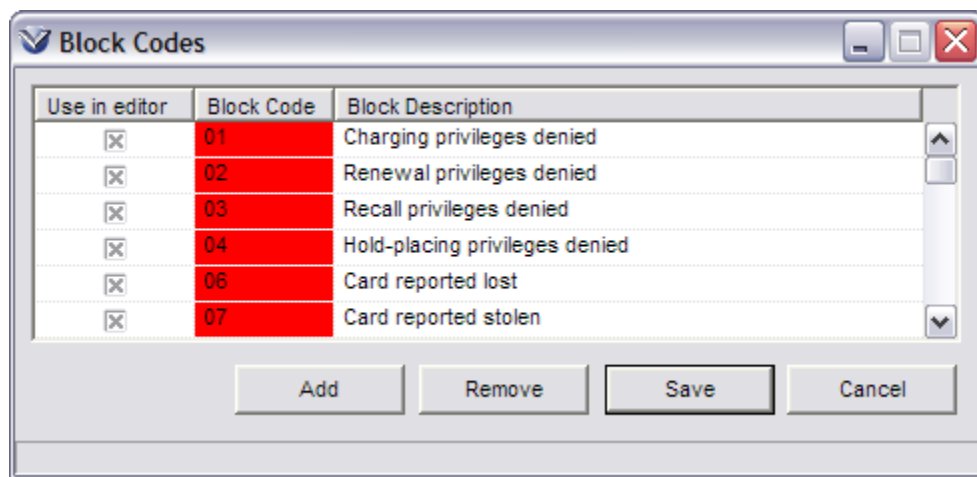


Figure 11-1. Block Codes Window

If the Use in Editor check box is selected for a given block code/description, that block definition will appear in the Add Patron Block drop-down list, which is accessible from the Blocks tab of the HKPL Patron Editor.

11.2 Patron Types Settings: HKPL Tab

Modify Patron Type - Adult Patron

Patron Type:

Patron Type Code:

General | ASR | **HKPL**

☐ Require Guarantor

Required Document Type(s)

☐ Birth Certificate Number

☐ HKID

☐ Passport Number

☐ Other ID Number

Last modified at 4/28/2011 11:03:24 AM by Root User

Figure 11-2. Modify Patron Type Window

On the HKPL tab of the Patron Types parameter, the Require Guarantor setting indicates whether a patron of that type requires a guarantor. The HKPL Patron Editor contains a Guarantor tab. When the Require Guarantor check box is selected for a particular patron type, guarantor information must be entered on the Guarantor tab when adding a patron (or modifying a patron) of that type.

The Required Document Type(s) settings let you specify, for each patron type, which document type or types (birth certificate number, HKID, passport number, and other ID number) will be required for a patron record of that type to be saved successfully in the client.

11.3 Patron Districts Parameter

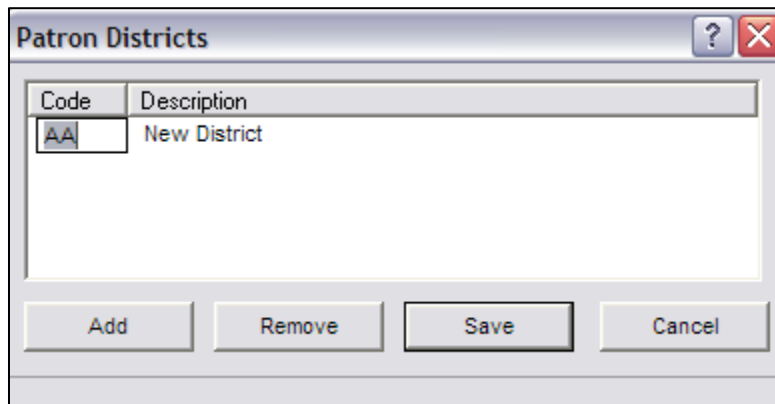


Figure 11-3. Patron Districts Parameter

The System Parameters > Patron Districts parameter lets you define a code for and a corresponding description of each Hong Kong district that you want to be available in the District drop-down list on the Main Address tab of the HKPL Patron Editor. Both the code and description will appear in the list.

The code must be a unique alphanumeric string that is two characters in length.

To add a description, click the Add button. To remove a description, select it and then click the Remove button.

11.4 Scheduling the Generation of the Black List

The Schedule BlackList Job Scheduling parameter allows you to specify when Virtua creates the patron black list file. The black list file is a list of disabled patron barcodes (i.e., a subfield \$x is present in the 015 tag of the patron record). The Circulation Backup System uses the black list to verify that a patron barcode is not disabled before allowing a circulation backup transaction. For more information on the Circulation Backup System, see the *Virtua Circulation Control/Circulation Backup User's Guide*.

To schedule the generation of the black list file,

1. On the Circulation tab, click the Schedule BlackList parameter.

The Blacklist Generation window ([Figure 11-4](#)) appears.

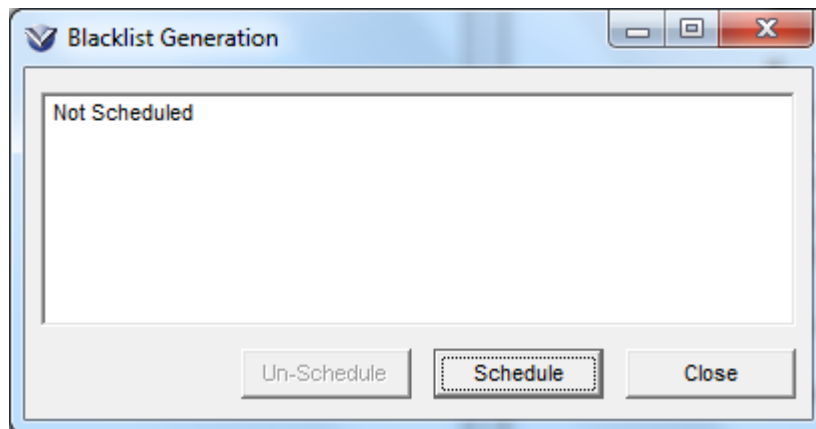


Figure 11-4. Blacklist Generation Window

2. Click the Schedule button.

The Scheduler window appears ([Figure 11-5](#)).

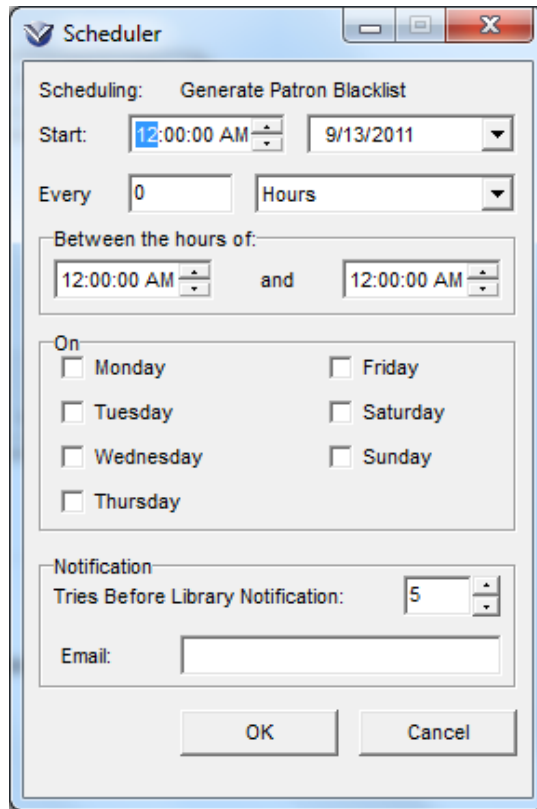


Figure 11-5. Scheduler Window

3. On the Scheduler window, specify the time of day and days of the week on which you would like the black list file to be generated.
4. Click the OK button.

