



Circulation

WORKFLOW-BASED REFERENCE GUIDE

Circulation

2017



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Introduction to Circulation

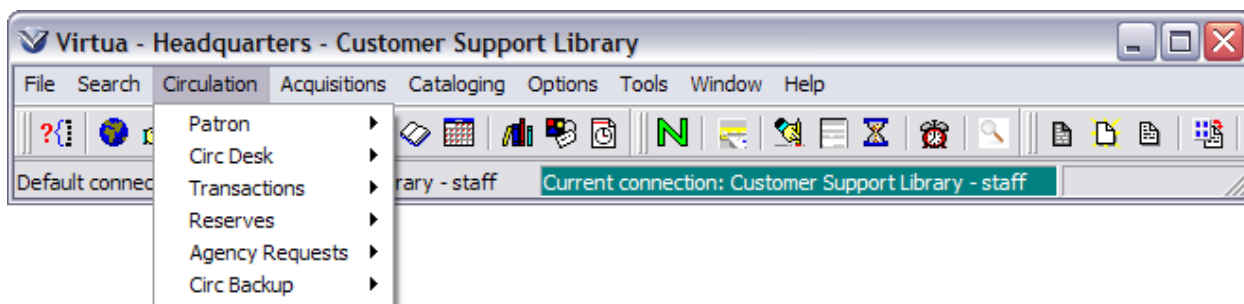
The intention of this workflow-based reference guide is to provide information about the Circulation module in Virtua, demonstrating the functions and features in the subsystem and providing instructions for performing tasks relating to circulation. As you read through the guide, it will be helpful for you to keep in mind particular needs, policies, and workflows as they will pertain to your library. Each library has special requirements to best meet the needs of the library staff and patrons. Virtua has been designed to meet those needs in a concise, intuitive way.

As an Integrated Library System, you cannot speak of any part of the system without referencing, in some way, all parts of the ILS. Circulation, by the nature of its functions, will touch on various parts of librarianship as they come together to provide patrons with the resources they require. Parts of this guide will seem like an OPAC guide, when searching for patron records, or a Cataloguing guide, when discussing the creation of Item records. It is in understanding these connections that the strengths of the Virtua Circulation subsystem will be most clear.







There are certain parameters and settings that must be configured in the *Virtua Profiler* when preparing to use circulation functions. You will need to setup Library Locations, Patron Types, and Item Classes prior to performing circulation transactions. Many of the settings needed for circulation will follow from these three main areas. The remaining settings will allow you to adjust the parameters to match the particular requirements of your library.


Understanding Menu & Toolbar

The Circulation drop-down menu displays the following selections: Patron, Circ Desk, Transactions, Reserves, Agency Requests, and Circ Backup.





Circulation Menu & Toolbar

Menu Bar	Icons	Function Keys	Function
<u>C</u> irculation			
<u>P</u> atron			
<u>N</u> ew		F7	Add a new patron
<u>R</u> ecord			Open a patron record
<u>A</u> ctivity		F2	Access patron activity
<u>A</u> ccount			Access patron account
<u>C</u> irc Desk			
<u>C</u> heck <u>I</u> n		F4	Check in an item
<u>C</u> heck <u>O</u> ut		F5	Check out an item
<u>R</u> enew		F6	Renew an item
<u>T</u> ransactions			
<u>R</u> equests			View requested items
<u>L</u> oans/Pages			View loans and pages
<u>A</u> udit Trail			Access the Audit Trail
<u>T</u> ransaction Log			Access the Transaction Log
<u>C</u> irc on the fly			Create a brief bib record

<u>R</u> eserves			View items on reserve
<u>C</u> reate		Ctrl+H	Open the Create Reserve List
<u>V</u> iew			Access Reserves
<u>A</u> ctive Items			View Active Reserve Items
<u>S</u> cheduled Items			View Scheduled Reserve Items
<u>R</u> eserves Due			Search for Reserves that are Due

Note: When used with the Alt key, underlined letters denote keyboard shortcuts
For example: **Alt + c + p + n** adds a new patron.

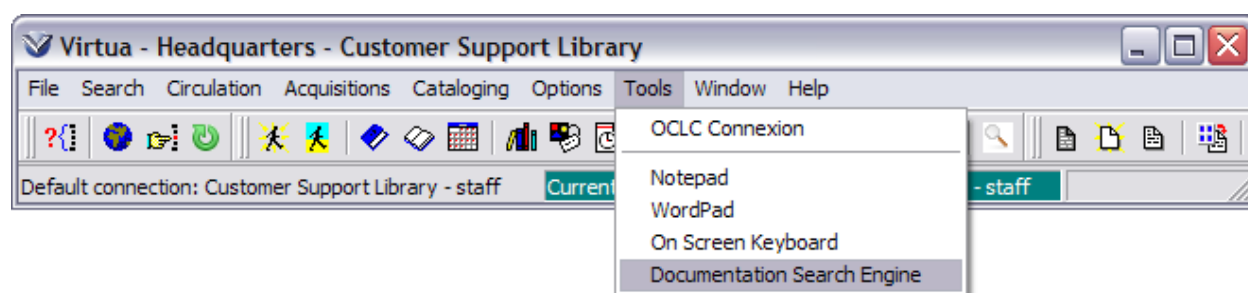
OPAC Menu & Toolbar

Menu Bar	Icon	Function Keys	Function
<u>S</u> earch			Opens Search window
<u>S</u> earch by State			Search by record state
<u>A</u> uthor			Author Search
<u>T</u> itle		F9	Title Search
<u>S</u> ubject			Subject Search
<u>C</u> all Number			Call Number Search
<u>P</u> atron Name		F8	Patron Name search (last name first)
<u>K</u> eyword		F12	Keyword Search
<u>I</u> SBN		Shift+F2	ISBN Control Number search
<u>I</u> SSN			ISSN Control Number Search
<u>L</u> CCN			LC Control Number Search
<u>P</u> atron Barcode		F2	Patron Barcode Number Search
<u>I</u> tem Barcode		F3	Item/Barcode number search
<u>I</u> SSN Serials		F10	Opens Serial Check-in window
Serial <u>A</u> bbreviation			
<u>I</u> nstructor			Reserve search by instructor name
<u>C</u> ourse ID			Reserve search by course number
<u>O</u> ptions			
<u>C</u> hange Location			Change Login Location
OPAC <u>D</u> isplay			Displays or hides Blind References, Authority Source, and Heading Type and provides Authority Browse Filter options

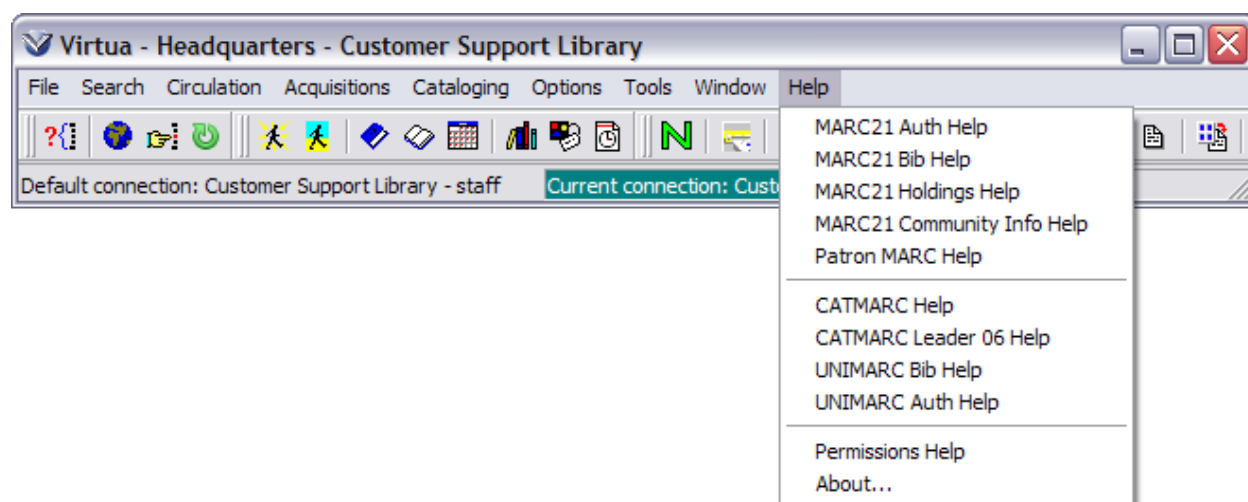
Note: When used with the Alt key, underlined letters denote keyboard shortcuts. For example: **Alt** + **s** + **a** performs an author search.

Documentation and Help

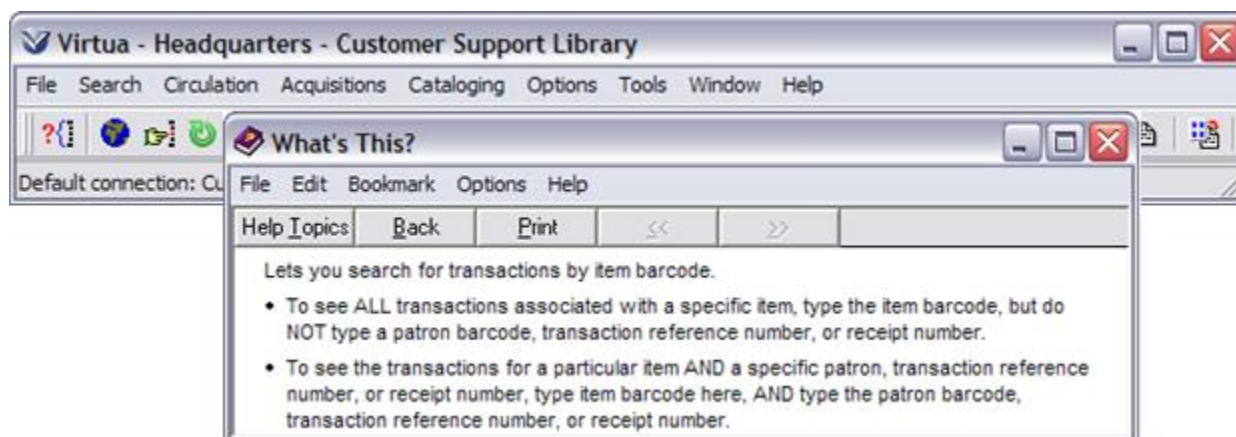
Virtua Users Guides are available in searchable .pdf format from the **Tools** menu; click on the **Tools** menu, then select **Documentation Search Engine**. The Documentation Search Engine appears on your **Tools** menu by default and is functional *only if* the Virtua documentation has been installed via the Documentation Installer. For details on the Documentation Search Engine, see the section *Getting Help with Virtua: Viewing and Searching the Virtua Documentation* in the *Virtua Client Getting Started Primer*.



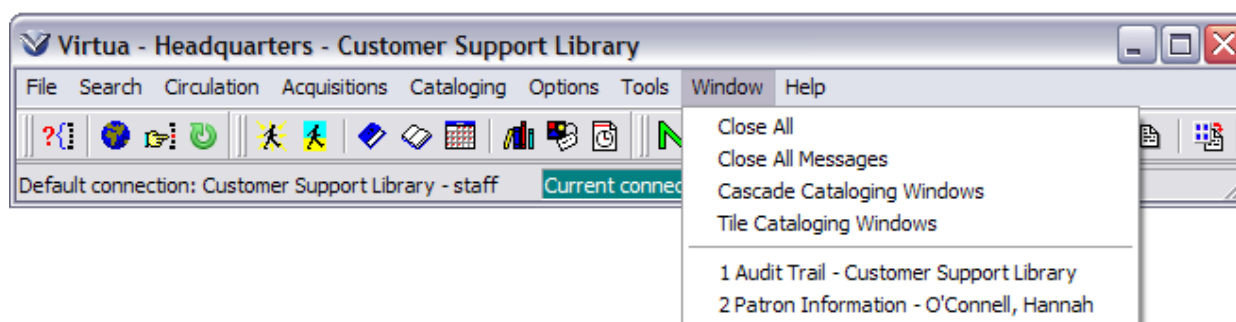
The **Help** Menu links to detailed information about **MARC 21, CATMARC, SWEMARC, and UNIMARC Format**.



Feature specific help is available; from the window for which additional information about a feature is wanted, using the **F1** key or right mouse click will bring forward more information regarding that portion of the window.



The **Window** Menu tracks the order in which open Virtua windows were accessed.



Item Records

Recommended Workflow	Explanation
<p>Edit Item Records</p> <pre> graph TD A[Obtain Bib Record] --> B[Open Item Record] B --> C[Edit Item Information] </pre> <p>Add Item Records</p> <pre> graph TD D[Obtain Bib Record] --> E[Add Item Record] E --> F[Add Item Information] </pre>	<p>An item record is a record that describes a physical or virtual piece in your library's collection. The item can consist of a single piece, such as a book, or multiple pieces in one or more physical formats, such as a multi-CD set with an accompanying printed pamphlet. The record contains identifying information that uniquely describes the item.</p> <p>While all copies share identical bibliographic information, other types of information are unique and differ from copy to copy. This information is vital for generating spine labels, processing requests, and for the proper functioning of Circulation.</p> <p>Summary</p> <ul style="list-style-type: none"> • Open and edit an Item Record • Add a new Item Record • Relate specific item information to its corresponding tab • Add Statuses to an Item • Add Notes to an Item <p>Key Terms</p> <ul style="list-style-type: none"> • Barcode Label • Barcode Number • Bibliographic Record • Circulation Notes • Item • Item Record • Main Location • Shelving Location • Statistics • Status

	Circulation Parameters
	<p>Profiler Parameters that affect item records</p> <p>Some parameters such as Library names affect selection options in dropdown menus. Others affect how the circulation system allows item records to be deleted.</p> <p>Global Settings Parameters</p> <p>Location Names: setup virtual locations (main locations and sub-locations) to represent the physical location of materials, usually circulation points, e.g. Main library, Reserve room, Special Collections, etc.; sets default values for the first item record associated with a bibliographic or holdings record, e.g. default item class, use Circulation Matrix, copy number value.</p> <p>Status Displays: setup special statuses for bibliographic, holdings, or item records, e.g. missing, damaged, lost, etc.</p> <p>Circulation: System Parameters</p> <p>Item Class Definition: Set up item class codes, descriptions of item classes, and class types (regular or reserve).</p> <p>Circulation: Circulation Basic Options Parameters</p> <p>Long Loan Flag: if set to ON a recallable by date will be generated and displayed on the item tab.</p> <p>Delete/Waive Flags</p> <p>Waive Fees Flag: if OFF prevents deletion of any item/patron record with associated fees.</p> <p>Delete Outstanding Requests Flag: if OFF system prevents deletion of any item/patron records with associated outstanding requests.</p> <p>Delete Special Status: if OFF system prevents deletion of any item/patron with a linked special status.</p> <p>Circulation Operational Security Permissions</p> <p>Item Acquisitions Tab: Determines whether the Acquisitions tab appears on the Item Information window in Edit mode</p> <p>Allow an item barcode to be modified: Determines whether the user can change an existing item barcode.</p>

Allow an item owning location to be modified:
Determines whether the user can modify the owning location of item records.

Allow item status to be edited at any location:
Lets staff modify the item status for items belonging to any location; useful for designating items as "In Transit"


Circulation InfoStation Reports

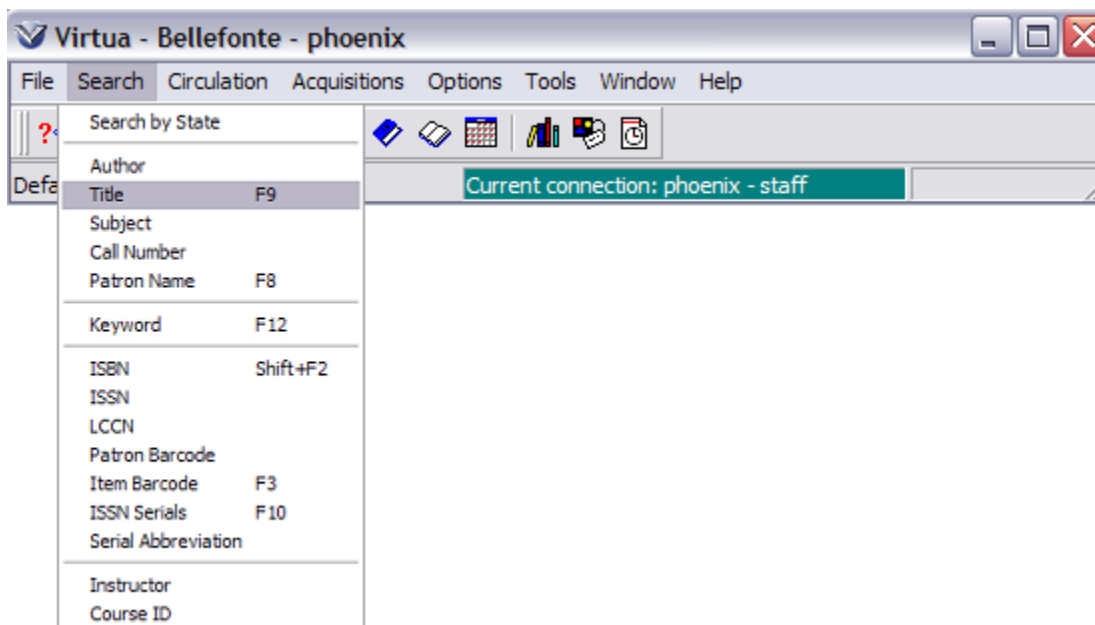
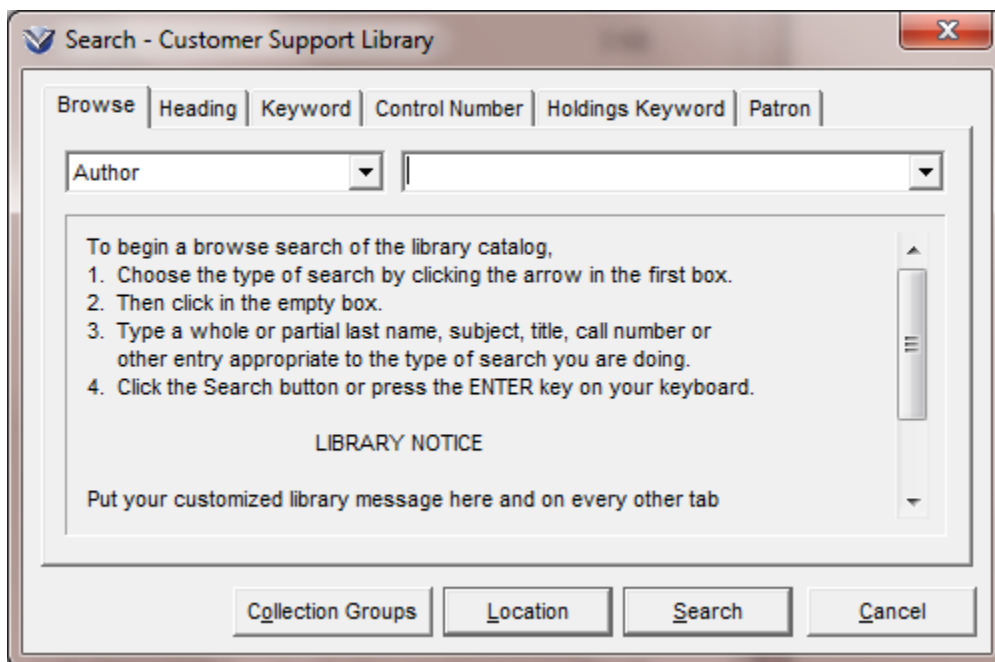
Items by Status: generates a list of items by status and location within a given barcode range.

Shelving Pull List report: generates a list of items that need to be returned from their current shelving location to their owning location.

Opening and Editing an Item Record

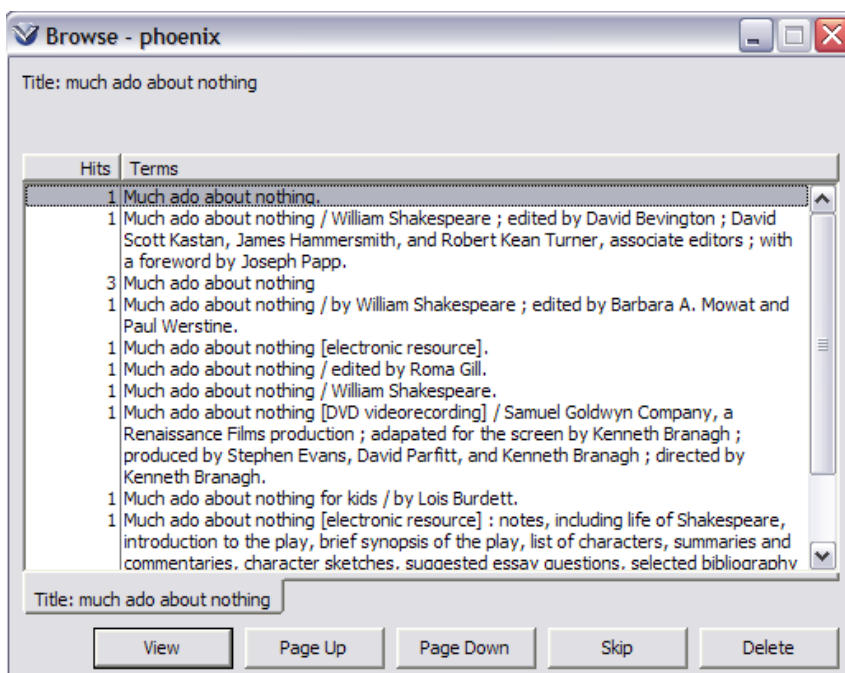
Obtain a Bibliographic Record

Search the OPAC by clicking the  icon or by clicking on **Search** and choosing a search type to verify that a bibliographic record exists.



If an exact match for your search term is found, the search term will be highlighted or in the case that it is the only matching record in the OPAC the View Bibliographic Record window will open.

If an exact match for your search term is *not* found the term before where your search term would be is highlighted.



Search terms with multiple hits retrieve an interim **List of Titles** window. To view a record from the list, click on the item or select the item by clicking on the **View** button. The **View Bibliographic Record** window will appear.

Open an Existing Item Record

Select the **Items** tab from the **View Bibliographic Record** window. A list of all items associated with the bibliographic record will appear.

View Bibliographic Record - NoiErnie18

1 / 1

Full **Items** MARC XML

Description: 128 p. : ill. (chiefly col.), col. maps ; 24 cm.
 Title: [Wind /](#)
 Imprint: Detroit [Mich.] : Greenhaven Press, c2007.
 Series: Fueling the future
 Publisher: Detroit [Mich.] :

Status Counts			
Checked Out:	0	On Reserve:	0
Available:	1	Requested:	0
On Hold:	0	Other:	0
Total Items:	1	Unsatisfied Requests:	0
Total Circ:	3	Total Requests:	0

Location	Item Class	Barcode	Call Number	Units	Copy	Status	URL
BRYAN STACKS	ITEM CLASS 0000:...	1000205093	TJ820 .W498 2007	1	1	Available	

Current Selection: 1 / 1

Location: ALL

Show Group View URL View Item Delete Item Request Item

Masked Agency Req View Archive Edit Request Bib Add Item Refresh Close

The View Bibliographic Record's Items tab contains the following information:

Label	Description
List of Items	Physical and/or virtual items attached to bibliographic record (or with the holdings record linked to the bibliographic record)
Item Level URL	If the item record has a URL an icon displays to the left of the call number.
Location	Where items are located
Call number(s)	Shelving location number
Units	Number of discrete pieces associated with the item
Copy	Specific copy number
Barcode	Barcode number of the item
Status	Items available, on reserve, booked, or which have outstanding requests
Status Counts	Tallies or counts of items with specific statuses
Requested	Number of outstanding requests for an item
Masked	If checked, the record will not display to users without permission

You can filter the list of items shown on the Items tab by location. To do this, select a location from the Location drop-down list. The drop-down list also contains an "ALL" option, which allows you to return to viewing all items associated with the bibliographic record.

Item Information

The **Item Information** window gives details about a particular physical piece in a library collection. While all copies of one title may have identical bibliographic information, other types of information are unique and differ from copy to copy.

From the **View Bibliographic Record** window, select an item and click on the **View Item** button or double click on the highlighted item. The **Item Information** window will appear.

Item Information - pho099

Item Elements | Statistics | Other Elements

Bibliographic Information
 Author: Shakespeare, William, 1564-1616.
 Title: Much ado about nothing / William Shakespeare ; edited by David Bevington ; David ...
 Publisher: Toronto ; New York : Bantam Books, 1988.

Item Information
 Item ID: 122510
 Barcode: 31781017282227
 Barcode Type: Regular
 Item Class: Book
 Reserves Item Class:
 Item URL:
 Location: North Regional
 Shelving Location: North Regional
 Number of Pieces: 1
 Price: \$ 6.95
 EPN Number:
 Accession Number:
 AV Accession Number:
 Collection Code:

Call Number
 Copy:
 Call #: 822.33 Q1 S
 2nd Call #:

Units
 Free Text
 Enumeration and Chronology
 None
 Edit

Preservation and Conservation
 Preservation and Conservation
 Code:

Non-Parameterized Shelf Location
 Non-Parameterized Shelf Location
 Location:

Circulation Rules
 Use Matrix
 Use Loan Period: 0
 Allow Request:

Masked
 Delete Edit Refresh Close

The Item Information window contains the following Tabs and Buttons:

Tab	Description
Item Elements	Bibliographic, item, and call number information, preservation and conservation codes, non-parameterized shelf location, and circulation rules
Notes	Public and staff notes and check-in and check-out alerts
Statistics	Information grouped by bibliographic information, record information, and circulation statistics
Status	Special or system-defined circulation statuses
Button	Description
Delete	Deletes the item record
Edit/Save	Displays as Save when in Edit mode to save changes
Refresh	Refreshes the item record display
Close	Closes the item record

To change item information, click the **Edit** button. Elements of the tabs will become active and the **Edit** button will change to a **Save** button.

Edit areas as needed. Click the **Save** button to save the changes.

Add Item Notes

To add an item level note, click on the **Notes** tab. If there is not a **Notes** tab, click the **Edit** button, a **Notes** tab will appear.

The screenshot shows a window titled "Item Information - phoenix" with a tabbed interface. The "Notes" tab is selected. The "Bibliographic Information" section contains the following text:

- Title: William Shakespeare's Much ado about nothing / edited and with an introduction by ...
- Publisher: New York : Chelsea House Publishers, 1988.
- Description: vii, 144 p. ; 25 cm.

Below the bibliographic information are four text input fields arranged in a 2x2 grid:

- Public Notes:
- Staff Notes:
- Checkout Alert:
- Checkin Alert:

At the bottom of the window, there is a "Masked" checkbox and four buttons: "Delete", "Save", "Refresh", and "Close".

Public Note: a note that appears in the OPAC.

Staff Note: a note that can only be viewed from this window.

Checkout Alert: a note that pops up an alert during checkout/renewal of item.

Check-in Alert: a note that pops up an alert during the check-in process.

Select the **Notes** tab. Add, modify, or delete text in the **Public Notes, Staff Notes, Checkout Alert, and Check-in Alert** fields as you would in any text box.

Click the **Save** button to save your changes.

View Item Statistics

Click on the **Statistics** tab to view circulation statistics for the item.

Item Information - phoenix

Item Elements | Notes | **Statistics** | Status | Acquisitions

Bibliographic Information

Title: William Shakespeare's Much ado about nothing / edited and with an introduction by ...
 Publisher: New York : Chelsea House Publishers, 1988.
 Description: vii, 144 p. ; 25 cm.

Record Information

Item ID:	54480	Last Modified:	12/15/2004
Barcode Date:	7/14/2004	by Operator ID:	9
Date Created:	6/26/2004		

Circulation Statistics

Circ Count:	35	In House Circ Count:	0
Temp Circ Count:	2	Temp In House Circ Count:	0
Since:	6/26/2004	Since:	6/26/2004
Reserve Count:	0	Last Inventory Date:	
Temp Reserve Count:	0	Last Circulation Date:	1/4/2011
Since:	6/26/2004		

Masked

Delete Save Refresh Close

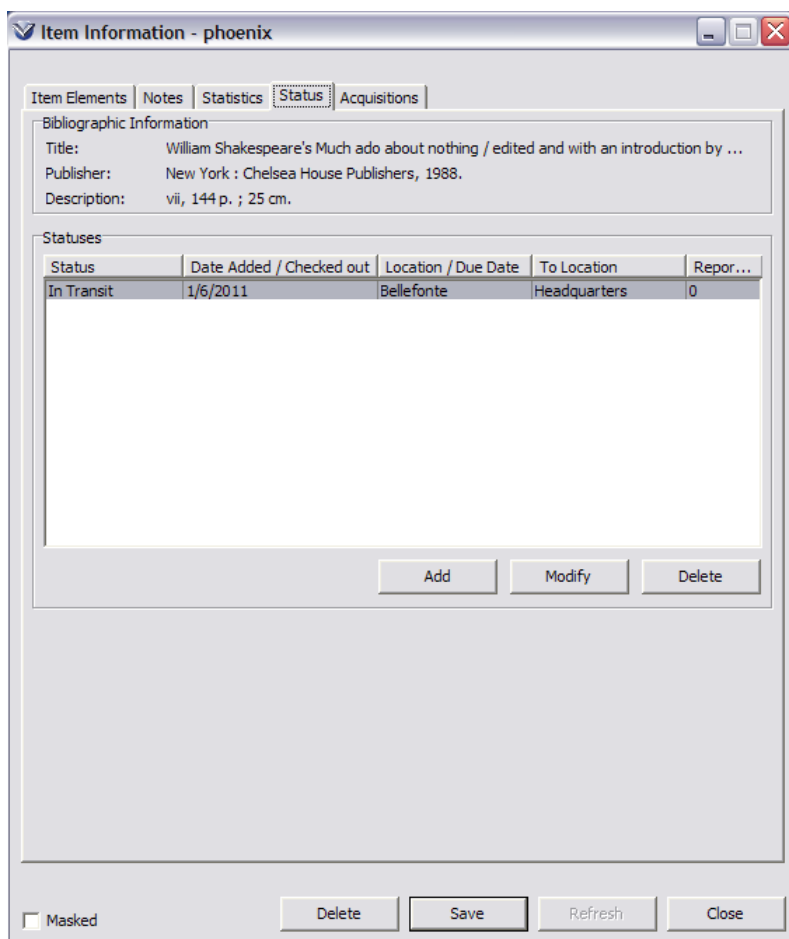
On the **Statistics** tab, the statistical data elements are organized into three sections:

- Bibliographic Information
- Record Information
- Circulation Statistics

The data elements that appear in the Bibliographic Information section of the **Item Information** window are configurable in the **Profiler** → **OPAC** → **Client Views** → **Item Information** parameter. Only the first three elements configured will display in the Bibliographic Information section. All other elements configured in this view are displayed on the Item tab of the View Bibliographic Record.

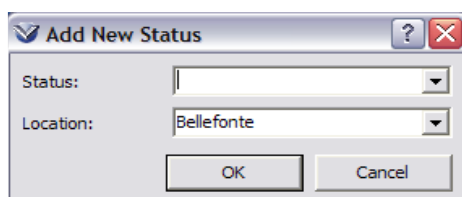
Add Item Status

From any tab of the **Item Information** window click the **Edit** button. The **Item Information** converts to edit mode, a **Save** button replaces the **Edit** button and the status and notes tabs appear. The **Status** tab will display before the edit button is clicked if any statuses are already associated with the item.



Select the **Status tab**.

Select the **Add** button. A dialog box appears for adding statuses. Select a status and location.



Click the **OK** button to add the status.

Click the **Save** button to save these changes.

The **Statuses** in the **Add New Status** drop down menu are configured in the **Profiler -> Global Settings -> System -> Status Displays** the library is able to create their own unique statuses to meet the needs of their library. Virtua comes with several system assigned statuses, it is recommended that these status not be deleted. Once a status is in use it can only be deleted if no items have that status assigned to them.

Add a New Item Record

From the **View Bibliographic Record** window click the **Add Item** button. The **Item Information** window will appear.

The screenshot shows the 'Item Information - phoenix' window with the following data:

Bibliographic Information	
Author:	Hemingway, Ernest, 1899-1961.
Title:	A farewell to arms / Ernest Hemingway.
Edition:	1st Scribner Paperback Fiction ed.

Item Information	
Item ID:	337809
Barcode:	31781011073929
Barcode Type:	Regular
Item Class:	Book
Reserves Item Class:	
Item URL:	
Location:	Headquarters
Shelving Location:	Headquarters
Number of Pieces:	1
Circulate Pieces:	<input type="checkbox"/>
Price:	\$ 13.00
EPN Number:	
Accession Number:	
AV Accession Number:	
Collection Code:	

Call Number	
Copy:	
Call #:	F HEMINGWAY
2nd Call #:	

Units	
<input type="radio"/> Free Text	
<input type="radio"/> Enumeration and Chronology	
<input checked="" type="radio"/> None	
Edit	

Preservation and Conservation	
<input type="checkbox"/>	Code:

Non-Parameterized Shelf Location	
<input type="checkbox"/>	Location:

Circulation Rules	
<input checked="" type="radio"/> Use Matrix	
<input type="radio"/> Use Loan Period:	0
Allow Request:	<input checked="" type="checkbox"/>

At the bottom of the window, there is a 'Masked' checkbox and buttons for 'Delete', 'Save', 'Refresh', and 'Close'.

Enter the item information appropriate to your library's specifications.

Click the **Save** button to save the item to the database.

Lost/Damaged Item Logic

Virtua Circulation Control uses the **Receipt Date** instead of the **Acquisition Date** to calculate the **Total Replacement Cost**. If the **Receipt Date** is not available, Virtua will use the **Acquisition Date**. The **Receipt Date** can be specified on the **Acquisitions** tab of the **Item Information** window in the client. If your library does not use this workflow, the **Acquisitions** tab can be hidden from display for any user using the **Profiler** → **System** → **User Profiles** → **Permissions** → **Operational Security** → **Item Information** permission flag.

The screenshot shows the 'Item Information - Virtua Library' window with the 'Acquisitions' tab selected. The window is divided into two main sections: 'Bibliographic Information' and 'Acquisitions Information'.

Bibliographic Information:

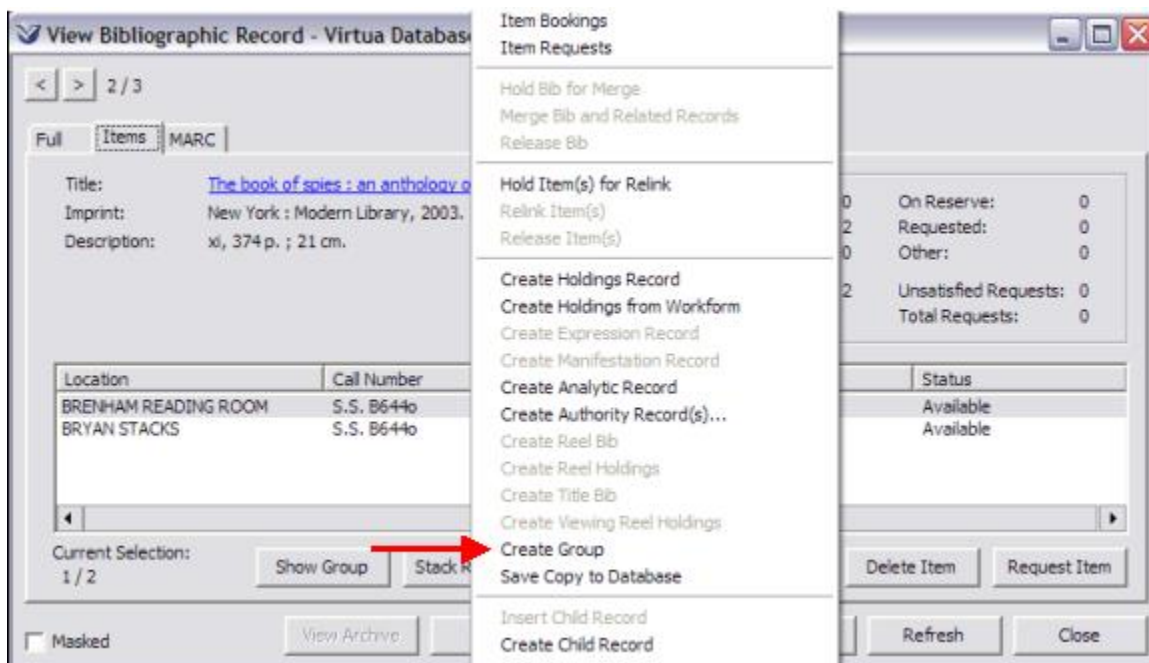
- Author: Fussell, Edwin S.
- Title: Lucifer in harness : American meter, metaphor, and diction / Edwin Fussell.
- Description: xv, 182 p. ; 25 cm.

Acquisitions Information:

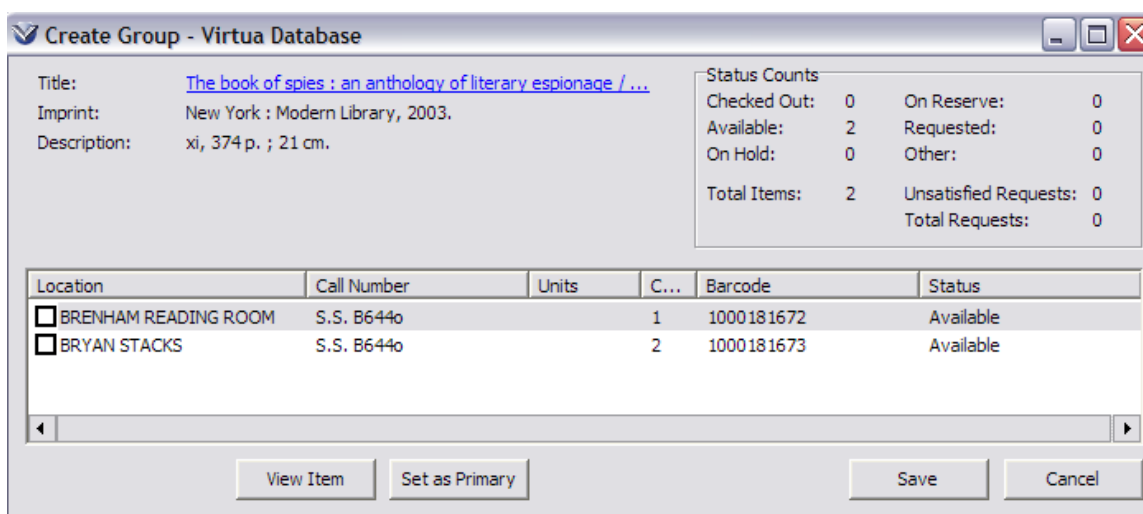
- Purchase Order Id: [Text Field]
- PO Line Number: [Text Field]
- Receipt Date: Use Date: 10/15/2014 [Dropdown]
- Invoice Unit Price: [Text Field]
- Invoice Number: [Text Field]
- Invoice Unit Discount: [Text Field]
- Invoice Currency: [Dropdown]
- Invoice Unit Fee: [Text Field]
- Vendor: [Text Field] (indicated by a red arrow)
- Original Purchase Price: [Text Field] [Dropdown]

Grouping Items for Circulation

When more than one item is attached to a bibliographic record, the **Create Group** option is available in the right-click menu of the **View Bibliographic Record** window.



Selecting this option opens the **Create Group** window, which displays the items attached to the bibliographic record.



On the **Create Group** window, select the item that you want to be the “primary” item, and then click the **Set as Primary** button. This action puts a check in the check box next to the item. The primary item is used to determine the circulation rules for the grouped items. Next, while holding down the Control keyboard button

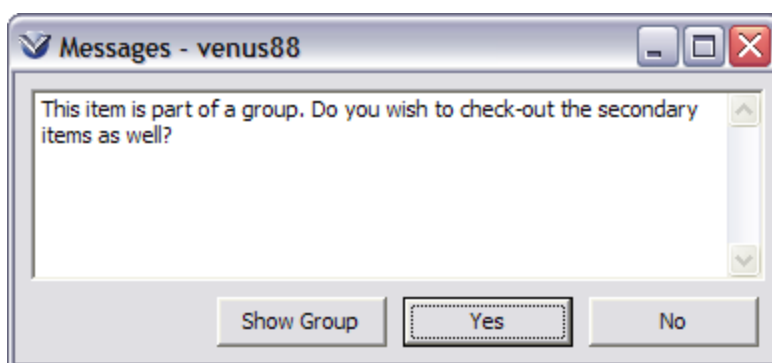
select/highlight the other items that you want to include in the group, and click the **Save** button.

From the **View Bibliographic Record** window, to see the group you created, click the **Show Group** button.

To show ALL of the items within any group attached to a bibliographic record, de-select all items on the **View Bibliographic Record** window, and then click the **All Groups** button. From the **Show All Groups** window you can choose to remove a non-primary item from a group, or you can break up an entire group by removing the primary item from the group.

Checking Out a Group of Items

On the **Check Out/Renew** window, when a barcode for an item belonging to a group is scanned for a checkout, Virtua displays the following message.



If you click **Yes**, the **Group Check Out/Renew** window appears displaying the primary item of the group in the list box. This window collects barcodes to send to the server for checking out all of the items in a group and to confirm that all of the items are present. The standard **Check Out/Renew** window remains open, but cannot be accessed until the **Group Check Out/Renew** window is closed.

On the **Group Check Out/Renew** window, enter the barcode of another item in the group.

On the **Group Check Out/Renew** window, you can...

- Click the **Show Group** button to see the **Show Group** window, containing the details about member items of the group.
- Click the **Check Out** button to send the items listed to the server for simultaneous checkout.

When you have checked out all of the items in the group, you can close the **Group Check Out/Renew** window, and Virtua will put the **Check Out/Renew** window back in focus.

When a patron checks out a group of items, the group of items counts as only ONE item (the primary item) against a patron's checkout limits, but *each* item in the group is counted when Virtua calculates alerts and blocks.

Library staff members have the ability to check out the primary item to patrons, without checking out the entire group, but a patron is unable to check out secondary items without checking out the entire group.

Once the items in a group are checked out, they must all be renewed at once. If a patron returns some of the items in a checked-out group, the rest of the items cannot be renewed.

Lost/Damaged Workflow for Grouped Items

When a patron has a group of items checked out, and the primary item is set to Lost, Virtua will assign the **Lost Processing** status to the primary item and the **Lost & Paid** status to the secondary items.

View Bibliographic Record - venus88

1 / 1

Full Items MARC

Author: Patterson, James, 1947-
 Title: Middle school, the worst years of my life / James Patters...
 Edition: 1st U.S. ed.
 Publication: New York : Little, Brown, 2011.
 Description: 281 p. : ill. ; 20 cm.

Status Counts
 Checked Out: 2 On Reserve: 0
 Available: 0 Requested: 0
 On Hold: 0 Other: 0
 Total Items: 2 Unsatisfied Requests: 0
 Total Requests: 0

Location	Call Number	Units	C...	Item Id	Barcode	Status	Collection Code
Hong Kong Central (*1...	[Fic]	1		8285	10000000008787	Due: 1/1/2012 7:0...	
Hong Kong Central (*1...	[Fic]	1		8284	10000000001238	Due: 1/1/2012 7:0...	

Current Selection: 1 / 2

Show Group View URL View Item Delete Item Request Item

Masked Agency Req View Archive Edit Request Bib Add Item Refresh Close

Patron Information - Grace Killion

Card Format MARC Format Activity Account

Total Items: 3

Barcode	Check Out Date	Due Date	Title	Checkout Location
2010082311	11/18/2011 11:06:52 AM	12/18/2011 11:06:00 AM	Enchanted glass / Diana Wynne Jones.	Hong Kong Central (*1000000)
10000000001238	12/2/2011 11:19:38 AM	1/1/2012 11:19:00 AM	Middle school, the worst years of my life / James ...	Hong Kong Central (*1000000)
10000000008787	12/2/2011 11:19:38 AM	1/1/2012 11:19:00 AM	Middle school, the worst years of my life / James ...	Hong Kong Central (*1000000)

Summary Checked Out

Change Due Date Lost Damaged Bill Extract To File Check In Renew Dispute Info

Print Receipt Update Renew All Refresh Close

View Bibliographic Record - venus88

< > 2 / 2

Full **Items** MARC

Author: Patterson, James, 1947-
 Title: Middle school, the worst years of my life / James Patters...
 Edition: 1st U.S. ed.
 Publication: New York : Little, Brown, 2011.
 Description: 281 p. : ill. ; 20 cm.

Status Counts
 Checked Out: 1 On Reserve: 0
 Available: 0 Requested: 0
 On Hold: 0 Other: 2
 Total Items: 2 Unsatisfied Requests: 0
 Total Requests: 0

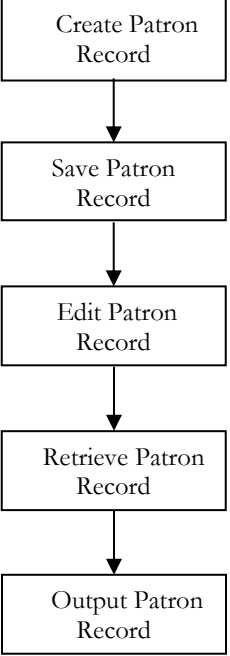
Location	Call Number	Units	C...	Item Id	Barcode	Status	Collection Code
Hong Kong Central (*1...	[Fic]		1	8285	1000000008787	Lost Processing	
Hong Kong Central (*1...	[Fic]		1	8284	1000000001238	Lost & Paid	

Current Selection:
1 / 2

Show Group View URL View Item Delete Item Request Item

Masked Agency Req View Archive Edit Request Bib Add Item Refresh Close

Patron Record

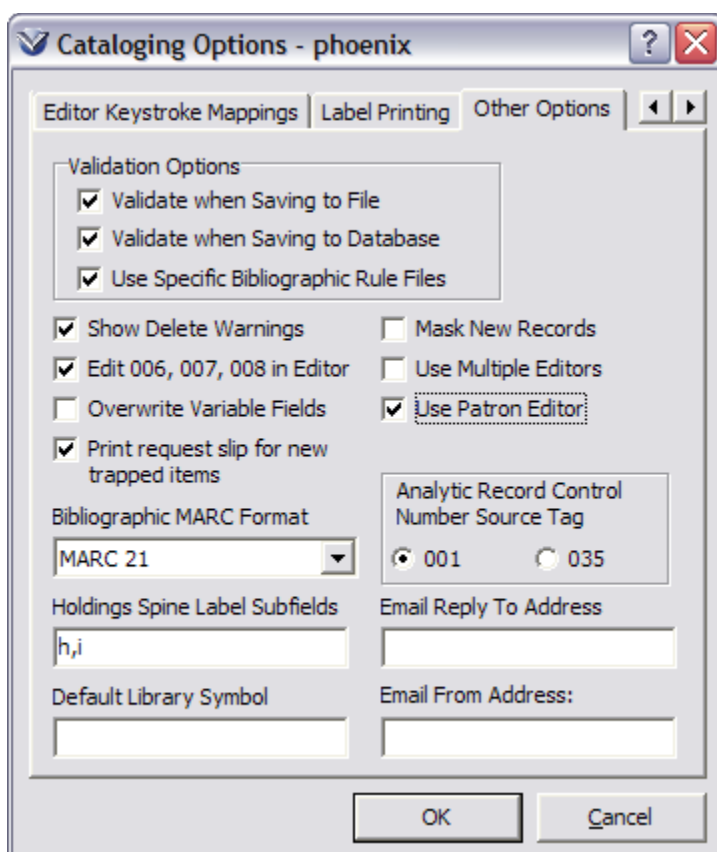
Recommended Workflow	Explanation
 <pre> graph TD A[Create Patron Record] --> B[Save Patron Record] B --> C[Edit Patron Record] C --> D[Retrieve Patron Record] D --> E[Output Patron Record] </pre>	<p>Virtua uses a 2709 MARC-like format to store patron records.</p> <p>Summary</p> <ul style="list-style-type: none"> Enter a Patron record in Virtua using the Patron Editor Save the Patron record to the database Identify elements of the Patron Information window Locate information on various tabs of the Patron Information window Print, Save and Email information <p>Key Terms</p> <ul style="list-style-type: none"> Patron Type <p>Profiler Circulation Parameters</p> <p>Circulation: Patron Types this parameter allows the library to define patron types and assign a patron code that is automatically entered in the 030 \a sub-field of the patron record when the patron type is selected from the pull-down menu. The parameter allows the library to set different circulation rules for different patron types.</p> <p>Circulation : Location + Patron Matrix</p> <p>Expiration Date: sets the length of time the patron's record remains active.</p> <p>Deletion Date: sets the time and date at which a patron record qualifies to be deleted from the system.</p>

	Circulation Parameters
	<p>Circulation InfoStation Reports</p> <p>Patron List: generates a list of patrons</p> <p>E-Mail Validation: generates a list of patron records, by patron type and address preference, that contain at least one invalid e-mail address</p> <p>Patron Record Load and Extract: allows a user to read patron records from a delimited or fixed length format input file and upload them to the Virtua database. Users may also download Patron MARC records that have changed in a given period and output them to a delimited or fixed length format file. This report is an Administrative Group report.</p> <p>Blocked Patrons: Generates a list of patrons that have a manual block in either the 043 tag or the 007 fixed fields of their patron record and meet the patron information criteria that you set for the report configuration.</p> <p>Expiring Patrons: Generates a list of patrons who meet the specified patron information criteria and whose patron records are due to expire within the amount of time specified for the report configuration.</p> <p>Patron Statistics: Generates counts and calculations for all transactions possible in the circulation transaction log for selected patron types from a date range specified. These transactions include requests, check-ins, check-outs, and notices.</p>

Use Patron Editor


The **Patron Editor** is a configurable workform in Virtua, which allows for easy creation/modification/deletion of patron records.

To use the **Patron Editor** in Virtua, instead of the **Patron Marc Editor**, on the Virtua menu click **Options** → **Cataloging Options**. The **Cataloging Options** dialog box appears. Click on the **Other Options** tab. Select the check box labeled **Use Patron Editor**. Click the **OK** button.



See Appendix D for Hong Kong Public Library Patron Editor and Card Format.

Create Patron Record

Select **Circulation** → **Patron** → **New** from the menu bar, or click on the  icon on the **Circulation** toolbar, or hit **F7** to open the **Patron Editor**.

The **Patron Editor** window allows you to create and edit patron records without using the **MARC Editor**, and without any specific knowledge of the 2709 patron record format.

The **Patron Editor** window has the following tabs: **Name**, **Main Address**, **Secondary Address**, **Email/Phone**, **Birthdate**, **Card Number/Password**, **Notes**, **Blocks**, **Passport**, **Academic Info**, and **Corporate Name**.

Click on a tab to add or edit patron record data.

Required fields will appear in red in the **Patron Editor**. As you fill in the fields, the information will appear in the **Patron Editor Header**. Required data elements must be completed for the patron record to be saved successfully. When all of the required information has been entered, the submit button will become active and the patron record can be saved to the database. The Virtua-required fields are Name, Street Address, Patron Type, and Barcode.

Note: If you do not enter a name on the **Name** tab, you can enter a corporate name on the **Corporate Name** tab to save the patron record.

Other required fields are configured in the **Patron Cataloging Options** window in the *Virtua Profiler Required Fields* section.

Profiler Tip: The **Patron Cataloging Options** parameter contains options that let you customize various aspects of the **Patron Editor** window in the Virtua client. See *Configuring Patron Cataloging Options* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

Many elements of the **Patron Editor** can be hidden from view by modifying the **Profiler** → **Global Settings** → **System** → **User Profiles** → **Group or User** → **Permissions** → **Cataloging** → **Patron Editor**.

Library Configurable Required Fields

Library specific required fields are configured in the **Profiler** → **Cataloging** → **Patron Cataloging Options**.

Primary Phone: This parameter requires a phone number be entered in the Primary Phone field before a patron's record can be saved.

Password: This parameter requires a password to be entered in the password field before a patron's record can be saved.

Valid Birth Date: This parameter requires a valid date of birth to be entered into a patron's record before it will be validated by Virtua.

Verified ID: Enabling this parameter will require an ID to be verified each time a Patron Record is modified by library staff. This parameter is disabled unless a library enables it in the Profiler. The **Verify ID** check box is located in the Card Number/PIN/Blocks tab. Selection of the check box enables the Enter New Barcode and Enter New PIN fields. When saving a *new* Patron record the Verified ID check box *must* be checked.

Patron Communication Preference Validation

There are the four communication options on the **Communication Preference** field drop-down list on the Email/Phone tab: Paper, Email, Text, and Text & Email. When the Communication Preference field has **Text**, **Text and Email** or **Email** as the preferred form of communication Virtua *will not* save a patron record without the appropriate Cell Phone or Email fields populated. If an attempt is made to save the patron record without the appropriate information an error message displays: The communication preference selected requires a cell phone number (or email address), please correct. The patron record *cannot be saved* if the appropriate communication preference fields are not populated.

The screenshot shows the 'Patron Editor - Customer Support Library' window. The main form displays the following information:

Name:	Hannah O'Connell	Cell Phone:	
Address:	1701 Kraft Drive	Email:	oconnelt@vtis.com
City:	Blacksburg	Patron Type:	VA
State:	VA	Birthdate:	20100222
Zip:	24060	Barcode:	vtis214
Primary Phone:	5405571201	Password:	*****
Alternate Phone:			

Below the main form, there are tabs for Name, Main Address, Secondary Address, Email/Phone, Birthdate, Card Number/Password, and Notes. The 'Email/Phone' tab is selected. In this tab, the 'Primary Phone' field contains '5405571201' and the 'Communication Preference' dropdown is set to 'Text'. There is also an 'Opt In For Phone Contact' checkbox which is unchecked.

An error dialog box is overlaid on the form with the following text:

Error

The communication preference selected requires a cell phone number, please correct.

OK

At the bottom of the main window, there are buttons for Delete, Next, Submit, and Close.

Patron Phone Contact Option

(only for phone contact with TALKINGtech's i-tiva phone messaging service)

The **Opt In For Phone Contact** check box on the Email/Phone tab of the **Patron Editor** determines whether the patron will be contacted via telephone for library notifications. When this check box is selected, the patron record will qualify for phone contact via the i-tiva phone messaging service.

The screenshot shows the 'Patron Editor - Customer Support Library' window. The 'Email/Phone' tab is selected. The form contains the following fields and values:

Name:	Hannah O'Connell	Cell Phone:	
Address:	1701 Kraft Drive	Email:	oconnell@vtis.com
City:	Blacksburg	Patron Type:	VA
State:	VA	Birthdate:	20100222
Zip:	24060	Barcode:	vtis214
Primary Phone:	5405571201	Password:	*****
Alternate Phone:			

Below the main form, there are several input fields and dropdown menus:

- Primary Phone: 5405571201
- Alternate Phone: [Empty]
- Cell Phone: [Empty]
- Primary E-mail Address: oconnell@vtis.com
- Secondary E-mail Address: [Empty]
- Communication Preference: E-mail
- Proxy Notification: Responsible person notifi
- Opt In For Phone Contact** (checkbox, highlighted with a blue box)

At the bottom of the window, there are four buttons: Delete, Next, Submit, and Close.

Note: TALKINGtech's i-tiva phone messaging service is a third-party product that works with InfoStation to alert users about overdue library items, the availability of requested items, recalled items, etc.

Patron History Flags

Patron Editor - Customer Support Library

Name: Hannah O'Connell Cell Phone:

Address: 1701 Kraft Drive Email: oconnell@vtls.com

City: Blacksburg Patron Type: AA

State: VA Birthdate: 2/14/1992

Zip: Barcode: vtls214

Primary Phone: 5571200 Password: *****

Alternate Phone:

Name | Main Address | Secondary Address | Email/Phone | Birthdate | Card Number/Password | Notes | Blc

Verified ID Expiration Date: 9/ 9/2016

Primary Barcode: vtls214 Record Permission: Read by another library

Primary Password: *****

Alternate Barcode:

Alternate Password:

Non-library use acceptable

Recall protection

Keep checkout history

Allow duplicate checkouts

Delete Next Submit Close

Select the **Keep checkout history** check box if you want Virtua to store the check-out history for this patron. This field corresponds to the 008 tag position 15 of the 2709 patron record format. Check-out history can be displayed on the History page of the Patron Information window if the user's permission settings call for the History page to be displayed.

The **Allow duplicate checkouts** check box affects both Chamo *and* Virtua; but in Virtua, the setting controls two aspects: patron history and duplicate check-outs. This field corresponds to the 008 tag position 16 of the 2709 patron record format.

When this setting is **checked** (default setting):

Virtua **will not** maintain patron checkout history.

Virtua **will** allow multiple check-outs of the same item to the patron.

When this setting is **de-selected**:

Virtua **will** maintain patron checkout history, which may be viewed on the **Patron Information** window.

Virtua **will not** allow multiple check-outs of the same item to the patron.

Note: Running the script **SetPatronAllowItemRepeatCheckoutOn.sh** enables the Allow Duplicate Checkout functionality for all patrons in the database.

Add Patron Notes

Patron notes added in the **Patron Editor** can display as pop-up alerts during Check-in, Checkout, Renew, and Request transactions. To change any of the fields in the Note Type, Print Notices, Display/ Alert, and Note Content highlight the specific field and double click inside the content you wish to modify.

Patron Editor - Customer Support Library

Name: Hannah O'Connell Cell Phone:

Address: 1701 Kraft Drive Email: oconnelle@vts.com

City: Blacksburg Patron Type: ST

State: VA Birthdate:

Zip: 24060 Barcode: vts214

Primary Phone: 540-557-1201 Password: *****

Alternate Phone:

Name	Main Address	Secondary Address	Email/Phone	Birthdate	Card Number/Password	Notes	Blk								
						<table border="1"> <thead> <tr> <th>Note Type</th> <th>Print Notices</th> <th>Display/Alert</th> <th>Note Content</th> </tr> </thead> <tbody> <tr> <td>General</td> <td>Do not prin...</td> <td>Do not displ...</td> <td>Patron's library ca...</td> </tr> </tbody> </table>	Note Type	Print Notices	Display/Alert	Note Content	General	Do not prin...	Do not displ...	Patron's library ca...	
Note Type	Print Notices	Display/Alert	Note Content												
General	Do not prin...	Do not displ...	Patron's library ca...												

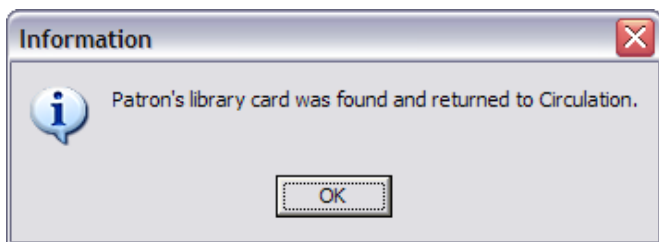
Most Recent Change
Date: 209051006 Operator: staff

Previous Changes
Date: 201209051002 Operator: staff

Record Created

Buttons: Add, Delete, Delete, Next, Submit, Close

To view the entire note right-click in the note section and select **Display Note**.



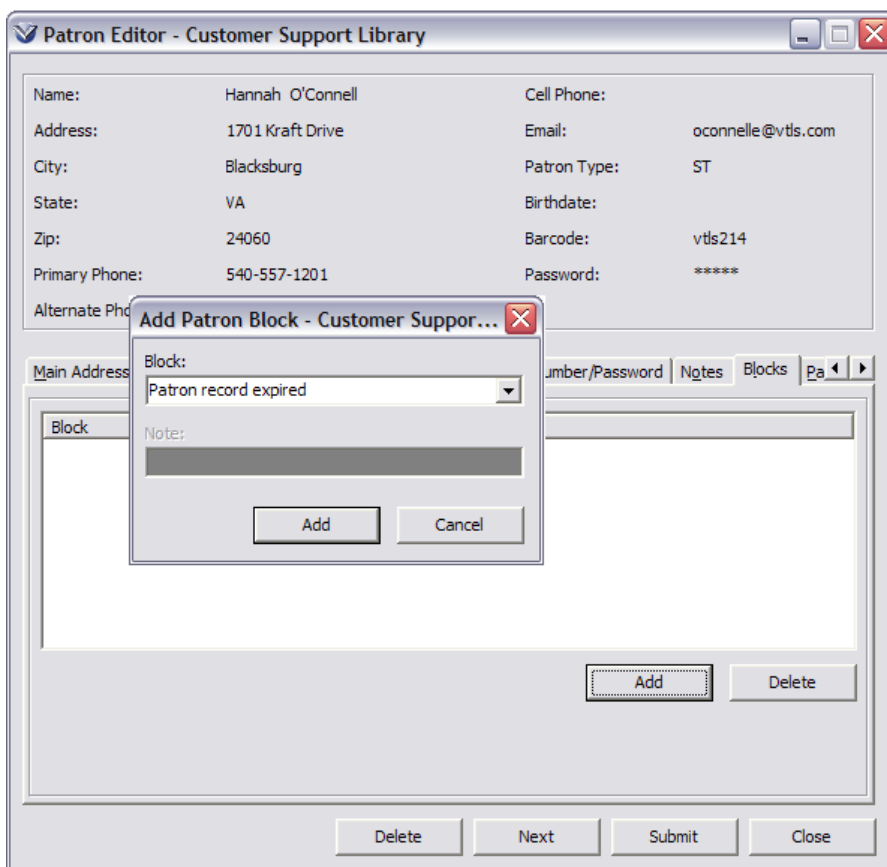
Blocks

The **Blocks** tab allows you to add a block to a patron record.

To add a block to a patron record, click the **Add** button to open the **Add Patron Block** window.

Select a block type from the drop-down list and click **Add**. The drop-down list contains the block descriptions as defined in the Block Code Definitions parameter in the *Virtua Profiler*.

To remove a block from the patron record, select the block you want to remove and click the **Delete** button.



Profiler Tip: The **Block Code Definitions** parameter lets you create definitions for the codes that your library uses to block patrons. See *Working with Circulation System Parameters: Configuring the Block Code Definitions Parameter* in the *Virtua Profiler/Circulation Parameters User's Guide* for more information.

Save the Record

When all of the required information has been entered, the submit button becomes active and the patron record can be saved to the database.

- **If** a patron record is saved with a duplicate barcode number, the system will generate an error message and the record will be saved in error state.
- **If** patron record duplicate checking is enabled, when a patron record is saved, Virtua launches a keyword search on the following fields in the patron record to check for duplicates:
 - Patron Name
 - Street Address
 - Social Security Number
 - Driver's License Number

The record is saved to the database, and the **Patron Information** window appears displaying the **Card Format** tab view of the record you just edited.

Duplicating Patron Records

A right click within the **Patron Editor** header will open a pop up menu with the option to create a **Duplicate Record in New Editor**. Selecting this option displays a copy of the current record in a new **Patron Editor** window, where the staff user may edit the copy of the record and then save it as a new patron record.

Note: Your library can choose to allow patrons to Self-Register for library cards in Chamo, to learn more about this workflow please refer to the Chamo Application Users Guide.

Edit a Patron Record

From the **Patron Information** window on the **MARC** or **Full** tabs, click the **Edit** button to open the **Patron Editor**.

Edit the record and save it again.

- If** you change the patron type, it will affect all *future* transactions once the record is saved.
- If** you change the barcode by moving it to the former barcode subfield or simply by changing it, the software can still link circulation transactions to this patron record since transactions are linked to the patron ID number.

The Patron Information Window

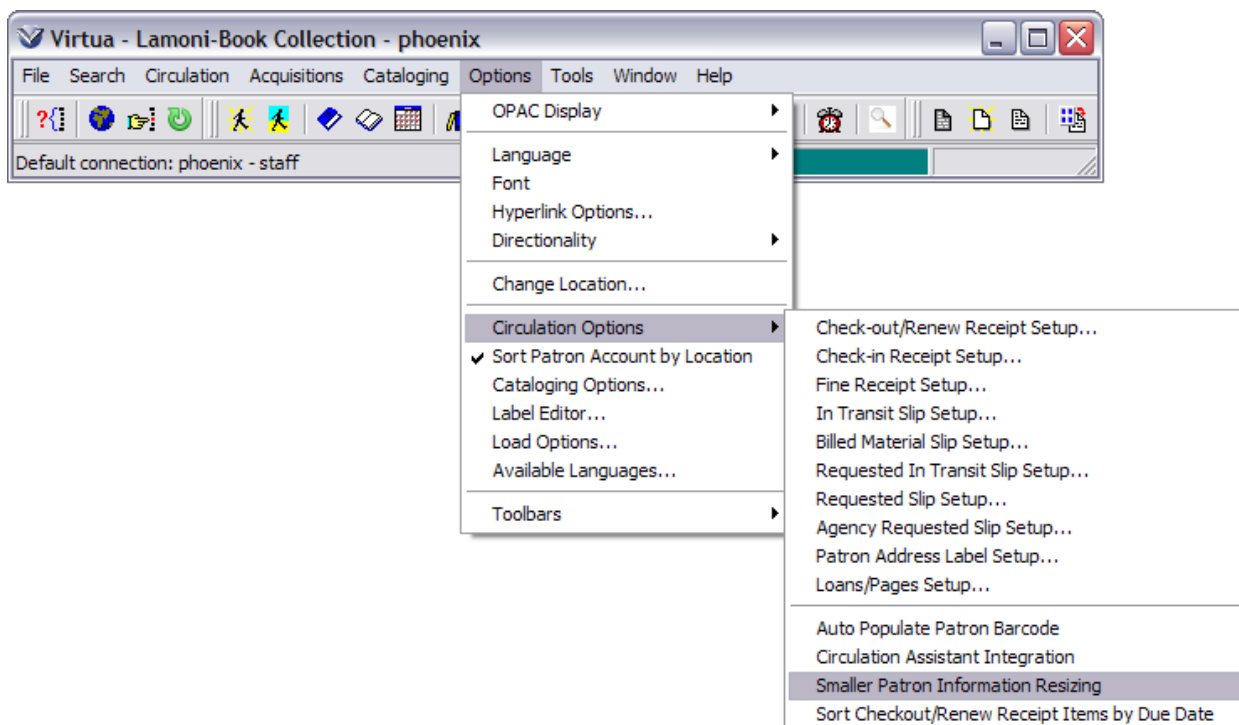
The **Patron Information** window contains the following tabs and buttons:

Tab	Description
Patron Record/Card Format	Patron information in format that your library can specify
Patron Record/MARC Format	Patron information in MARC format
Activity Tab	Displays patron circulation activity
Account Tab	Displays patron's account, such as fees or fines owed
Button	Description
Renew All	Renews all items that are eligible for renewal as determined by the Profiler settings. To renew specific items, navigate to the Activity Tab
Update	Updates patron expiration date (tag 042 subfield \$b) as determined by the expiration date parameters set in the Profiler
Refresh	Refreshes the window to reflect changes to the patron information
Close	Closes the Patron Information window

In addition, a right mouse click from the **Patron Information Window** will display several different menus depending on the tab.

Patron Information Window Resizing Option

The **Patron Information** window is unable to be resized until the **Smaller Patron Information Resizing** option is enabled. To enable the resizing option, on the Virtua Main Menu go to **Options** → **Circulation Options** → **Smaller Patron Information Resizing**. After enabling the option modify the **Patron Information** window using the arrows around the edge of the window to modify the size to your preference. Once the **Patron Information** window is resized the new window size is persistent.



Card Format

The **Card Format** is the public view of the patron record and displays the patron's personal information in a formatted view. The information displayed on the **Card Format** tab is configured in the **Profiler** → **OPAC** → **Client Views** → **Patron Information/Checkout/ Renew/ Check-in MARC View Editor**.

Patron Information - O'Connell, Hannah

Card Format | MARC Format | Activity | Account

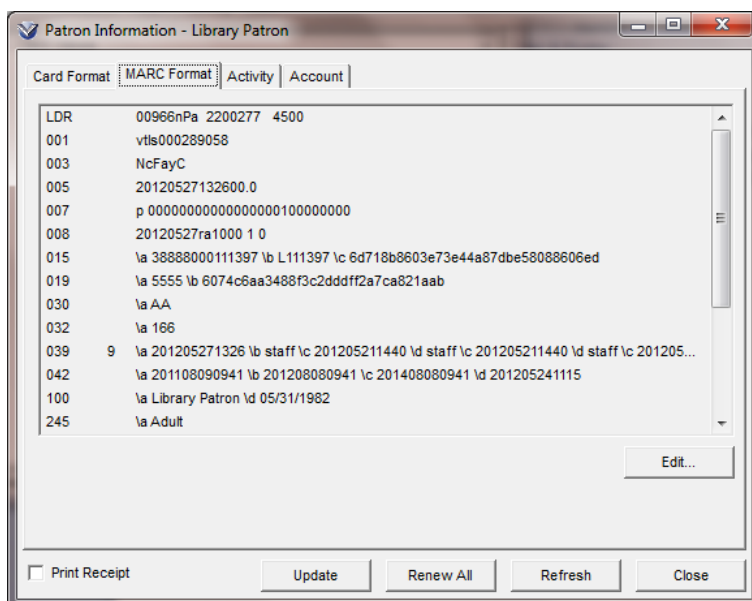
Patron barcode:	vtls214
Patron barcode:	1992
Name:	O'Connell Hannah
Patron Category:	AA
Date of Birth:	20100222
Home library:	Bellefonte
Primary Address:	1701 Kraft Drive, 24060, Blacksburg, Montgomery, VA, USA
Primary Telephone:	557-1200
E-mail:	oconnellh@vtscolm
Expiration date:	201112301111

Edit...

Print Receipt Update Renew All Refresh Close

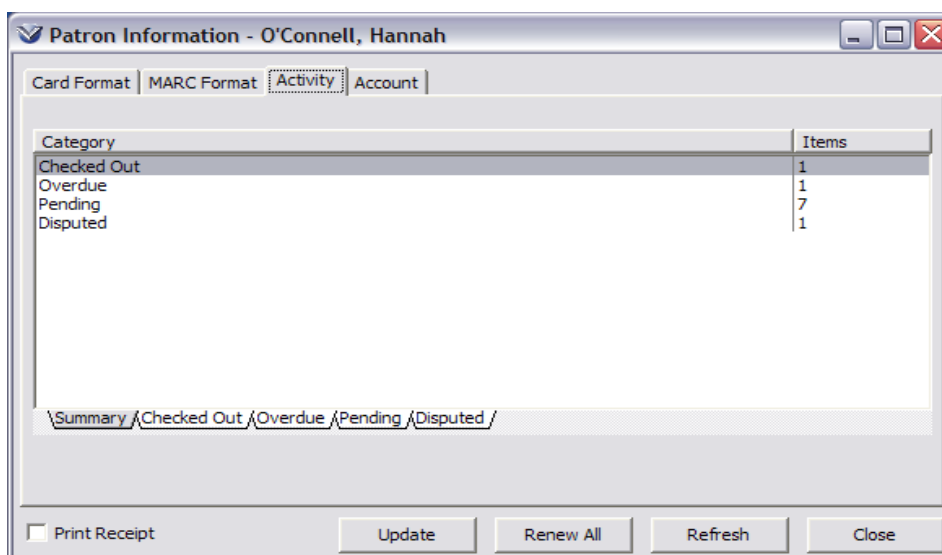
MARC Format

The **MARC Format** tab can be displayed in Virtua if your library chooses to enable this option in the **Profiler** → **Global Settings** → **System** → **User Profiles** → **Permissions** → **Operational Security** → **Patron Information** → **MARC Format** tab check box.



Activity Tab

The **Activity** tab lets you view and manage various aspects of a patron's circulation activity. Category tabs will only display when a patron has an item in a category. If the patron has an item that is checked out and overdue, it will display on the **Overdue** sub-tab, not on the Checked out tab.



The Category sub-tabs contain columns of information about each item; your library can choose which information is to be displayed in these columns. This information is configured in the **Profiler** → **OPAC** → **Client Views** → **Patron Activity**: category sub-tab of user's choice to define. Information columns can be resorted by clicking on the column header. If the patron has multiple items on their Checked Out sub-tab these can be resorted by Title, Due Date, or any column header displayed.

Title	Barcode	Hold Till Date	Pickup Location	Notice Sent
Dangerous dating : helping young women break out of ab...	31781038014625	12/13/2011 10:28:57 AM	Headquarters	No

Suspending Pending Requests

To deactivate pending requests click the **Deactivate** button to open the **Add Suspension Dates** window. The **Add Suspension Dates** window allows staff to determine a date after which the selected request will be suspended.

To suspend the request indefinitely, define only a **Start Date**.

To automatically reactivate the request after a certain date, select the **Use End Date** check box and define an end date.

Click the **Save** button to save your changes.

Possible Category Sub-tabs for Display on the Activity Tab

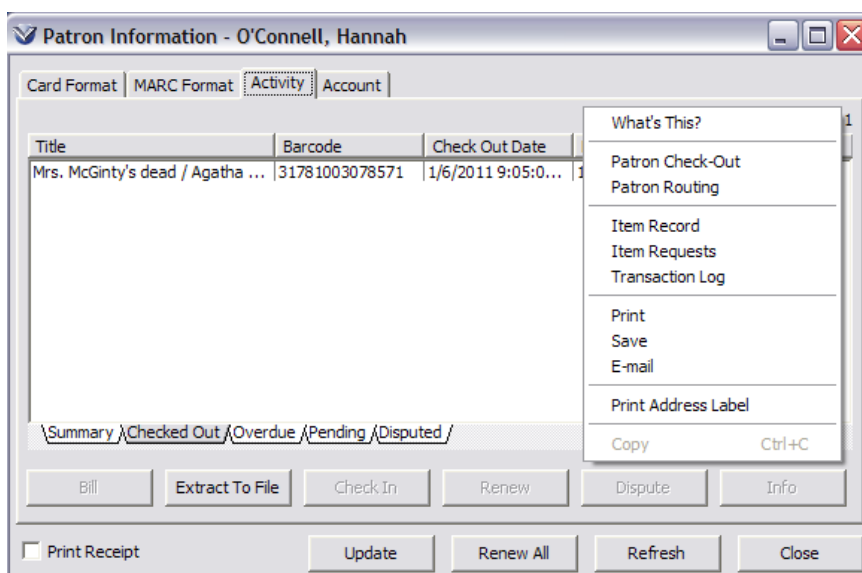
Tab	Description
Checked Out	Items Checked Out
Overdue	Items Overdue
Billed	Items Billed for Replacement
Requested Billed	Billed Items Requested from the patron
Requested	Items Requested from the patron
Requested Overdue	Items Requested from the patron, which are overdue.
Pending	Items Pending (that is, items requested by or for the patron)
In Transit	Requests that have been trapped but that are not ready for pickup
Pickup	Requests for the patron that have been satisfied and are ready for Pickup, including materials booking, holds, recalls, and loans
Disputed	Items Disputed by the patron
Waived	Items Waived by the library
History	History of patron transactions (008 Positions 15 & 16)

Account Tab

From the **Account** tab, you can view and manage all the fines and fees associated with a patron's account.

Categories on the **Account** tab will only display if a patron has items in the category. If a category has no items, the tab for that category does not appear on the window.

Account Summary Sub-Tab

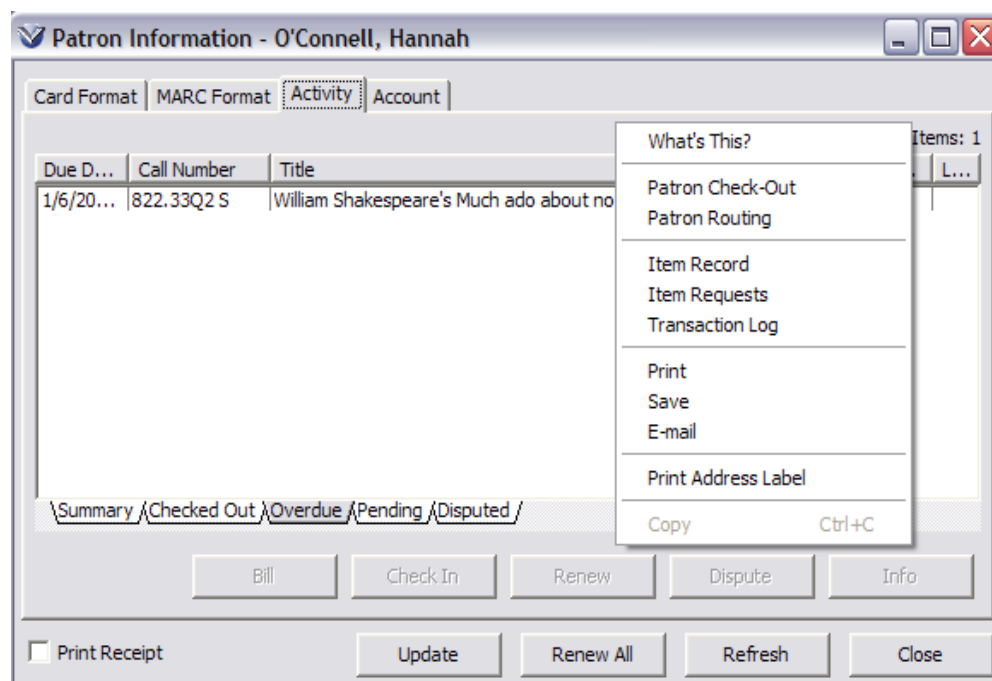


Fee and Fine Categories

Virtua includes a set number of default fee and fine categories. Your library can define additional fees/fines in the **Profiler** → **Circulation** → **System Parameters** → **Fine Code Definitions**. Listed below are the default fee and fine categories.

- Overdue
- Late Renewal
- Item Price Fee
- Damaged Item
- Recall
- Processing Charge
- Dispute

Right Click Pop-up Menus for Activity and Account Tabs

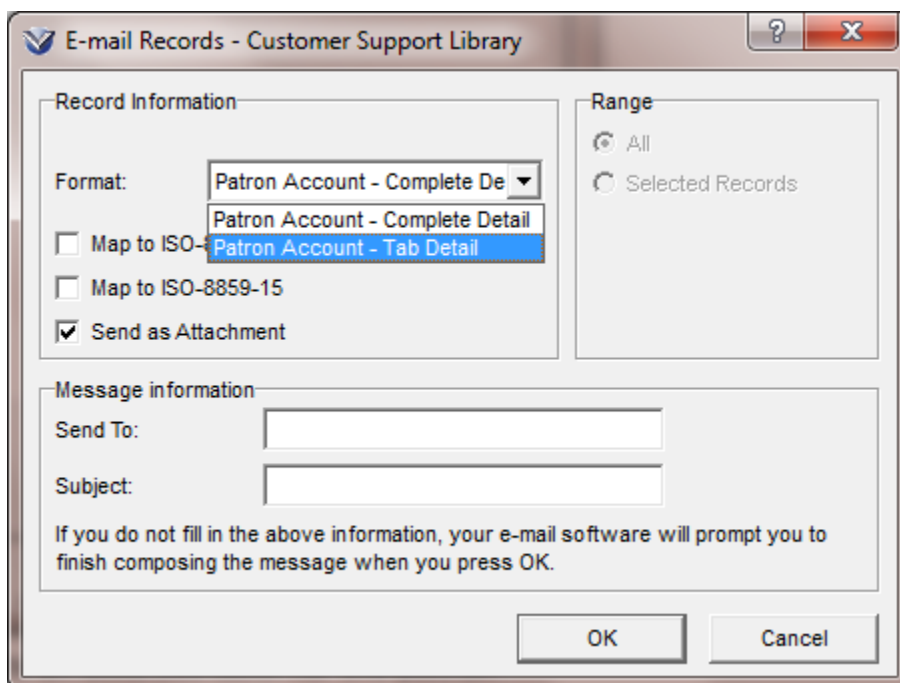
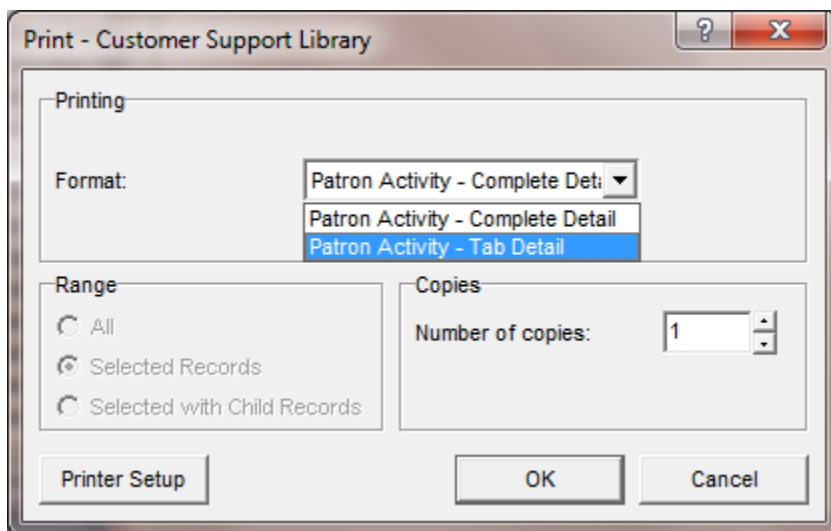


Right Click Pop-up Menus Contain the Following Options

Option	Description
Patron Checkout	Opens the checkout window
Patron Routing	Displays serials routing lists the patron is on
Item Record	Retrieves the item record
Item Requests	Displays items requested by patron
Transaction Log	Displays transaction log for the patron (Activity tab)
Audit Trail	Displays audit trail log for the patron (Account tab)
Lost/Damaged Note	Displays the Lost/Damaged information when an item has been marked Lost or Damaged
Print Address Label	Prints an address label for the patron
Print	Print Activity or Account information
Save	Save Activity or Account information to workstation
Email	Email Activity or Account information to self or other interested party

Print, Save, and E-mail

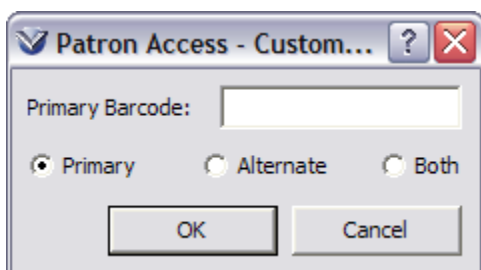
The right click pop-up menu from the **Activity** and **Account** tabs in the **Patron Information** window allows you to Print, Save, or Email the information contained in the tabs. You can record in the information in full using the Complete Detail option or per tab using the Tab Detail option



Retrieve Patron Records

To Obtain Patron Information by Entering a Patron Barcode

Click the **View Patron Information** icon , press the **F2** key on your keyboard, or select **Circulation** → **Patron** → **Record** on the Virtua menu bar. The **Patron Access** window will appear.