The Scheduler window is closed, and the Blacklist Generation window ([Figure 11-6](#)) is updated to display the schedule you have configured.

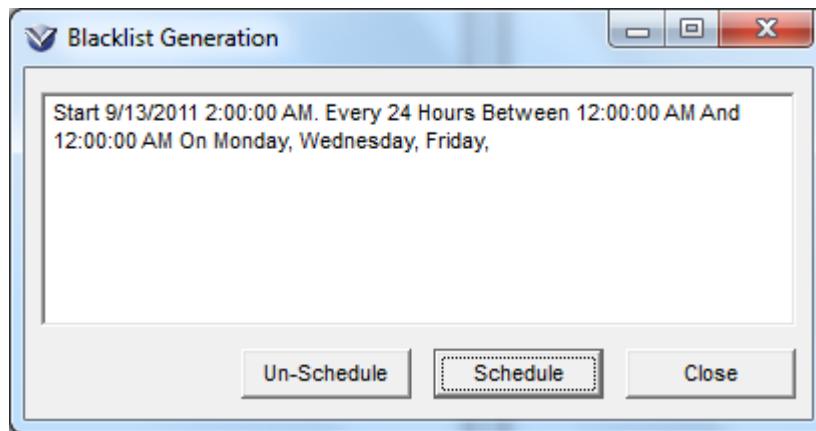


Figure 11-6. Blacklist Generation Window, Displaying Schedule

11.5 Schedule WhiteList Parameter

The Schedule WhiteList parameter allows you to specify when Virtua creates the patron white list file. The white list file is a list of the HKIDs of valid Virtua patrons who have ‘opted-in’ to use the HKID MASC card as a library card.

The Circulation Backup System uses the white list file to validate patron HKIDs when the MASC authentication server is down:

- When the MASC authentication server is down and the patron is using his or her HKID for circulation, the Circulation Backup System will check the white list to validate the HKID before allowing a circulation backup transaction to proceed.
- If the MASC authentication server is available, the Circulation Backup client will communicate with it to verify that the HKID is valid.

To schedule the generation of the white list file,

1. Click the Schedule WhiteList parameter.

The Whitelist Generation window ([Figure 11-7](#)) appears.

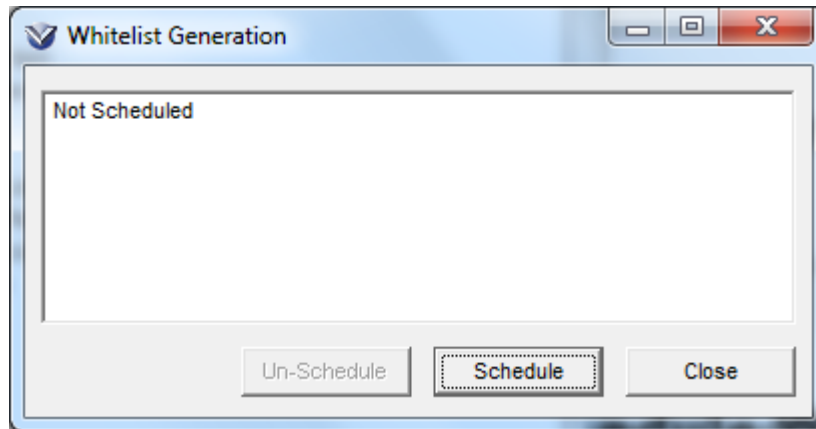


Figure 11-7. *Whitelist Generation Window*

2. Click the Schedule button.

The Scheduler window appears ([Figure 11-8](#)).

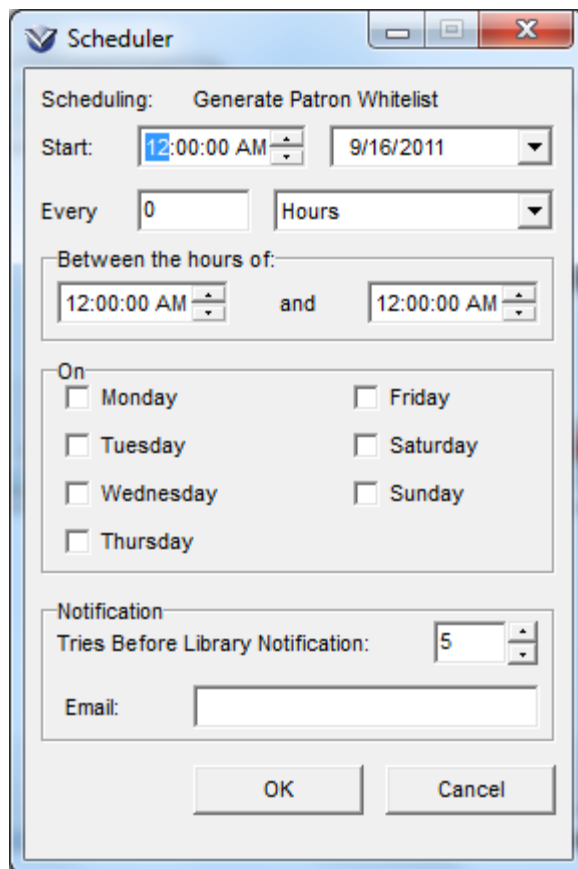


Figure 11-8. *Scheduler Window*

3. On the Scheduler window, specify the time of day and days of the week on which you would like the black list file to be generated.
4. Click the OK button.

The Scheduler window is closed, and the Blacklist Generation window (*Figure 11-6*) is updated to display the schedule you have configured.

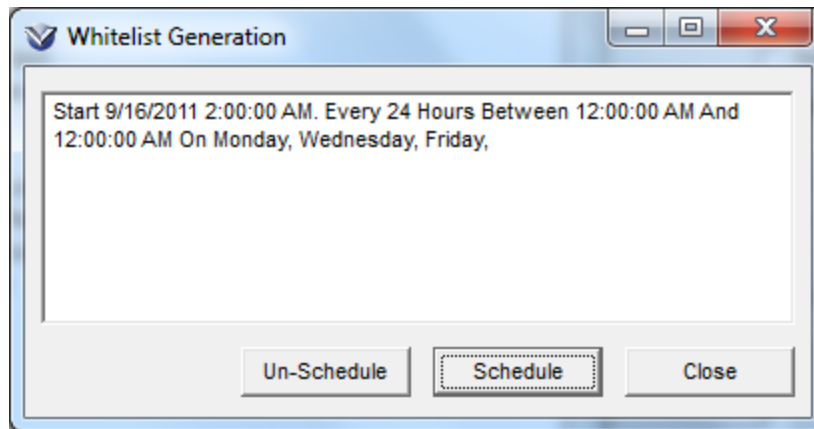


Figure 11-9. Whitelist Generation Window, Displaying Schedule

12. Appendix D - Changes in this Guide

12.1 Changes for Version 16.1

No changes were made.

Index

0

- 007 fixed fields · 112
 - manual blocks and · 115, 117
- 043 tag of the patron record · 112, 114

3

- 3M Error Message setting · 154
- 3M Patron SelfCheck System
 - diagnostic messages and · 209, 211
 - error messages · *See* Patron Diagnostic Messages
- 3M Receipt · 154
- 3M SelfCheck Interface · 154
- 3M SelfCheck machine · 182

5

- 506 tag of patron record · 238, 241

A

- Academic Info tab, on the Patron Editor · 172
- Account Adjustment Notes · 100
- Account Adjustment Notes window (fig) · 100
- accrual rate for fines · *See* Fine Period
- Add Adjustment Reason window, enabling · *See* Require Activity Dispute/Waive Notes setting
- Add button · 77, 119, 169, 175
 - Block Code Definitions window · 119
 - description of · 6
 - Fine Codes window · 175
 - Item Class Definitions window · 181, 182
 - Library Defined Dates parameter · 77
 - using to add rows to a table · 6
- Add Patron Type window · 85
- Add Request Group window (fig) · 248
- Add status button, disabling · 143
- adding
 - block code definitions · 118
 - fine code definitions · 174
 - item class definitions · 181
 - item class groups · 184
 - items to the tree structure · 6
 - library calendars · 188
 - Library Hours · 196

- library-defined dates · 77
- patron diagnostic messages · 212
- request groups · 248
- Address block · 117, 257
- Agency Request Priority settings · 138
- Agency request satisfied status setting · 147
- agency request slip, configuring · 242
- agency requests, enabling · 147
- alert message · 108
- alerts and blocks · *See also* Block Code Definitions
 - parameter
 - system-calculated · 108
 - triggered by check-outs · 108
 - triggered by requests · 109
 - triggering · 107
 - viewing in the client · 108
- Alerts and Blocks Matrix · 8, 102, 108
- Allow loans at requesting location setting · 136
- Allow patrons to request items they have checked out setting · 137
- Allow renewal of items with outstanding requests setting · 134, 135
- Allow Renewal Within X Days of Due Date setting · 20
- Allow Request for Bibs Without Items · 34, 41
- Allow Withdrawal of Checked Out Items setting · 131
- Also apply to non-staff check-outs setting · 144
- Also support selection of alternate controlled values setting, on Patron Cataloging Options window · 170
- Always radio button, on Circulation Basic Options window · 134
- amnesty periods, allowing for · 63
- Amount
 - on deposit account slip · 245
- Amount Paid (For Item) on fine receipt · 229
- Amount Paid on fine receipt · 229
- Annual Loans · 276
- Apply Calendar window
 - Library Calendars parameter (fig) · 194
- Apply extra ‘Canceled/Remains At Check-in’ fees to patron account at check-in setting · 159
- Apply Setting window · 27
- Apply Settings window
 - Alerts and Blocks Matrix (fig) · 106
 - example
 - for Location + Item Matrix · 26
 - for Location + Patron + Item Matrix · 74
 - for Location + Patron Matrix · 42
 - Location + Item Matrix (fig) · 25, 26
 - Location + Patron (fig) · 43
 - Location + Patron + Item Matrix (fig) · 73, 74
 - Location + Patron Matrix (fig) · 42

- using · 26, 42, 73
- Apply To button · 25, 35, 42, 53, 72, 105
- Assess Fee When Request Is parameter · 53, 71
- Audit Trail, enabling · 155
- Author
 - on Billed Material slip · 234
 - on check-in receipt · 226
 - on check-out/renew receipt · 223
 - on fine receipt · 229
 - on In Transit slip · 232
 - on loans/pages printout · 204
 - on Requested In Transit slip · 237
 - on Requested slip · 240
- Auto requests and Number of Requests on Same Bib-ID setting · 92
- AutoCheckIn.exe · 110
- Automatic Check-ins · 110
 - running JobScheduler.exe and · 110
- AV Accession Number
 - on Loans/Pages printout · 205
- Available Item Classes list box · 185, 186
- Available Locations list box · 249

B

- Batch Item Editor · 131, 182
- Begin Date column · 77
- Bib-ID
 - on loans/pages printout · 204
- Bill Date, on Billed Material slip · 234
- Billed for Replacement (Long Overdue) status · 131
- billed for replacement items
 - allowing withdrawal/deletion of · 131
 - status when disputed then deleted · 146
- billed items · 157
 - status change when paid for · 146
- billed material slip, configuring · 233
- Billed Overdue fines in Bills report? setting · 160
- Billed Patron Note · 112
- Billing Period · 52, 67, 68
- binding cost · 24
- block code definitions
 - modifying · 118
 - modifying strings for · 216
 - translating · 216
- Block Code Definitions parameter · 112
 - components of · 114
 - defining text for error messages · 113
 - guidelines for setting · 114
 - recommended 007 blocks · 117
 - Use in Editor feature · 280
- block codes
 - adding translations for · 216
 - modifying · 118
 - modifying strings for · 216
- Block Codes tab on Patron Diagnostic Messages window · 216

- Block Codes window (fig) · 119
- block message
 - triggered by check-out · 109
 - triggered by renewal · 109
 - triggered by request · 109
- Block/Alert Matrix window (fig) · 104, 107
- blocking patron records, defining circulation rules for · 102
- blocks
 - converting fines to days of suspension · 58, 61
 - defining · 112
 - determining if item price is used for · 38
 - determining if processing fees are used for · 37
 - fixed field · 115
 - library-defined · 114
 - manual · 112
 - overriding · 109
 - system-generated fixed field · 117
- blocks and alerts · *See* alerts and blocks
- Blocks message (fig) · 113
- book clubs, requesting books for · 147
- booking items · 17, 19, 20, 92, 136
- Bookings take priority over satisfied requests setting · 136

C

- calculated loan rules · 56
- Calculated radio button · 50
- Calendar · 14
- Call Number
 - on Billed Material slip · 234
 - on check-in receipt · 226
 - on check-out/renew receipt · 223
 - on fine receipt · 229
 - on In Transit slip · 232
 - on loans/pages printout · 204
 - on Requested In Transit slip · 237
 - on Requested slip · 240
- Cancel button · 109
- Canceled at Check-in text box · 32, 159
- Cannot Delete Item check box · 180
 - on Item Class Definitions window · 182
- card reported
 - lost block · 117, 257
 - stolen block · 117, 257
- Chamo
 - request behavior · 150
- changes in the guide · 288
- charging privileges denied block · 115, 117, 257
- Check Out/Renew window (fig) · 55
- Check patron eligibility before trapping an item · 138
- CheckCircParameters.sh script · 8, 9, 29, 45
- Checked Out Date
 - on check-in receipt · 226
 - on check-out/renew receipt · 224
- checked out items, disabling new statuses for · 143