Select the **Primary**, **Alternate**, or **Both** radio button. The **Both** radio button allows you to search both the primary (patron record 015 tag) and alternate (patron record 016 tag) patron barcodes in a single search. The presence of the **Both** radio button is determined by an operational security permission setting in the *Virtual Profiler*.

Enter the patron barcode and click **OK**. The **Patron Information Window** will appear displaying the patron record.

Note: The radio button setting is persistent and becomes the default the next time the **Patron Access** window is opened.

To Obtain Patron Information Without a Patron Barcode

Patron Keyword Search Types

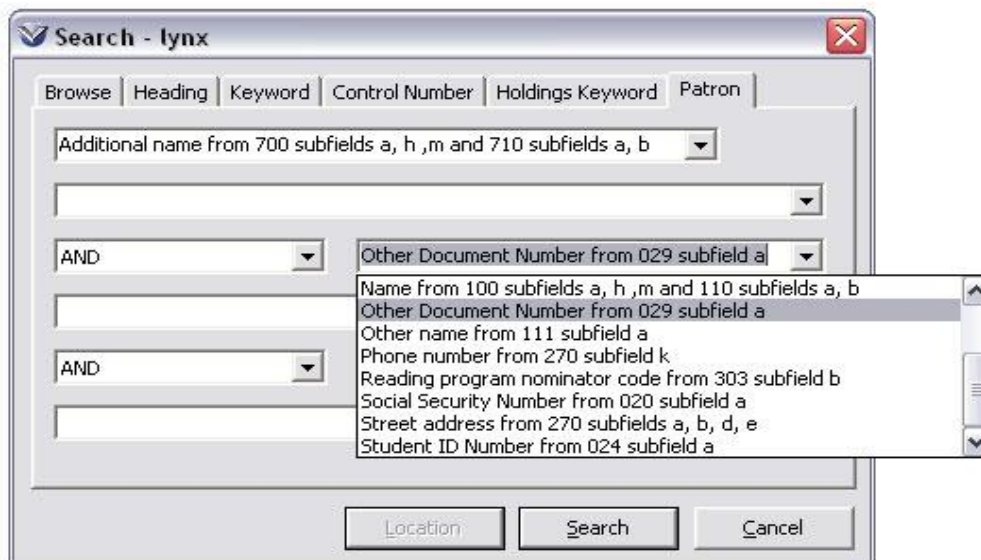
On the toolbar, click the **Search** icon  and choose any of the following options from the drop down menu in third row of the Patron search tab **Patron Name**, **Reading Program Nominator Code**, **Other Name**, or **Other Document Number** as your search category, or press **F8** (opens patron name browse search).

For the **Patron Name** search enter the name of the patron (last name, first name) and click the **Search** button. The **Browse Window** appears.

For the **Reading Program Nominator Code** Search enter the ID number assigned to the patron.

For the **Other Name** search enter _____.

For the **Other Document Number** search enter the number of the document. This is defined by the library for the 029 tag.

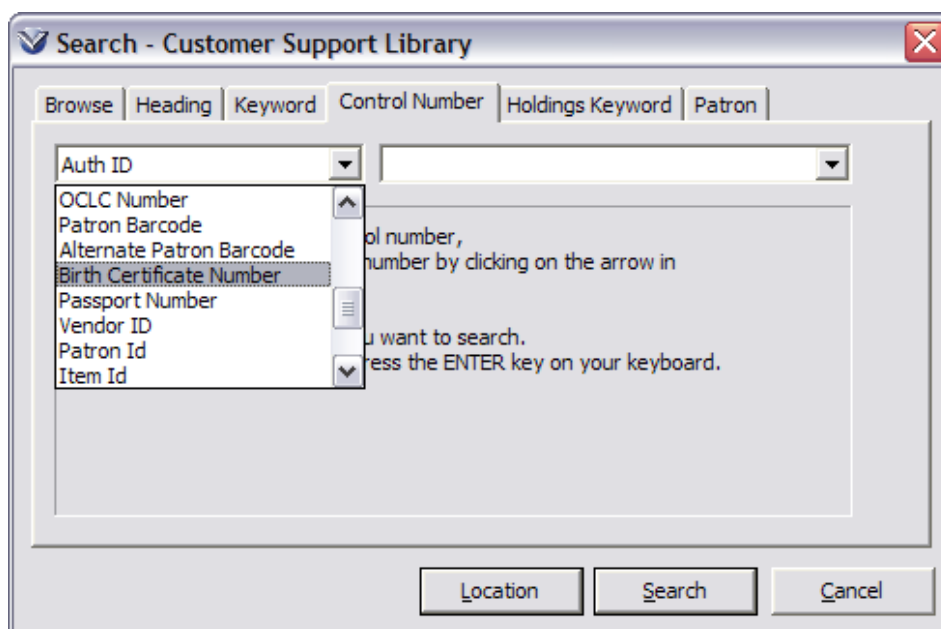


Double-click the name of the patron whose information you want to view. The **Patron Information Window** will appear.

Control Number Search Types

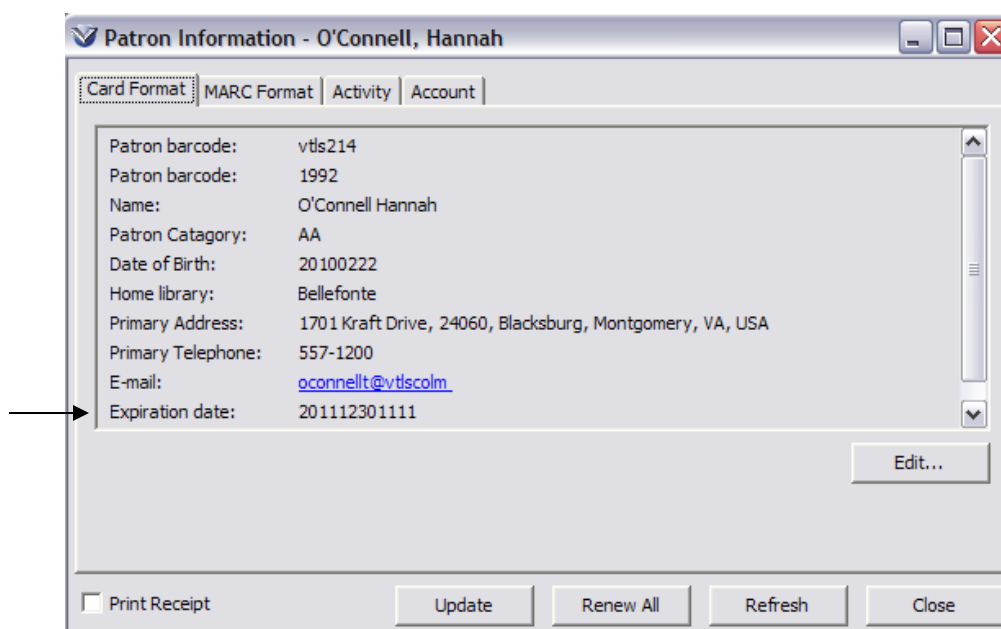
Patrons can also be search for by Control Numbers in the **Search** window, using the following control number types:

- Birth Certificate Number (patron record 025 tag subfield \$a)
- Passport Number (patron record 022 tag subfield \$a)



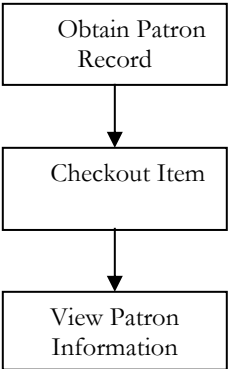
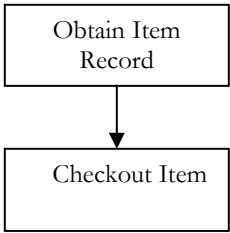
Update a Patron's Expiration Date

Open the patron record in the **Patron Information** window:



If a patron record is about to expire clicking on the **Update** button will reset the expiration date. A new expiration date will be set based upon the parameters set in the **Profiler** → **Circulation** → **Location + Patron Matrix**. Both the expiration date and the delete date parameters can be set as a fixed date, for example, the end of a semester or the parameters can be a calculated date, for example, 2 years from the date the patron was first entered into the system.

Checkout Item

Recommended Workflow	Explanation
<p><i>Checkout from Patron record</i></p>  <pre> graph TD A[Obtain Patron Record] --> B[Checkout Item] B --> C[View Patron Information] </pre> <p><i>Checkout from Item Record</i></p>  <pre> graph TD D[Obtain Item Record] --> E[Checkout Item] </pre>	<p>Virtua provides a simple and straightforward workflow for checking out items.</p> <p>Summary</p> <ul style="list-style-type: none"> Retrieve a patron record by entering a patron barcode Retrieve a patron record by performing a browse search Checkout an item View patron limits tab Retrieve patron information for a checked-out item <p>Key Terms</p> <ul style="list-style-type: none"> Audio Signals Circulation Matrix Check-out Due Date Fixed Due Date Patron Limits Receipt <p>The Profiler parameters listed below affect the checkout process.</p> <p>Circulation: System Parameters</p> <p>Checkout Limits: sets total number of items a patron may check out.</p>

	Circulation Parameters
	<p>Circulation: Location Specific Parameters</p> <p>Closed Dates: sets dates library is closed and adjusts due dates accordingly.</p> <p>Library Hours: sets hours library is open for each main location. Sub-locations have the same hours as their main location.</p> <p>Library Defined Dates: allows library to set a fixed due date for the loan parameter in the Location + Patron+ Item Matrix, e.g.: at the Main Library all books checked out to faculty are annual loans and therefore due Dec.31st.</p> <p>Alerts and Blocks Matrix Defines system-calculated Alerts and blocks based on: Number of overdue items Number of overdue items with requests Number of days overdue Number of bills Number of overdue reserves Amount of money owed to library</p> <p>Circulation: Location + Patron + Item</p> <p>Loan Rules: determines fixed or calculated loan period based on checkout type.</p> <p>Requests per Item that trigger a loan rule change: If more than the number of requests specified here are placed against an item, the loan period for this item is automatically set to the Guaranteed Circulation Period.</p> <p>Circulation: Location + Patron</p> <p>Set Default Date & Time: Sets default date and time that displays on the checkout/renew window when Fixed Date and Time is selected.</p> <p>Circulation: Location + Item</p> <p>For the Items Circulating Less Than One Day Are Due at Closing setting, it gives the option of choosing either . . .</p> <p>Yes - An item with a loan period of less than one day is due at closing on the day it was checked out.</p> <p style="text-align: center;">-OR-</p> <p>No - An item with a loan period of less than one day is due the following business day if its loan period has NOT expired by closing on the day it was checked out.</p>

For the Items Circulating One Day or More Are Due at Closing setting, it gives the option of choosing either . . .

Yes - Items are due by closing on their due dates.

-OR-

No - On their due dates, items are due at the same time they were checked out.

Circulation InfoStation Reports

Basic Circulation Statistics: generates circulation statistics.

Circulation by Call Number Range: generates count of items by call number range, location, and date range.

Circulation Snapshot: generates a summary of circulation statistics at the time the report is run.

Bills: generates a list of overdue items that are eligible for billing. It can generate billing notices/emails.

Overdues: generates a list of overdue items. It can generate overdue notices/emails.

Review Notices: generates a review notice for patrons whose borrowed items are about to come due.

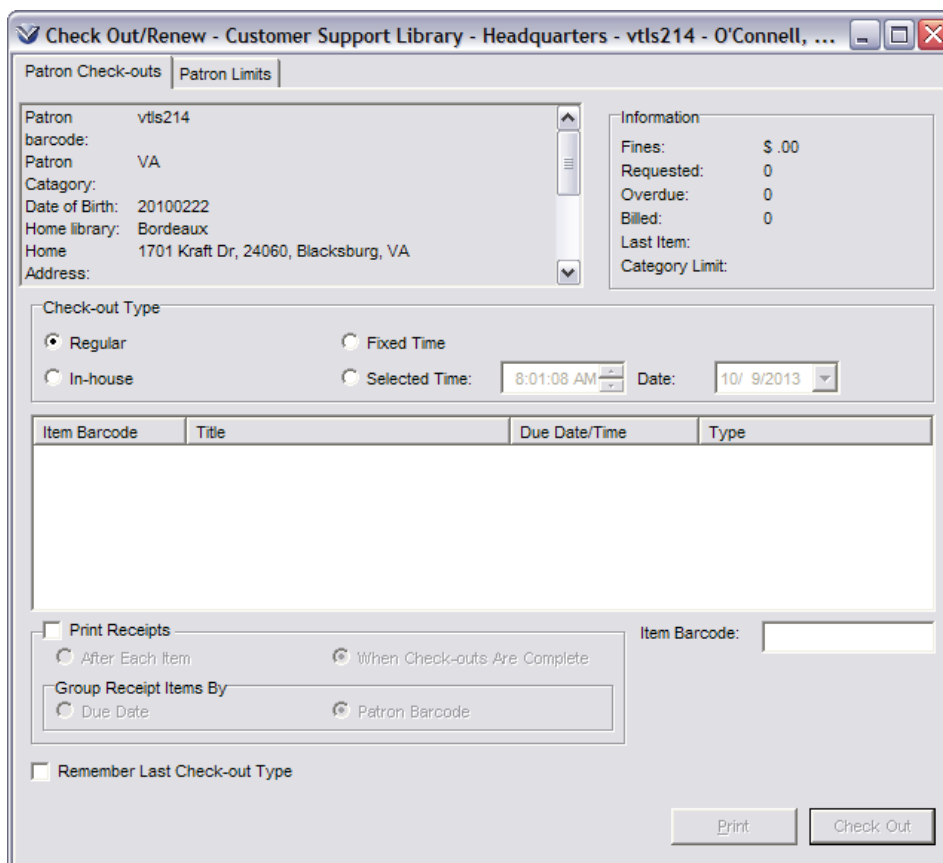
Journal Circulation: Generates statistics for serial titles in the database.

Checkout from Patron Record

Open Patron Record in Checkout Window With a Patron ID Number (Barcode)

Click on the  Icon on the **Circulation** toolbar or use the **F5** key.

Enter the patron barcode. The **Checkout** window will appear.



The screenshot shows a software window titled "Check Out/Renew - Customer Support Library - Headquarters - vtls214 - O'Connell, ...". The window is divided into several sections:

- Patron Check-outs / Patron Limits:** A list of patron information including:
 - Patron: vtls214
 - barcode:
 - Patron: VA
 - Category:
 - Date of Birth: 20100222
 - Home library: Bordeaux
 - Home: 1701 Kraft Dr, 24060, Blacksburg, VA
 - Address:
- Information:** A summary of financial and usage statistics:
 - Fines: \$.00
 - Requested: 0
 - Overdue: 0
 - Billed: 0
 - Last Item:
 - Category Limit:
- Check-out Type:** Radio buttons for "Regular" (selected), "Fixed Time", "In-house", and "Selected Time". The "Selected Time" field is set to "8:01:08 AM" and the "Date" field is set to "10/ 9/2013".
- Table:** A table with columns for "Item Barcode", "Title", "Due Date/Time", and "Type". The table is currently empty.
- Print Receipts:** A section with checkboxes for "Print Receipts" and "Remember Last Check-out Type".
 - Under "Print Receipts", there are radio buttons for "After Each Item" and "When Check-outs Are Complete".
 - Under "Group Receipt Items By", there are radio buttons for "Due Date" and "Patron Barcode".
 - An "Item Barcode:" input field is present.
- Buttons:** "Print" and "Check Out" buttons are located at the bottom right.

If a patron whose borrowing privileges have expired attempts a checkout, a pop-up message appears notifying the staff member of the expired privilege. Staff will need to update the patron's library record before the checkout can be completed.

If a patron whose borrowing privileges will expire during the checkout period a message will display to notify the library staff member. The staff member will need to decide whether to proceed with the checkout with a shortened due date, view the patron's record (this will cancel the transaction) or to cancel the checkout.

When a checkout is initiated Virtua checks for blocks against the patron for each checkout or renewal transaction until a block is overridden for the patron. It is only after a block is overridden that Virtua stops checking for blocks against the patron.

Virtua still checks for blocks against a patron each time a new **Check Out/Renew** window is opened.

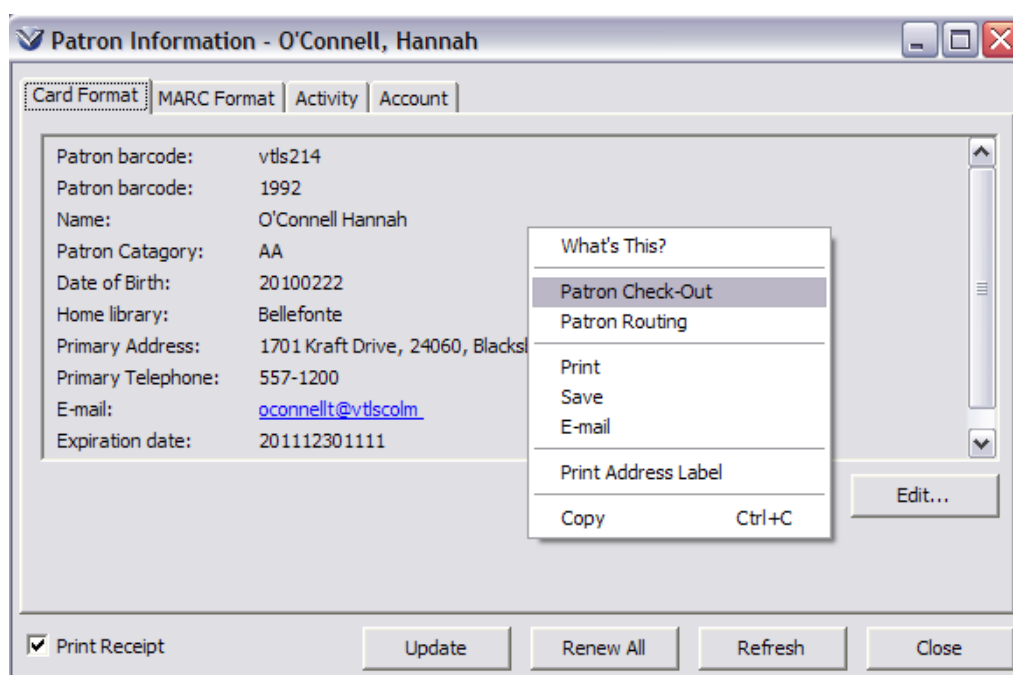
Check Out Types

In the Check Out window select Check Out Type:

Type	Description
Regular	Loan rules based on the Circulation Matrix.
In-house	Loan rules based on the Circulation Matrix.
Fixed Time	Sets one due date and time for everything.
Selected Time	Allows you to override the Circulation Matrix.

Without a Patron Barcode

Perform a Browse search for the patron's name; this will open a Browse list with the patron names near that of your patron. Highlight and double click on the patron name you would like to open and the Patron Information window will appear for display. From the **Patron Information** window, right mouse click and select **Patron Check-Out** to open the **Checkout/Renew** screen.



Checkout Using Item ID

Retrieve the Item Record

Select **Search** → **Item Barcode** from the Virtua menu bar or click **F3** to open the **Control Number Search** window with the Item category selected.

Enter the Item number (barcode) and click the **Search** button. The **Item Information** window will appear.

Checkout Item

Right mouse click in the **Item Information** window and select **Checkout** from the popup menu. The **Patron Access** window will appear.

The screenshot shows the 'Item Information - Customer Support Library' window. The 'Bibliographic Information' tab is active, showing the following details:

- Author: Jackson, Shirley, 1916-1965.
- Title: Haunting of Hill House
- Subject: Haunted houses Fiction.

The 'Item Information' section contains the following fields:

- Item ID: 974227
- Barcode: 3790
- Barcode Type: Regular
- Item Class: Book
- Reserves Item Class: (empty)
- Item URL: (empty)
- Location: Bordeaux
- Shelving Location: Bordeaux
- Number of Pieces: 1 (with a spinner) and a checkbox for 'Circulate Pieces' which is unchecked.
- Price: \$ 16.95
- EPN Number: (empty)
- Accession Number: (empty)
- AV Accession Number: (empty)
- Collection Code: (empty)

A context menu is open over the 'Item Information' section, listing the following options:

- What's This?
- Append/Print Spine Label
- Clear Label File
- Append/Print Property Label
- Clear Property Labels
- Patron Activity
- Check Out...** (highlighted)
- Check In...
- Renew...
- Item Bookings
- Item Requests
- Bib Requests
- Audit Trail...
- Transaction Log...
- Parent Record
- Bibliographic Record
- More Notes
- Print
- Save
- E-mail

At the bottom of the window, there are buttons for 'Delete', 'Save', 'Refresh', and 'Close'. A 'Masked' checkbox is also present in the bottom left corner.

In the **Patron Access** window, type or scan the **Patron** barcode number.

The checkout window will appear with the item number already entered.

Select the **Checkout Type** and click the **Checkout** button to checkout the item.

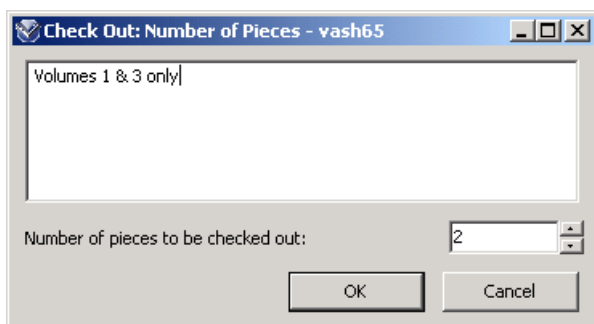
Item Barcode	Title	Due Date/Time	Type

The circulation rules are set in the **Profiler** → **Circulation** → **Location + Patron + Item** matrix. Virtua looks at the rules established in this matrix each time checkouts and/or renewals are performed.

To check out an item enter the item's barcode and click on the **Check Out** button.

If the item you are checking out consists of more than one piece, Virtua alerts staff in one of two ways:

If the option to circulate individual pieces is turned ON in the Item Information elements, you will be prompted to choose whether or not to perform a “partial check-out.”

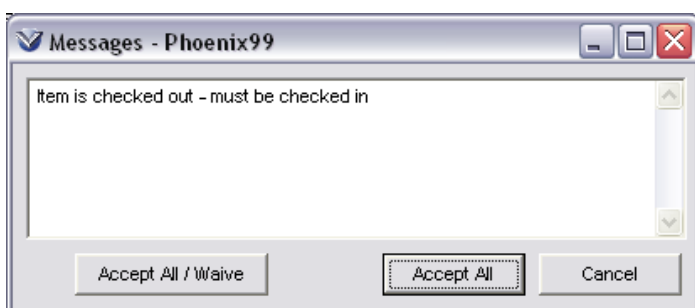


Use the arrow keys to adjust the Number of pieces to be checked out value to the desired number of pieces.

Staff members have the ability to enter a note about the checkout transaction in the text box at the top of the window, in case a piece is missing or they want to make note of something about the transaction.

If the option to circulate individual pieces is turned OFF in the item record, you will receive an alert that the item has multiple pieces, but the Note option and the ability to adjust the number of pieces being circulated are not available.

Virtua supports the option to perform an Improper Check-in when the item you are checking out is already checked out staff will receive an alert that the “Item is checked out - must be checked in.” Then you have the options of:



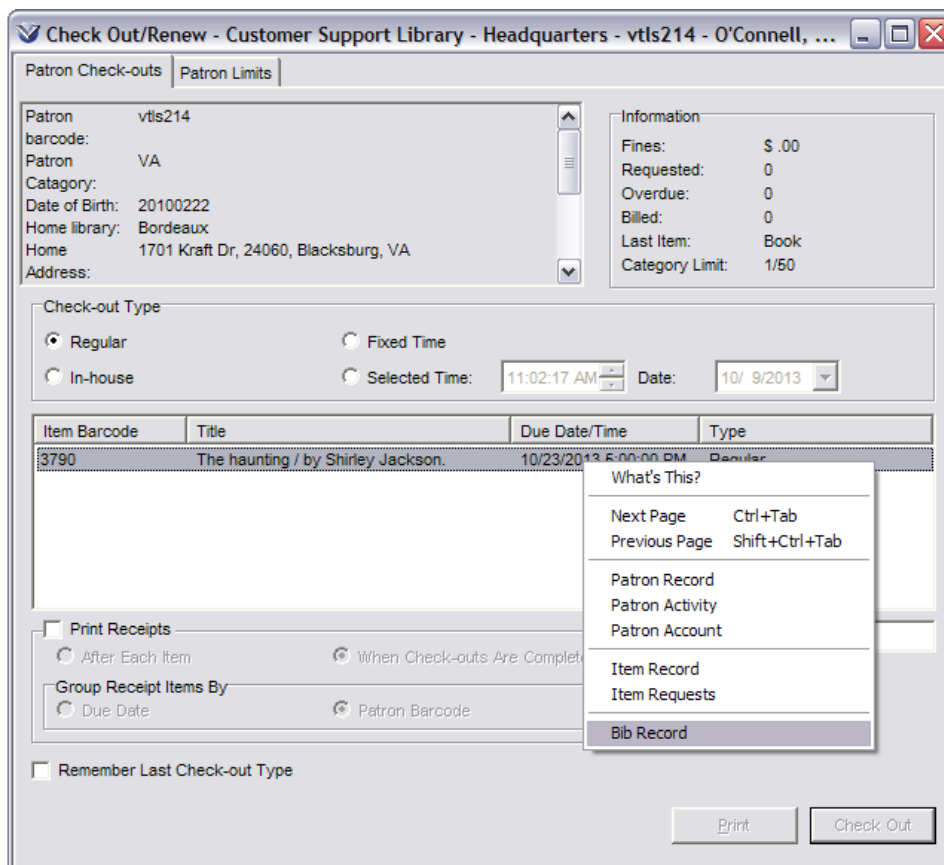
Accept All – the system checks the item in from the first patron, assesses any fines that apply to the first patron, and then checks the item out to the second patron.

Accept All/Waive – the system checks the item in from the first patron, waives any fines that apply to the first patron, and then checks the item out to the second patron.

Cancel – this will cancel the check out.

Access to the View Bibliographic Record and Item Record

To access the bibliographic record from the **Check Out/Renew** window highlight the checked out item and right click to open the pop-up menu and select **Bib Record**.



Clicking the **Bib Record** option opens the **View Bibliographic Record** window.

View Bibliographic Record - Customer Support Library

1 / 1

Full **Items** MARC

Title: The haunting / by Shirley Jackson.
 ISBN: 0140287434 (pbk.) :
 ISBN: 9780140287431 (pbk.)
 Publication: New York, NY : Penguin Books, 1999.
 Description: 246 p. ; 20 cm.
 Subject: [Haunted houses Fiction.](#)

Status Counts			
Checked Out:	1	On Reserve:	0
Available:	0	Requested:	0
On Hold:	0	Other:	0
Total Items:	1	Unsatisfied Requests:	0
		Total Requests:	0

Call Number	shelving Location	U...	Status	Item Barcode
F JACKSON	Bordeaux		Due: 10/23/2013...	3790

Current Selection:
1 / 1

Show Group View URL View Item Delete Item Request Item

Masked Agency Req View Archive Edit Request Bib Add Item Refresh Close

Also access to the Item Record or Item Requests is provided by the right click pop up menu from the **Check Out** window.

Print Receipts

To print a receipt, check the **Print Receipts** check box on the **Check Out** window. The **Print Receipt** setting is persistent. If print is enabled, closing the window without printing will generate a reminder to print the receipt.

Select either the

After Each Item radio button

OR

When Checkouts are Complete radio button

Then click on the **Print** button to generate a receipt when checkouts are complete.

OR

Uncheck the **Print Receipt** check box if you do not want to print a receipt.

Configure Receipt Setup

Receipts in Virtua can be configured individually per workstation or through the *Virtua Profiler*. The *Profiler* settings apply to all locations and will **override** receipt and slip configurations set in the Virtua client. System wide receipts are configured in the **Profiler** → **Circulation** → **System Parameters** → **Receipt/ Slip Setup**.

For the *individual* workstation receipt configuration:

Select **Options** → **Circulation Options** → **Checkout/Renew Receipt Setup** from the Virtua main menu.

Enter Library name/address in the **Starting Text** box (up to 3 lines of text)

Enter the field names to appear on the receipt.

Select the options to be included on the receipt *i.e.* checked out date, time, etc.

Fine Receipt Setup - Customer Support Library

Starting Text:
Library of the Great West
123 Raw Hide Road
Silver Spur, WY 38482

Fine Receipt

Field Names:

Payment Type:	Payment Type:	Location:	Location:
Patron Name:	User:	<input type="radio"/> Show Owning Location	
Patron Barcode:	User ID:	<input type="radio"/> Show Shelving Location	
Author:	Author:	<input checked="" type="radio"/> Show Both	
Title:	Title:	Payment Date:	Payment Date:
Call Number:	Call Number:	<input checked="" type="checkbox"/> Include Payment Time	
Item Barcode:	Item Barcode:	Amount Paid:	Amount Paid:
Item's Due Date:	Item Due Date:	New Balance:	New Balance:
Amount Paid (For Item):	Amount Paid (For It	<input checked="" type="checkbox"/> Print Detailed Item Information	
New Balance (For Item):	New Balance (For It	Receipt Number:	Receipt Number:
Reprint Text:	Reprinting Fine Rec	Transaction Reference Num:	Transaction Ref Num:
		Fine:	Fine:

(Only named fields will be printed.)

Ending Text:
Thank you for your patronage!

Copies to Print: 1

OK Cancel

Enter any ending text to appear on the receipt.

Save the configuration by clicking the **OK** button.


The receipt will be printed.

Note: When the fine receipt is configured to print detailed item information, and the Fine label is configured to print the fine type (Overdue, Replacement Fee, etc.), the fine receipt will include the fine type for each fine or fee paid.

Library of the Great West
123 Raw Hide Road
Silver Spur, WY 88482

Fine Receipt

Name: Documentation
Barcode: 4589

Author: Brydges, Egerton, Sir, 1762-1837.
Title: Censura literaria: Containing
titles, abstracts, and opinions of old
English books / By Samuel Egerton
Barcode: 1000003110
Due date: 12/15/2011
Amount paid this item: \$5.00
Amount due: \$10.00
Fine: Processing Fee 

Date: 5/2/2012
Total amount paid: \$5.00

To configure the default Receipt Printer to be used by the workstation on the **File Menu** select the **Receipt Printer Setup** option.

Printing Grouped Items and Regular Items

A single checkout receipt may contain information about both regular checkouts and grouped items since a receipt for *all* items in a transaction is printed.

Library of the Great West
123 Raw Hide Road
Silver Spur, WY 89482

Check-Out Receipt

User: Steele, James
User ID: 940
User Phone: 757-555-0940
Author: Real Estate Research Corporation.
Title: Neighborhood preservation : legal and administrative documents / prepared for the Office of Policy Development and
Call Number: HT175.U6 R52
Item ID: 1000016389
Transaction Ref Num: 284407
Checked-out Date: 5/8/2012 5:42:14 PM
Due Date: 5/10/2012 5:27:42 PM
Location: Wilson Library

User: Steele, James
User ID: 940
User Phone: 757-555-0940
Author: Reich, Steve, 1936-
Title: Music for a large ensemble ; Violin phase ; Octet sound recording / Steve Reich.
Call Number: ECM ECM-1-1168
Item ID: 1123455708
Transaction Ref Num: 284407
Checked-out Date: 5/8/2012 5:42:23 PM
Due Date: 5/10/2012 5:27:42 PM
Location: Garcia - Reserve Room

User: Steele, James
User ID: 940
User Phone: 757-555-0940
Author: Pritchard, John Paul, 1902-
Title: Literary wise men of Gotham : criticism in New York, 1815-1860.
Call Number: PN99.U52 P7
Item ID: 1000013091
Transaction Ref Num: 285407
Checked-out Date: 5/8/2012 5:57:04 PM
Due Date: 5/10/2012 5:27:42 PM
Location: Wilson Library

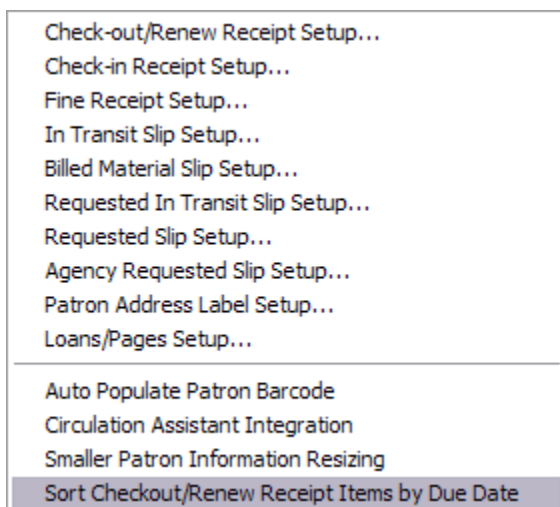
User: Steele, James
User ID: 940
User Phone: 757-555-0940
Author: Pritchard, John Paul, 1902-
Title: Literary wise men of Gotham : criticism in New York, 1815-1860.
Call Number: PN99.U52 P7
Item ID: 1000013092
Transaction Ref Num: 285407
Checked-out Date: 5/8/2012 5:57:07 PM
Due Date: 5/10/2012 5:27:42 PM
Location: Wilson Library

Non-grouped items

Grouped items

Sort Checkout/Renew Receipt

To group items by due date on the checkout or renewal receipt select **Options** → **Circulation Options** → **Sort Checkout/Renew Receipt Items by Due Date** from the Virtua main menu.



Due Date: March 16, 2012
 User: Andrews, Catherine
 User ID: vtls0215
 Author: Grisham, John
 Title: The last juror / John Grisham.
 Call Number: F GRIS 2004
 Item ID: 191
 Transaction Ref Num: 6014
 Checked-out Date: 3/13/2012 12:31:31 PM
 Due Date: 3/16/2012 10:30:00 PM
 Location: Bryan Campus Library

Due Date: March 20, 2012
 User: Andrews, Catherine
 User ID: vtls0215
 Author: Grisham, John
 Title: The king of torts [sound recording] / John Grisham.
 Call Number: PT F G887k
 Item ID: 7065
 Transaction Ref Num: 6014
 Checked-out Date: 3/13/2012 12:31:28 PM
 Due Date: 3/20/2012 10:30:00 PM
 Location: BRENHAM READING ROOM

User: Andrews, Catherine
 User ID: vtls0215
 Title: Runaway jury [videorecording] / Regency Enterprises presents a New Regency Production , a Gary Fiedler Film
 Call Number: DVD R870j 2004
 Item ID: 977
 Transaction Ref Num: 6014
 Checked-out Date: 3/13/2012 12:31:34 PM
 Due Date: 3/20/2012 10:30:00 PM
 Location: BRENHAM READING ROOM

Note: The **Sort Checkout/Renew Receipt Items by Due Date** option is ignored for checkouts that include group items.

Patron Limits Tab

Click on the **Patron Limits** tab; the following **Check Out/Renew** window will appear.

Category	Current Count	Max Count
Book	5	200
Paperback	0	200
DVD	0	4
Video	0	25
Audio Book Cassette	0	25
Magazines	0	50
Music CD	0	25
Reference	0	0
Book Large Print	0	200
Audio Book CD	0	25
Kit	0	25
Miscellaneous	0	100
Best Seller	0	200
Big Read	0	200
2 Hour Reserve	0	0

Patron Limits

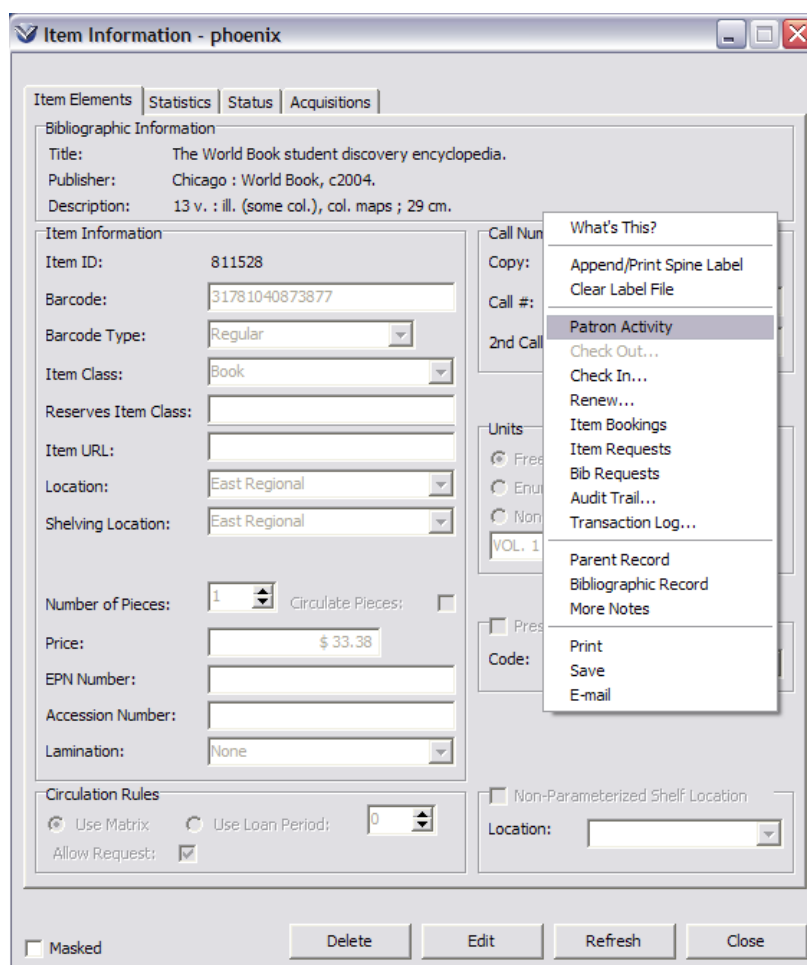
Patron Limits are based on parameters set in the **Profiler** → **Circulation** → **System Parameters** → **Check-out Limits Matrix**. The parameters here work in combination with the settings of other Profiler Circulation matrices, which are listed below.

- Patron Type + Item Class + Location
- Patron Type + Item Class
- Patron Type + Location
- Patron Type
- Default (None)

View Patron Information for a Checked Out Item

When a book is checked out it is sometimes necessary to know who has it for the purpose of holds, recalls, etc. This information can be obtained using the Item's Barcode or if you do not know the barcode number, open the bib record in the **View Bibliographic Record** window. From the list of items, highlight the item and right mouse click to access patron activity information.

To use the item barcode select **Search** → **Item Barcode** from the Virtua menu bar or click **F3** to open the **Control Number Search** window with the Item category selected. Enter the Item number (barcode) and click the **Search** button. The **Item Information** window will appear.

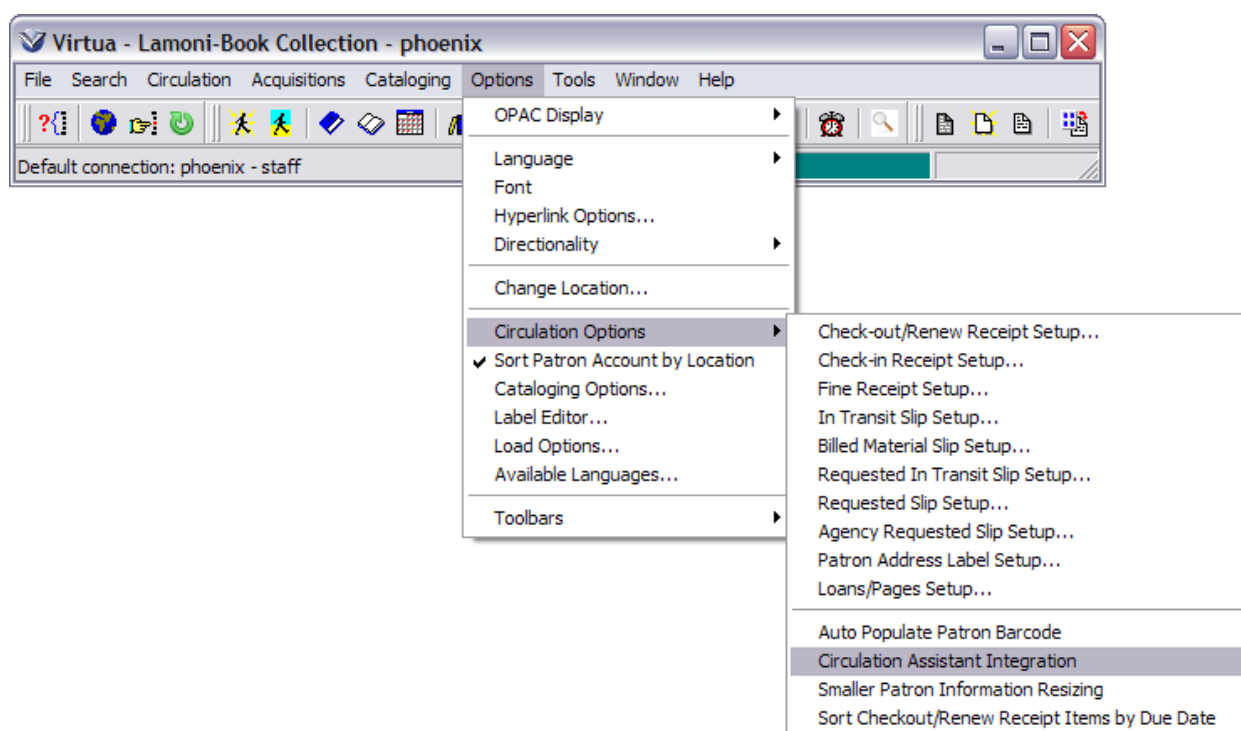


Right mouse click in the Item Information window and select **Patron Activity** from the pop-up menu. The **Patron Information** window will appear containing the patron record associated with the item.