- Check-in Date
 - on check-in receipt · 226
 - on Requested In Transit slip · 238
 - on Requested slip · 241
- check-in receipt setup · 225
- check-ins, scheduling automatic · 110
- Check-out Limits parameter · 8
 - accessing · 120
 - Check-out Limit · 126
 - Limit Period · 126
 - Period Type · 126
 - Reserve Check-out Limit · 126
 - Reserve Limit Period · 127
- Check-out Limits Types · 120
 - Patron Type · 120
 - Patron Type + Item Class · 120
 - Patron Type + Item Class + Location · 120
 - Patron Type + Item Class Group · 120
 - Patron Type + Location · 120
- Check-out Limits window (fig) · 126
- Check-out Limits Window, Patron Type + Item Tab (fig) · 120
- check-out/renew receipt setup · 223
- check-outs
 - block messages displayed during · 112
 - blocking · 108, 113
 - due dates for · 56, 57
 - limits for regular items · 123
 - limits for reserve items · 123
 - restricting to staff's own location · 142
 - setting fixed due dates for · 35
 - setting limits for · 120, 122
 - setting loan periods for · 54
 - types of · 55
- CircReport.exe · 134, 135
- Circulation Backup System
 - HKPL blacklist · 283
 - HKPL whitelist · 285
 - HKPL, allowing patrons to use · 285
 - HKPL, blocking patrons from · 283
- Circulation Basic Options · 128
 - 3M Error Message setting · 154
 - 3M Options tab · 152
 - Agency Request Priority settings · 138
 - Agency request satisfied status · 147
 - Allow loans... · 136
 - Allow patrons to request items they have checked out · 137
 - Allow renewal of items... · 134
 - Also apply to non-staff check-outs · 144
 - Apply extra 'Canceled/Remains At Check-in' fees to patron account at check-in · 159
 - Billed Overdue fines in Bills report? · 160
 - Bookings take priority... · 136
 - Check patron eligibility before trapping an item · 138
 - Closed Dates · 161
 - Damaged and paid status · 148
 - Delete/Waive Options tab · 130
 - Deleted billed for replacement dispute status · 146
 - Deny request when status added disallows loan/page · 138
 - Display minimum circulation question · 157
 - Do not trap new items · 142
 - Each part of a multi-part is unique circulation · 158
 - Global Request Trapping Options tab · 150
 - Item Options tab · 141
 - Item Statuses tab · 145
 - Log financial transactions... · 155
 - Lost and paid status · 147
 - No message or fines at check-out · 144
 - Not available until street date status · 146
 - Other Options tab · 154
 - Paid for replacement status · 146
 - Prohibit item fine payments... · 143
 - Remove focus from Close button on Check-in and Check-out messages · 160
 - Renewal Options tab · 148
 - Request Clear Notification · 137
 - Request Options tab · 133
 - Restrict check-outs to owned items · 142
 - Restrict staff mediated renewals... · 142
 - Send e-mail when request item... · 134
 - Show total requests... · 136
 - Update request expiration date... · 135
 - Use Long Loans · 156
 - Use transaction location for due date calculations · 144
- Circulation Basic Options window · 129
- Circulation Calendar Apply Settings window
 - Library Calendars parameter (fig) · 193
- circulation errors, defining strings for · 216
- Circulation parameters
 - accessing · 4
 - adding to the tree structure · 6
 - expanded (fig) · 4, 10, 30, 86
- Circulation System Parameters · *See* System Parameters
- Circulation tab · 3, 4, 10, 30, 45, 75, 76, 78, 83, 88, 99, 100, 102, 118, 162, 163, 164, 169, 174, 181, 184, 188, 190, 191, 196, 199, 200, 248, 252
 - Circulation parameters expanded (fig) · 10, 30
 - Library Defined Dates expanded (fig) · 79
 - Location + Patron + Item expanded (fig) · 47, 48
 - Location + Patron + Item parameter expanded (fig) · 46
 - Location + Patron expanded (fig) · 30, 31
 - Location +Item expanded (fig) · 11
 - patron types appearing on · 85
 - Patron Types on · 85
 - System Parameters expanded (fig) · 99
- Circulation Workflow-Based Reference Guide* · 20, 92, 109, 113, 114, 136, 142, 143, 146, 150, 157, 204
- Circulation Workflow-Based Reference Guide* · 174
- clearing unsatisfied requests · 137
- close day · 197, 201
- close time · 197, 201

Closed Dates parameter · 161
 adding closed dates · 162
 deleting closed dates · 163
 introduction to · 161
 modifying closed dates · 164
 closed day of the week, specifying via Library Hours · 202
 computer disks · 182
 configuring
 agency request slip · 242
 billed material slip · 233
 check-in receipt · 225
 check-out/renew receipt · 223
 deposit account slip · 243
 fine receipt · 228
 in transit slip · 231
 loans/pages printout · 203
 receipt/slip footer · 245
 requested in transit slips · 236
 requested slip · 239
 Controlled Patron Values
 adding · 169
 deleting · 170
 modifying · 169
 working with · 166
 Convert Fine to Block · 58, 60
 workflow · 277
 Copy Number
 on Billed Material slip · 234
 on In Transit slip · 232
 on loans/pages printout · 204
 on Requested In Transit slip · 237
 on Requested slip · 240
 creating text for block error messages · 113

D

Damaged and paid status setting · 148
 damaged items, determining status for · 148
 date and time last modified · 5
 Days Overdue · 105
 days the library is closed · 161
 Default (due) Date and Time · 36
 Default Booking Time For Materials · 19
 Default Date · 32, 35, 36
 Default Expiration Period · 53, 71
 Default Item Price · 17
 Default Time · 32, 35, 36
 Delete button · 81, 170, 176
 Controlled Patron Values window · 170
 Fine Codes window · 176
 Item Class Definitions window · 183
 Library Defined Dates parameter · 80
 Delete Item Class Group confirmation message (fig) · 188
 Delete menu item · 187, 251
 Delete Outstanding Requests setting · 130

Delete Request Group confirmation message (fig) · 252
 Delete Special Status setting · 131
 Deleted billed for replacement dispute status setting · 146
 DeleteExpiredPatronBlocks.sh · 277
 deleting
 Controlled Patron Values · 170
 Fine Code Definitions · 176
 item class definitions · 183
 Item Class Groups · 187
 library calendars · 190
 Library Hours · 199
 patron diagnostic messages · 215
 patron types · 88
 Request Groups · 251
 Delinquent Owed Amount · 105
 Deny request when status added disallows loan/page setting · 138
 deposit account slip, configuring · 243
 deposit accounts, enabling/disabling for patrons · 207
 depreciation rate · 24
 diagnostic messages · *See* patron diagnostic messages
 Disallow new status for checked out items setting · 143
 Display minimum circulation question setting · 157, 158
 disputes, threshold for number allowed · 93
 Do not trap new items setting · 142
 Does Fine Accrue from Grace Period · 52, 63
 Does Fine Accrue from Grace Period? · 60, 63
 due date
 adjusted forward from closed date · 161
 adjusting ahead of closed date · 56
 calculated · 56
 for calculated check-out · 49
 for fixed check-out · 49
 for in-house check-out · 55
 for recall · 71
 for regular check-out · 55
 grace period added to · 63
 Due Date
 on check-in receipt · 226
 on check-out/renew receipt · 224
 on fine receipt · 229
 Due Date column · 77
 due date for renewals, defining · 149
 Due Date Time column · 77
 due date time, modifying for library-defined dates · 80

E

Each part of a multi-part is unique circulation setting · 158
 Edition
 on loans/pages printout · 204
 End Date column · 77

End Time
on Requested In Transit slip · 237
on Requested slip · 240
Ending Text · 246
on Billed Material slip · 235
on check-in receipt · 227
on check-out/renew receipt · 224
on fine receipt · 230
on In Transit slip · 232
on Requested In Transit slip · 238
on Requested slip · 241
error message
displayed for block · 109
when deleting an item class currently in use (fig) · 184
when saving Item Class Groups · 185
when saving Request Groups · 249
excessive outstanding
fees block · 117, 257
fines block · 117, 257
Expiration Alert (Days) · 93
expiration date of requests · *See* Default Expiration Period
Expired Requests report · 71
expiring patron records
alert days for · 93

F

failed notifications settings · 205
Fee Age · 105
Fee text box · 32, 37
fees, assessed on requests · 71
financial transaction, logging · 155
fine accrual · 63
alternate · 61
fine accrual rate · 51
alternate · 61
Fine Adjustment Wizard · 37
Fine Code Definitions
adding · 174
components of · 176
deleting · 176
guidelines for setting · 176
modifying · 175
working with · 174
Fine Codes window · 174
fine codes, system assigned · 177
fine payment, location for · 143
Fine Period · 51, 60
fine receipt setup · 228
Fine type on fine receipt · 229
Fines Accrue During Non-operating Hours · 17
fines, limits for patron · 102
Fines/Grace tab · 51, 58, 59, 60, 63
Override Fines · 61
Fines/Grace tab (fig) · 58

Fixed Field Editor · 118
Fixed Field Editor (fig) · 116
fixed loan rules · 56
Fixed or Calculated radio button · 50
Fixed radio button · 50
fixed-field blocks · 115
system generated · 117
floating items
disabling acceptance for an item class and location · 22
disabling for an item class and location · 21
enabling acceptance for an item class and location · 22
enabling for an item class and location · 21
setting a maximum · 21
setting a minimum · 21
further privacy restrictions · 224, 226, 230, 238, 241

G

Global request permissions · 151
Global Request Trapping Options · 252
Global Request Trapping Options parameter · 150
examples of · 151
Group level · 151
Institution level · 151
Local level · 151
relationship to Request Groups parameter · 247
Global Settings tab · 6, 7
Grace Period · 60, 63
Does Fine Accrue from Grace Period? · 63
example of · 63
setting values for · 51, 63
Group Request Indicator
on Loans/Pages printout · 205
Group request permissions · 151
Guaranteed Circulation Period · 50, 52, 57, 60, 63, 64, 65, 154, 157
guarantor · *See* Require Guarantor setting

H

hand pointing
down button · 250
left button · 185, 249
right button · 185, 249
up button · 250
has made too many renewals block · 117, 257
has recall overdue block · 117, 257
header text, defining · 246
HKPL Patron Editor · 280, 282
Hold Allowed When Available Item Exists at Another Location · 34, 40
Hold Allowed When Available Item Exists at Log-in Location · 34, 40
Hold Pickup Time · 18

hold request · 70
 allowing/not allowing · 53
 setting default expiration for · 53
 setting pickup time for · 18
 setting placement order · 90
 Hold/Recall Flag · 254
 hold-placing privileges denied block · 117, 257
 holidays · *See* Closed Dates parameter
 hours of operation · *See* Library Hours parameter OR
 Closed Dates parameter

I

Ignore requests check box · 50, 54, 57
 ILL Options · 178
 ILL privileges denied block · 117, 257
 Immediate Recall · 65
 in transit slip
 configuring · 231
 Include Checked Out Time check box · 224
 Include Item-Level Requests in that Number setting ·
 92
InfoStation User's Guide · 69
InfoStation/
 Circulation Reports Reference Guide · 65, 134,
 157
 in-house check-out loan periods · 56, 57
 Inspection End Time
 on Requested In Transit slip · 237
 on Requested slip · 240
 Inspection Time For Materials · 19
 institution symbol · 117
 interlibrary loans, configuring options for · 178
 Is First Notice Review Notice? · 52, 69
 Item Barcode
 on Billed Material slip · 234
 on check-in receipt · 226
 on check-out/renew receipt · 223
 on fine receipt · 229
 on In Transit slip · 232
 on loans/pages printout · 204
 on Requested In Transit slip · 237
 on Requested slip · 240
 item booking · 17, 19, 20, 92, 136, 181
 Item Booking Limit · 92
 Item Class
 on Loans/Pages printout · 205
 on Requested In Transit slip · 237
 on Requested slip · 240
 Item Class Definitions
 adding · 181
 Class Type · 182
 Code · 181
 components of · 180
 deleting · 183
 deletion of items and · 182
 how they are used in Virtua · 180

Media Type · 182
 modifying · 183
 window (fig) · 5
 Item Class Definitions parameter · 5, 6
 Item Class Definitions window (fig) · 181
 Item Class Group Name · 185, 186
 Item Class Groups
 adding · 184
 deleting · 187
 member item classes · 185
 modifying · 186
 removing members · 186
 Item Class Groups parameter · 184
 guidelines for setting · 184
 Item Class setting, ILL Options window · 179
 Item Classes list box · 25, 73, 194
 Item Info tab (fig) · 14
 Item Information window · 22, 143
 Item Options settings · 141
 Item Price Fee
 Remains at Check-in · 38
 Used for Blocks · 38
 Item Price Fee Used for Block · 33
 item price fees added to accounts · 38
 item price, defining default · 17
 item renewals · 142
 item renewals, restricting to staff's own location · 142
 Item Statuses settings · 145
 Item's Due Date
 on fine receipt · 229
 Items Circulating
 Less Than One Day Are Due at Closing · 15
 One Day or More Are Due at Closing · 16
 Items Circulating Less Than One Day Are Due at
 Closing · 15
 Items Circulating One Day or More Are Due at
 Closing · 16

J

JobScheduler.exe · 110

L

lamination cost · 24
 Last Modified date and time · 5
 library calendar · 14
 Library Calendars
 adding · 188
 deleting · 190
 modifying · 191
 Library Calendars parameter · 188, 195
 applying settings to location/item class
 combinations · 193
 applying settings to locations · 194
 Library Defined Dates window · 79