Fastrac Circulation Assistant

Virtua is integrated with **Fastrac** with regard to circulation transactions (check-outs, check-ins, and renewals). The **Fastrac Circulation Assistant** lets you use your **RFID** hardware to perform circulation transactions singly or in bulk. The **RFID** technology handles the communication with the Virtua client. The **Circulation Assistant** works by reading the barcode on an item's **RFID** tag via an antenna and then sending the item barcode to the Virtua client to complete the circulation transaction.

Select **Options** → **Circulation Options** → **Circulation Assistant Integration** on the Virtua Main Menu to enable this option to tell Virtua to look for and process **Fastrac** input.



Fastrac will send the input barcode as a filename with the extension **.fca** to Virtua. The file will reside in **C:\temp**. Virtua will respond with the barcode, a code indicating the transaction type, and a code indicating whether the transaction was successful.


Note: The **Circulation Assistant Integration** option is registry-persistent.

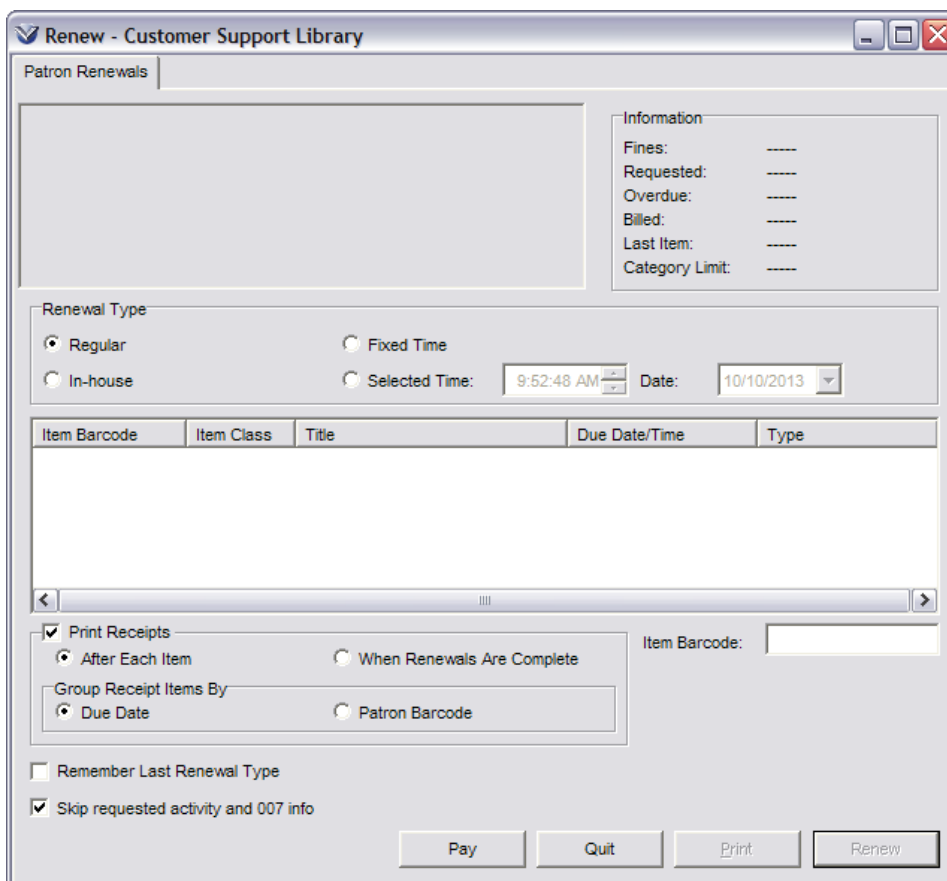
Renewal and Check In

Recommended Outline	Explanation
<div data-bbox="207 453 431 573" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Renewal Using Item Barcode Information</div> <div data-bbox="207 638 431 758" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Renewal Using Patron Information</div> <div data-bbox="207 814 431 934" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Renewal Using Bibliographic Record</div> <div data-bbox="207 991 431 1068" style="border: 1px solid black; padding: 5px;">Check-in</div>	<p>Virtua offers simple and efficient ways to renew and check-in items.</p> <p>Summary</p> <ul style="list-style-type: none"> Renew a book by entering an item (barcode) number. Renew a book by entering a patron barcode Renew a book by obtaining a bibliographic record Check-in a book <p>Key Terms</p> <ul style="list-style-type: none"> Check In Item number (barcode) Patron Barcode Renew Trapped <p>General Parameters</p> <p>Location Names: Global Settings tab; Amnesty Flag, Check In Status, Check-in Date, Check-in Flag 3-M</p> <p>Status Displays: Global Settings Tab</p> <p>Circulation Parameters</p> <ul style="list-style-type: none"> Circulation System: Renewal Override Location + Patron + Item: Renewal loan rules Location + Patron + Item: Renewal Limit Restrict staff mediated renewals to items belonging to own location

	Circulation Parameters
	<p>The parameters listed below affect the renewal or check-in process.</p> <p>Status Displays (Global tab)</p> <p>Item statuses will be updated by the ItemStatusMonitor.exe program, even if the Age Threshold is set to zero. Libraries are advised to review their item status definitions so that desired statuses will not be deleted. Pay particular attention to statuses that have an Age Threshold of 0 minutes/hours. These statuses must have the Next Status box unchecked in order to prevent them from being deleted by the ItemStatusMonitor.exe program.</p> <p>Circulation Basic Options (Circulation tab)</p> <p>Renewal Override: Allows or disallows renewal if there are requests the item qualifies for.</p> <p>Library Names Parameter (Global Settings tab)</p> <p>Amnesty Flag: determines if fines are assessed when a patron returns an overdue item.</p> <p>Check In Status: specifies the item status that will be assigned to items checked in at that particular location.</p> <p>Check-in Date: set date and time that will be used for all items checked in if the check box is selected.</p> <p>Check-in Flag 3-M: allows or disallows patron self-check-in using the 3M system.</p> <p>Location + Patron + Item (Circulation tab)</p> <p>Renewal Loan rules: determines loan rules for renewals.</p> <p>Renewal Limit: sets renewal limit and period.</p>

Renewal Using Item Information (Book In-hand)

Click on the **Renewal** icon  on the circulation toolbar, press **F6**, or select **Circulation** → **Circ Desk** → **Renew** from the Virtua Menu Bar, or to open the **Renew** window.



Enter the item barcode and click **Renew**. The item will be renewed.

The **Renew** window allows users to renew items that are checked out to any number of patrons and displays the item information and patron information associated with each renewal.

Items checked out to any number of patrons may be renewed on the same **Renew** window.

The header and the Information area display information about the patron associated with the most recent renewal.


All renewals performed while the **Renew** window is open are considered part of a single session and the fines for all associated patrons may be managed at the same time.

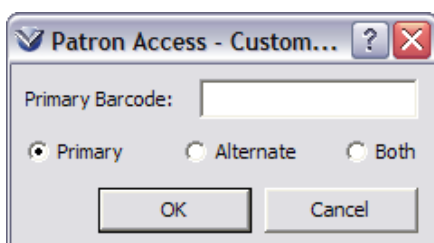
The **Group Receipt Items By** option allows users to specify whether items are grouped by due date or patron barcode.

The **Skip requested activity and 007 info** option users to skip 007 tag generation and Requested information in the header area.

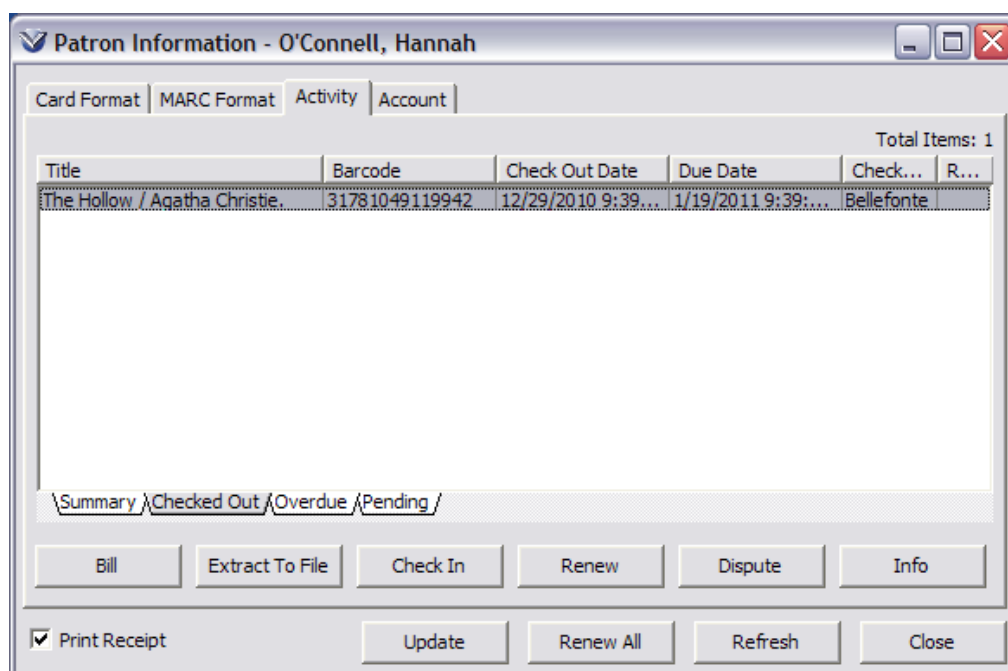
In the **Profiler** → **Circulation** → **System Parameters** → **Circulation Basic Options** → **Item Options** section is a parameter to **Restrict staff mediated renewals to items belonging to own location**, if enabled staff will not be able renew items belonging to a location other than their own location.

Renewal Using Patron Information

Click the  icon, press the **F2** key on your keyboard, or select **Circulation** → **Patron** → **Record** on the Virtua menu bar. The **Patron Access** window will appear.



Click the **Activity** tab of the **Patron Information** window. Click the **Checked Out** tab to view a list of items checked out to the patron.



Other category tabs may be available depending on the status of items the patron has checked out, e.g. checked out, overdue, etc. If the item is not on the Checked Out tab, look at the other available tabs.

If your library would like to provide a printed receipt of the renewed item(s), click to place a check in the **Print Receipt** box.

Highlight a single item or multi-select items in a category tab using the Ctrl-Key, and then click the **Renew** button to renew the selected items. There is also the **Renew All** button to renew all checked-out items that qualify for renewal.

Renewal from Item Record

Search the OPAC for the bibliographic record. Open the record in the **View Bibliographic Record** window.

Highlight the appropriate item record from the list of item records displayed and click the **View Item** button.

Right mouse click and select **Renew** from the pop-up menu.

The **Checkout** window will appear with the item information already entered.

Click the **Checkout** button to renew the item.

The screenshot shows the 'Item Information - phoenix' window with a right-click context menu open over the 'Renew...' option. The window is divided into several sections:

- Item Elements:** Statistics, Status, Acquisitions
- Bibliographic Information:**
 - Author: Christie, Agatha, 1890-1976.
 - Title: Appointment with death / Agatha Christie.
 - Edition: 1st Winterbrook ed.
- Item Information:**
 - Item ID: 659720
 - Barcode: 31781003078605
 - Barcode Type: Regular
 - Item Class: Book
 - Reserves Item Class:
 - Item URL:
 - Location: Cliffdale
 - Shelving Location: Cliffdale
 - Number of Pieces: 1
 - Circulate Pieces:
 - Price: \$ 15.00
 - EPN Number:
 - Accession Number:
 - Lamination: None
- Circulation Rules:**
 - Use Matrix
 - Use Loan Period: 0
 - Allow Request:
- Other Options:**
 - Non-Parameterized Shelf Location
 - Location:


The context menu includes the following options:

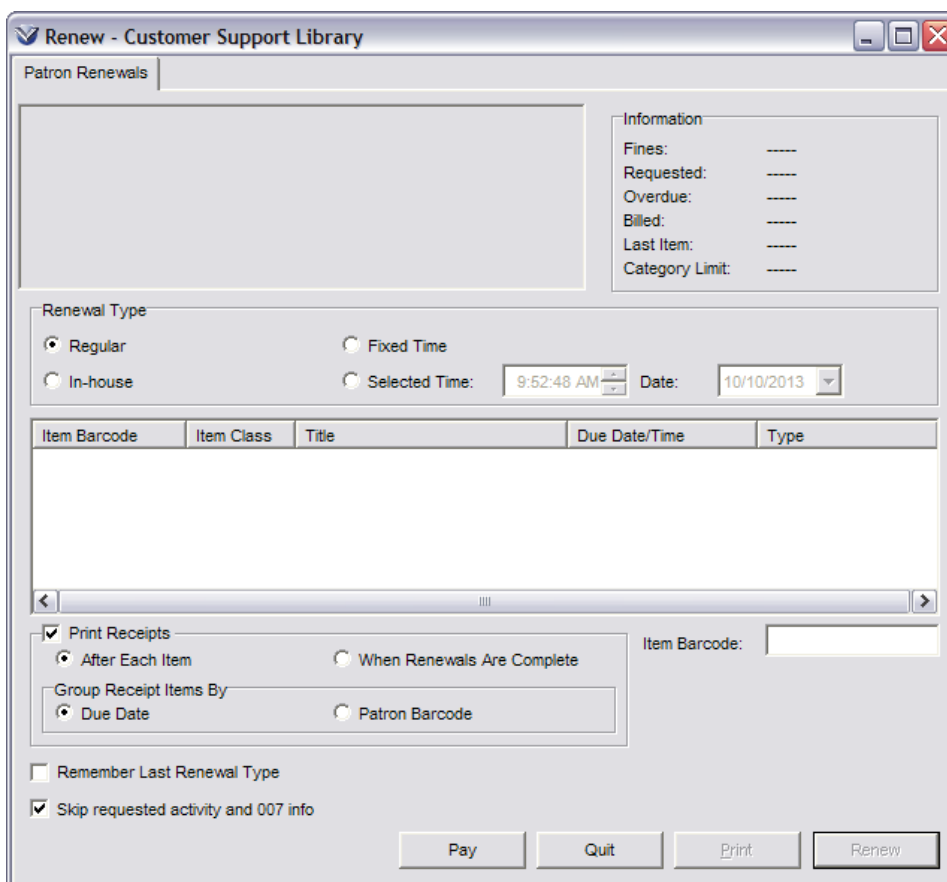
- What's This?
- Append/Print Spine Label
- Clear Label File
- Patron Activity
- Check Out...
- Check In...
- Renew...** (highlighted)
- Item Bookings
- Item Requests
- Bib Requests
- Audit Trail...
- Transaction Log...
- Parent Record
- Bibliographic Record
- More Notes
- Print
- Save
- E-mail

At the bottom of the window, there are buttons for Delete, Edit, Refresh, and Close, along with a 'Masked' checkbox.

Renewing Items in a Group

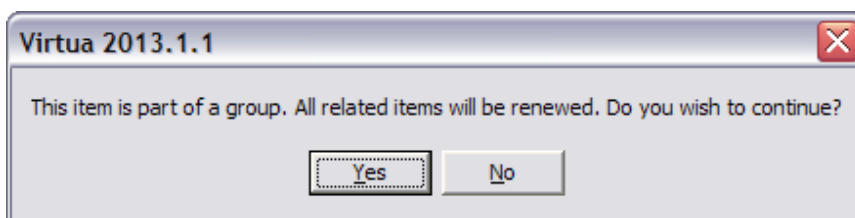
Renewing Items in a Group via the Check Out/Renew Window

Select **Circulation** → **Circ Desk** → **Renew** on the Virtua Main Menu, the **Renew**  icon, or **F6** on the keyboard to open the **Renew** window.



Enter the item barcode and click **Renew**.

A message displays:



Click **Yes**. All items in the group are renewed simultaneously.

Renew - Headquarters - vtls214 - O'Connell, Hannah Grace

Patron Renewals

Patron: vtls214
barcode:
Patron: VA
Category:
Date of Birth: 20100222
Home library: Bordeaux
Home: 1701 Kraft Dr, 24060, Blacksburg, VA
Address:

Information
Fines: \$.00
Requested: skipped
Overdue: 0
Billed: 0
Last Item: Book
Category Limit: 2/50

Renewal Type
 Regular Fixed Time
 In-house Selected Time: 9:52:48 AM Date: 10/10/2013

Item Barcode	Item Class	Title	Due Date/Time	Type
31781037828348	Book	The essential plays / Anton Chek...	11/7/2013 9:00:00 AM	1/3 Renew - Regular

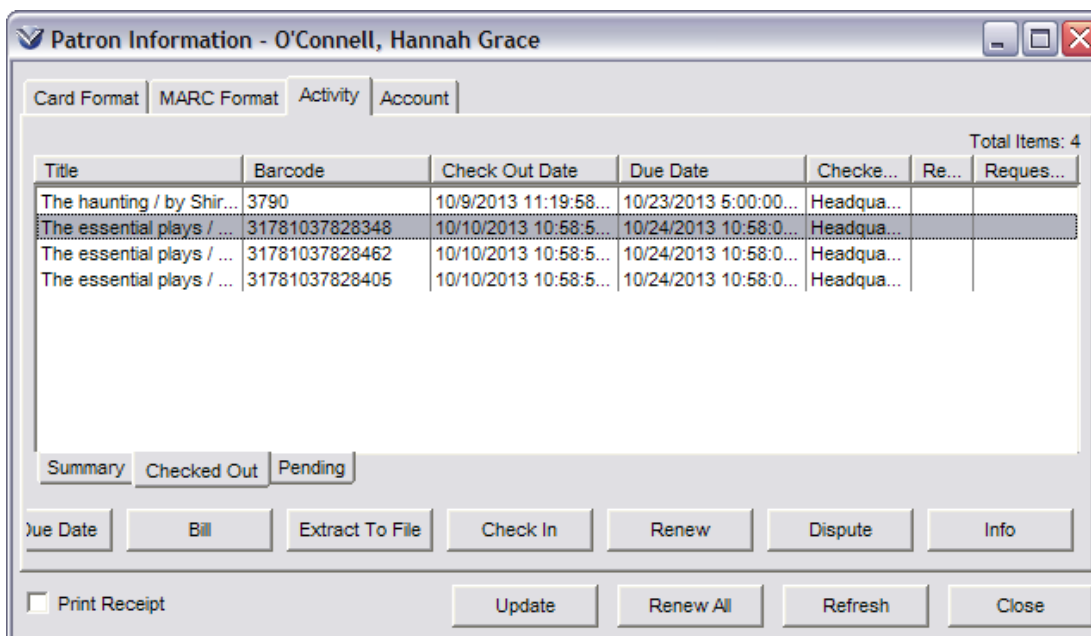
Print Receipts
 After Each Item When Renewals Are Complete
Group Receipt Items By
 Due Date Patron Barcode
Item Barcode:

Remember Last Renewal Type
 Skip requested activity and 007 info

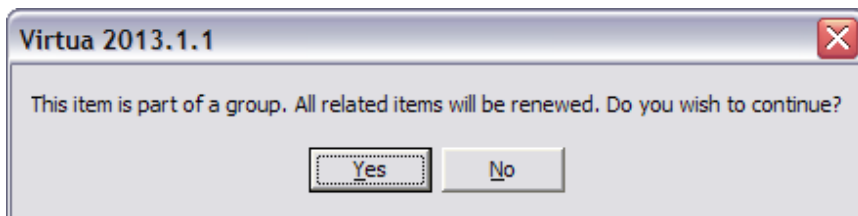
Pay Quit Print Renew

Renewing Items in a Group via the Patron Activity Window

To renew group items from the **Patron Information** window **Activity** tab, **Checked Out** tab highlight the item and click **Renew**.



A message displays:



Click **Yes**. All group items are renewed simultaneously.

Patron Information - O'Connell, Hannah Grace

Card Format | MARC Format | Activity | Account

Total Items: 4

Title	Barcode	Check Out Date	Due Date	Checke...	Re...	Reques...
The haunting / by Shir...	3790	10/9/2013 11:19:58...	10/23/2013 5:00:00...	Headqua...		
The essential plays / ...	31781037828348	10/10/2013 10:58:5...	11/7/2013 10:58:00...	Headqua...	10/1...	
The essential plays / ...	31781037828462	10/10/2013 10:58:5...	11/7/2013 10:58:00...	Headqua...	10/1...	
The essential plays / ...	31781037828405	10/10/2013 10:58:5...	11/7/2013 10:58:00...	Headqua...	10/1...	

Summary | Checked Out | Pending

Due Date | Bill | Extract To File | Check In | Renew | Dispute | Info

Print Receipt | Update | Renew All | Refresh | Close

When a user tries to renew only one item that is checked out as part of a group a message displays:

Patron Information - O'Connell, Hannah Grace

Card Format | MARC Format | Activity | Account

Total Items: 3


Title	Barcode	Check Out Date	Due Date	Checke...	Re...	Reques...
The haunting / by Shir...	3790	10/9/2013 11:19:58...	10/23/2013 5:00:00...	Headqua...		
The essential plays / ...	31781037828405	10/10/2013 10:58:5...	11/7/2013 10:58:00...	Headqua...	10/1...	
The essential plays / ...	31781037828462	10/10/2013 10:58:5...	11/7/2013 10:58:00...	Headqua...	10/1...	

Summary | Checked Out | Pending

Due Date | Bill | Extract To File | Check In | Renew | Dispute | Info


Print Receipt | Update | Renew All | Refresh | Close

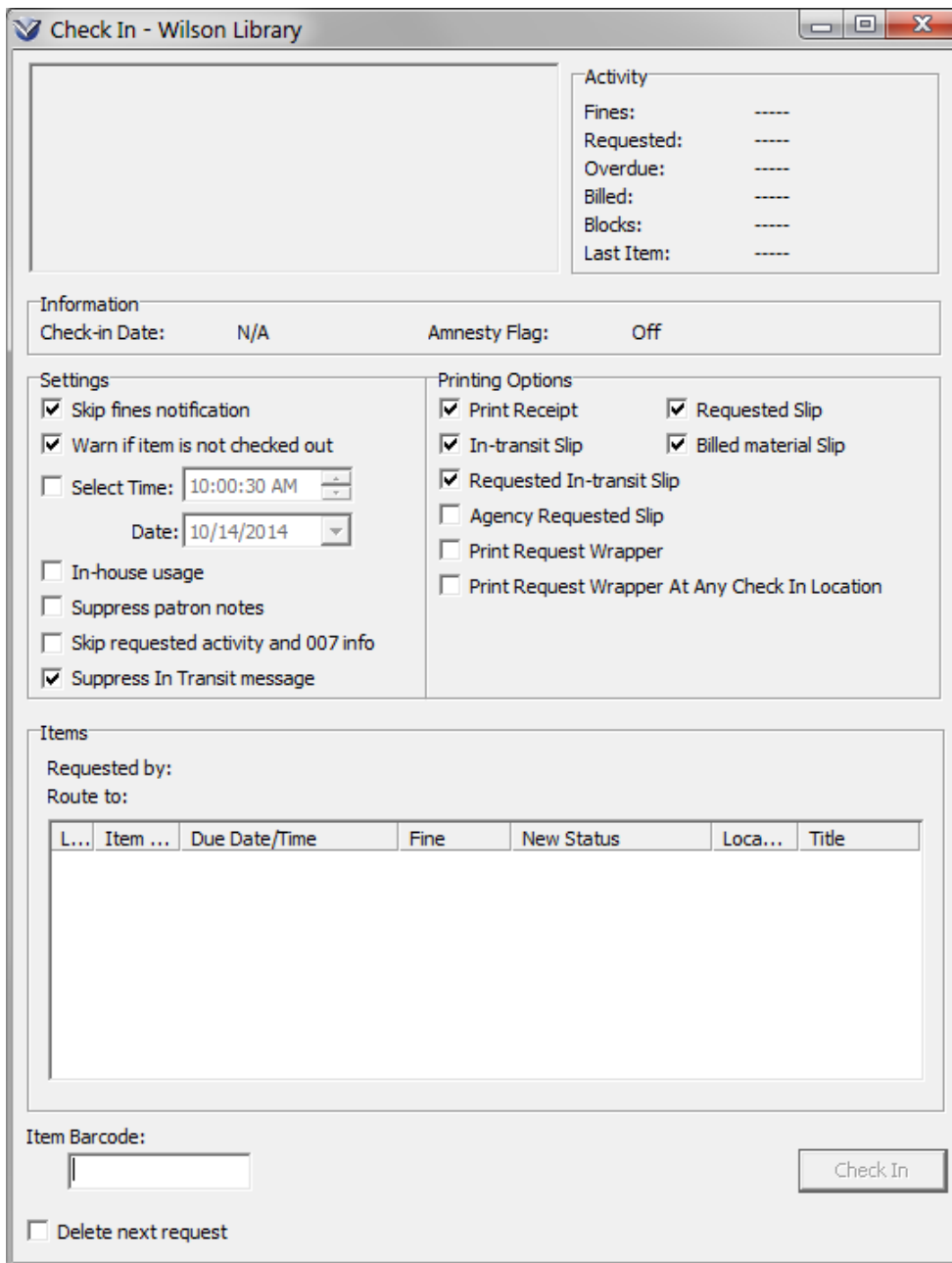
Error

 This item is part of a group and can only be renewed as a set. Not all items are available for renewal; therefore this item cannot be renewed. Please see a librarian for assistance.

OK

Check In

Click the **Check In** icon , press the **F4** key on your keyboard, or select **Circulation** → **Circ Desk** → **Check In** from the Virtua menu bar. The **Check In** window will appear.



Check In - Wilson Library

Activity

Fines: ----
Requested: ----
Overdue: ----
Billed: ----
Blocks: ----
Last Item: ----

Information

Check-in Date: N/A Amnesty Flag: Off

Settings

Skip fines notification
 Warn if item is not checked out
 Select Time: 10:00:30 AM
Date: 10/14/2014
 In-house usage
 Suppress patron notes
 Skip requested activity and 007 info
 Suppress In Transit message

Printing Options

Print Receipt Requested Slip
 In-transit Slip Billed material Slip
 Requested In-transit Slip
 Agency Requested Slip
 Print Request Wrapper
 Print Request Wrapper At Any Check In Location

Items

Requested by:
Route to:

L...	Item ...	Due Date/Time	Fine	New Status	Loca...	Title

Item Barcode:

Delete next request

Check In

Enter the item barcode and click the **Check In** button. The item will appear in the list with a new status.

Statuses

In Transit status indicates that the item belongs at another location. The item has to be checked in at its owning location for the status to change to Available.

In Transit Requested status indicating the item has been requested at a location different from where the check in has taken place.

On Hold item has been requested at the check in location and is now available for pick up by the patron.

Shelving status will automatically change to "Available" once the amount of time set in the Profiler for shelving an item has elapsed.

Check In - Wilson Library

Patron: 456789
barcode:
Name: Documentation 19750112
Preferred: en
Language:
Patron type: Library Board Member
Home library: Garcia Research Library -- code: 20000
Registering: Garcia Research Library -- 20000
Library:

Activity
Fines: \$55.33
Requested: 0
Overdue: 0
Billed: 0
Blocks: 6
Last Item: Book

Information
Check-in Date: N/A
Amnesty Flag: Off

Settings
 Skip fines notification
 Warn if item is not checked out
 Select Time: 10:00:30 AM
Date: 10/14/2014
 In-house usage
 Suppress patron notes
 Skip requested activity and 007 info
 Suppress In Transit message

Printing Options
 Print Receipt
 In-transit Slip
 Requested In-transit Slip
 Agency Requested Slip
 Print Request Wrapper
 Print Request Wrapper At Any Check In Location
 Requested Slip
 Billed material Slip

Items
Requested by:
Route to:

L...	Item ...	Due Date/Time	Fine	New Status	Loca...	Title
1	24348	5/23/2014 5:00:00 PM	\$12.13	Available	Gardi...	... יד'יה א

Item Barcode:

Delete next request

To access the bibliographic record from the **Check In** window, highlight the item and right-click to open the pop-up menu and select **Bib Record**. Clicking the **Bib Record** option will open the **View Bibliographic Record** window.

Check In - Wilson Library

Patron: 456789
barcode:
Name: Documentation 19750112
Preferred: en
Language:
Patron type: Library Board Member
Home library: Garcia Research Library -- code: 20000
Registering: Garcia Research Library -- 20000
Library:

Activity
Fines: \$55.33
Requested: 0
Overdue: 0
Billed: 0
Blocks: 6
Last Item: Book

Information
Check-in Date: N/A Amnesty Flag: Off

Settings
 Skip fines notification
 Warn if item is not checked out
 Select Time: 10:00:30 AM
Date: 10/14/2014
 In-house usage
 Suppress patron notes
 Skip requested activity and 007 info
 Suppress In Transit message

Printing Options
 Print Receipt Requested Slip
 In-transit Slip Billed material Slip
 Requested In-transit Slip
 Agency Requested Slip
 Print Request Wrapper
 Print Request Wrapper At Any Check In Location

Items
Requested by:
Route to:

Line	Item Barcode	Due Date/Time	Fine	New Status	Location	Title
1	24348	5/23/2014 5:00:00 PM	\$12.12	Available	Garcia Res...	...אודיסיה

Item Barcode:

Delete next request

What's This?
Patron Record
Patron Activity
Patron Account
Item Record
Item Requests
Bib Record
Check In

The **Check In** window displays information about the patron activity and account. This information can be configured in the **Profiler** → **OPAC** → **Client Views** → **Patron Information/Checkout/Renew/Check-in** view.

Check In Window Settings

Skip Fines Notification: You will **not** receive the message "Patron owes \$nn.nn" in a pop-up window when an overdue item is checked in.

Warn If Item Is Not Checked Out: If the item is not checked out, you will receive the message "Item is not checked out". This setting can be overridden by the **Suppress In Transit message** setting; see below.

Select Time/Date: Used to back date check-ins.

In-house Usage: Increments the In House Circ Count for each item that you check in, regardless of check-out type or checked-out status.

Suppress Patron Notes: Specifies whether notes from the patron record are displayed as items are checked in. When the check box is selected, any note found in a 5xx field of the patron record will NOT be displayed as an alert/message during check-in from the Check-in window. The option will not affect check-ins done from the Patron Information window.

Skip requested activity and 007 info: Specifies whether to suppress the information from the 007 tag of the patron record and requested information at the top of the window. This can be useful when checking in items for a patron with many items checked out.

Suppress In Transit message: Specifies whether to suppress the pop-up message that appears when a checked-in item's previous status was In Transit. Also suppresses the "Item is not checked out" message, even when the **Warn if item is not checked out** check box is selected.

Delete Next Request: Specifies whether to delete the next request on the item being checked in. When this check box is selected, a confirmation message will appear before the request is selected. This setting can be useful when a patron decides they no longer want items that have been trapped for their request.

Check In Window Printing Options

Print Receipt: Select this check box to print a receipt for each item checked in.

In-transit Slip: Select this check box to print a slip for each item that needs to be transported to another location.

Requested Slip: Select this check box to print a slip for each item checked in that has been trapped by a request.

Billed Material Slip: Select this check box to print a slip for each item checked in for which a Bill notice has been generated.

Requested In-transit Slip: Select this check box to print a slip for each requested item checked in that needs to be routed to another location.

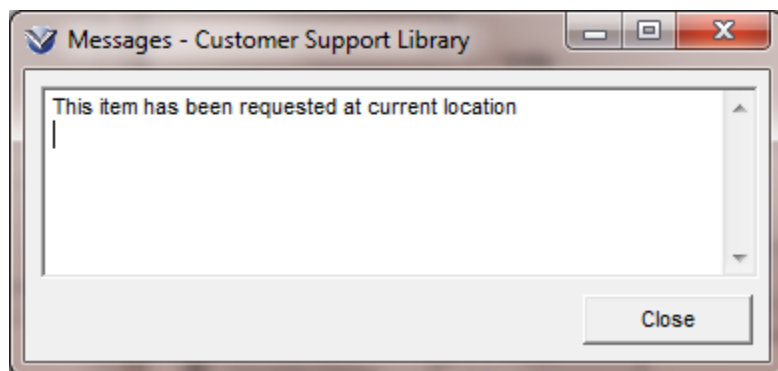
Agency Requested Slip: Select this check box to print a slip for each item checked in that has been trapped for an agency request.

Print Request Wrapper: Select this check box to print a request book wrapper for each item checked in that has been requested at the check-in location.

Print Request Wrapper At Any Check In Location: Select this check box to print a request wrapper for *any* requested item that is checked in, *regardless* of whether the check-in location is the same as the request pickup location.

Check In of Requested Items

When a requested item is checked in, a pop-up message will display to alert staff that the item has been requested.



If the patron requesting the item is set up to receive e-mail notifications:

Running the Availability Report can generate notices.

OR

In the **Profiler** → **Circulation** → **Circulation Basic Options**, the library can enable automatic e-mail notification for available requests, by selecting the checkbox for the parameter to ***Send e-mail when requested item is checked in.***

Automatic Reset of the Shelving Location

After an item is checked in and the "At Shelving Location Until" date in the item record has been reached, Virtua *automatically* resets the item's shelving location to the owning location.

When Virtua resets the shelving location to the owning location at check-in, it sends a notification to the staff user, and the owning location will be used in determining whether or not the item needs to be sent in transit.

For current customers who may not want Virtua to reset the location automatically, VTLS provides a script that will delete, or make null, the "At Shelving Location Until" date in all or selected item records.

The script **RemoveShelvingDate.ksh** can read a list of item barcodes from a file and removes the items' "At Shelving Location Until" date OR can remove the shelving location date for EVERY item. The script will use as input a file of barcodes generated from the Shelving Pull List report.

Usage:

```
RemoveShelvingDate.ksh inputType [< barcodeFile]
```

where inputType = 0 (default) tells the script to use input from a file and inputType = 1 tells the script to process all items.

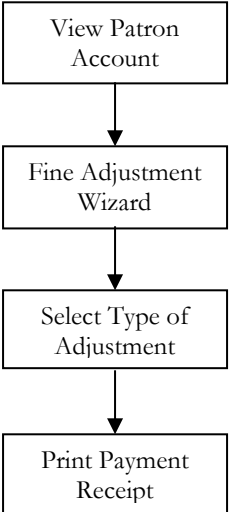
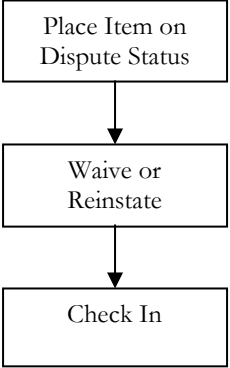
Example:

```
./RemoveShelvingDate.ksh 0 < barcodeFile (remove shelving location dates using barcodeFile)
```

```
./RemoveShelvingDate.ksh 1 (remove shelving location date for ALL items)
```


If customers want to retrieve items that are past their "At Shelving Location Until" date that haven't been checked out or checked in and are still shelved, customers will still need to use the Shelving Pull List report to generate the list of items that need to be pulled from the shelves.

Accounts Management

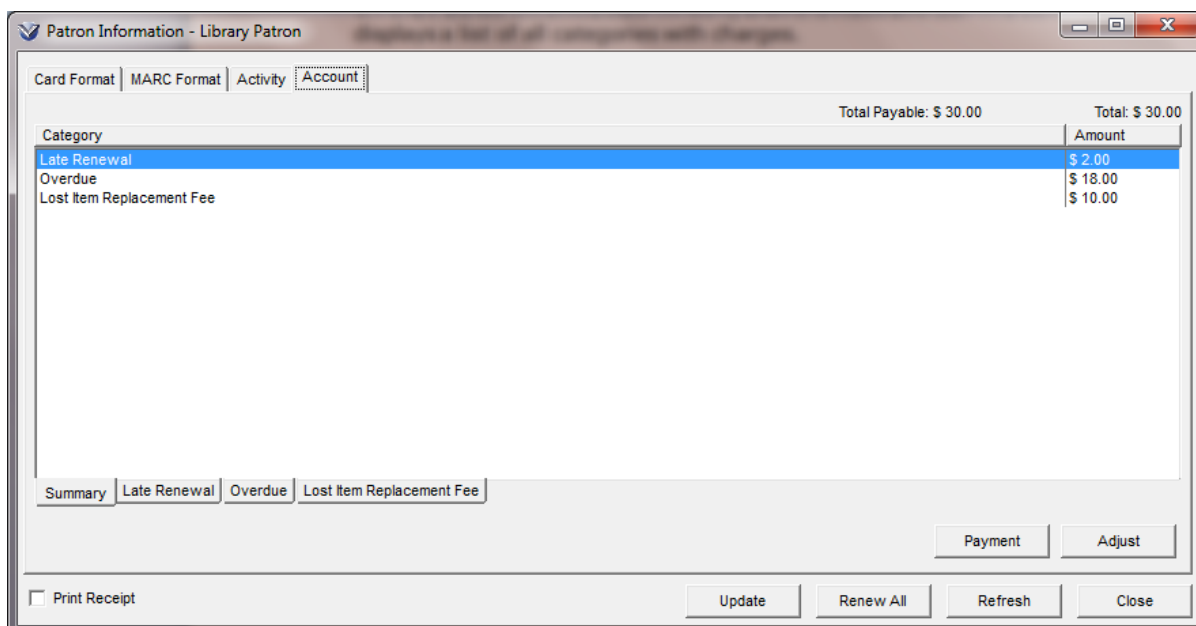
Recommended Workflow	Explanation
<p>Adjust Fees</p>  <pre> graph TD A[View Patron Account] --> B[Fine Adjustment Wizard] B --> C[Select Type of Adjustment] C --> D[Print Payment Receipt] </pre> <p>Dispute Fine/Fee</p> <p>Dispute Checkout</p>  <pre> graph TD E[Place Item on Dispute Status] --> F[Waive or Reinststate] F --> G[Check In] </pre>	<p>Virtua offers the Fine Adjustment Wizard as a quick and easy way of accepting payments.</p> <p>Summary</p> <ul style="list-style-type: none"> Use the Fine Adjustment Wizard to manage patron accounts Use the payment button to accept a payment Move a fine or fee to the disputed tab Pay Fines for Multiple Patrons in a Session <p>Key Terms</p> <ul style="list-style-type: none"> Alerts and blocks Audit Trail Delete Fees Dispute Fee/Item Fines Fee/Fine Category Grace Grace Period Mail Grace Period Processing Fee Resolve Fee/Item Waive Fee/Item <p>Circulation InfoStation Reports</p> <p>Patron Account: generates a list of patron account summaries.</p> <p>Delinquent Patron Accounts: Generates a list of fines and fees that are considered to be “delinquent,” according to the information in the patron account and criteria that you specify in the report configuration.</p> <p>Transition Disputed Items: Allows you to change items that are at a status of Disputed to a status of Overdue after a user-defined number of days.</p>

	Circulation Parameters
	<p>The Profiler parameters listed below affect the accounts management process.</p> <p>Circulation: System Parameters</p> <p>Fine Code Definitions: Sets codes and definitions for fines that your library assesses. These display on the Patron Information Account tab and on reports and bills sent to patrons.</p> <p>Circulation: Location + Patron + Item</p> <p>Fines/Grace: Calculates fines to be paid when a patron returns or renews an overdue item. Fines can be calculated differently for requested and non-requested material.</p> <p>Circulation: Location + Item</p> <p>Fines Accrue: Determines if fines accrue during non-operating hours.</p> <p>Circulation: System Parameters: Circulation Basic Options</p> <p>Prohibit item fine payments at non-assessed locations: Determines whether patrons are allowed to pay a fine at a different location from the item's owning location.</p>

View Patron Account

Open the **Patron Information** window by clicking the  icon on the **Circulation** toolbar and entering the patron barcode or by searching the OPAC for the patron name or number.

On the **Patron Information** window, click the **Account** tab. The summary tab displays a list of all categories with charges.



Category	Amount
Late Renewal	\$ 2.00
Overdue	\$ 18.00
Lost Item Replacement Fee	\$ 10.00

Total Payable: \$ 30.00 Total: \$ 30.00

Buttons: Payment, Adjust, Update, Renew All, Refresh, Close

Print Receipt:

Buttons Displayed on the Patron Account Tab

Payment: Displays **Payment** window to enter payment amount.