- adding a new date category · 76
- Library Hours
 - adding · 196
 - deleting · 199
 - modifying · 200
- Library Hours parameter · 195
 - guidelines for setting · 201
 - using to specify closed day · 202
- library-defined blocks · 114
- Library-defined Dates parameter · 3, 49, 56, 75, 76, 78
 - deleting a date category · 81
 - deleting defined dates · 80
- Limit Period · 123, 126
- loan periods
 - based on transaction date · 57
 - calculated · 56
 - fixed · 56
 - fixed or calculated · 57
- loan request · 71
 - allowing/not allowing · 53
 - setting default expiration for · 53
 - setting placement order · 90
- Loan Rules
 - based on transaction date · 57
 - calculated · 56
 - fixed · 56
 - fixed or calculated · 57
 - Ignore requests setting · 54
 - Protect from recall setting · 54
 - Requests per item that trigger...setting · 54
- Loan Rules tab · 49, 54, 55, 56, 75
- loans at requesting locations · 136
- loans/pages printout setup · 203
- Loans/Pages Setup · 203
- Loans/Pages Setup window (fig) · 203
- Local request permissions · 151
- Location
 - on check-in receipt · 226
 - on check-out/renew receipt · 224
 - on fine receipt · 229
- Location + Item Matrix · 3, 8
 - accessing · 10
 - Allow Renewal Within X Days of Due Date · 20
 - applying a single setting to other matrices · 27
 - applying settings to other matrices · 25
 - Calendar · 14
 - Default Booking Time For Materials · 19
 - Default Item Price · 16, 17
 - displaying · 11
 - Due at Closing settings · 15
 - Fines Accrue/Non-operating Hours · 17
 - Hold Pickup Time · 18
 - Inspection Time For Materials · 19
 - introduction to · 9
 - item classes expanded (fig) · 11
 - Item Info tab (fig) · 14
 - Item Info tab settings
 - details of · 13
 - Lost/Damaged tab settings · 22
 - Max floating item count threshold setting · 21
 - Min floating item count threshold setting · 21
 - Minimum Booking Time For Materials · 20
 - Must Pick Up at Shelving Location · 14
 - Prep Time For Materials · 18
 - Replacement Cost at Billing · 16
 - Total Replacement Cost · 17
- Location + Patron + Item Matrix · 3, 8, 157
 - accessing · 45
 - applying settings to other matrices · 72
 - components of · 44
 - displaying · 48
 - Fines/Grace tab (fig) · 59
 - introduction to · 44
 - Notices/Limits tab (fig) · 67
 - Requests tab (fig) · 70
 - setting
 - Fines · 58
 - Grace Period · 63
 - Guaranteed Circulation Period · 63
 - Override Fines · 61
 - Renewal Limit · 69
- Location + Patron Matrix · 3, 8, 159
 - General tab (fig) · 35
 - setting
 - Allow Request for Bibs Without Items · 41
 - Default Due Date and Time · 35
 - Hold Allowed/Log-in Location · 40
 - Hold Allowed/Non-Log-in Location · 40
 - Processing Fee · 36
 - Processing Fee Canceled at Check-in · 37
 - Processing Fee Used for Blocks · 37
 - window (fig) · 31
- Location Routing window (fig) · 252
- Location setting
 - ILL Options window · 179
- Locations list box · 25, 42, 73, 194
- Location-specific Parameters · 3, 75
- Log financial transactions to the Audit Trail setting · 155
- logging financial transactions · 156
- log-in location
 - effect on requests · 40
 - on Requested In Transit slip · 238
 - on Requested slip · 240
 - printing on receipts · 232
- logon location · *See* log-in location
- Logon Location
 - on Billed Material slip · 234
 - on In Transit slip · 232
- long loans setting · *See* Use Long Loans setting
- Lost and paid status setting · 147
- lost items
 - determining status for · 147
 - threshold for number allowed · 93

M

MAGNETIC media type · 182
 Mail Grace Period · 51, 60, 63, 64, 65, 66, 154
 main locations
 in request groups · 248, 249
 in the Location + Item Matrix · 10
 in the Location + Patron Matrix · 30
 manual blocks · 113
 matching opening day and time to closing day and time · 201
 matrix
 Alerts and Blocks · *See* Alerts and Blocks Matrix
 Max floating item count threshold setting · 21
 Max Hold, Recall, Loan, Page Limit · 93
 Max Number of Notices · 52, 68
 restriction on changing · 68
 Max Overdue Fine setting · 90
 maximum depreciation · 24
 Maximum Fine · 51, 60
 maximum number of requests allowed · 93
 maximum overdue fine
 setting for a patron type · 90
 Media Type · 180, 182
 magnetic · 182
 non-magnetic · 182
 media types, protection of · 182
 Member Item Classes list box · 185
 Member Locations list box · 249, 250
 Messages window · 109
 midnight, setting as close time · 202
 Min floating item count threshold setting · 21
 Minimum Booking Time For Materials · 20
 minimum circulation question · 157
 Minimum Period Needed field · 157, 158
 Modify Item Class Group window (fig) · 187
 Modify Request Group window (fig) · 251
 modifying
 Controlled Patron Values settings · 169
 fine code settings · 175
 item class definitions · 183
 Item Class Groups · 186
 library calendars · 191
 Library Hours · 200
 patron diagnostic messages · 215
 Request Groups · 250
 multi-part items, statistics for · 158
 Must Pick Up at Shelving Location · 14

N

New Balance
 on deposit account slip · 245
 on fine receipt · 229
 New Balance (For Item)
 on fine receipt · 229

new items, trapping · 142
 New Request for Bib window (fig) · 247
 Next Receipt Number · 229
 No message or fines at check-out setting · 144
 non-circulating items · 50
 Non-Parameterized Shelf Location
 on loans/pages printout · 204
 Not available until street date status setting · 146
 NOT SET status
 meaning of · 5
 Notes
 on Requested In Transit slip · 238
 on Requested slip · 241
 notice date · 65
 Notice Period · 52, 67, 68
 notice-generation schedule · 157
 Notices/Limits tab · 52, 66, 67, 68, 69
 Notices/Limits tab (fig) · 66
 Notification Options · 205
 Notification Options window (fig) · 205
 Number of Requests on Same Bib-ID setting · 92
 Auto requests and · 92

O

on order date · 35
 on requests · 151
 Only when at least one available item exists radio
 button, on Circulation Basic Options window · 134
 open day · 201
 Open Day · 197, 200
 open time · 197, 201
 operating hours · *See* Library Hours parameter OR
 Closed Dates parameter
 order of Request Group members · 250
 organization of user's guide · 2
 Other Circulation-related blocks · 117, 257
 outstanding requests, waiving · 130
 Overall · 90, 126, 127
 check-out limit · 126
 request limit period · 90
 overdue fine
 amount, setting · 51
 setting maximum for a patron type · 90
 setting maximum for location, patron, and item · 51
 Overdue Fine · 60
 overdue fine accrual, modifying · 160
 Overdue fines, reporting on · 160
 overdue items · 157
 setting fines for · 59, 60
 setting suspensions for · 60
 overdue notices · 44, 66, 67, 68
 Override button · 109
 Override Fine · 60
 Override Fines · 51, 61
 Override Notices · 52, 67, 68

overriding blocks · 109, 113
 Owed Amount · 104
 owning location, effect on requests · 151