Adjust: Displays **Fines Adjustment** wizard to add, modify, or resolve a fine or fee. **Note:** Virtua does not support very large fines/fees (>\$29,000,000.00).

Click on a category tab to see an itemized list of charges for that category.

Select a category or item to adjust. If you do not select a category or item, any action taken will result in a change to the category or item that is highlighted.

To accept payment or adjust a fee or fine for a **whole account**, select the **Summary** tab.

To accept a payment or adjust a fee/ fine for a **fee category**, select a category tab.

To accept payment or adjust a fee/ fine for a **specific item** within a category, select the appropriate category tab and then highlight the item.

Accept Payment via the Payment Button

The **Payment** button on the **Accounts** tab is a quick method of accepting payments.

From the **Patron Accounts** tab, click on **Payment**. The **Account Payment** window will appear.

Select full or partial amount and enter the amount of the payment.

Enter the amount tendered by the patron. (Optional)

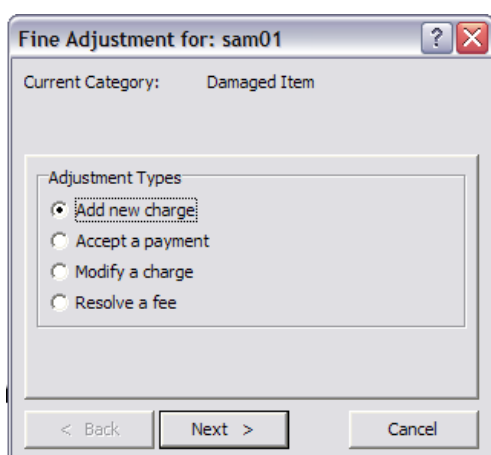
Click to place a check in the **Print Receipt** box if you wish to print a receipt.

If you type a value in the **Amount Tendered** field, when you click the **OK** button, a summary message will appear, displaying details of the transaction, including the system-calculated "change due to patron"

Access Fine Adjustment Wizard

Staff can be granted the permission to use the **Fine Adjustment Wizard** to accept or adjust fee/fine payments in the Virtua Client. In the **Profiler** → **Global Settings** → **System** → **User Profilers** → **Permissions** → **Circulation** → **Fine Adjustment** wizard, your library can choose to disable the Fine Adjustment Wizard for individual user profiles or a group of users. Disabling the **Fine Adjustment** wizard will have the effect of allowing only supervisory staff to make adjustments to fines and fees, but will allow student or volunteer workers to accept payments via the **Payment** button.

From any tab within the **Accounts** window, click on the **Adjust** button. The **Fine Adjustment** wizard will appear.



Select Type of Adjustment

There are four fee adjustment options:

- Add new charge
- Accept a payment
- Modify a charge
- Resolve a fee

Add New Charge

Select **Add New Charge** and click **Next**. The **Adjust/Add** window appears.

Fine Adjustment for: sam01

Current Category: Damaged Item
Adjust: Add

Item Barcode: 0134354

Fee Category: Damaged Item

Fee Amount: \$ 15.00

< Back Next > Cancel

Enter the item barcode (optional).

Select a Fee Category.

Enter a Fee Amount and click **Next**. If the adjustment is successful you will see the window below.

Note: Virtua does not support very large fines/fees (>\$29,000,000.00).

Fine Adjustment for: sam01

Current Category: Damaged Item
Adjust: Add

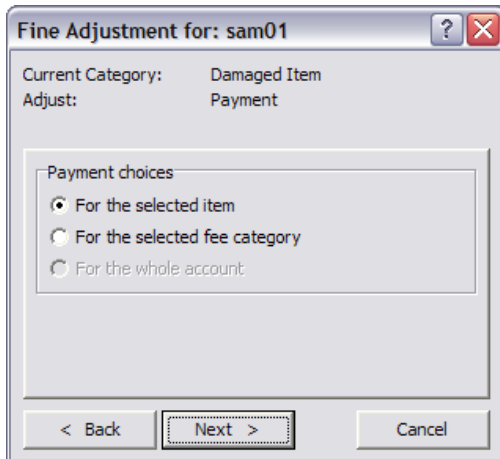
Completed !!!

< Back Finish Cancel

Click **Finish** to return to the **Patron Information** window.

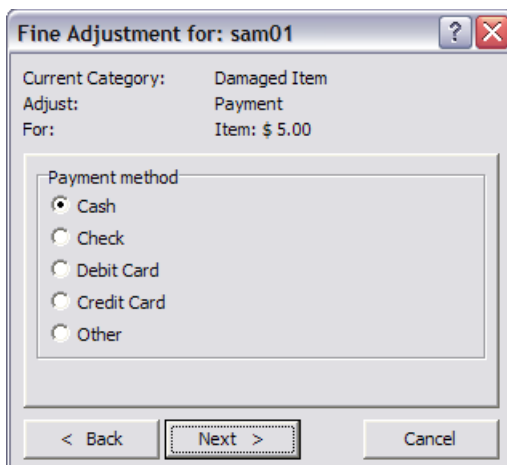
Accept a Payment

Select Accept Payment. The **Adjust: Payment** window will appear.



When the ***For the whole account*** option is grayed out the Fine Wizard was not accessed from the Summary tab. Only the Summary tab allows you to pay on the whole account.

Select a **Payment choice**; click **Next**, and the **Payment Method** window will appear.



Select a **Payment method**, Click **Next**. The **Fee Amount** window will appear.

Fine Adjustment for: sam01

Current Category: Damaged Item
 Adjust: Payment
 For: Item: \$ 5.00

Item Barcode: 000005548

Fee Category: Damaged Item
 Fee Amount: \$.00
 Tendered Amount: \$.00

< Back **Next >** Cancel

Enter a **Fee Amount** and **Tendered Amount** (optional), and then click **Next**. You will get a **Completed Message** if the transaction is successful.

Fine Adjustment for: sam01

Current Category: Damaged Item
 Adjust: Payment
 For: Item: \$ 5.00

Completed !!!

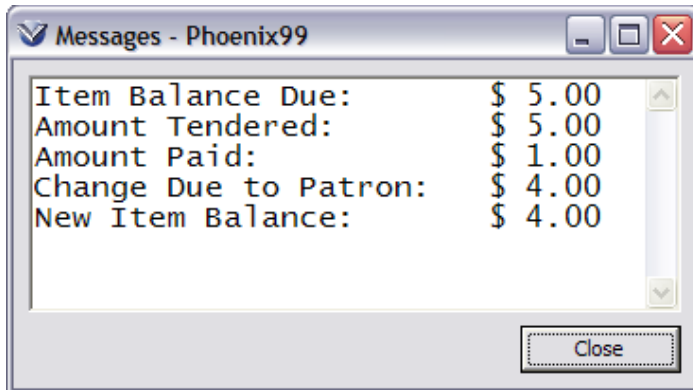
Print Receipt

< Back **Finish** Cancel

Click to add a check in the **Print Receipt** box if you wish to print a receipt.

Click **Finish**.

When an Amount Tendered is entered in the **Fine Adjustment/ Fee Amount** window; the **Change Calculator** window will appear displaying details of the transaction, including the system-calculated "change due to patron" value.



Paying Fines for Multiple Patrons in a Session

The **Session** feature in the Virtua client lets you start a payment session in which you can pay fines for multiple patrons in one transaction.

When you renew or check in an item that is overdue, the **Session** button appears on the **Messages** screen.



When you click the **Session** button, a **Session** window appears:

Renew Session

Patron Check-outs

Check-out Type

Regular

In-house

Selected Time: 11:51:27 AM Date: 12/ 6/2011

Item Barcode	Title	Due Date/Time	Type
9406	The consumer handbook on dizziness an...	12/27/2011 11:56:00 AM	1/ 6 Renew - Regular

Print Receipts

After Each Item When Check-outs Are Complete

Remember Last Check-out Type

Item Barcode:

Pay Quit Print Check Out

Check In Session - Wilson Library - Audiovisuals

Information
 Check-in Date: N/A Amnesty Flag: Off

Settings

Skip fines notification
 Warn if item is not checked out
 Select Time: 11:03:16 AM
 Date: 1/10/2011
 In-house Usage
 Suppress Patron Notes

Printing Options

Print Receipt Requested Slip
 In-transit Slip Billed material Slip
 Requested In-transit Slip
 Agency Requested Slip
 Print Request Wrapper

Items

Requested by:
 Route to:

Line	Item Barcode	Due Date/Time	Fine	New Status	Loc...
1	1000012200	1/7/2011 4:51:0040\$	In Transit	Garc...

Item Barcode:

On the **Session** window, you can simply check in or renew items from multiple patrons; there is no need to enter multiple patron barcodes.

When you complete the check-in or renewal session, click the **Pay** button to open the **Session Payment** window.

Session Payment - Virtua Library

Accounts | Documentation | Lucas, Elizabeth

Total Payable: 19.20\$ Total: 19.20\$

Name	Amount
Documentation	18.40\$
Lucas, Elizabeth	.80\$

Payment

Print Receipt Refresh Close

From the **Session Payment** window, you can click the **Payment** button from the **Accounts** tab to pay fines associated with all of the accounts or you can click on an individual patron tab to pay fines for a specific patron.

Pay All Accounts

Pay for

Account Category Item

Payment Method:

Pay

Full amount

Partial amount:

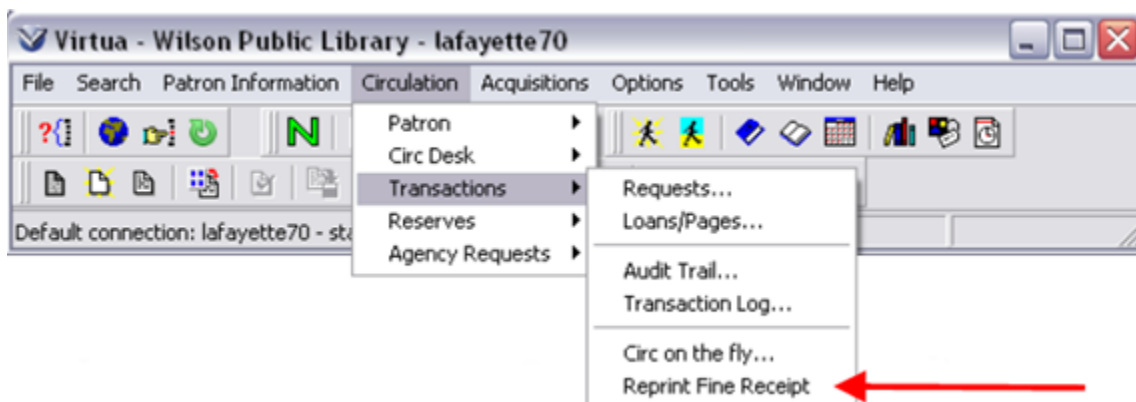
Amount tendered:

Print Receipt

OK Cancel

Re-printing Patron Receipts

To Re-print a patron receipt: Select **Transactions** → **Reprint Fine Receipt** on the **Circulation** menu in the Virtua toolbar to reprint the receipt. Only the most recent receipt is available for reprint.



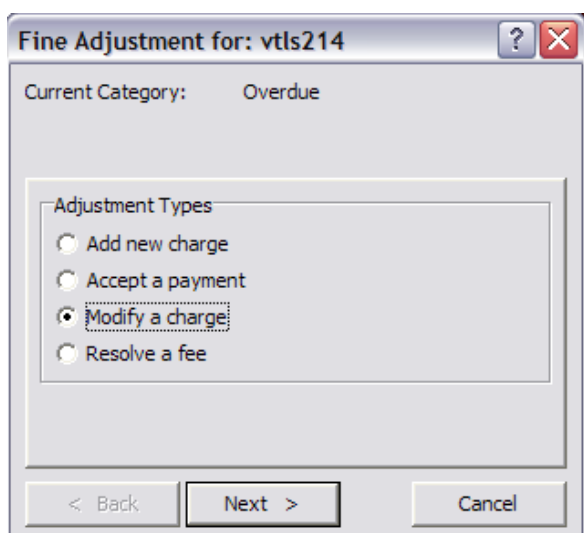
When a receipt is printed it is also saved as the file **fee_receipt.txt** in the Virtua directory on the user's workstation. The text file will be overwritten the next time a receipt is printed.

Receipt Numbers on Fine Payment Receipts

Each library location has the ability to generate receipt numbers on fine payment receipts. The receipt numbers are unique and are incremented for each fine receipt, starting with a customer-determined value defined in the Next Receipt Number setting of the Location Names parameter. The Fine Receipt/Slip Setup contains a Receipt Number label.

Modify a Charge

From the **Fine Adjustment** window select **Modify a charge** and click **Next**.



Select a **Payment Choice** and click **Next**.

Fine Adjustment for: vtls214

Current Category: Overdue
Adjust: Modify

Payment choices

For the selected item
 For the selected fee category
 For the whole account

< Back Next > Cancel

The **Fee Amount** window appears.

Select a Fee Category and enter a Fee Amount. Click **Next**.

Fine Adjustment for: vtls214

Current Category: Overdue
Adjust: Modify
For: Item: \$ 5.00

Item Barcode: 31781006351157

Fee Category: Overdue
Fee Amount: \$.00

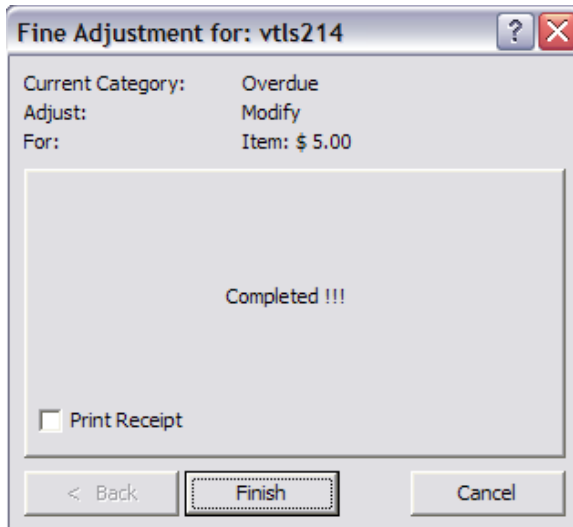
< Back Next > Cancel

To **reduce** a fine, enter a minus sign before the amount, (-10.00).

To **increase** a fine, enter the amount by itself, (10.00).

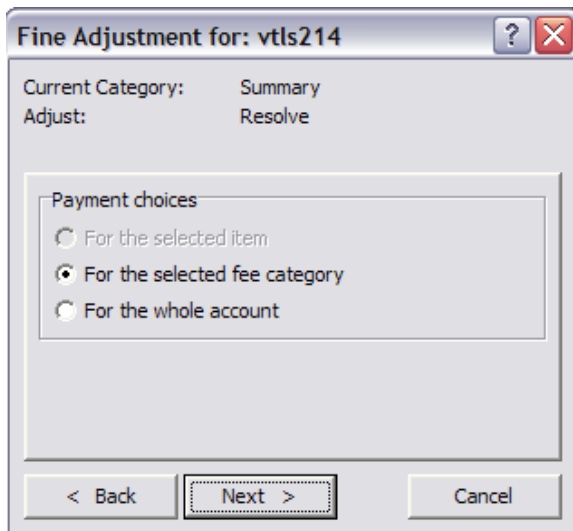
If the adjustment is successful you will see the completed message window below.

Click **Finish** to complete the transaction.

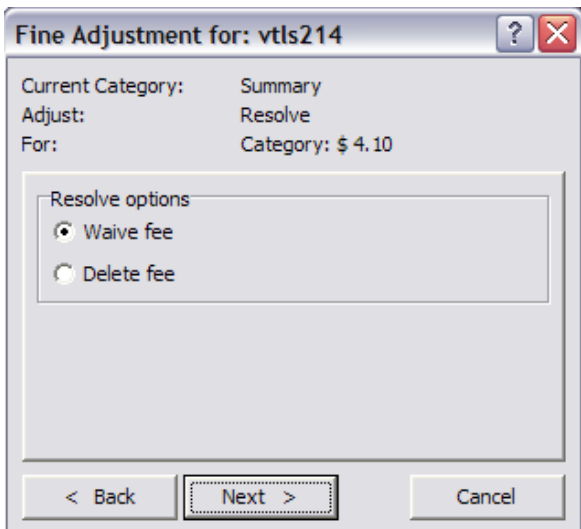


Resolve a Fee

From the **Fine Adjustment** window select **Resolve a fee**. Click **Next** and the **Payment Choice** window appears.



Select a **Payment Choice** and click **Next**. The **Resolve Options** window appears.



Choose a Resolve option:

Waive: fee/fine is removed from balance due but kept on waive tab for history

Delete: fee/fine is removed from balance due and patron information. To find the history you must use the audit trail.

Click **Next**. The **Complete Message** will appear if the transaction is successful.

Click **Finish** to return to the **Patron Information** window.

Dispute Fines/Fees or Items

Disputed fines do not count towards alerts and blocks, and fines do not accrue for disputed items. The **Dispute** button is available from any category tab except the **Summary** sub-tab on the **Account** tab of the **Patron Information** window.

Highlight the item you want to dispute, and click on **Dispute** button. A **Disputed** tab will be created if one does not already exist, and the item will be moved to that category.

Once a resolution has been found to the disputed item, you may either reinstate the item to its original fee category, or waive the fee.

From the **Account** tab of the **Patron Information** window, click on the **Dispute** Tab.

Patron Information - O'Connell, Hannah

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

Total Payable: \$ 2.00 Total: \$ 2.00

Barcode Number	Title	Check...	Date Fine A...	Fee A...	Balance
31781006351157	William Shakespeare's Mu...	1/6/201...	1/6/2011 8:3...	\$ 5.00	\$ 2.00

\Summary / \Overdue / \Dispute /

Reinstate Waive Info

Print Receipt Update Renew All Refresh Close

Reinstate - moves from dispute category back to original category
Waive - moves from dispute category to the waive category for history

To waive a fee, click the **Waive** button on the **Dispute** Tab. A **Waive** tab will be created if one does not already exist.

Patron Information - O'Connell, Hannah

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

Total Payable: \$ 2.00 Total: \$ 2.00

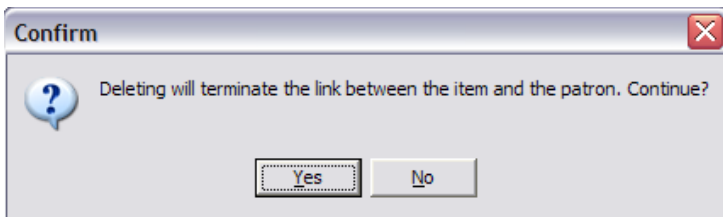
Barcode Number	Title	Check...	Date Fine A...	Fee A...	Balance
31781006351157	William Shakespeare's Mu...	1/6/201...	1/6/2011 8:3...	\$ 5.00	\$ 2.00

\Summary / \Overdue / \Waive /

Delete Reinstate Info

Print Receipt Update Renew All Refresh Close

Click the **Delete** button to delete a waived fine/fee from the patron's account. On the **Confirm** window, click the **Yes** button to proceed with the deletion. The item will be removed from the patron's record. The history can then only be accessed through the audit trail.

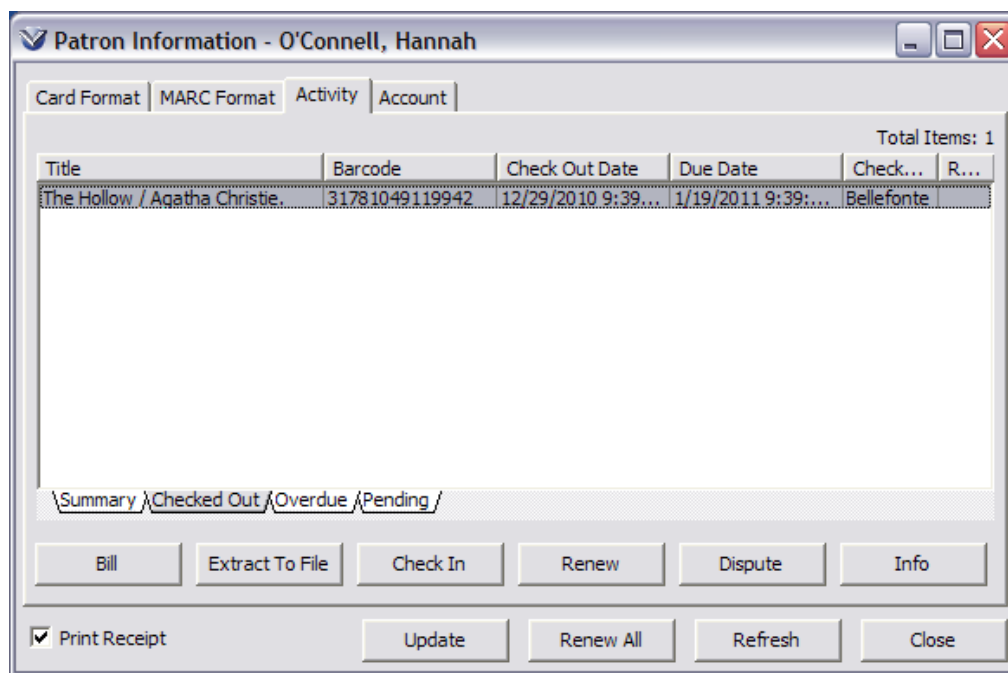


Dispute Checkouts

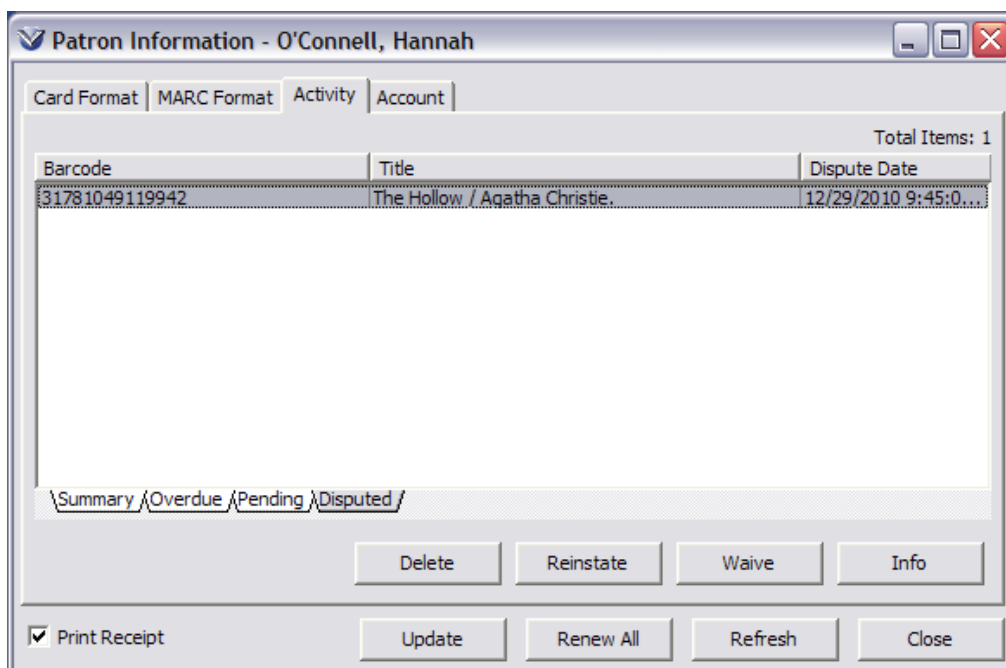
Checked out items may also be disputed *i.e.*, a patron claims to have returned an item. A disputed checkout still has a status of Checked Out, but will not count towards the patron's checkout limit.

Open the **Patron Information** window and click the **Activity** tab.

Click the **Checked Out** sub-tab located at the bottom of the **Activity** tab.



To move an item to the dispute tab, highlight an item and click the **Dispute** button.



An item on the **Disputed** tab may be Waived, Reinstated, or Deleted by highlighting the item and clicking the **Waive**, **Reinstatement**, or **Delete** button. This has the following implications for charging of overdue fines.

- If** the item is checked in from the **Waived** tab, the system **will not** assess fines.
- If** a disputed item is returned to Checked Out status, the system **will** assess fines based on the due date.
- If** the item is checked in from the **Disputed** tab the system **will** assess fines based on the due date.
- If** the item is deleted it is removed the item from the **Disputed** tab and any fines or fees associated with the item (including billed fines or fees, if the item has already been billed) are deleted. In addition, the item's circulation status is removed and the item is no longer checked out. Note that the item should now be checked in so that Virtua can check for requests that the item might satisfy.

Force Item into Billing

The **Bill** command button moves the selected item(s) to the Billed category, bypassing the Overdue/Billing process done in InfoStation. The **Bill** command button is available on the following Patron Activity pages:

- Checked Out
- Disputed
- Overdue
- Requested
- Requested Overdue

Patron Information - O'Connell, Hannah

Card Format | MARC Format | Activity | Account

Total Items: 4

Title	Barcode	Check Out Date	Due Date	Check...	R...
The Hollow / Agatha Christie.	31781019782604	1/6/2011 10:07:...	1/6/2011 11:49:...	Bellefonte	1/6...
Mrs. McGinty's dead / Agatha ...	31781003078571	1/6/2011 9:05:0...	1/6/2011 11:52:...	Bellefonte	1/6...
Witness for the prosecution / ...	31781003130760	1/6/2011 11:44:...	1/6/2011 11:54:...	Bellefonte	
Hamlet / William Shakespeare.	31781019064987	1/6/2011 11:45:...	1/6/2011 11:55:...	Bellefonte	

\Summary / \Checked Out / \Pending / \Disputed /

Bill Extract To File Check In Renew Dispute Info

Print Receipt Update Renew All Refresh Close

Highlight the item you wish to place in Billed status.

Click the **Bill** button.

If the item's status is Billed For Replacement, the item's status is set to the status defined in the **Deleted billed for replacement dispute status** parameter configured in the **Profiler** → **Circulation** → **Circulation Basic Options** → **Item Statuses**.

Processing Lost/Damaged Items

When a patron loses or damages an item, the Virtua staff can use the **Lost** or **Damaged** button on the **Activity** tab of the **Patron Information** window to begin the process for charging the patron for an item based on the original purchase price for the item, taking into account the purchase date, a rate of depreciation, binding or lamination costs, and a library-defined surcharge.

Lost and Damaged Buttons

The **Lost** and **Damaged** buttons are located on the **Activity** tab of the **Patron Information** window. The buttons are available from the following page tabs of that window: Checked Out, Overdue, and Disputed.

Patron Information - O'Connell, Hannah

Card Format | MARC Format | Activity | Account

Total Items: 2

Title	Barcode	Check Out Date	Due Date	Location	She...	Ren...	Requested
Timbuktu / Paul Auster...	38888168741340	1/12/2012 12:37:19 PM	2/2/2012 12:37:00 PM	Headquarters	Cliffd...		
The Haiku anthology : ...	31781018312791	9/29/2011 12:15:20 PM	2/15/2012 3:52:00 PM	Headquarters	Hope...	1/6/20...	

Summary | Checked Out | Pending | Pickup | History | Lost

Change Due Date | Lost | Damaged | Bill | Extract To File | Check In | Renew | Dispute | Info

Print Receipt

Update | Renew All | Refresh | Close

The **Process Lost/Damaged Item** window is where staff users can declare an item lost or damaged, and review and edit the below information that impacts how the replacement fee is calculated.

These fields available for edit:

- Original Purchase Price and Currency
- Depreciation Rate (Per Year)
- Maximum Depreciation
- Binding Cost
- Lamination Cost
- Surcharge
- Acquisition Date

Process Lost/Damaged Item - phoenix

Item Information

Title: The Haiku anthology : haiku and senryu in English ,

Item Barcode: 31781018312791

Item Class: Book

Accession Number:

Check-out Date/Time: 9/29/2011 12:15:20 PM

Lamination Status: None

Exchange Rate: 1

Overdue Fines:

Replacement Cost

Original Purchase Price: \$ 10.00

Original Purchase Price Currency: United States D... USD

Depreciation Rate (Per Year): 0.00 %

Maximum Depreciation: 100.00 %

Binding Cost: \$.00

Lamination Cost: \$.00

Surcharge: 0.00 %

Receipt Date: 6/26/2004

Surcharge Amount:

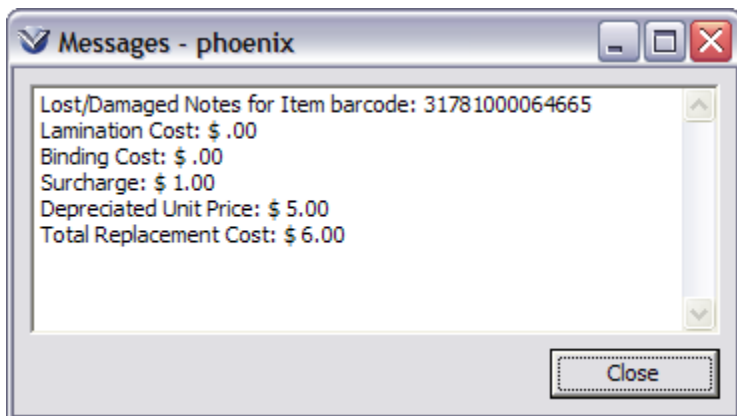
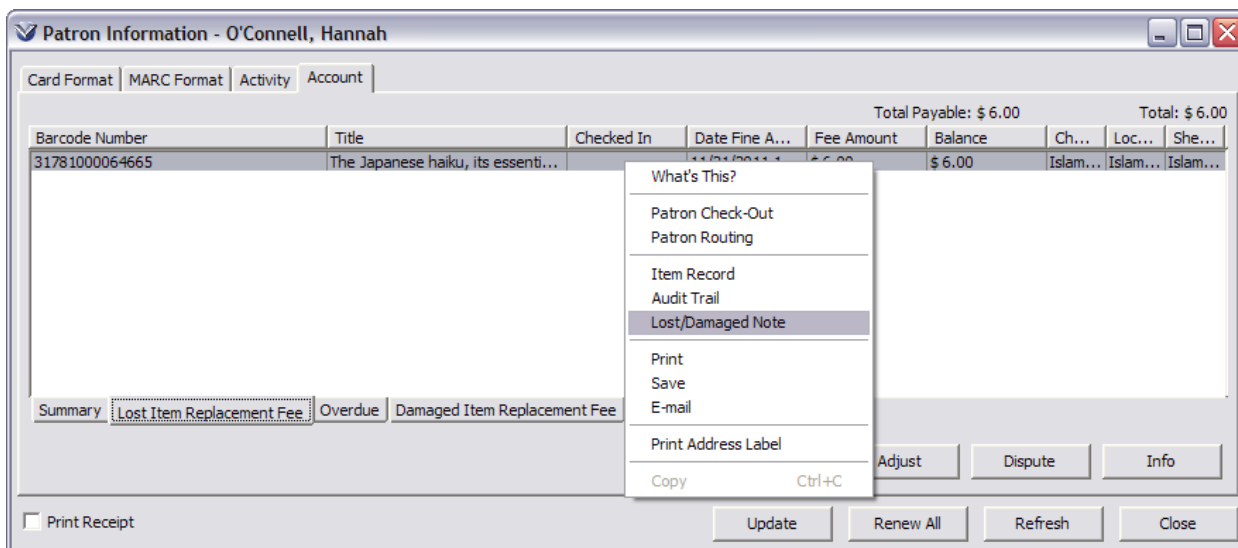
Total Replacement Cost: \$ 10.00

Edit Continue Cancel

The original purchase price and currency on the **Process Lost/Damaged Item** window are either pulled from the item's invoice or defined on the **Acquisitions** tab of the **Item Information** window.

Lost/ Damaged Note

Details associated with a lost/damaged item charge have been made available via the right-click Notes option on the **Account** tab of the **Patron Information** window. The note will provide a breakdown of the individual elements of the total lost/damaged item charge.



Profiler Settings for the Lost/ Damaged Workflow

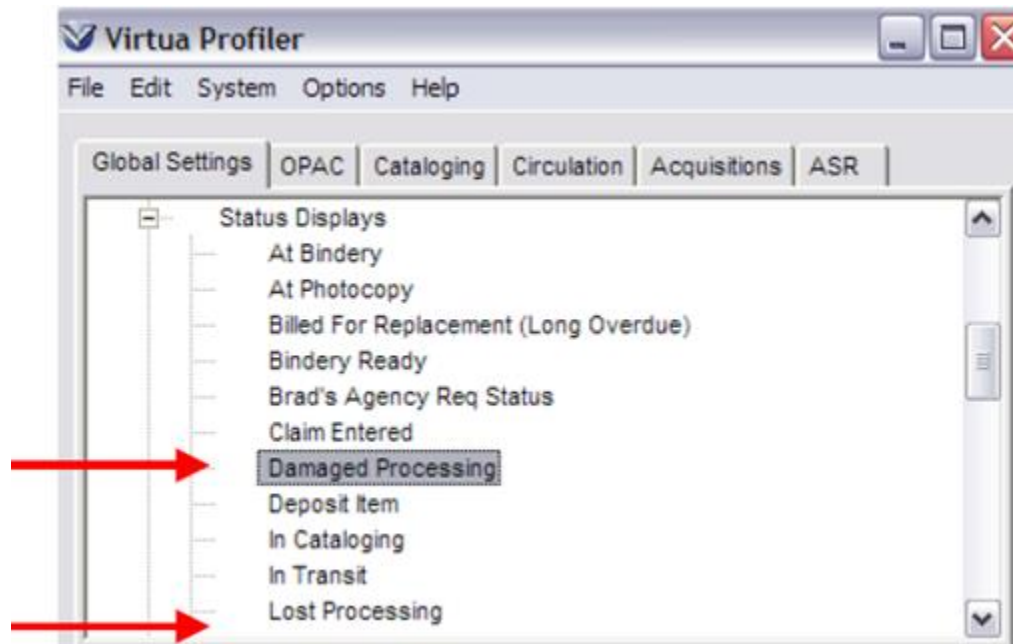
The **Lost/Damaged** tab is found in the **Profiler** → **Circulation** → **Location + Item** matrix.

The screenshot shows a software window titled "Arlington Library + Book Matrix" with a "Lost/Damaged" tab selected. The window contains several input fields for configuring depreciation and costs. The "Depreciation Rate" is set to 10.00 % Per Year. The "Maximum Depreciation" is set to 80.00 %. The "Binding Cost" is set to 2.50\$. The "Lamination Cost" is set to 3.00\$. The "Surcharge" is set to 10.00 %. At the bottom of the window, there are three buttons: "Apply To", "Save", and "Cancel". A status bar at the very bottom of the window indicates "Last modified at 11/30/2010 9:07:15 AM by Root User".

Field	Value	Unit
Depreciation Rate	10.00 %	Per Year
Maximum Depreciation	80.00 %	
Binding Cost	2.50\$	
Lamination Cost	3.00\$	
Surcharge	10.00 %	

System Assigned statuses workflow:

Profiler → Global Settings → Status Displays → Damaged Processing or Lost Processing.



Circulation Basic Options for Lost/ Damaged Items

The **Circulation Basic Options** window contains the settings for defining the item status of a lost or damaged item that has been paid for.

Circulation Basic Options

Delete / Waive Options

- Delete Outstanding Requests
- Delete Special Status
- Require Activity Dispute/Waive Notes
- Allow withdrawal of checked out items

When fees are present:

- Do not allow item deletion
- Waive fees
- Keep fees

Request Options

- 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
- 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

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

Item Options

- 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
- No message or fines at check-out
- Use transaction location for due date calculations

Item Statuses

- Paid for replacement status
Shelving
- Deleted billed for replacement dispute status
Shelving
- Not available until street date status
Street Date Not Reached
- Agency request satisfied status
On Hold
- Lost and paid status
Lost and paid
- Damaged and paid status
Damaged Processing

Renewal Options

- Use current date for renewals
- Use due date for renewals

Conversion Factor and Alternate Conversion Factor Radio Buttons in the Currencies Parameter

The **Alternate Conversion Factor** column allows for configuration of an alternate set of currency conversion factors. The **Alternate Conversion Factor** will ONLY be used by Virtua to calculate the replacement cost of lost items (and the replacement cost of billed items that are long overdue).

Currencies

Code	Conversion Factor	Description	Symbol	Decimals	Decimal Separator	Grouping Size	Leading Zeros	Positive Format	Negative Format	Group Separator	Alternate Conversion
AED	0.2723	United Arab Emirates, Dirhams	\$	2	.	3	No	1.1\$	-\$1.1	.	0.2723
AFA	1	Afghanistan, Afghanis	\$	2	.	3	No	1.1\$	-\$1.1	,	0.123
ALL	0.01	Albania, Leke	\$	2	.	3	No	1.1\$	-\$1.1	,	0.01
AMD	9.39	Armenia, Drams	\$	2	.	3	No	1.1\$	-\$1.1	,	0
ANG	0.5581	Netherlands Antilles, Guilders	\$	2	.	3	No	1.1\$	-\$1.1	,	0.5581

Schedule/UnSchedule Conversion

Conversion Factor Alternate Conversion Factor

Schedule Updates Unschedule Errors Re-encumber Save Cancel

Last Modified 11/22/2010 11:07:05 AM by Root User

The radio buttons for **Conversion Factor** and **Alternate Conversion Factor** work as follows:

- **If** the **Conversion Factor** radio button is selected, clicking the **Schedule Updates** button or the **Unschedule** button will let you schedule or unschedule updates to the exchange rates in the **Conversion Factor** column.
- **If** the **Alternate Conversion Factor** button is selected, clicking the **Schedule Updates** button or the **Unschedule** button will let you schedule or unschedule updates to the **Alternate Conversion Factor** exchange rates.

Circulation History

Recommended Outline	Explanation
<div data-bbox="212 459 438 556" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Alerts and Blocks</div> <div data-bbox="212 617 438 730" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Audit Trail</div> <div data-bbox="212 777 438 873" style="border: 1px solid black; padding: 5px;">Circulation Transaction Log</div>	<p>Virtua provides several ways of tracking circulation records.</p> <p>Alerts and Blocks: A system of circulation alerts and blocks that gives your library flexibility in dealing with patron delinquencies.</p> <p>Audit Trail: A log of all financial transactions recorded by the system. Entries in the log are organized by transaction groups. For example, the assessment of a fee, its partial payment, and then its final payment compose one transaction group.</p> <p>Transaction Log: The circulation transaction history of a particular item or patron. The transaction log is <i>read only</i>, and only authorized users may access it.</p> <p>Summary</p> <ul style="list-style-type: none"> Distinguish between alerts and blocks Enter Block codes in a patron record Delete Block codes from a patron record View patron audit trail View Item, Patron, and Item/Patron circulation transaction and audit trail logs <p>Key Terms</p> <ul style="list-style-type: none"> Alert Block Audit Trail Transaction Log <p>Circulation Parameters</p> <p>System: Block Codes, Audit Trail Flag</p> <p>User Permissions: Circulation → Transactions → Transaction Log</p>

	Circulation Parameters
	<p>The parameters listed below affect the processes related to Circulation History.</p> <p>System Parameters (Circulation tab)</p> <p>Block Codes: Defines codes used to block circulation transactions, these codes are added manually to the 043 tag of the patron record.</p> <p>Circulation Basic Options (Circulation tab)</p> <p>Audit Trail: Determines whether financial transactions are logged and searchable by the Audit Trail feature of the Patron Activity window.</p> <p>User Permissions (Global Settings tab)</p> <p>Operational Security tab → Circulation Permissions → Override System Blocks: Determines if user can override system-assigned blocks.</p> <p>Circulation tab → Transaction Log → Transaction Log Menu: Determines whether circulation transactions are logged in the transaction log table of the Patron Activity window (currently cannot be disabled, but permission to view the transaction log may be disabled).</p> <p>InfoStation Reports</p> <p>Blocked Patrons: Generates a list of patrons who have one or more blocks (system-generated or manual) against them.</p>

Alerts and Blocks

Alert: A message during a circulation transaction that indicates an "alert" condition exists for the patron. An alert condition is typically a delinquency such as owing a fine for an overdue book.

Block: A message encountered during a circulation transaction that indicates that a "block" condition exists for the patron. A block condition is more serious than an alert, for example, the patron account shows an excessive number of billed items. Blocks can cause the transaction to be canceled.

The Alerts and Blocks Matrix

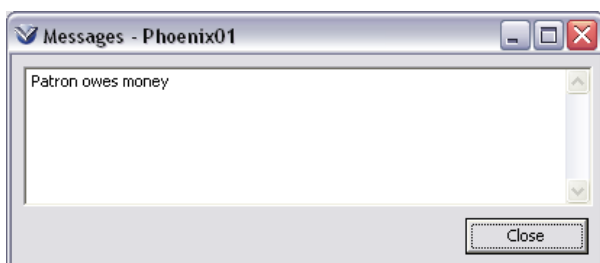
The **Alerts and Blocks Matrix** in the **Profiler → Circulation → System Parameters → Alerts & Blocks** allows the library to set the threshold at which Virtua will send an alert or block during a specified transaction such as a check-out, renewal, or request.

Alert/Block	Overdue	Requested Overdue	Billed	Reserve Overdue	Owed Amount	Days Overdue
Checkout Alert	5	3	1	5	100.00	1
Checkout Block	100	7	3	10	150.00	200
Renewal Alert	5	2	2	3	100.00	1
Renewal Block	100	4	3	5	150.00	20
Hold Alert	15	8	3	8	30.00	1
Hold Block	30	15	5	12	100.00	31
Recall Alert	2	1	0	1	30.00	1
Recall Block	3	2	1	2	30.00	31
Loan Alert	5	4	2	4	40.00	1
Loan Block	8	9	4	8	80.00	31
Page Alert	12	9	5	2	30.00	1
Page Block	15	12	7	4	50.00	31

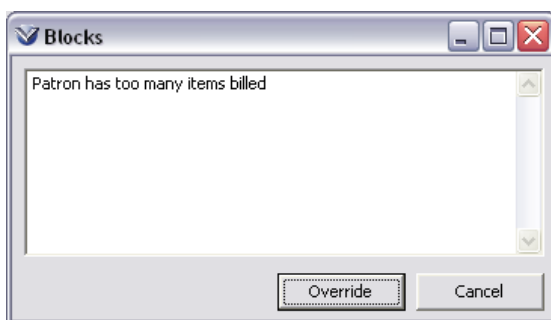
Last Modified 08/01/2000 3:57:38 PM

When you enter a patron barcode to begin a check-out, renewal, or request, Virtua checks this matrix and acts accordingly. For a given transaction:

If the parameter calls for an alert, the **Messages** window pops-up, displaying a message about the delinquency.



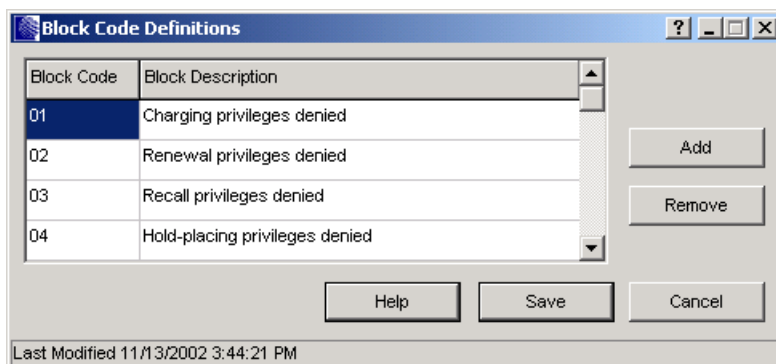
If the parameter calls for a block, the **Blocks** dialog box appears, displaying the reason for the block(s). If permissions have been enabled, an **Override** and **Cancel** button appear. If **Override** is selected, the **Checkout/Renew** window appears. If **Cancel** is selected, the transaction is canceled.



Block Code Definitions

Block Code Definitions gives your library the ability to create its own block codes and define its own blocks. These are set in the **Profiler** → **Circulation** → **System Parameters** → **Block Code Definitions**.

Warning: Do not change the numeric block codes that are default settings in Virtua.

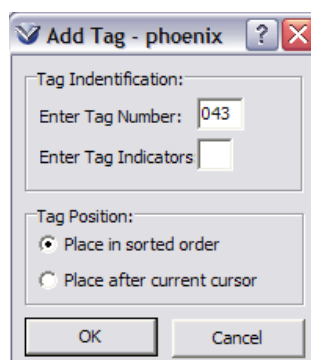
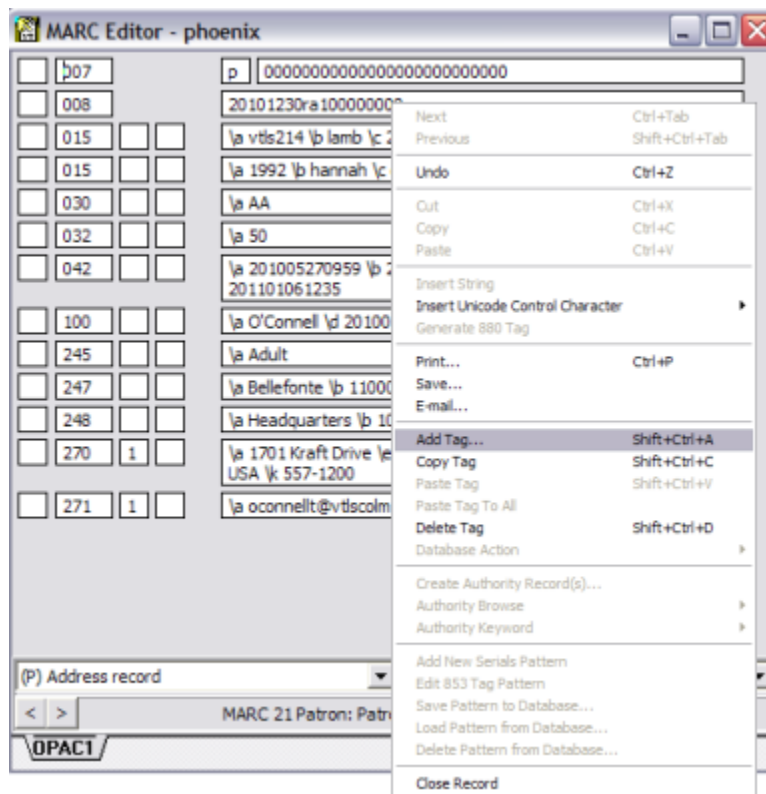


Add Block Codes to a Patron Record

Once your library has defined its own block codes, you can assign them as needed by manually inserting them in the 043 tag of the patron record or in the Patron Editor on the Blocks tab.

Open the patron record in the **MARC Editor**. If the Editor is in label mode go to **Options** → **Cataloging Options** on the Virtua main menu. Turn off MARC Labels.

Right mouse click to create a 043 tag if one does not already exist.



Type the first block code for the patron in the 043 field and press enter. The software will automatically add the delimiter, (e.g. \$a).

To add a second block code, type the delimiter followed by the second block code. Continue in this way until you have manually entered all needed block codes for this patron.

For example: \$a AA \$a DG \$a OO

Note: Instead of repeating subfield \$a, you can create multiple 043 tags.

Save the record to the database.

Delete Block Codes from a Patron Record

Open the patron record in the **MARC Editor**.

Delete the appropriate subfields from the 043 tag.

Save the record to the database.

Manually Block Patrons Using an 007 Tag Fixed Field

Patron blocks can also be set using the fixed fields in the 007 tag *p* (Patron Blocks and Restrictions) is entered as the category of material.

Open the patron record in the **MARC Editor**

Click in the 007 tag to open the **Fixed Field Editor**. The **Patron Blocks and Restrictions** fields will display.

Fixed Field Editor - Phoenix01

Blocks and Restrictions (Patron) 007 Fixed Fields

Chrg Priv Deny: Not blocked	Renew Priv Deny: Not blocked	Recd Priv Deny: Not blocked
H-P Priv Deny: Not blocked	ILL Priv Deny: Not blocked	Card Lost: Not blocked
Card Stolen: Not blocked	Max Itms Chrgd: Not blocked	Max Itms Odue: Not blocked
Maxed Renewls: Not blocked	Mx Itm Rt Clms: Not blocked	Max Itms Lost: Not blocked
Excsv Fines: Not blocked	Excsv Fees: Not blocked	Recall Ovdue: Not blocked
Max Itms Billed: Not blocked	Sys Checkout Blk: Blocked	Sys Renew Blk: Not blocked
Sys Hold Blk: Not blocked	Address Blk: Not blocked	Other Circ Blks: Not blocked
Sys Loan Blk: Not blocked	Sys Recd Blk: Blocked	Sys Page Blk: Blocked
Institution: Default Institution		

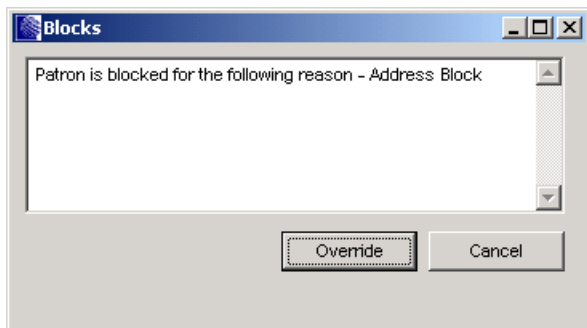
OK Cancel

To set a patron block, select **Blocked** from the pull-down menu for the block you wish to set, such as *Chrg Priv Deny*.

Note: System generated blocks display, but are grayed out and cannot be changed manually.

How Virtua Displays the Blocks

If blocks are associated with the patron's account, during an appropriate transaction Virtua issues a message that displays the block definition.



For libraries using the 3M Patron SelfCheck Interface: The SelfCheck program detects when a library card is left in the machine or when a patron tampers with the machine. The program automatically notifies the Virtua software, which responds by entering a 1 in the *Card Lost* fixed field of the 007 tag. In this way, Virtua blocks any transactions by a person using the lost card illegally or by the person *caught* tampering.

Audit Trail

You can access the log of financial transactions by entering any of the following information:

- Patron barcode
- Item barcode
- Date range

A flag in the Circulation parameters called the Audit Trail Flag controls The Audit Trail function. The flag is ON by default. When the flag is OFF, the Audit Trail no longer collects information and the list of financial transactions will become outdated.

Access the Audit Trail

On the Virtua menu, click **Circulation** → **Transactions** → **Audit Trail**. The **Audit Trail** window appears.

The screenshot shows the 'Audit Trail - venus88' window. It has two tabs: 'Search Criteria' and 'Results'. The 'Search Criteria' tab is selected. Below the tabs, there is a message: 'You may search using one or more of the following criteria:'. On the left side, there are four input fields: 'Item Barcode:', 'Patron Barcode:', 'Transaction Reference Number:', and 'Receipt Number:'. On the right side, there is a 'Filters' section. The 'Use Dates/Time:' checkbox is checked. The 'From:' date is '11/14/2011' and the time is '12:00:00 AM'. The 'To:' date is '11/16/2011' and the time is '11:59:59 PM'. Below the date filters, there is a 'Filter by Location' section with a list of locations: Chamo - Internet (*000010000), TPU, Hong Kong Central (*1000000), Hong Kong Central - bookdrop (1000001), To be deleted (2), City Hall (*301000000), City Hall - bookdrop (301000010), To be deleted, Kowloon (302000000), To be deleted (3), Kowloon - bookdrop (302000002), To be deleted (4), Sha Tin (303000000), Sha Tin - bookdrop (303000001), Tsuen Wan (304000000), Tsuen Wan - bookdrop (304000001), and Tsuen Wan (305000000). At the bottom of the window, there are 'Search' and 'Close' buttons.

The **Audit Trail** window has two tabs: **Search Criteria** and **Results**.

The **Search Criteria** tab lets you enter search criteria such as a specific patron barcode, item barcode, transaction reference number, receipt number, or any combination of these. In addition, you can limit the list of transactions to a specific date range, or filter the list of transactions by location.

Click the **Search** button or press **ENTER**. The results of the search will appear on the **Results** tab.

You can change your search criteria at any time by clicking on the Search Criteria tab.

Search on any or all of the fields listed in the left hand side of the window.

If you search by patron barcode, Virtua displays all fee transactions for that patron.

If you search by patron barcode AND item barcode, Virtua displays the fee transactions for that patron and that specific item.

If you search by item barcode, Virtua displays all fee transactions for that item and the barcodes of all patrons associated with the transactions.

Enter a date range to limit your search results by date.

Click the **Search** button or press **ENTER**. The results of the search will appear on the **Results** tab.

The **Results** tab displays the list of account transactions that corresponds to your search parameters. The list is sorted: 1) by transaction groups in ascending date order, and 2) within a transaction group by date and time.

Patron	Type	Fee	Date/Time	Amount	Balance	Payment Method	Item Barcode	Assessment ID
vtls0215	Delete - Request Placed	HK\$9.00	11/14/2011 10:21:1...	-HK\$9.00	HK\$0.00		10000000007854	1858
vtls0406	Delete - Request Placed	HK\$1.00	11/14/2011 10:21:3...	-HK\$1.00	HK\$0.00		10000000008704	1859
11182008123450	Payment - Overdue	HK\$130.00	11/15/2011 1:36:49 ...	+HK\$130.00	HK\$0.00	Cash	38888000200380	1862
11182008123450	Assessment - Overdue	HK\$130.00	11/14/2011 9:30:30 ...	HK\$130.00	HK\$130.00		38888000200380	1862
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:12 ...	HK\$0.10	HK\$0.10		38888000200380	1863
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:13 ...	HK\$0.10	HK\$0.10		38888000200323	1864
vtls0215	Payment - Overdue	HK\$10.00	11/14/2011 3:22:44 ...	-HK\$10.00	HK\$0.00	Cash	10000000000511	1866
vtls0215	Assessment - Overdue	HK\$10.00	11/14/2011 10:37:2...	HK\$10.00	HK\$10.00		10000000000511	1866
vtls0215	Payment - Lost Item Replacem...	HK\$0.01	11/14/2011 3:22:44 ...	-HK\$0.01	HK\$0.00	Cash	10000000000511	1867
vtls0215	Assessment - Lost Item Replac...	HK\$0.01	11/14/2011 10:37:2...	HK\$0.01	HK\$0.01		10000000000511	1867
vtls0215	Payment - Request Placed	HK\$9.00	11/16/2011 10:25:3...	-HK\$9.00	HK\$0.00		10000000000511	1868
vtls0215	Assessment - Request Placed	HK\$9.00	11/14/2011 4:03:14 ...	HK\$9.00	HK\$9.00		10000000000511	1868
vtls0215	Payment - Request Trapped	HK\$2.50	11/16/2011 10:25:3...	-HK\$2.50	HK\$0.00		10000000000511	1869
vtls0215	Assessment - Request Trapped	HK\$2.50	11/14/2011 4:21:09 ...	HK\$2.50	HK\$2.50		10000000000511	1869
vtls529	Payment - Request Placed	HK\$999.00	11/16/2011 11:43:5...	-HK\$999.00	HK\$0.00	Cash	754	1870
vtls529	Assessment - Request Placed	HK\$999.00	11/15/2011 11:43:3...	HK\$999.00	HK\$999.00		754	1870
4321	Assessment - Late Renewal	HK\$10.00	11/15/2011 12:47:0...	HK\$10.00	HK\$10.00		00000000000083	1871
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:05:05 ...	-HK\$2.50	HK\$0.00	Cash	38888000200323	1872
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:04:28 ...	HK\$2.50	HK\$2.50		38888000200323	1872
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:23:31 ...	-HK\$2.50	HK\$0.00	Cash	38888000200372	1876
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:23:23 ...	HK\$2.50	HK\$2.50		38888000200372	1876
101	Assessment - Overdue	HK\$30.00	11/15/2011 2:26:46 ...	HK\$30.00	HK\$30.00		101	1878
vtls0215	Payment - Request Picked Up	HK\$0.01	11/16/2011 10:25:3...	-HK\$0.01	HK\$0.00		10000000000511	1883
vtls0215	Assessment - Request Picked Up	HK\$0.01	11/16/2011 10:24:2...	HK\$0.01	HK\$0.01		10000000000511	1883
vtls0215	Delete - Request Placed	HK\$999.00	11/16/2011 10:57:0...	-HK\$999.00	HK\$0.00		100000000005916	1884
vtls0215	Assessment - Request Placed	HK\$999.00	11/16/2011 10:42:4...	HK\$999.00	HK\$999.00		100000000005916	1884

Each fee occurrence has a unique transaction number for audit purposes. This means that if the same item number is associated with a fee for the same patron more than once, you can associate and track payments to a specific fee. In addition, the **Audit Trail** logs the date, hour, minute, and second that the fine is assessed or the transaction processed.

Audit Trail records are grouped by the unique transaction number and sorted by time and date in reverse chronological order. This allows for a sequentially view of the history of a transaction from assessment through final resolution. By clicking on any of the tabs you can alter the sorting of the log. For example a click on the **Date/Time** tab rearranges the sorting of the items by ascending or descending date/time.

Patron	Type	Fee	Date/Time	Amount	Balance	Payment Method	Item Barcode	Assessment ID
11182008123450	Assessment - Overdue	HK\$130.00	11/14/2011 9:30:30 ...	HK\$130.00	HK\$130.00		38888000200380	1862
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:12 ...	HK\$0.10	HK\$0.10		38888000200380	1863
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:13 ...	HK\$0.10	HK\$0.10		38888000200323	1864
vtis0215	Delete - Request Placed	HK\$9.00	11/14/2011 10:21:1...	-HK\$9.00	HK\$0.00		100000000007854	1858
vtis0406	Delete - Request Placed	HK\$1.00	11/14/2011 10:21:3...	-HK\$1.00	HK\$0.00		100000000008704	1859
vtis0215	Assessment - Overdue	HK\$10.00	11/14/2011 10:37:2...	HK\$10.00	HK\$10.00		100000000000511	1866
vtis0215	Assessment - Lost Item Replac...	HK\$0.01	11/14/2011 10:37:2...	HK\$0.01	HK\$0.01		100000000000511	1867
vtis0215	Payment - Overdue	HK\$10.00	11/14/2011 3:22:44 ...	-HK\$10.00	HK\$0.00	Cash	100000000000511	1866
vtis0215	Payment - Lost Item Replacem...	HK\$0.01	11/14/2011 3:22:44 ...	-HK\$0.01	HK\$0.00	Cash	100000000000511	1867
vtis0215	Assessment - Request Placed	HK\$9.00	11/14/2011 4:03:14 ...	HK\$9.00	HK\$9.00		100000000000511	1868
vtis0215	Assessment - Request Trapped	HK\$2.50	11/14/2011 4:21:09 ...	HK\$2.50	HK\$2.50		100000000000511	1869
vtis529	Assessment - Request Placed	HK\$999.00	11/15/2011 11:43:3...	HK\$999.00	HK\$999.00		754	1870
4321	Assessment - Late Renewal	HK\$10.00	11/15/2011 12:47:0...	HK\$10.00	HK\$10.00		00000000000083	1871
11182008123450	Payment - Overdue	HK\$130.00	11/15/2011 1:36:49 ...	-HK\$130.00	HK\$0.00	Cash	38888000200380	1862
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:04:28 ...	HK\$2.50	HK\$2.50		38888000200323	1872
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:05:05 ...	-HK\$2.50	HK\$0.00	Cash	38888000200323	1872
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:23:23 ...	HK\$2.50	HK\$2.50		38888000200372	1876
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:23:31 ...	-HK\$2.50	HK\$0.00	Cash	38888000200372	1876
101	Assessment - Overdue	HK\$30.00	11/15/2011 2:26:46 ...	HK\$30.00	HK\$30.00		101	1878
vtis0215	Assessment - Request Picked Up	HK\$0.01	11/16/2011 10:24:2...	HK\$0.01	HK\$0.01		100000000000511	1883
vtis0215	Payment - Request Placed	HK\$9.00	11/16/2011 10:25:3...	-HK\$9.00	HK\$0.00		100000000000511	1868
vtis0215	Payment - Request Trapped	HK\$2.50	11/16/2011 10:25:3...	-HK\$2.50	HK\$0.00		100000000000511	1869
vtis0215	Payment - Request Picked Up	HK\$0.01	11/16/2011 10:25:3...	-HK\$0.01	HK\$0.00		100000000000511	1883
vtis0215	Assessment - Request Placed	HK\$999.00	11/16/2011 10:42:4...	HK\$999.00	HK\$999.00		100000000005916	1884
vtis0215	Delete - Request Placed	HK\$999.00	11/16/2011 10:57:0...	-HK\$999.00	HK\$0.00		100000000005916	1884
vtis529	Payment - Request Placed	HK\$999.00	11/16/2011 11:43:5...	-HK\$999.00	HK\$0.00	Cash	754	1870

View Related Information

To access related information about a specific item highlight the desired line item, notice that more information about the transaction is displayed in the gray area at the bottom of the Audit Trail. A right click on the mouse will bring up the pop-up menu to gain further information access.

The screenshot shows a window titled "Audit Trail - venus88" with a search criteria and results section. The main area contains a table with columns: Patron, Type, Fee, Date/Time, Amount, Balance, Payment Method, Item Barcode, and Assessment ID. A context menu is open over the row for Patron vts529, showing options: "What's This?", "Patron Record", "Patron Activity", "Patron Account", "Item Record", "Print...", "Save...", "E-mail...", and "Save As CSV". Below the table, there is a summary section with fields for Operator, Location, Receipt Number, Transaction Reference Num, System Generated, and Machine Name.

Patron	Type	Fee	Date/Time	Amount	Balance	Payment Method	Item Barcode	Assessment ID
vts529	Payment - Request Placed	HK\$999.00	11/16/2011 11:43:30	HK\$999.00	HK\$999.00	Cash	754	1870
vts0215	Delete - Request Placed	HK\$999.00	11/16/2011 10:03:14	HK\$999.00	HK\$999.00		10000000005916	1884
vts0215	Assessment - Request Placed	HK\$999.00	11/16/2011 10:03:14	HK\$999.00	HK\$999.00		10000000005916	1884
vts0215	Payment - Request Placed	HK\$9.00	11/16/2011 10:03:14	HK\$9.00	HK\$9.00		10000000000511	1868
vts0215	Payment - Request Trapped	HK\$2.50	11/16/2011 10:03:14	HK\$2.50	HK\$2.50		10000000000511	1869
vts0215	Payment - Request Picked Up	HK\$0.01	11/16/2011 10:03:14	HK\$0.01	HK\$0.01		10000000000511	1883
vts0215	Assessment - Request Picked Up	HK\$0.01	11/16/2011 10:03:14	HK\$0.01	HK\$0.01		10000000000511	1883
101	Assessment - Overdue	HK\$30.00	11/15/2011 2:00:00	HK\$30.00	HK\$30.00		101	1878
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:00:00	HK\$2.50	HK\$2.50	Cash	38888000200372	1876
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:00:00	HK\$2.50	HK\$2.50		38888000200372	1876
11182008123450	Payment - Request Trapped	HK\$2.50	11/15/2011 2:00:00	HK\$2.50	HK\$2.50	Cash	38888000200323	1872
11182008123450	Assessment - Request Trapped	HK\$2.50	11/15/2011 2:00:00	HK\$2.50	HK\$2.50		38888000200323	1872
11182008123450	Payment - Overdue	HK\$130.00	11/15/2011 12:00:00	HK\$130.00	HK\$130.00	Cash	38888000200380	1862
4321	Assessment - Late Renewal	HK\$10.00	11/15/2011 12:00:00	HK\$10.00	HK\$10.00		00000000000083	1871
vts529	Assessment - Request Placed	HK\$999.00	11/15/2011 11:43:30	HK\$999.00	HK\$999.00		754	1870
vts0215	Assessment - Request Trapped	HK\$2.50	11/14/2011 4:21:09	HK\$2.50	HK\$2.50		10000000000511	1869
vts0215	Assessment - Request Placed	HK\$9.00	11/14/2011 4:03:14	HK\$9.00	HK\$9.00		10000000000511	1868
vts0215	Payment - Overdue	HK\$10.00	11/14/2011 3:22:44	-HK\$10.00	HK\$0.00	Cash	10000000000511	1866
vts0215	Payment - Lost Item Replac...	HK\$0.01	11/14/2011 3:22:44	-HK\$0.01	HK\$0.00	Cash	10000000000511	1867
vts0215	Assessment - Overdue	HK\$10.00	11/14/2011 10:37:2	HK\$10.00	HK\$10.00		10000000000511	1866
vts0215	Assessment - Lost Item Replac...	HK\$0.01	11/14/2011 10:37:2	HK\$0.01	HK\$0.01		10000000000511	1867
vts0406	Delete - Request Placed	HK\$1.00	11/14/2011 10:21:3	-HK\$1.00	HK\$0.00		10000000008704	1859
vts0215	Delete - Request Placed	HK\$9.00	11/14/2011 10:21:1	-HK\$9.00	HK\$0.00		10000000007854	1858
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:13	HK\$0.10	HK\$0.10		38888000200323	1864
100	Assessment - Late Renewal	HK\$0.10	11/14/2011 9:40:12	HK\$0.10	HK\$0.10		38888000200380	1863
11182008123450	Assessment - Overdue	HK\$130.00	11/14/2011 9:30:30	HK\$130.00	HK\$130.00		38888000200380	1862

Operator: User, Staff
 Location: Hong Kong Central (*1000000)
 Receipt Number: HKC309
 Transaction Reference Num: 35268
 System Generated: No
 Machine Name: oconnelle.vts.com

Select **Patron Record**, **Patron Activity**, or **Patron Account** to view additional information about the patron associated with this transaction or select **Item Record** to view information about the item associated with this transaction.

Note: The **Audit Trail** shows the username instead of the internal user ID for the Operator field.

Audit Trail Notes

When an entry has an account adjustment note or a lost/damaged note it is identified by an asterisk (*). To view a note stored in the **Transaction Log**, highlight the row, right-click, and select **Display Note**.

Audit Trail - venus88

Search Criteria Results

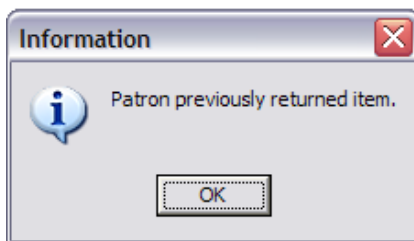
Patron Barcode: 38888168741456

Patron	Type	Fee	Date/Time	Amount	Balance	Payment Method	Item Barcode	Assessment
38888168741456	Payment - Overdue	HK\$70.00	12/6/2011 12:38:21 ...	-HK\$70.00	HK\$0.00	Cash	2011012801	1960
38888168741456	Assessment - Overdue	HK\$70.00	12/1/2011 11:55:12 ...	HK\$70.00	HK\$70.00		2011012801	1960
38888168741456	Payment - Lost Item Replacem...	HK\$103.96	12/2/2011 11:13:45 ...	-HK\$103.96	HK\$0.00	Cash	10000000008787	1963
38888168741456	Assessment - Lost Item Replac...	HK\$103.96	12/1/2011 12:26:38 ...	HK\$103.96	HK\$103.96		10000000008787	1963
38888168741456	Payment - Lost Item Replacem...	HK\$103.96	12/2/2011 11:46:45 ...	-HK\$103.96	HK\$0.00	Cash	10000000008787	1967
38888168741456	Assessment - Lost Item Replac...	HK\$103.96	12/2/2011 11:26:32 ...	HK\$103.96	HK\$103.96		10000000008787	1967
38888168741456	Delete - Request Placed	HK\$1.00	12/2/2011 12:34:47 ...	-HK\$1.00	HK\$0.00		38888168740797	1968
38888168741456	Assessment - Request Placed	HK\$1.00	12/2/2011 12:34:33 ...	HK\$1.00	HK\$1.00		38888168740797	1968
38888168741456	Delete - Request Placed	HK\$1.00	12/3/2011 8:34:21 AM	-HK\$1.00	HK\$0.00		38888168740797	1969
38888168741456	Assessment - Request Placed	HK\$1.00	12/2/2011 12:46:39 ...	HK\$1.00	HK\$1.00		38888168740797	1969
38888168741456	Delete - Request Placed	HK\$1.00	12/5/2011 12:03:32 ...	-HK\$1.00	HK\$0.00		38888168740797	1970
38888168741456	Assessment - Request Placed	HK\$1.00	12/3/2011 8:37:26 AM	HK\$1.00	HK\$1.00		38888168740797	1970
38888168741456	Delete - Overdue *	HK\$57.00	1/27/2012 9:52:53 AM	-HK\$57.00	HK\$0.00		38888168740789	2112
38888168741456	Modify - Overdue *	HK\$57.00	1/27/2012 9:52:53 AM	HK\$57.00	HK\$58.00		38888168740789	2112
38888168741456	Assessment - Overdue	HK\$57.00	1/27/2012 9:52:53 AM	HK\$57.00	HK\$57.00		38888168740789	2112

Operator: User, Staff
 Location: Hong Kong Central (*1000000)
 Transaction Reference Num: 59297
 System Generated: No
 Account Adjustment Note: Patron previously returned item.
 Machine Name: oconnelle.vtls.com

What's This?
 Display Note
 Patron Record
 Patron Activity
 Patron Account
 Item Record
 Print...
 Save...
 E-mail...
 Save As CSV

Clicking the option will display the note in an **Information** window. Notes are displayed in full.



Saving Audit Trail Information

Audit Trail information may be saved in .csv (comma-separated value) format via the right-click menu.

The screenshot shows a window titled "Audit Trail - venus88" with a search criteria field containing "Patron Barcode: vtls214". Below the search field is a table with the following data:

Patron	Type	Fee	Date/Time	Amount	Balance	Pa...	Item Barcode	Assessment ID
vtls214	Dispute - Request Placed	\$9.00	8/13/2011 9:01:27 AM	(\$9.00)	\$0.00		4444444444440	878
vtls214	Assessment - Request Placed	\$9.00	8/13/2011 8:59:30 AM	\$9.00	\$9.00		4444444444440	878
vtls214	Payment - Request Canceled	\$2.50	8/13/2011 9:02:29 AM	(\$2.50)	\$0.00		4444444444440	879
vtls214	Assessment - Request Canceled	\$2.50	8/13/2011 9:01:27 AM	\$2.50	\$2.50		4444444444440	879
vtls214	Payment - Request Canceled	\$2.50	8/13/2011 9:02:29 AM	(\$2.50)	\$0.00		mbh8787	880
vtls214	Assessment - Request Canceled	\$2.50	8/13/2011 9:01:35 AM	\$2.50	\$2.50		mbh8787	880
vtls214	Payment - Architecture	\$2,000.00	11/17/2011 11:11:5...	(\$2,000.00)	\$0.00	Cash		1860
vtls214	Assessment - Architecture *	\$2,000.00	11/10/2011 11:39:5...	\$2,000.00	\$2,000.00			1860
vtls214	Assessment - Request Placed	\$999.00	11/17/2011 12:23:1...	\$999.00	\$999.00		2010082012	1888

A context menu is open over the table, showing options: "What's This?", "Print...", "Save...", "E-mail...", and "Save As CSV" (which is highlighted).

The .csv file may be viewed in a text editor, for example, Notepad.

The screenshot shows a Notepad window titled "test - Notepad" with the following CSV data:

```
Patron,Item,Type,Fee,Date,Amount,Balance,Operator,Receipt,System,Pa
vtls214,4444444444440,Dispute - Request Placed,$9.00,8/13/2011,($
vtls214,4444444444440,Assessment - Request Placed,$9.00,8/13/2011,
vtls214,4444444444440,Payment - Request Canceled,$2.50,8/13/2011,(
vtls214,4444444444440,Assessment - Request Canceled,$2.50,8/13/201
vtls214,mbh8787,Payment - Request Canceled,$2.50,8/13/2011,($2.50),
vtls214,mbh8787,Assessment - Request Canceled,$2.50,8/13/2011,$2.50
vtls214,,Payment - Architecture,"$2,000.00",11/17/2011,"($2,000.00)
vtls214,,Assessment - Architecture,"$2,000.00",11/10/2011,"$2,000.00
vtls214,2010082012,Assessment - Request Placed,$999.00,11/17/2011,$
```

Circulation Transaction Log

Retrieve the Transaction Log

On the Virtua menu bar, click **Circulation** → **Transactions** → **Transaction Log**. The **Transaction Log** window appears.

The screenshot shows the 'Transaction Log' window with the 'Search Criteria' tab selected. The window includes input fields for Item Barcode, Patron Barcode, and Transaction Reference Number. The Filters section is expanded, showing options for 'Use Dates/Time' (with 'From' and 'To' date and time pickers), 'Filter by Location' (with a list of locations including Chamo, TPU, Hong Kong Central, City Hall, Kowloon, Sha Tin, and Tsuen Wan), 'Show Denied Transactions', and 'Patron Initiated (Renewals Only)'. The 'Search' and 'Close' buttons are at the bottom.

The **Transaction Log** window has two tabs: **Search Criteria** and **Results**.

The **Search Criteria** tab lets you enter search criteria such as a specific patron, item, transaction reference number, receipt number, or any combination of these. In addition, you can limit the list of transactions to a specific date range, or filter the list of transactions by location.

Search on any or all the fields listed in the left-hand side of the window.

If you search by item barcode, Virtua displays all transactions for that item and the barcodes of all patrons associated with the transactions.

If you search by patron barcode, Virtua displays all transactions for that patron.

If you search by patron barcode AND item barcode, Virtua displays the transactions for only that patron and that specific item.

To limit your search results, specify a date range. Results of the transaction log are sorted by time to the second and by date in reverse chronological order.

Click the **Search** button or press **ENTER**. The transactions that meet your criteria appear in the list box on the **Results** tab of the **Transaction Log** window.

The **Results** tab displays the list of account transactions that corresponds to your search parameters. The list is sorted: 1) by transaction groups in descending date and time order, and 2) within a transaction group by date and time. Note that Virtua limits search results to the first 1,000 entries returned for your search criteria.

The screenshot shows a window titled "Transaction Log - venus88" with two tabs: "Search Criteria" and "Results". The "Results" tab is active, displaying a table of transactions. Below the table, there is a detailed view of the selected transaction.

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/16/2011 10:57:03 AM	Add Request	vtls529	Hong Kong Central (*1000000)	2010082114
11/15/2011 11:43:32 AM	Add Request	vtls529	Hong Kong Central (*1000000)	754
11/15/2011 11:11:40 AM	Delete Request	vtls529	Chamo - Internet (*000010000)	62626262626606
11/15/2011 11:04:07 AM	Add Request	vtls529	Chamo - Internet (*000010000)	62626262626606
11/15/2011 11:01:23 AM	Regular Check-in	vtls529	Hong Kong Central (*1000000)	2nd1
11/15/2011 11:00:18 AM	Regular Check-in	vtls529	Hong Kong Central (*1000000)	62626262626606
11/14/2011 11:38:56 AM	Delete Request	vtls529	Hong Kong Central (*1000000)	
11/14/2011 10:34:53 AM	Add Request	vtls529	Hong Kong Central (*1000000)	
10/28/2011 10:15:17 AM	Regular Check-in	vtls529	Hong Kong Central (*1000000)	2nd2
10/28/2011 9:47:33 AM	Regular CkOut	vtls529	Hong Kong Central (*1000000)	2nd2
10/28/2011 9:47:32 AM	Regular CkOut	vtls529	Hong Kong Central (*1000000)	2nd1
10/28/2011 9:47:32 AM	Regular CkOut	vtls529	Hong Kong Central (*1000000)	62626262626606

BibId	41795
CallNumber	[Fic]
Username:	User, Staff
Reserve Item:	NO
Patron Class:	Adult Patron
Transaction Location:	Hong Kong Central (*1000000)
Transaction Reference Num:	35261
Expire Date/Time:	11/15/2012 10:57:03 AM
Request Date/Time:	11/16/2011 10:57:03 AM
Pickup Location:	Hong Kong Central (*1000000)
Request Location:	Hong Kong Central (*1000000)
RequestType	Loan

By highlighting a line item in the list box, additional information about that transaction appears in the text area below the list box. Click the right mouse button to see the options for viewing patron and item information.

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/16/2011 10:57:03 AM	Add Request	vtis529	Hong Kong Central (*1000000)	20
11/15/2011 11:43:32 AM	Add Request	vtis529	Hong Kong Central (*1000000)	78
11/15/2011 11:11:40 AM	Delete Request	vtis529	Chamo - Internet (*000010000)	60
11/15/2011 11:04:07 AM	Add Request	vtis529	Chamo - Internet (*000010000)	60
11/15/2011 11:01:23 AM	Regular Check-in	vtis529	Hong Kong Central (*1000000)	20
11/15/2011 11:00:18 AM	Regular Check-in	vtis529	Hong Kong Central (*1000000)	60
11/14/2011 11:38:56 AM	Delete Request	vtis529	Hong Kong Central (*1000000)	
11/14/2011 10:34:53 AM	Add Request	vtis529	Hong Kong Central (*1000000)	
10/28/2011 10:15:17 AM	Regular Check-in	vtis529	Hong Kong Central (*1000000)	20
10/28/2011 9:47:33 AM	Regular CkOut	vtis529	Hong Kong Central (*1000000)	20
10/28/2011 9:47:32 AM	Regular CkOut	vtis529	Hong Kong Central (*1000000)	20
10/28/2011 9:47:32 AM	Regular CkOut	vtis529	Hong Kong Central (*1000000)	60

BibId: 41795
 CallNumber: [Fic]
 Username: User, Staff
 Reserve Item: NO
 Patron Class: Adult Patron
 Transaction Location: Hong Kong Central (*1000000)
 Transaction Reference Num: 35261
 Expire Date/Time: 11/15/2012 10:57:03 AM
 Request Date/Time: 11/16/2011 10:57:03 AM
 Pickup Location: Hong Kong Central (*1000000)
 Request Location: Hong Kong Central (*1000000)
 RequestType: Loan

Select **Patron Record**, **Patron Activity**, or **Patron Account** to view additional information about the patron associated with this transaction or select **Item Record** or **Item Request** to view information about the item associated with this transaction.

The Information Detail area of the **Circulation Transaction Log** displays a number of new fields:

- **Override** - Indicates by a Yes or No if the transaction is an override of a patron block check-out, renewal or request.
- **Authorized by** - Username of the staff that authorized/performed the override (only appears if Override field contains Yes).
- **Username** - Username of the staff member logged in at the time of the transaction.
- **Fee Exempt** - Indicates if an item is exempt from fees associated with the request.
- **New Status** - The item status change after a check-in.
- **Barcode Type** - The type of barcode that was used for a check-out or renewal.

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/17/2011 11:12:10 AM	Improper Check-in	vt9529	Hong Kong Central (*1000000)	2010082112
11/17/2011 11:12:10 AM	Regular ClkOut	vt9214	Hong Kong Central (*1000000)	2010082112
11/17/2011 11:10:55 AM	Regular ClkOut	vt9529	Hong Kong Central (*1000000)	2010082112
11/17/2011 10:59:59 AM	Add Request	19851122	Aberdeen (501000000)	0000000000182
11/17/2011 10:59:00 AM	Add Request	19851122	Hong Kong Central (*1000000)	
11/17/2011 10:14:34 AM	Delete Request	104	Chamo - Internet (*000010000)	
11/17/2011 10:14:05 AM	Add Request	104	Chamo - Internet (*000010000)	000000182
11/16/2011 1:24:17 PM	Regular Check-in	vt90215	Hong Kong Central (*1000000)	10000000005916
11/16/2011 1:23:51 PM	Lost Processing	vt90215	Hong Kong Central (*1000000)	10000000005916
11/16/2011 1:16:42 PM	Regular ClkOut	vt90215	Hong Kong Central (*1000000)	10000000005916
11/16/2011 1:08:46 PM	Delete Request	vt90215	Hong Kong Central (*1000000)	
11/16/2011 1:06:32 PM	Regular ClkOut	11182008123450	Aberdeen (501000000)	38888000200372
11/16/2011 11:05:03 AM	Delete Request	kc003	Hong Kong Central (*1000000)	
11/16/2011 11:05:53 AM	Delete Request	kc005	Hong Kong Central (*1000000)	
11/16/2011 10:59:22 AM	Add Request	vt90215	City Hall (*301000000)	
11/16/2011 10:58:53 AM	Regular ClkOut	vt90612	Hong Kong Central (*1000000)	10000000008704
11/16/2011 10:57:09 AM	Delete Request	vt90215	Hong Kong Central (*1000000)	10000000005916
11/16/2011 10:57:03 AM	Add Request	vt9529	Hong Kong Central (*1000000)	2010082114
11/16/2011 10:42:47 AM	Add Request	vt90215	City Hall (*301000000)	10000000005916
11/16/2011 10:25:13 AM	Regular Check-in	vt90215	City Hall (*301000000)	1000000000511
11/16/2011 10:24:25 AM	Regular ClkOut	vt90215	City Hall (*301000000)	1000000000511
11/16/2011 10:23:10 AM	Delete Request	vt90719	City Hall (*301000000)	
11/16/2011 7:51:29 AM	Regular Check-in	100	Hong Kong Central (*1000000)	950
11/16/2011 7:51:06 AM	Regular ClkOut	100	Hong Kong Central (*1000000)	950
11/16/2011 7:51:06 AM	Regular ClkOut	100	Hong Kong Central (*1000000)	952
11/16/2011 7:51:06 AM	Regular ClkOut	100	Hong Kong Central (*1000000)	951
11/15/2011 2:26:47 PM	Regular Check-in	101	Hong Kong Central (*1000000)	101

Summary fields:

Username: User, Staff
 Reserve Item: NO
 Patron Class: Adult Patron
 Transaction Location: Hong Kong Central (*1000000)
 Transaction Reference Num: 35277
 Due Date/Time: 11/23/2011 1:16:00 PM
 Out Date/Time: 11/16/2011 1:16:42 PM
 Owning Location: Hong Kong Central (*1000000)
 Shelf Location: Hong Kong Central (*1000000)
 Item Class: Junior Lending Cassettes
 Amnesty Flag: OFF
 Override: No

The **Circulation Transaction Log** is updated each time a patron record is updated via the Patron Account Statement report or via the Overdues report when the Include Patron Account Info setting is enabled.

Transaction Log Related Ad Hoc Views

In conjunction with the addition of data elements to the **Transaction Log**, the following fields have been added to the following **Ad Hoc** views:

CIRC_CHECKOUT_LOG_V

CIRC_RENEWAL_LOG_V

CIRC_REQUEST_LOG_V.