P

Page Flag · 254
 page request · 71
 allowing/not allowing · 53
 setting default expiration for · 53
 setting placement order · 90
 Paid for replacement status setting · 146
 PARAMETER NOT SET, meaning of · 5
 Part Title
 on Billed Material slip · 234
 on In Transit slip · 232
 on Requested In Transit slip · 237
 on Requested slip · 240
 Patron Activity Requested/Recalled tab options, on
 Circulation Basic Options window · 139
 patron activity, determining display of · 139
 Patron Address
 on Requested In Transit slip · 238
 on Requested slip · 241
 Patron Barcode
 on Billed Material slip · 234
 on check-in receipt · 226
 on check-out/renew receipt · 224
 on check-out/renew receipt · 223
 on deposit account slip · 245
 on fine receipt · 229, 230
 on Requested In Transit slip · 238
 on Requested slip · 241
 Patron Block History parameter · 206
 Patron Block History window (fig) · 206
 patron blocks, defining circulation rules for · 102
 Patron Deposit Accounts parameter · 207
 patron diagnostic messages
 list of · 211
 Patron Diagnostic Messages
 3M Patron SelfCheck and · 211
 about · 211
 adding · 212
 deleting · 215
 modifying · 215
 translating · 214
 Patron Diagnostic Messages parameter · 209
 Patron Diagnostic Messages window
 Block Codes tab · 216
 Patron Diagnostic Messages window (fig) · 210
 Patron Districts parameter · 282
 Patron Editor
 configuring Academic Info values for · 172
 Patron Expiration Reminders report, Expiration Alert
 (Days) setting and · 93
 patron fines
 defining circulation rules for · 102
 location for payment · 143
 Patron Name
 on Billed Material slip · 234
 on check-in receipt · 226
 on check-out/renew receipt · 223
 on deposit account slip · 244
 on fine receipt · 229
 on loans/pages printout · 204
 on Requested In Transit slip · 238
 on Requested slip · 241
 patron owes too much money · 112
 Patron Phone
 on check-out/renew receipt · 223
 on Requested In Transit slip · 238
 on Requested slip · 241
 Patron Record
 Delete Fixed Date · 40
 Expiration Fixed Date · 39
 Patron Record Delete Fixed Date · 34, 40
 Patron Record Delete Period · 34, 39
 Patron Record Expiration Fixed Date · 33, 39
 Patron Record Expiration Period · 33, 38, 39
 Patron Type
 Code · 82, 89
 description · 82
 Patron Type Code text box · 89
 patron type codes, valid characters and · 89
 Patron Type text box · 89
 Patron Type Values parameter
 Request Queue Priority Number · 219
 Patron Type Values window (fig) · 220
 Patron Types · 85
 Patron Types list box · 42, 73
 Patron Types parameter · 6, 82
 aspects of · 82
 deleting patron types · 88
 deletion confirmation message · 88
 Expiration Alert (Days) · 93
 HKPL tab · 281
 Include Item-Level Requests in That Number · 92
 Item Booking Limit · 92
 Max Hold, Recall, Loan, Page Limit · 93
 Patron Type
 Code · 88
 description · 88
 request limit and period · 89
 Requests Allowed on Same Bib-ID · 92
 setting request limits · 89
 setting request placement order · 90
 Total Dispute Threshold · 93
 Total Lost Threshold · 93
 Update Patron Type · 91
 Payment Date
 on fine receipt · 229
 Payment Method
 on deposit account slip · 245
 Payment Type
 on fine receipt · 229
 Period from Recall Letter to Due Date · 60, 63, 64

Period text box · 90
 Period Type · 127
 Pickup Location
 on loans/pages printout · 204
 on Requested In Transit slip · 238
 on Requested slip · 241
 pickup location for requests · 238, 241
 pop-up calendar · 32, 77
 pop-up menu (fig) · 6
 Prep Start Time
 on Requested In Transit slip · 237
 on Requested slip · 240
 Prep Time For Materials · 18
 Primary Patron Barcodes setting · 180
 Print Detailed Item Information
 on fine receipt · 229
 privacy restrictions · 224, 226, 230, 238, 241
 Process Lost/Damaged Item window · 22
 processing fee
 canceled at check-in · 37
 determining amount · 37
 setting · 36
 used for blocks · 37
 Processing Fee Used for Block · 33
 Profiler pop-up menu (fig) · 6
 Prohibit item fine payments at non-assessed locations
 setting · 143
 Protect from recall check box · 50, 54, 57
 ptrnblok file, automatically updating · 94, 97
 ptrnblok.txt file, automatically updating · 94, 97

Q

Quarter Loans · 56, 276

R

recall notice · 157
 recall privileges denied block · 117, 257
 recall request · 70
 allowing/not allowing · 53
 setting default expiration for · 53
 setting placement order · 90
 Recallable · 64
 Recallable by date · 156, 157
 Recallable By date · 64
 Recallable date on 3M receipt setting · 154
 recalled overdue items, setting fines for · 59
 recalled overdue notices · 157
 Recalled tab, enabling or disabling in the Virtua client
 · 139
 receipt header · 246
 Receipt Number
 on fine receipt · 229
 receipt slips · *See* Receipt/Slip Setup
 receipt/slip footer, configuring · 245

Receipt/Slip Setup · 221
 receipts, configuring · 221
 recommended workflow · 2, 8
 regular check-out loan periods · 56, 57
 Regular radio button · 56
 Remains at Check-in text box · 33, 159
 Remove focus from Close button on Check-in and
 Check-out messages setting · 160
 RemoveStreetDateStatus.sh · 147
 Renewal Limit · 69
 Renewal Limits · 52
 renewal loan periods · 56, 57
 Renewal Options, on Circulation Basic Options
 window · 148
 renewal override flag · 134
 renewal privileges denied block · 117, 257
 renewals · 142
 allowing within period of due date · 20
 block messages displayed during · 112
 blocks triggered by · 112
 limit for · 69
 limits for · 68
 restricting to staff's own location · 142
 setting loan periods for · 54
 Reprint Text
 on fine receipt · 230
 Request Allowed · 53, 71
 Request Clear Notification setting · 137
 Request Date
 on loans/pages printout · 204
 request expiration date · *See* Default Expiration Period
 Request Expiration Date
 on Requested Slip · 240
 Request From Group setting · 247
 Request Group Code · 249
 Request Group Name · 249, 250
 request group selection for pickup location · 247
 Request Groups
 adding · 248
 deleting · 251
 member locations · 249
 modifying · 250
 removing members · 249
 re-ordering members · 250
 Request Groups parameter · 247
 guidelines for setting · 248
 Request Location Routing parameter · 252
 Request Placement Order · 90
 request queue data, determining display of · 136
 Request Queue Priority Number · 219
 applies to unsatisfied requests only · 220
 setting to 5555 · 221
 Request Wizard (fig) · 157
 requested in transit slips, configuring · 236
 requested slip, configuring · 239
 Requested tab, enabling or disabling in the Virtua
 client · 139
 Requesting Location
 on Agency Request Slip · 243