These fields allow the library to generate reports of:

- 1) Patron block overrides performed by staff at a particular workstation for check-outs, renewals and requests.
- 2) Document type usage, specifically for the MASC card and the library card.
- 3) Changes to item status, in particular changes related to "transit" check-ins, which may assign the status In Transit or In Transit-Requested.

Transaction Log Notes

To view a note stored in the **Transaction Log**, highlight the row, right-click, and select **Display Note**.

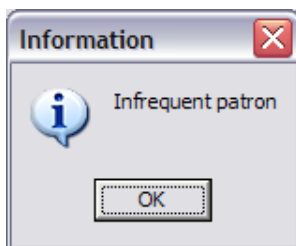
The screenshot shows a window titled "Transaction Log - venus88" with a search criteria field containing "Patron Barcode: 38888168741456". Below the search field is a table with the following columns: Date/Time, Transaction, Patron Barcode, Location, and Item Barcode. The table contains multiple rows of transaction data, including "Billed and Paid Delete", "Lost Processing", "Lost Secondary Item Removed", "Regular CkOut", and "Regular Check-in". A context menu is open over the last row, with "Display Note" selected. Other menu options include "What's This?", "Patron Record", "Patron Activity", "Patron Account", "Print...", "Save...", "E-mail...", and "Save As CSV".

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
12/2/2011 11:46:45 AM	Billed and Paid Delete	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/2/2011 11:26:32 AM	Lost Processing	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/2/2011 11:26:32 AM	Lost Processing	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/2/2011 11:26:32 AM	Lost Secondary Item Removed	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/2/2011 11:19:38 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/2/2011 11:19:38 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/2/2011 11:13:45 AM	Billed and Paid Delete	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/1/2011 12:26:38 PM	Lost Processing	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/1/2011 12:26:38 PM	Lost Processing	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/1/2011 12:26:38 PM	Lost Secondary Item Removed	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/1/2011 12:21:53 PM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	10000000008787
12/1/2011 12:21:53 PM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	10000000001238
12/1/2011 12:01:50 PM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	62626262626606
12/1/2011 12:01:45 PM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	2nd2
12/1/2011 12:01:37 PM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	2nd1
12/1/2011 11:55:12 AM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	2011012801
12/1/2011 11:53:52 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2nd2
12/1/2011 11:53:50 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2nd1
12/1/2011 11:53:47 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	62626262626606
11/18/2011 11:10:50 AM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	2390847309848
11/18/2011 11:10:08 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2390847309848
11/18/2011 11:07:23 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2011012801
11/18/2011 11:06:52 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2010082311
11/18/2011 11:03:59 AM	Patron note deleted	38888168741456	Hong Kong Central (*1000000)	
11/18/2011 11:02:18 AM	Patron note added	38888168741456	Hong Kong Central (*1000000)	
11/18/2011 11:01:40 AM	Patron note added	38888168741456	Hong Kong Central (*1000000)	

Metadata displayed at the bottom of the window:

- Username: User, Staff
- Patron Class: Adult Patron
- Transaction Location: Hong Kong Central (*1000000)
- Note Type: General
- Note: Infrequent patron
- Machine Name: oconnelle.vtts.com

Clicking the option will display the entire note in an **Information** window.



Displaying Denied Transactions

The **Circulation Transaction Log** reports any transaction in which a block appeared with the prefix 'Blocked' in the Transaction column. When a block has to be overridden the transaction log reads 'Blocked - Regular CkOut'. If the block was *NOT* overridden, the transaction log will read 'Blocked - Denied - Regular CkOut'.

To display denied transactions select the **Show Denied Transactions** check box on the **Search** Criteria tab.

Note: The **Show Denied Transactions** check box setting is persistent. When the Transaction Log window opens, the **Show Denied Transactions** setting is either enabled or disabled, based on the check box setting that was used for the previous Transaction Log search.

Transaction Log - venus88

Search Criteria | Results

You may search using one or more of the following criteria:

Item Barcode:

Patron Barcode:

Transaction Reference Number:

Filters

Use Dates/Time:

From: 12/ 7/2011 12:00:00 AM

To: 12/ 7/2011 11:59:59 PM

Filter by Location

- Chamo - Internet (*000010000)
- TPU
- Hong Kong Central (*1000000)
- Hong Kong Central - bookdrop (1000001)
- To be deleted (2)
- City Hall (*301000000)
- City Hall - bookdrop (301000010)
- To be deleted
- Kowloon (302000000)
- To be deleted (3)
- Kowloon - bookdrop (302000002)
- To be deleted (4)
- Sha Tin (303000000)
- Sha Tin - bookdrop (303000001)
- Tsuen Wan (304000000)
- Tsuen Wan - bookdrop (304000001)
- Tsuen Wan (305000000)

Show Denied Transactions

Patron Initiated (Renewals Only)

Search Close

Transaction Log - venus88

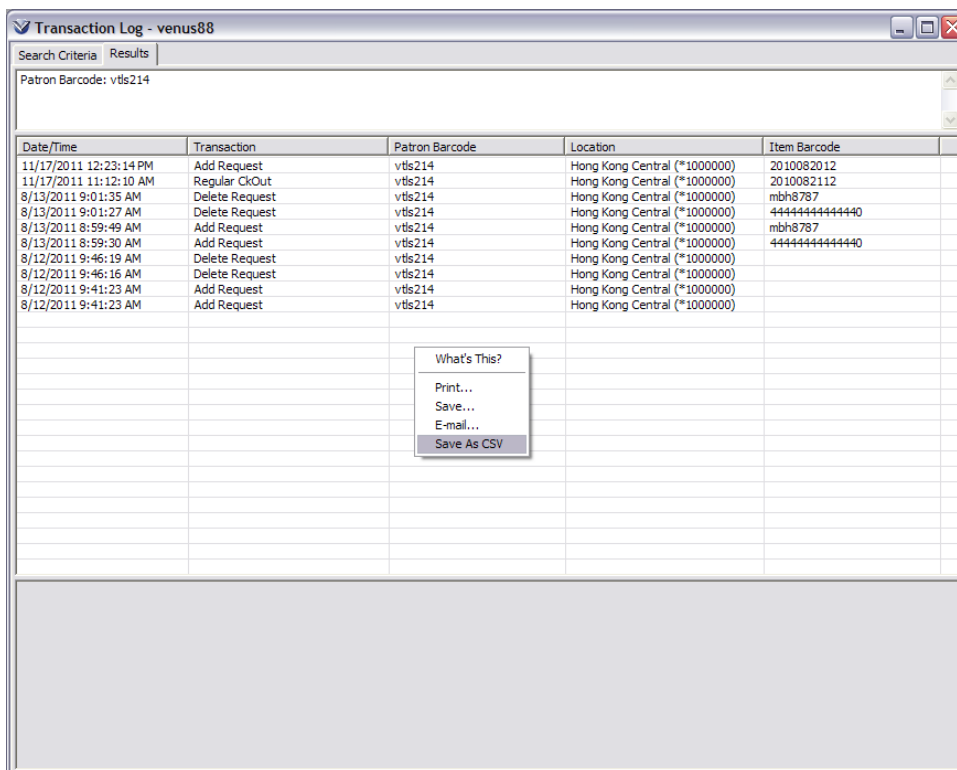
Search Criteria | Results

Patron Barcode: 38888168741456 AND Show Denied Transactions

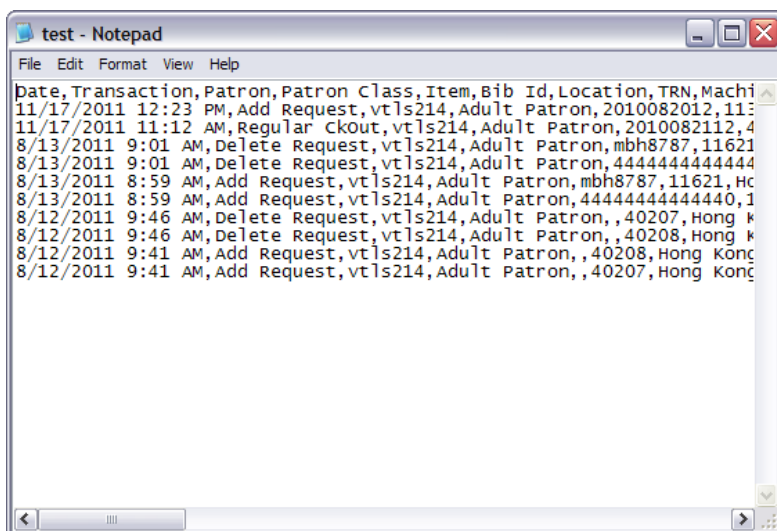
Date/Time	Transaction	Patron Barcode	Location	Item Barcode
12/7/2011 10:35:37 AM	Blocked - Regular CkOut	38888168741456	Hong Kong Central (*1000000)	535353535306
12/7/2011 10:35:20 AM	Blocked - Denied - Regular CkOut	38888168741456	Hong Kong Central (*1000000)	
12/7/2011 10:34:57 AM	Manual Block Added - Card repor...	38888168741456	Hong Kong Central (*1000000)	
12/7/2011 10:33:15 AM	Denied - Regular Renewal	38888168741456	Hong Kong Central (*1000000)	2010082311
12/7/2011 9:55:56 AM	Denied - Regular Renewal	38888168741456	Hong Kong Central (*1000000)	38888168740789

Saving Transaction Log Information

Circulation Transaction Log information may be saved in .csv (comma-separated value) format via the right-click menu.



The .csv file may be viewed in a text editor, for example, Notepad.



Recording Improper Check-ins

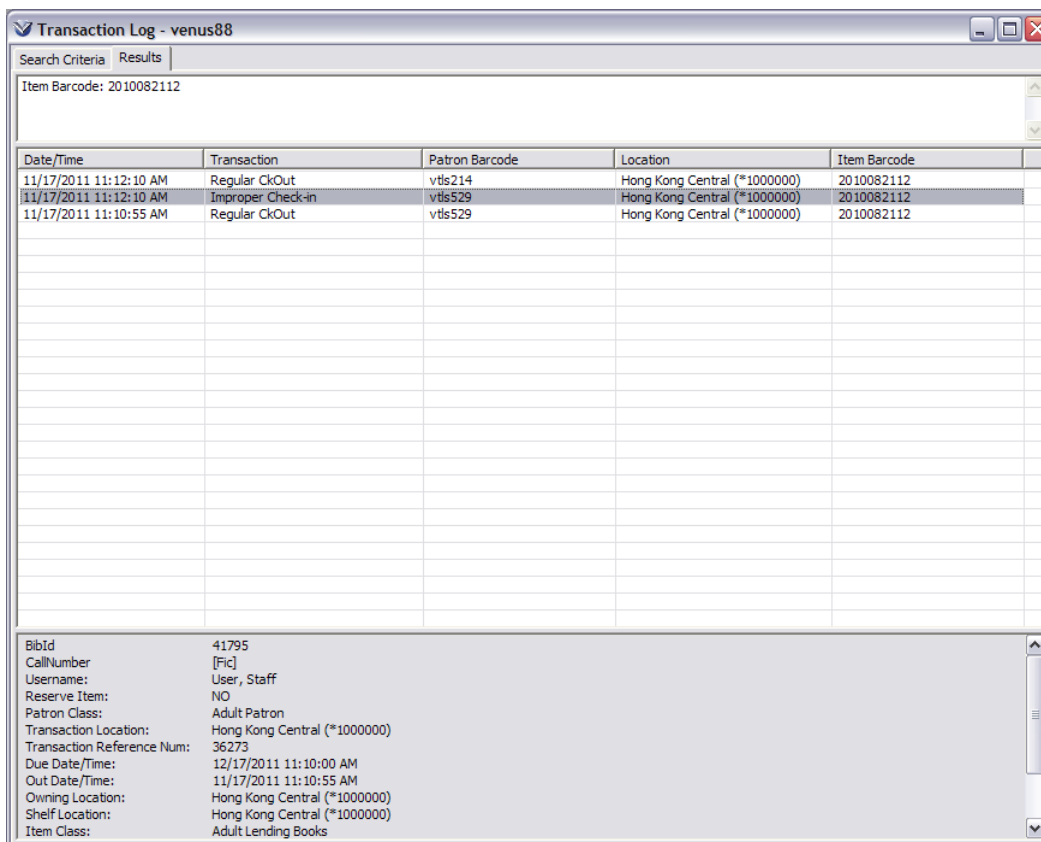
Virtua is capable of storing information about “improper check-ins” in addition to regular check-ins.

When an item already charged to a different patron (i.e., an item that has not been checked in since its last check-out) is attempted to be checked-out, an alert is displayed.

The options are to Accept All/ Waive, Accept All, or Cancel the transaction.

If either of the Accept options is selected, Virtua will record the check-in as an "Improper Check-in" in the **Transaction Log** of the item and the patron who originally had the item checked out.

If the item associated with the improper check-in is overdue, the word *Overdue* will appear in the Due Date/Time field in the information detail of the **Transaction Log**.



Transaction Log - venus88

Search Criteria Results

Item Barcode: 2010082112

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/17/2011 11:12:10 AM	Regular CkOut	vts214	Hong Kong Central (*1000000)	2010082112
11/17/2011 11:12:10 AM	Improper Check-in	vts529	Hong Kong Central (*1000000)	2010082112
11/17/2011 11:10:55 AM	Regular CkOut	vts529	Hong Kong Central (*1000000)	2010082112

BibId: 41795
 CallNumber: [Fic]
 Username: User, Staff
 Reserve Item: NO
 Patron Class: Adult Patron
 Transaction Location: Hong Kong Central (*1000000)
 Transaction Reference Num: 36273
 Due Date/Time: 12/17/2011 11:10:00 AM
 Out Date/Time: 11/17/2011 11:10:55 AM
 Owning Location: Hong Kong Central (*1000000)
 Shelf Location: Hong Kong Central (*1000000)
 Item Class: Adult Lending Books

Both Check-in and Improper Check-in transactions are available for Ad Hoc and InfoStation reporting.

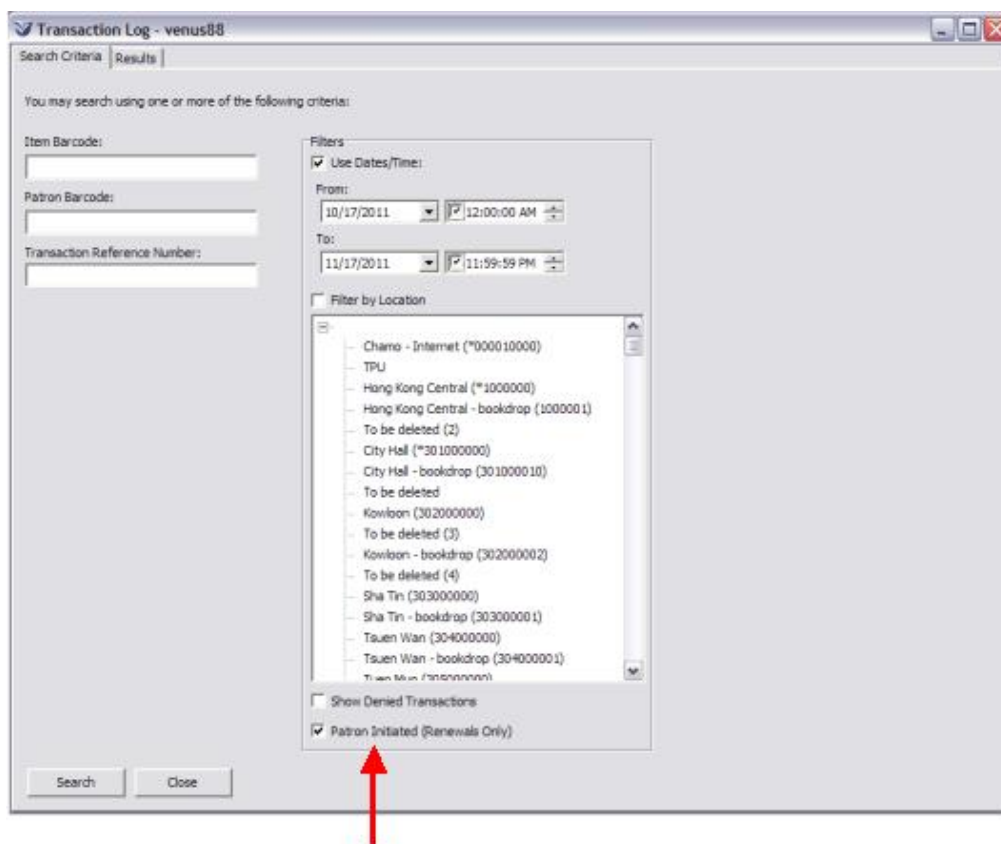
Logging Renewal Statistics

The **Circulation Transaction Log** also gathers/records data on the data elements: Previous Due Date and Login Mode. These two elements will appear in the Information area below the transaction log table on the **Circulation Transaction Log** window.

For the Log-in Mode value the **Circulation Transaction Log** can record the following types of logins:

- Internet :Chamo accessed remotely
- OPAC: Chamo accessed internally or Virtua client
- Self-Check: Fastrac or 3M SelfCheck
- Other

Another element to the **Circulation Transaction Log** window is a filter that allows you to get search results on *patron-initiated, self-renewals* only. The filter is a check box labeled Patron Initiated (Renewals Only).




Transaction Log - venus88

Search Criteria Results

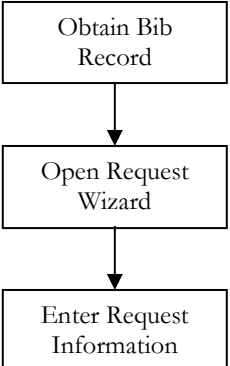
Use Dates/Time: From: 10/17/2011 12:00:00 AM To: 11/17/2011 12:00:00 AM AND Patron Initiated (Renewals Only)

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/15/2011 12:47:08 PM	Regular Renewal	4321	Chamo - Internet (*000010000)	00000000000083
11/11/2011 3:55:43 PM	Regular Renewal	11182008123450	Chamo - Internet (*000010000)	38888000200265
11/10/2011 3:00:19 PM	Regular Renewal	19861122	Chamo - Internet (*000010000)	20938472039847
11/10/2011 2:58:16 PM	Regular Renewal	19861122	Chamo - Internet (*000010000)	20938472039847
10/21/2011 10:28:02 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:26:31 AM	Regular Renewal	102	Hong Kong Central (*1000000)	103
10/21/2011 10:26:31 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:25:47 AM	Regular Renewal	102	Hong Kong Central (*1000000)	103
10/21/2011 10:25:47 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:23:41 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:22:12 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:21:00 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:19:00 AM	Regular Renewal	101	Hong Kong Central (*1000000)	10101010101016
10/21/2011 10:14:38 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:14:14 AM	Regular Renewal	102	Hong Kong Central (*1000000)	103
10/21/2011 10:11:17 AM	Regular Renewal	102	Hong Kong Central (*1000000)	103
10/21/2011 10:11:12 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:11:06 AM	Regular Renewal	102	Hong Kong Central (*1000000)	101
10/21/2011 10:08:55 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 10:08:49 AM	Regular Renewal	102	Hong Kong Central (*1000000)	101
10/21/2011 9:48:20 AM	Regular Renewal	102	Hong Kong Central (*1000000)	102
10/21/2011 9:48:09 AM	Regular Renewal	102	Hong Kong Central (*1000000)	101
10/21/2011 9:47:53 AM	Regular Renewal	102	Hong Kong Central (*1000000)	103

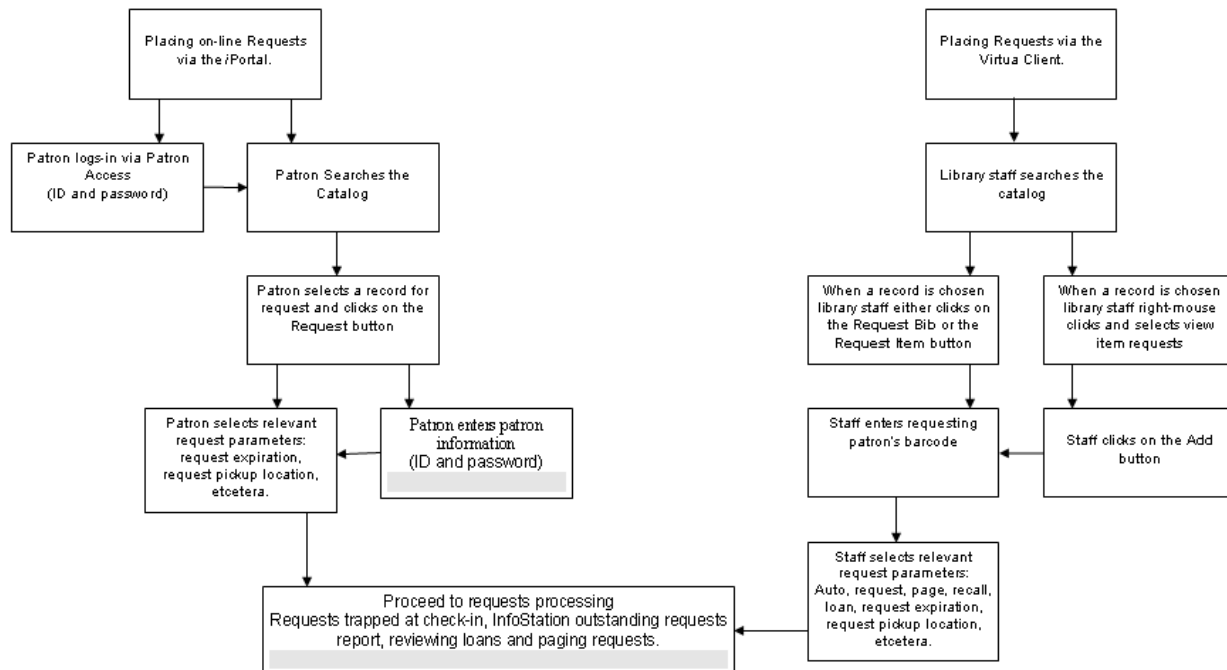
Out Date/Time: 11/15/2011 12:45:58 PM
 Owning Location: Butterfly Estate (702000000)
 Shelf Location: Butterfly Estate (702000000)
 Item Class: Adult Lending Books
 Renewals: 1
 Amnesty Flag: Off
 Override: No
 Machine Name: robertsa.vds.com
 Previous Due Date: 11/15/2011 12:47:00 PM
 Patron Login: Internet
 Patron Barcode Type: Primary



Requests via the Virtua Client

Recommended Workflow	Explanation
<p><i>Virtua Client</i></p>  <pre> graph TD A[Obtain Bib Record] --> B[Open Request Wizard] B --> C[Enter Request Information] </pre>	<p>Virtua allows for both staff mediated and user initiated request functions.</p> <p>Summary Place a request using the Virtua Client</p> <p>Key Terms:</p> <ul style="list-style-type: none"> Bib Level Request Holds Item Level Request Loans Pages Recalls Request Group Request Level Request Queue Request Type Request Wizard Volume Level Request <p>InfoStation Reports</p> <p>Availability: Generates a list of requested items that are currently available.</p> <p>Expired Requests: Lists Available Requests with expired Hold times and Unavailable Requests with expired Expiration dates.</p> <p>Excessive Requests: Generates a list of title with an "excessive number" of outstanding patron requests.</p> <p>Recalls: Generates a list of items for which recall requests have been placed.</p> <p>Requested Bills: Generates a list of billable items requested by other patrons.</p> <p>Requested Overdues: Generates a list of overdue items requested by other patrons.</p> <p>Unsatisfied Requests Report: Generates a list of unsatisfied requests.</p>

Request Processing Workflow



Place Requests via the Virtua Client

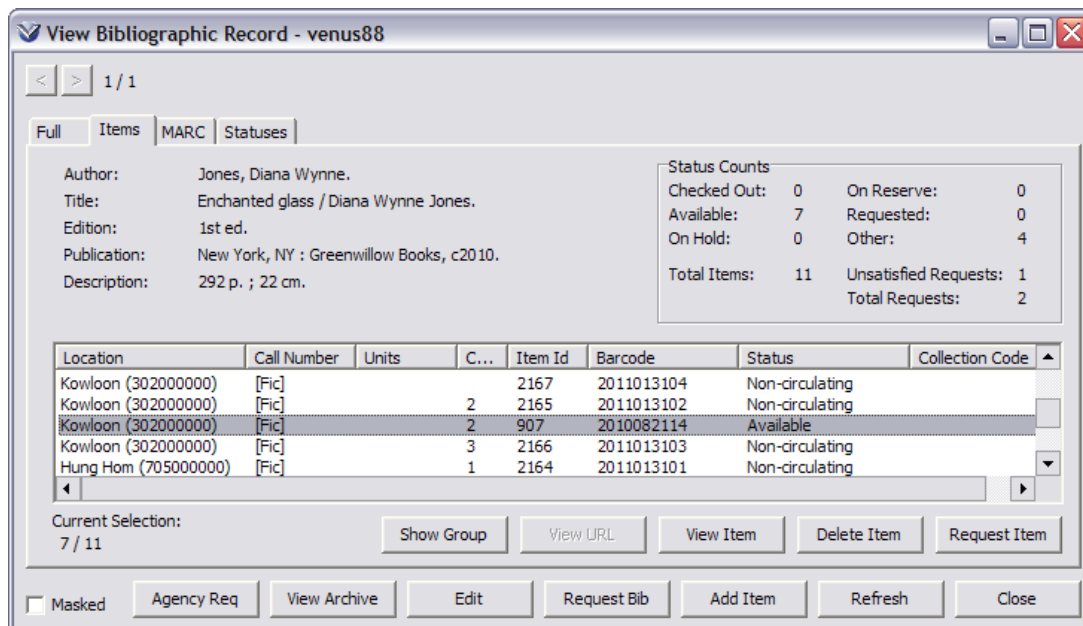
Requests can be placed in two ways: using the **Requests** icon  and entering a bib-id or item-id, or by searching the OPAC to obtain a bibliographic record.

Obtain a Bibliographic Record

Search the OPAC for the requested item.

Open the bibliographic record in the **View Bibliographic Record** window.

Open the Request Wizard



You may place requests at the bibliographic level or you may request a particular item.

- a) To place a *Bib-level request* click the **Request Bib** button on the **View Bibliographic Record** window.
- b) To place an *Item level request* highlight the item and click the **Request Item** button. The **Request** wizard will open.

The *Include Item-Level Requests in That Number* setting in the *Virtua Profiler* determines whether item-level requests count towards the number of requests allowed on a Bib-ID for each patron type.

Enter Request Information

The **Request Wizard** will prompt you for the patron barcode. Enter the patron barcode and click the **Next** button.

The screenshot shows a dialog box titled "New Request for Item: 2010082114 - venu...". The dialog contains the following information:

- Author: Jones, Diana Wynne.
- Title: Enchanted glass / Diana Wynne Jones.
- Edition: 1st ed.
- Publication: New York, NY : Greenwillow Books, c2010.

Below this information is a section labeled "Patron Barcode:" with an empty text input field. At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

The **Request Type** window will appear.

The screenshot shows the same dialog box as above, but now the "Request Type" section is visible. It contains the following options:

- Auto
- Page
- Loan
- Hold
- Recall

Below these options is a checkbox labeled "Immediate recall:" which is currently unchecked. The "Next >" button is highlighted, indicating it is the next step in the process.

The default setting is **Auto**. This setting lets Virtua decide the most appropriate Request Type based on such factors as item class, patron class, and status. All Auto requests are placed at Bib-level.

Select the type of request: Hold, Recall, Loan, Page or leave on Auto.

Type of Request	Description
Holds	Placed on a checked-out item or title where no action is taken until an item is checked in.
Recalls	Placed on a checked-out item, which may result in a shortened due date and a letter to the item's borrower.
Loans	Placed on an available item at a location other than the log-in location.
Pages	Request placed on an available item at a location or sub-location designated as a paging location.

If **Recall** is selected the **Immediate Recall** check box will become active. Click in the box to recall the item immediately.

New Request for Item: 2010082114 - venu... ? X

Author: Jones, Diana Wynne.
 Title: Enchanted glass / Diana Wynne Jones.
 Edition: 1st ed.
 Publication: New York, NY : Greenwillow Books, c2010.

Request Type

Auto
 Page
 Loan
 Hold
 Recall

Immediate recall:

< Back Next > Cancel

Click the **Next** button to continue. The next window prompts you for **Request Options**.

Author: Jones, Diana Wynne.
 Title: Enchanted glass / Diana Wynne Jones.
 Edition: 1st ed.
 Publication: New York, NY : Greenwillow Books, c2010.

Request Options
 Only This Item Any Item of This Volume

Pickup location: Hong Kong Central (*1000000) ▼

Not needed after: Use date: 11/16/2011 ▼

Request From Group: Standard Libraries (CH) ▼

Fee Exempt

Number of items in database: 11

Calculate the number of qualifying items: Calculate

Number of items that qualify for this request: ?

< Back Next > Cancel

When placing an Item-level request, you will have two additional request options active on the **Request Wizard** window: Only This Item and Any Item of This Volume.

- **Only This Item** - Lets you place a request for a specific item in a multi-volume (or multi-part) set. This is set as the default and will place an item-level request.
- **Any Item of This Volume** - Lets you place a request for *any* copy of the specified volume in a multi-volume set. If chosen, this will place a volume-level request. (Mostly used for serial requests.)

Select a Pick-up Location.

Enter a Not needed after date (optional).

If you are placing a request for a bib without items, you **MUST** select a *Not needed after* date.

Enter a Request Group. (This field is active only if your library allows group requests.)

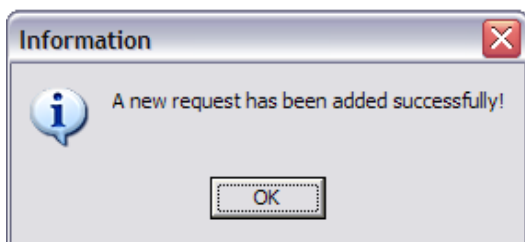
Note: Request Groups are set in the *Virtua Profiler*. All groups of which the login location is a member will appear in the drop down menu.

Enter a **Minimum period needed** (only active if set in *Virtua Profiler*).

Click on the **Fee Exempt** checkbox to waive any fees normally associated with placing the request.

Click on the **Calculate** button to see if the request will be successfully processed.

Click the **Next** button. A message will appear indicating that the request was successfully placed.



Note: Virtua no longer assesses fees when an unfilled request is cancelled; it is only after the request has been trapped and is ready for pickup and then cancelled that a cancellation fee is assessed. In this case, a request is considered trapped as soon as a requested item is checked in.

Profiler Tip: In the Patron Types setting of the *Virtua Profiler* you can set limits for the number of outstanding requests a patron can have at a given period of time. A limit will be set for each type of request the library allows (Hold, Recall, Loan, and Page). In addition, the Maximum number of all outstanding requests must be set. See *Working with the Patron Types Parameter: About Patron Type Settings: Request Limits* in the *Virtua Profiler/Circulation Parameters User's Guide* for more information.

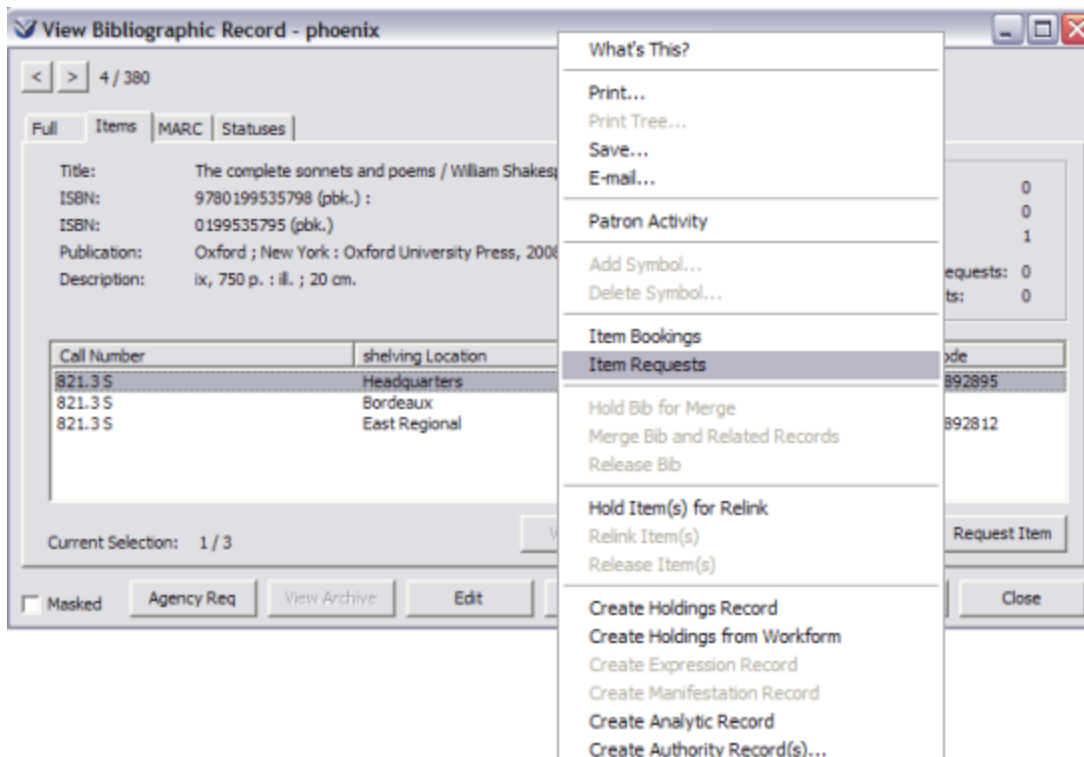
Request Access

You may access requests from the **View Bibliographic Record** window and the **Item Information** window or from the **Circulation** main menu.

Access Requests from the View Bibliographic Record Window

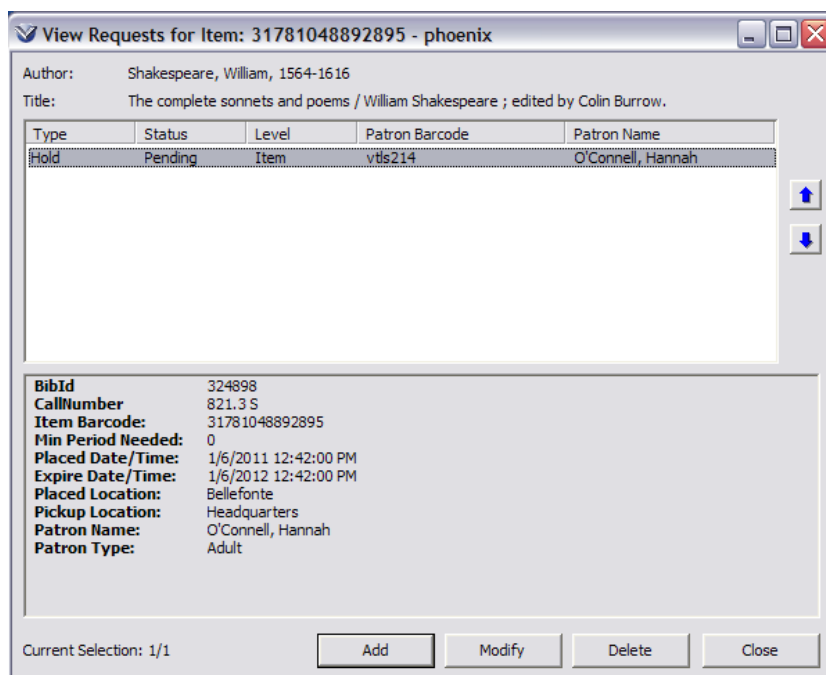
On the **View Bibliographic Record** window, you can view and manage ALL requests of any type for a specific bibliographic or item record.

To view a request from the **Items** window, right mouse click and select **Item Requests**.




The **View Request** window appears. Each request appears in the list in the order it will be satisfied.

Highlight a request to view additional information about the request. The specific information about the request will appear in the area below the request list box.



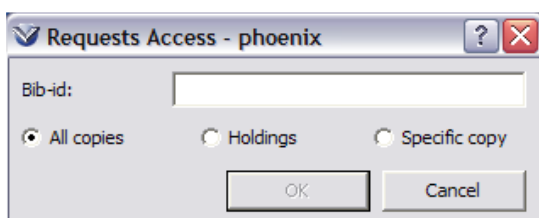
Access Requests from the Circulation Main Menu

From the **Circulation** main menu, you can view and manage ALL requests of any type for a specific bibliographic record or item record.

Select **Circulation → Transactions → Requests** from the Virtua menu or click the  **Requests** icon on the Circulation toolbar. The **Request Access** window will appear.

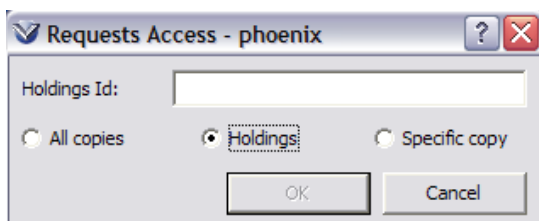
You have the choice of searching for requests by bibliographic ID or by item number.

Select the **All Copies** radio button to search on requests by bibliographic ID.



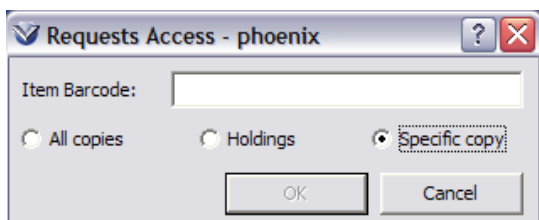
The screenshot shows a dialog box titled "Requests Access - phoenix". It has a "Bib-id:" label and an empty text input field. Below the input field are three radio buttons: "All copies" (which is selected), "Holdings", and "Specific copy". At the bottom of the dialog are "OK" and "Cancel" buttons.

Select the **Holdings** radio button to search for requests by holdings ID.



The screenshot shows the same dialog box, but now the "Holdings" radio button is selected. The label above the input field is "Holdings Id:". The "All copies" and "Specific copy" radio buttons are unselected.

Select the **Specific copy** radio button to search for requests by item barcode number.

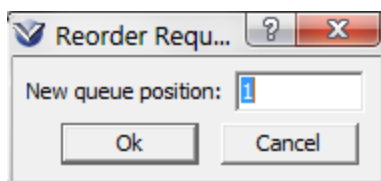


The screenshot shows the same dialog box, but now the "Specific copy" radio button is selected. The label above the input field is "Item Barcode:". The "All copies" and "Holdings" radio buttons are unselected.

To re-order requests, use the up and down arrows or highlight the item, hold down the left mouse and drag the item to the proper position in the queue.

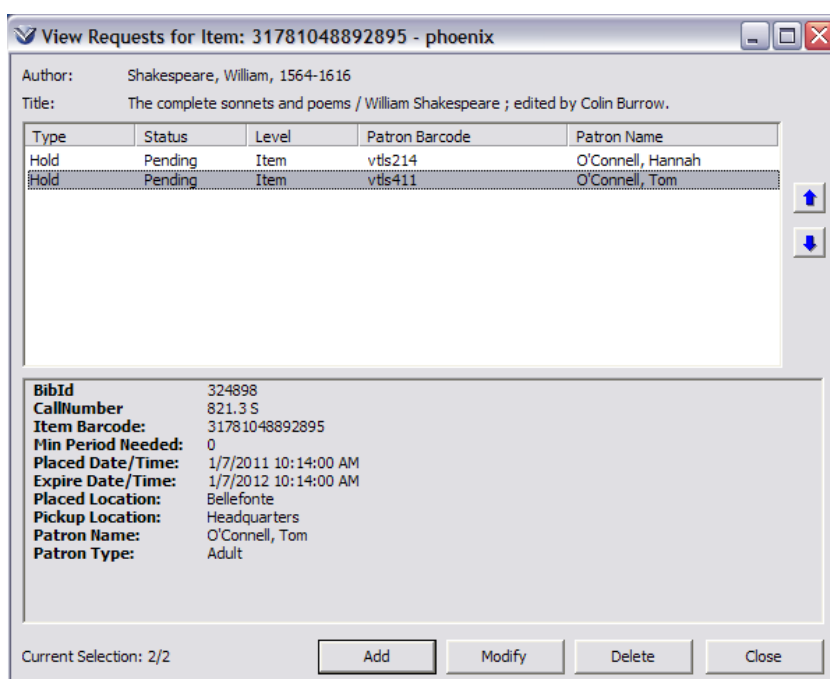
-OR-

Right-click on the request, choose the Reorder Request option, and type the new queue position for the request in the Reorder Request window.



To **Add**, **Modify** or **Delete** a request in the queue, click on the appropriate button:

Button	Description
Add	Opens up a new Request Wizard
Modify	Opens up the Request Wizard for the selected patron barcode
Delete	Opens up a confirm delete window



Group Requests

When a user places a request on an item that is the primary item of a group and all other items in the group are available, Virtua prompts the user to inform them that the item is part of a group and to ask whether the user would like to request all items in the group.

View Bibliographic Record - venus88

1 / 1

Full Items MARC

Author: Hemingway, Ernest, 1899-1961.
 Title: The complete short stories of Ernest Hemingway : th...
 Title: Short stories
 Edition: 1st Scribner Paperback Fiction ed.
 Publication: New York, N.Y. : Scribner Paperback Fiction, 1998.