- requests
 - allowing/not allowing · 71
 - allowing/not allowing holds
 - when item exists at log-in location · 40
 - when item exists at non-log-in location · 40
 - blocking · 109
 - blocks triggered by · 110
 - clearing unsatisfied · 137
 - default expiration period for · 53, 71
 - fees · 53, 71
 - including item-level requests in Requests Allowed on Same Bib-ID · 92
 - limiting number allowed · 89
 - limiting number allowed on same Bib-ID · 82, 92
 - number allowed on same Bib-ID · 89
 - on bibs with no items · 41
 - pickup location for · 14
 - pickup time for · 18
 - placement order of · 90
 - setting default expiration period · 71
 - setting limits for patrons · 89
 - setting priority levels · 221
 - setting types allowed · 18, 44
 - types of · 70
 - waiving · 131
 - Requests per item that trigger a loan rule change check box · 50, 54, 58
 - Requests tab · 53
 - Location + Patron + Item Matrix
 - Default Expiration Period · 71
 - Request Allowed · 71
 - Require Activity Dispute/Waive Notes setting · 131
 - Require Guarantor setting · 282
 - Required Document Type(s) settings · 282
 - Reserve Check-out Limit · 127
 - Reserve Limit Period · 127
 - Restrict checkouts to owned items setting · 142
 - Restrict staff mediated renewals to owned items setting · 142
 - Restrictions
 - on Requested In Transit slip · 238
 - on Requested slip · 241
 - review notice · 69
 - Review Notice Days Before Due Date · 52, 69
 - review notice settings · 68
 - Review Notice, setting values for · 69
 - Root Title on Requested In Transit slip · 237
 - Root Title on Requested slip · 240
 - Fine Codes window · 175, 176
 - Item Class Definitions window · 182, 183
 - Item Class Group window · 186
 - Library Calendars parameter · 190
 - Library Defined Dates parameter · 77
 - Library Hours parameter · 198
 - Library-defined Dates parameter · 80
 - Request Group window · 187, 250, 251
 - Schedule Circ Backup Job · 94
 - Schedule BlockPat · 95
 - Scheduled Jobs
 - HKPL Blacklist Generation · 283, 285
 - HKPL Whitelist Generation · 285
 - Scheduler window · 111
 - Second Call Number
 - on loans/pages printout · 204
 - Second Week button
 - Library Hours parameter · 197
 - Select a request group for pickup location check box · 247
 - SelfCheck Interface, 3M · 154
 - Send e-mail when requested item is checked in setting · 134
 - Set Circ button · 193
 - Set Location button · 194
 - SetConsiderAllRequestedItemsFlag.sh · 104
 - settings, system-assigned · 6
 - shelving location
 - printing on In Transit slips · 232
 - Shelving Location
 - on In Transit slip · 232
 - on loans/pages printout · 204
 - Show total requests with request queue position setting · 136
 - slip footer, configuring · 245
 - slip header · 246
 - slips, configuring · 221
 - Start Time
 - on Requested In Transit slip · 237
 - on Requested slip · 240
 - Starting Text
 - on Billed Material slip · 235
 - on check-in receipt · 227
 - on check-out/renew receipt · 224
 - on fine receipt · 230
 - on In Transit slip · 232
 - on Requested In Transit slip · 238
 - on Requested slip · 241
 - statuses
 - defining for items before street date · 147
 - disabling new for checked out items · 143
 - street date · 147
 - street date, of items · 147
 - surcharge · 24
 - System Check-out Block · 118
 - System Hold Block · 118
 - System Loan Block · 118
 - System Page Block · 118
 - System Parameters · 3, 99
-
- S**
- Save button · 26, 35, 43, 53, 73, 80, 105, 170, 176, 184, 186, 250
 - Add Patron Type window · 85
 - Check-out Limits window · 127
 - Controlled Patron Values window · 170
 - Fine Code window · 169, 175

- accessing · 99
- Account Adjustment Notes · 100
- Alerts and Blocks Matrix · 102
- Automatic Check-ins · 110
- Billed Patron Note · 112
- Block Code Definitions · 112
- Check-out Limits · 120
- Circulation Basic Options · 128
- Closed Dates · 161
- Controlled Patron Values · 166
- Fine Code Definitions · 174
- Item Class Definitions · 180
- Item Class Groups · 184
- Library Calendars · 188
- Library Hours · 195
- Loans/Pages Setup · 203
- Patron Block History · 206
- Patron Deposit Account · 207
- Patron Diagnostic Messages · 209
- Patron Type Values · 219
- Receipt/Slip Setup · 221
- Request Groups · 247
- Request Location Routing · 252
- System Parameters expanded (fig) · 99
- System Recall Block · 118
- System Renewal Block · 118
- system-assigned settings · 6

T

- tag 007 of the patron record · 112
- tag 043 of the patron record · 112, 114
- Time of Day · 33, 34, 39, 40
- Title
 - on Billed Material slip · 234
 - on check-in receipt · 226
 - on check-out/renew receipt · 223
 - on fine receipt · 229
 - on In Transit slip · 232
 - on loans/pages printout · 204
 - on Requested In Transit slip · 237
 - on Requested slip · 240
- too many
 - claims of items returned block · 117, 257
 - items
 - billed block · 117, 257
 - charged block · 117, 257
 - lost block · 117, 257
 - overdue block · 117, 257
- Total Dispute Threshold · 93
- Total Lost Threshold · 93
- Transaction Date
 - on deposit account slip · 245
- Transaction Reference Number
 - on Billed Material slip · 234
 - on check-in receipt · 226
 - on check-out/renew receipt · 223

- on deposit account slip · 245
- on fine receipt · 230
- on In Transit slip · 232
- on Requested In Transit slip · 237
- on Requested slip · 240
- Transaction Type
 - on deposit account slip · 245
- transactions, logging · 155
- translating
 - block code definitions · 216
 - Patron Diagnostic Messages · 214
- trap new items · 142

U

- Units
 - on Billed Material slip · 234
 - on In Transit slip · 232
 - on loans/pages printout · 204
 - on Requested In Transit slip · 237
 - on Requested slip · 240
- Unsatisfied Request Cancellation InfoStation report · 137
- Update Patron Type settings · 91
- Update request expiration date at check-in setting · 135
- UpdatePatronTypeByAge.sh · 91
- Use current date for renewals setting · 149
- Use due date for renewals setting · 149
- Use Long Loans setting · 64, 156
 - effect on recalls · 157
- Use These Limits check box · 121
- Use transaction location for due date calculations setting · 144
- user's guide
 - organization of · 1, 8

V

- validation checks · 182
- video tapes · 182
- View Bibliographic Record window (fig) · 156
- Virtua Getting Started Primer* · 1
- Virtua ILS – Integrated Library System · 1
- Virtua Profiler
 - global features · 1
 - overview of · 1
- Virtua Profiler main window (fig) · 3, 4
- Virtua Profiler/*
 - Acquisitions Parameters User's Guide* · 1
 - Cataloging Parameters User's Guide* · 1, 168
 - Getting Started Primer* · 1, 5
 - Global Settings User's Guide* · 1, 6, 7, 11, 30, 46
 - OPAC Parameters User's Guide* · 1
- Virtua system · 1
- Virtua System Management*

Circulation User's Guide · 8, 9, 29, 45
Virtua Translation and String Customization Guide ·
118

Withdrawal Reason
 on deposit account slip · 245
workflow, recommended · 7, 8
worksheets · 254

W

When Fees Are Present options · 132
Withdrawal list workflow · 131