Status Counts
 Checked Out: 0 On Reserve: 0
 Available: 2 Requested: 0
 On Hold: 0 Other: 0
 Total Items: 2 Unsatisfied Requests: 0
 Total Requests: 0

Location	Call Number	Units	C...	Item Id	Barcode	Status	Collection Code
Kowloon (302000000)		1		8423	38888168740797	Available	
Kowloon (302000000)		1		8424	38888168740789	Available	

Current Selection:
1 / 2

Show Group View URL View Item Delete Item Request Item

Masked Agency Req View Archive Edit Request Bib Add Item Refresh Close

Virtua 2011.2.14

This title includes secondary items. Do you wish to place a request for all secondary items as well?

Yes No Show Group(s)

Click **Yes** to request the secondary items in the group.

When a loan request is placed on a group of items, the **Loans/Pages** window indicates that the request is a group request.

Loans/Pages - Kowloon (302000000)

Outstanding Denied

Shelf Location	Call Number	Author	Title	Request Date
Kowloon (30200...		(L)	Journal of Candy	7/8/2011 1:43:24 PM
Kowloon (30200...		(L) Hemingway...	The complete short stories of Ernest Hemin...	12/2/2011 12:46:39 PM
Kowloon (30200...	341.2303	(L) Moore, Joh...	Encyclopedia of the United Nations / John ...	11/29/2011 4:15:20 PM
Kowloon (30200...	813/.5409	(L) Hamilton, G...	Encyclopedia of American popular fiction ...	11/29/2011 4:15:20 PM
Kowloon (30200...	818/.5409	(L) Gillespie, M...	Maya Angelou : a glorious celebration / by ...	11/15/2011 11:43:32 AM
Kowloon (30200...	GV199.6 .B33 ...	(L)	Beyond backpacker tourism : mobilities and...	1/24/2011 8:00:27 PM
Kowloon (30200...	[Fic]	(L) Jones, Dian...	Enchanted glass / Diana Wynne Jones.	11/16/2011 10:57:03 AM

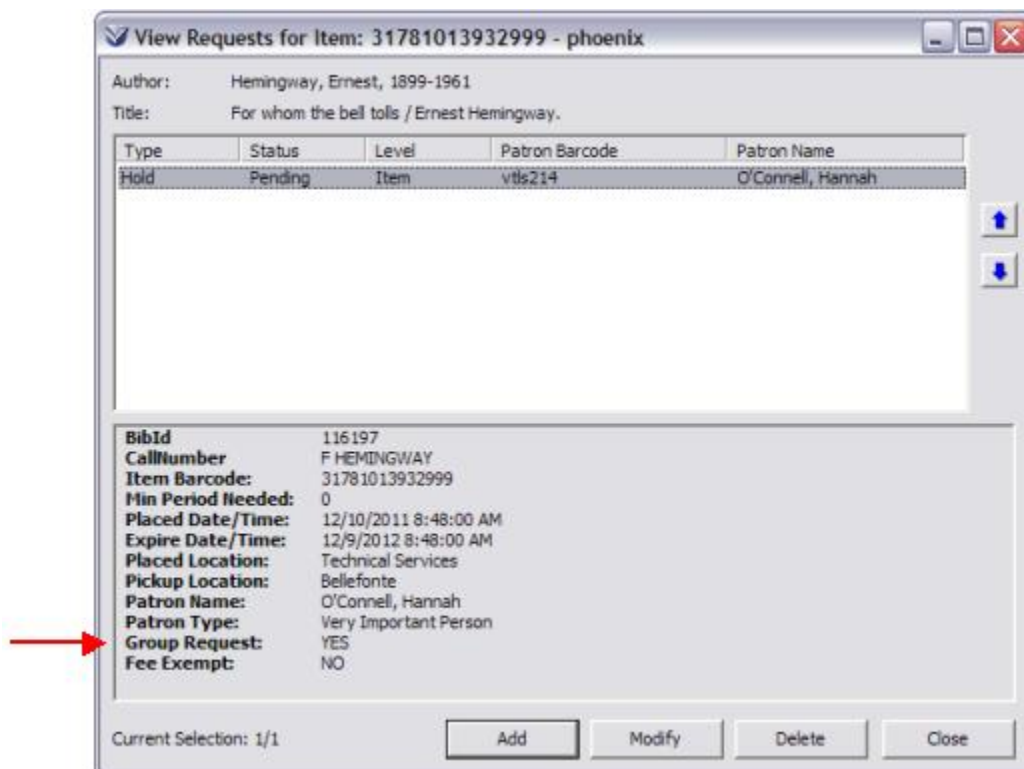
Satisfy Deny Info

Pull List Refresh Close

To view the loan information, highlight the item and click the **Info** button.

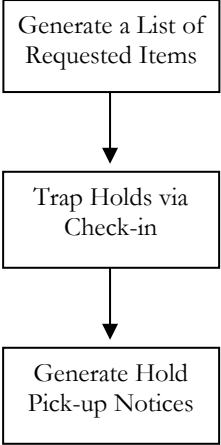


When a request is placed on a group of items, the **View Requests for Item** window displays a **Group Request** entry in the additional information area for each request.



Virtua will trap the primary item in a request group first, and will only trap secondary items in the group after the primary item is trapped.

Process Hold and Recall Requests

Recommended Workflow	Explanation
 <pre> graph TD A[Generate a List of Requested Items] --> B[Trap Holds via Check-in] B --> C[Generate Hold Pick-up Notices] </pre>	<p>In order to <i>trap</i> requested items for the hold shelf, all items must be processed through check-in.</p> <p>If the specific item (item level request) or all attached items (bib level request) are checked out when the hold/recall is placed; they will be <i>trapped</i> at check-in.</p> <p>If the specific item (item level request) or all attached items (bib level request) are available when the hold/recall is placed; staff will need to generate a list of requested items via InfoStation. When the items are pulled from the shelf they will be checked-in and the items will be <i>trapped</i> for the hold shelf.</p> <p>Summary</p> <p>Trap items for hold pick-up. Generate a request pull list.</p> <p>Key Terms</p> <p>Guaranteed Circulation Period In transit In transit requested On hold Trap</p>

Generate a List of Unsatisfied Requests

The Unsatisfied Requests report is used to pull items from the shelves to trap for the hold-shelf. This report can be scheduled to run automatically and is able to email the results to staff.

Open a web browser and connect to InfoStation.

Login to Circulation reports.

Select the Unsatisfied Requests report for configuration (See *Virtua InfoStation Reports Training Guide* for details).

Run the report.

Trap Items for the Hold-Shelf

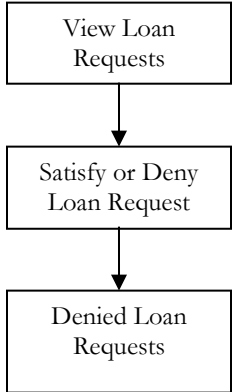
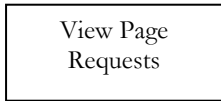
In order to trap items for the hold-shelf, items must be checked-in in the Virtua Client.

When an item is trapped for a hold the client will indicate to the staff member that the item has a hold and needs to be placed on the hold-shelf or to send it transit to the appropriate hold pick-up location.

Statuses of Requested and In Transit Items

Items that have been trapped and are in transit to another location to fulfill a request are tracked as the system assigned status of In Transit Requested. These items are tracked separately from items that are In Transit. The Circulation Transaction Log displays both In Transit and In Transit Requested statuses. In addition, both statuses are available for InfoStation and Ad Hoc reporting with appropriate views.

Process Loans and Paging Requests

Recommended Workflow	Explanation
<p>Loans</p>  <pre> graph TD A[View Loan Requests] --> B[Satisfy or Deny Loan Request] B --> C[Denied Loan Requests] </pre> <p>Pages</p>  <pre> graph TD D[View Page Requests] </pre>	<p>A <i>Loan</i> is a request on an item that is available at a location other than the location where the request is placed.</p> <p>If the library satisfies the request, the status of the item changes to On Hold or In Transit, depending on where the item is to be picked up.</p> <p>If the library denies the request, the item appears on the Denied (loans) tab of the requesting library, and if loans are flagged as Group in the Circulation parameter Global Request Trapping Flags, the loan request circulates to the next library in the group.</p> <p>A <i>Page</i> is a request to view an item from a closed stack or remote storage location.</p> <p>Summary</p> <ul style="list-style-type: none"> View outstanding requests View requests for other locations Satisfy or deny a loan request View denied loan requests Resubmit and delete denied requests View outstanding page requests <p>Key Terms</p> <ul style="list-style-type: none"> Denied Loan Request In transit On hold Page Satisfied Loan Request <p>Circulation Parameters</p> <p>Location + Item: Requests, Loan Requests allowed</p> <p>Location + Item: Requests, Page Requests allowed</p>

Loans

The **Loans/Pages Setup** window allows you to configure which fields are included on the loans/pages printout. To configure the fields go to **Options → Circulation Options → Loans/Pages Setup**. (This may also be configured in the *Virtua Profiler: Circulation Parameters* and overrides anything set in the individual client work station.)


Loans/Pages Setup - venus88

Patron Name:	Patron Name:	Edition:	Edition:
Author:	Author:	Bib Id:	Bib Id:
Title:	Title:	Units:	Units:
Call Number:	Call Number:	Shelf Location:	Shelving Location:
Second Call Number:	Second Call Number:	Pickup Location:	Pickup Location:
Item Barcode:	Item Barcode:	Non-Parameterized Shelf Location:	Non-Parameterized Shelf Loc:
Copy Number:	Copy Number:	Request Date:	Request Date:
Copies:	Copies:	AV Accession Number:	AV Accession Number:
Collection Code:	Collection Code:	Group Request Indicator:	Group Request Indicator:

(Only named fields will be printed.)

Save Cancel

View Loan Requests

Click the **Loans** icon  on the **Circulation Toolbar** or Select **Circulation → Transactions → Loans** on the Virtua menu bar. The **Loan/Page Access** window appears.

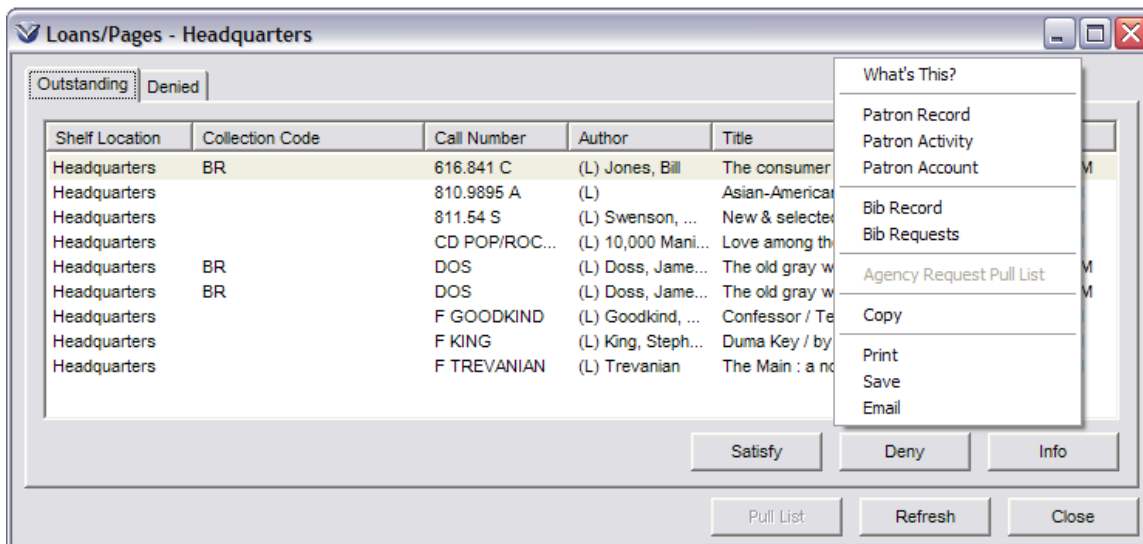
Loan/Page Access - Customer Support Library

Select Location: Headquarters

OK Cancel

Select the location for which you want to view loan and page requests.

Click the **OK** button. The **Loans/Pages** window appears, displaying the **Outstanding** tab. Columns can be re-sorted by clicking on the column headings.



Outstanding Tab: Displays outstanding requests (pages) made *to* the selected location; items are sorted by shelving location and then by call number. To resort, click on the column header.

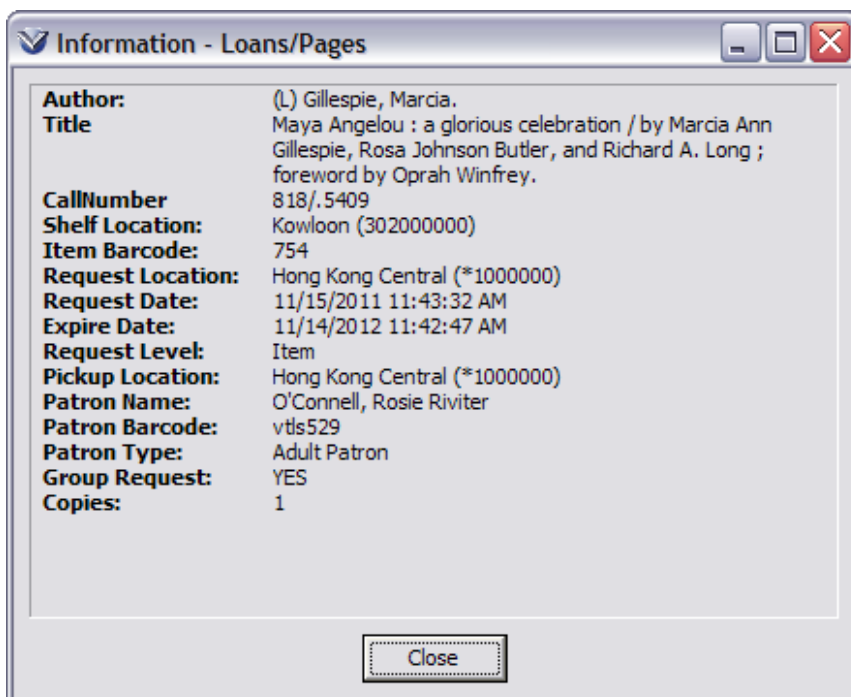
The data in the **Collection Code** column may be sorted by collection code and then by call number. The sorted order of the **Collection Code** data also displays in the Print/Save/Email output.

Denied Tab: Displays requests that the library has denied.


To print, save, e-mail, or copy *selected rows* from the **Loans/Page** window list box, right-click to access the pop-up menu. In addition, the *entire* Outstanding Loans/Pages list may be printed, saved, or emailed.

To access **Bib Records** and **Bib Requests** use the pop-up menu to navigate to the **View Bibliographic Record** window or **View Requests** window associated with a particular loan or page request.

Highlight a line item and then click the **Info** button to view detailed information about a particular loan request. The **Information - Loans/Pages** window appears.



To view requests for other locations:

On the **Circulation** toolbar, click the **Loans** icon . The **Loan/Page Access** window appears.

Select another library location. Click the **OK** button.

Satisfy or Deny Loan Request

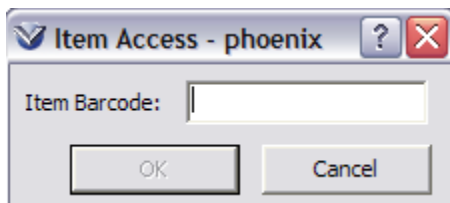
You can satisfy a loan request as long as the item is requested of the log-in location. There are two ways to satisfy a loan request.

Satisfy Request via Loans/Pages Window

Display the **Loans/Pages** window for the login location.

On the **Outstanding** tab, highlight the desired line item(s).

Click the **Satisfy** button. The **Item Access** dialog box appears.



Type the item number being used to satisfy the outstanding loan. Click the **OK** button.

Satisfy request via Check In Window

Check in the item to be loaned.

The check-in transaction traps the request and satisfies the loan request.

Deny Loan Requests

You can deny a loan request as long as the item is requested of the log-in location.

Display the **Loans/Pages** window for the log-in location.

On the **Outstanding** tab, highlight the desired line item(s).

Click the **Deny** button.

If the request is a **bib-level request**, the loan request will appear on the **Outstanding** tab of the next library location in the queue. If each library in turn denies the request, the request will appear on the Denied tab at the requesting location.

If the request is an **item-level request**, the request will appear on the **Denied** tab at the Requesting location.

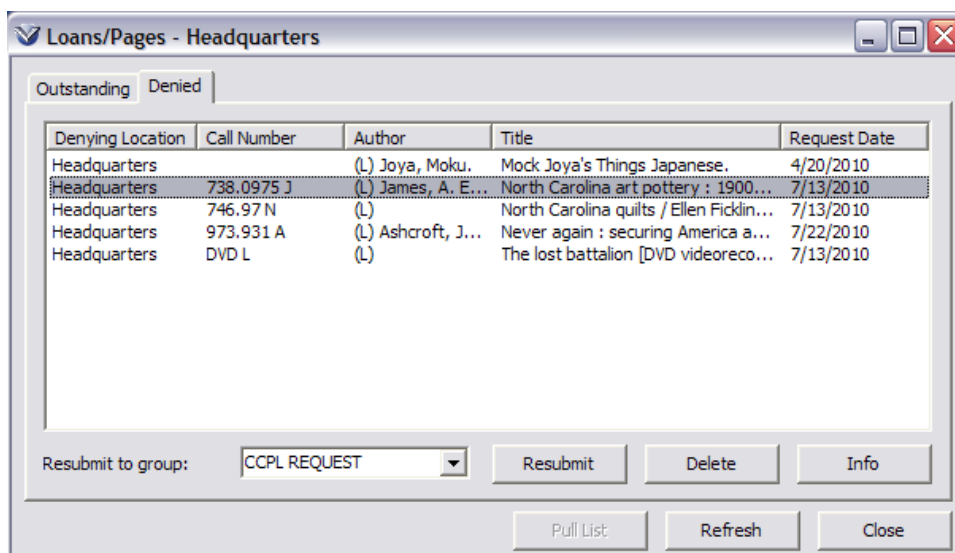
View Denied Loan Requests

The **Denied** tab lists requests made *by* your patrons that could not be satisfied by any library.

To view a denied loan request open the **Loans/Pages** window for the log-in location.

Click the **Denied** tab.

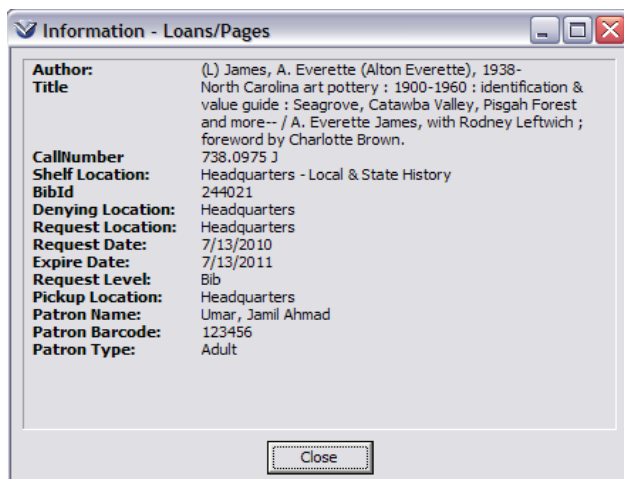
Note: The **Denied** tab window displays the denied requests for the log-in location. You may either **resubmit** or **delete** the denied loan request.



View Loan Request Information

Highlight the desired line item.

Click the **Info** button. The **Information - Loans/Pages** window appears.



Resubmit Denied Loan Request

Highlight the desired line item.

Click the **Resubmit** button.

The request will route back through the qualifying locations. If only one item is in the list box and you resubmit it, the **Loans/Pages** window closes.

Profiler Tip: When the Process Denied Loans check box is selected, Virtua will automatically resubmit loan requests that are denied for the location and all of its sublocations. See *Working with Setting Up Locations: Setting the Process Denied Loans Flag* in the *Virtua Profiler/Global Settings User's Guide* for more information.

Delete Denied Loan Request

Highlight the desired line item. Click the **Delete** button.

If only one item is in the list box and you delete it, the **Loans/Pages** window closes.

View Page Requests

See [View Loans Requests](#).

Reserves

Recommended Outline	Explanation
<div data-bbox="207 478 435 562" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">View Reserves</div> <div data-bbox="207 625 435 709" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Archive Reserves</div> <div data-bbox="207 772 435 856" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Delete Reserves</div> <div data-bbox="207 919 435 1003" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Copy Reserves List</div> <div data-bbox="207 1066 435 1150" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Schedule Reserve Items</div> <div data-bbox="207 1213 435 1297" style="border: 1px solid black; padding: 5px;">Reserves Due</div>	<p data-bbox="492 478 1321 615">Virtua Reserves allows you to create and maintain course reserve lists and monitor the circulation of items associated with those lists using a special set of circulation rules.</p> <p data-bbox="492 653 651 684">Summary</p> <ul data-bbox="537 695 1224 869" style="list-style-type: none"> Search for an item on reserve Create a reserve header Place an item on reserve Create a bibliographic record using Circ-on-Fly Add an item record to a bibliographic record <p data-bbox="492 905 667 936">Key Terms</p> <ul data-bbox="537 947 899 1478" style="list-style-type: none"> Active Reserve Item Archived Reserve Item Begin Date Circ-on-the-fly Course ID Course Section Current Active Current Inactive End date Instructor Number Reserve Reserve Item Reserve List Reserve Header Scheduled Reserve Item

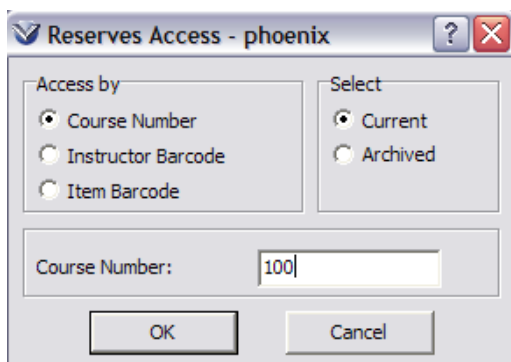
	Circulation Parameters
	<p>The parameters listed below affects the processes related to Reserves.</p> <p>Global Settings</p> <p>Location Names: Set default values for items that are added to a new reserve list. Set begin dates, end dates, and pull period in number of days.</p> <p>Circulation</p> <p>Item Class Definitions: Define reserve items classes.</p> <p>InfoStation Reports</p> <p>Reserves Activate list: generates a list of reserve items that qualify for activation</p> <p>Reserves Current Active list: generates a list of items currently on active reserve</p> <p>Reserves Pull list: generates a list of scheduled reserve items that need to be pulled from the shelves and moved to the reserve area</p> <p>Reserves Remove list: generates a list of active reserve items that have expired and need to be deleted or archived</p>

View Reserves

View Reserves to ensure that the Header does not already exist.

Via Reserves Access Window

On the toolbar, click the **Reserves** icon  or select **Circulation** → **Reserves** → **View** from the Virtua menu bar. The **Reserves Access** window opens.




Select **Course Number**, **Instructor Barcode**, or **Item Barcode** as the access mode.

Select **Current** or **Archived** to view either active or archived reserve lists.

Type in the appropriate search term in the text box.

Click the **OK** button.

Via the OPAC

On the toolbar, click the **Search** icon .

On the **Browse** tab of the **Search** window, choose **Instructor** or **Course ID** as your search category.

Obtain Instructor Barcode

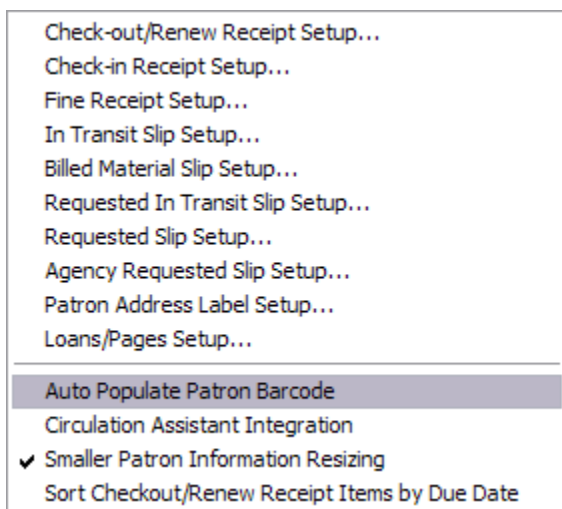
You must have the Instructor's barcode (patron ID number) in order to create the reserve header.

Search the OPAC for the Patron ID number by hitting the **F8** key or by selecting **Search → Patron Name** from the Virtua Main menu.

Enter the instructor's name and click the search button. The patron record will open in the **Patron Information** window. The Patron ID number is the 015 tag, subfield\$ a.

To auto populate the **Create Reserve Header** window with the patron barcode number, leave the patron record open and select **Options → Circulation Options → Auto Populate Patron Barcode** from the Virtua main menu.

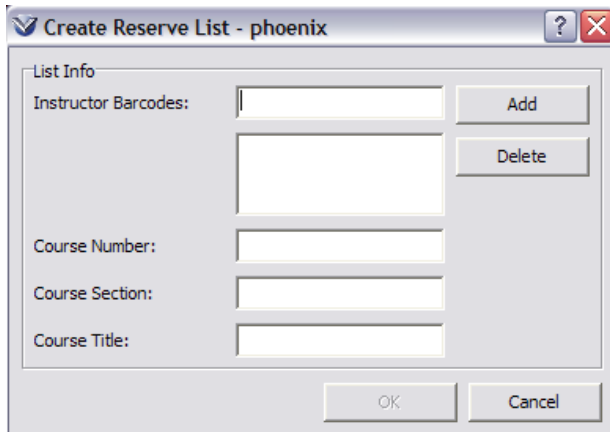
When *multiple* **Patron Information** windows are open, the Instructor Barcodes text box will be automatically populated from the last focused open **Patron Information** window.



Create Reserve Header

You must first create a reserve header for the reserve list and then add the items to the list.

Select **Circulation → Reserves → Create** from the Virtua menu bar. The **Create Reserve List** dialog box appears.



The dialog box titled "Create Reserve List - phoenix" contains a "List Info" section with the following fields and buttons:

- Instructor Barcodes: A text input field with an "Add" button to its right.
- A second empty text input field with a "Delete" button to its right.
- Course Number: A text input field.
- Course Section: A text input field.
- Course Title: A text input field.

At the bottom of the dialog are "OK" and "Cancel" buttons.

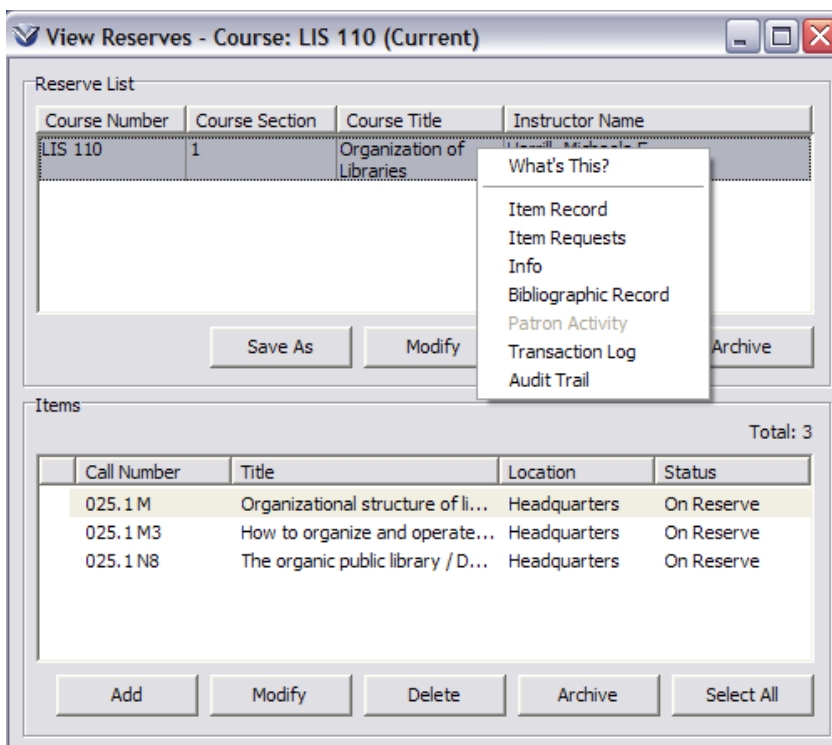
Enter the information. Click **OK**.

Only ONE occurrence of a course number, instructor, and section can be active at any time.

Place Items on Reserve

Place an Existing Item on Reserve

Open the **View Reserve** window.



The "View Reserves - Course: LIS 110 (Current)" window displays a "Reserve List" table and an "Items" detail box.

Course Number	Course Section	Course Title	Instructor Name
LIS 110	1	Organization of Libraries	David M. ...

Below the table are buttons: "Save As", "Modify", and "Archive". A context menu is open over the table with options: "What's This?", "Item Record", "Item Requests", "Info", "Bibliographic Record", "Patron Activity", "Transaction Log", and "Audit Trail".

The "Items" section shows a list of items with a "Total: 3" count:

Call Number	Title	Location	Status
025.1 M	Organizational structure of li...	Headquarters	On Reserve
025.1 M3	How to organize and operate...	Headquarters	On Reserve
025.1 N8	The organic public library / D...	Headquarters	On Reserve

At the bottom are buttons: "Add", "Modify", "Delete", "Archive", and "Select All".

Below the Items detail box, click the **Add** button. The **Create Reserve Item** dialog box appears.

Enter the **Item Barcode** of the item you are adding to the reserve list.

Select the **Item Class** from the pull-down list box.

Choose the beginning and ending dates of the **Active (Reserve) Period** using the calendars or by accepting the default.

Select the **Reserve Location** from the pull-down list box.

To allow requests to be placed against this item, click the **Allow Requests** check box.

Click **OK**. The *Create Reserve Item* dialog box will remain open until you choose to close it, and allows you to quickly add multiple items to a reserve list without reopening the window.

An item can be associated with multiple reserve lists, but it can have only ONE reserve location, ONE item class, and ONE requests designation.

Place a New Item on Reserve

If a bibliographic record does not exist in the OPAC use Circ-on-the-fly to create a brief MARC record, then add an item.

Circ-on-the-Fly

Select **Circulation** → **Transactions** → **Circ-on-the-Fly** from the Menu Bar.


The **MARC Editor** appears, displaying the default *circ-on-the-fly* workform. Type the necessary data.

<input type="checkbox"/>	008				120530	00	eng
<input type="checkbox"/>	090	<input type="checkbox"/>	<input type="checkbox"/>		\a		
<input type="checkbox"/>	100	<input type="checkbox"/>	<input type="checkbox"/>		\a		
<input type="checkbox"/>	245	<input type="checkbox"/>	<input type="checkbox"/>		\a		
<input type="checkbox"/>	260	<input type="checkbox"/>	<input type="checkbox"/>		\a		
<input type="checkbox"/>	500	<input type="checkbox"/>	<input type="checkbox"/>		\a		
<input type="checkbox"/>	700	<input type="checkbox"/>	<input type="checkbox"/>		\a		

(a) Language material (m) Monograph/Item Masked

< > MARC 21 Bib: Book New Record Modified

Untitled1

Save the record by pressing the **F11** key or the  icon on the cataloging toolbar.

The saved record reappears and then the **View Bibliographic Record** window appears, displaying the brief bibliographic record you created.

Add Item Records

From the **View Record** window, click the **Add Items** tab. The **Item Information** window appears displaying default values for the mandatory item elements.

Accept or change the default item values where applicable.

Enter a barcode of up to 50 characters.

Click the **Save** button.

Click the **Refresh** button on the **View Bibliographic Record** window; note that an **Item** tab appears.

This is now available to be placed on Reserve.

Delete Item Records

Once a reserve item, which does not belong to the library, is no longer on reserve, the item may need to be deleted from the database. Do not delete the item if you intend to archive the reserve list and include the item.

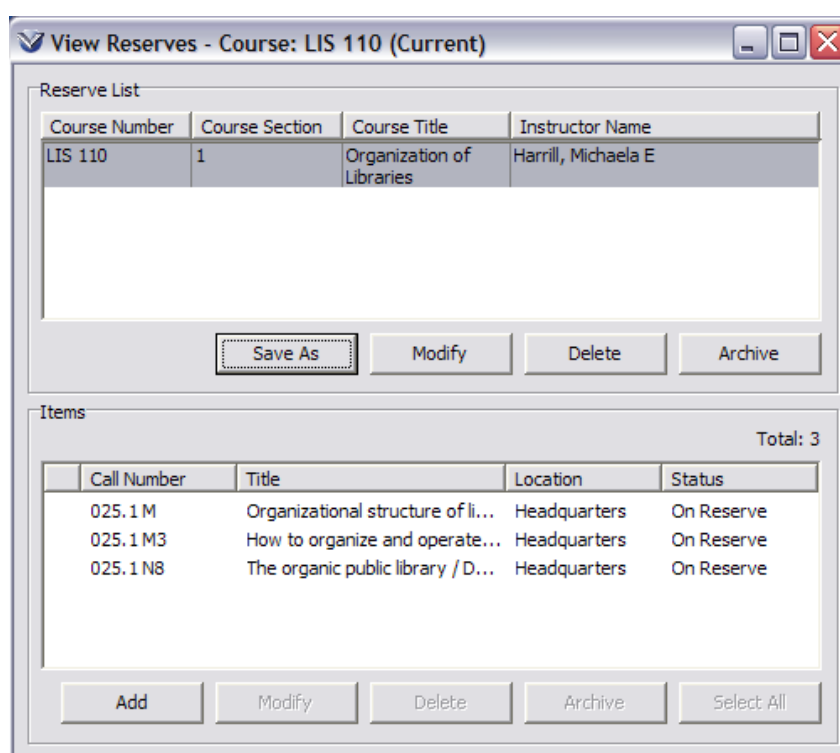
From the **View Bibliographic Record** window, highlight the item to be deleted and press the **View Item** button. The **Item Information** window appears.

Press the **Delete** button. A confirmation window appears prompting a *yes* or *no* to either proceed with or **cancel the delete action**.

From the **View Bibliographic Record** window, press the **Refresh** button to refresh the window to reflect the deletion.

View, Modify, and Copy Reserves

Perform a Browse Search by **Instructor** (last name, first name) or **Course number** to open the **View Reserves** window.



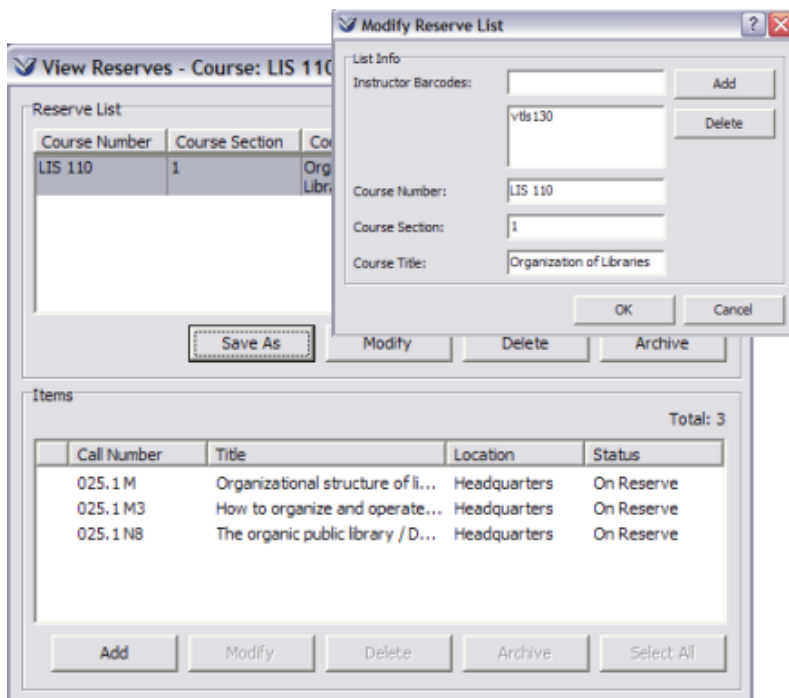
From this window you can edit both reserve headers and items on reserve.

Modify Reserves

You may modify the reserve header or items placed on reserve.

Modify Headers

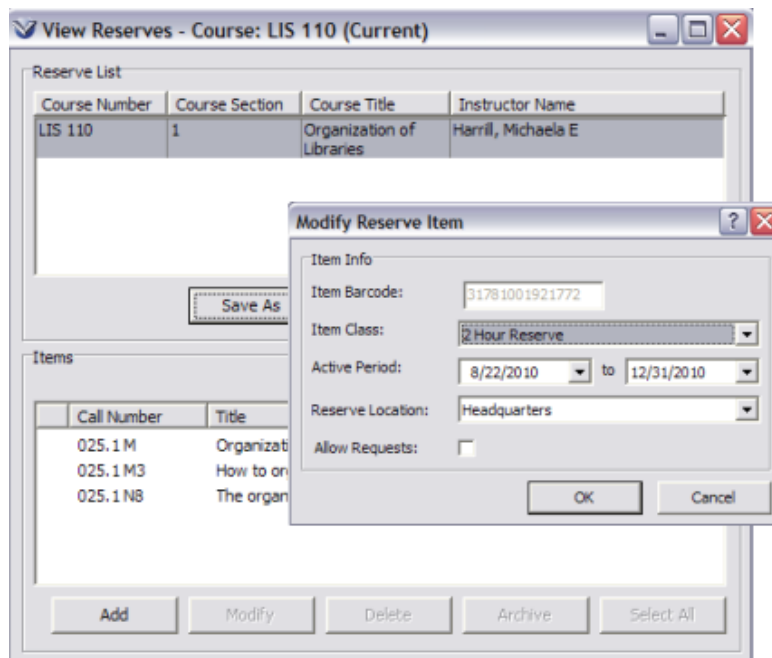
From the **View Reserves** windows, highlight the course/instructor header and click the **Modify** button. The **Modify Reserve Header** window will appear.



Edit the Header and click **OK** to save. The **View Reserves** window will be active.

Modify Items

From the **View Reserves** windows, highlight the desired item and click the **Modify** button. The **Modify Reserve Item** window will appear.



Edit the item and click **OK** to save.

Note: You cannot modify the Item Barcode. If an incorrect item has been added, it needs to be deleted.

To modify all items on the reserve list, click the **Select All** button. All of the items on the reserve list will be grayed out. Click the **Modify** button and the **Modify Reserve** window appears. Any changes that you make will be reflected on all reserve items.

Copy Reserve List

To save time, you may want to create a new reserve list by copying much of the information already associated with a current list.

From the **View Reserves** windows, highlight the course/instructor header and click on the **Save As** button.

Enter in the new information.

Note: Items associated with multiple current lists cannot have different loan periods or different reserve locations or have the Allow Request Flag set.

Archive Reserves

You can archive a reserve header and all items attached to that header, or a single reserve item. Currently circulating Reserve items cannot be archived.

Header

From the **View Reserves** windows, highlight the **Course/Instructor header**.

Click the **Archive** button. The **Reserve Header** and **all items** attached to the header will be removed from the **View Reserves** window and archived.

Item

From the View Reserves windows, highlight the **item**.

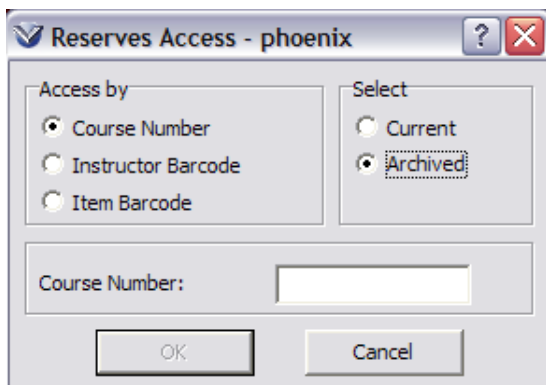
Click the **Archive** button. The **item** will be removed from the reserve list and archived.

Click the **Select All** button and then the **Archive** button to archive all reserve items.

Activate Reserves

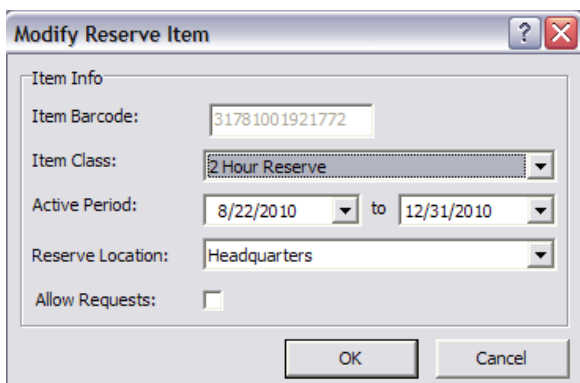
To activate archived reserves select **Circulation** → **Reserves** → **View**, from the Virtua main menu.

Select the **Archived** radio button.



Click the **Select All** button and then the **Modify** button to reactivate an entire list or highlight a single item or multi-select items from the list using the **Ctrl** key. The **Modify Reserve Item** window appears.

Enter the new active period.



Delete Reserves

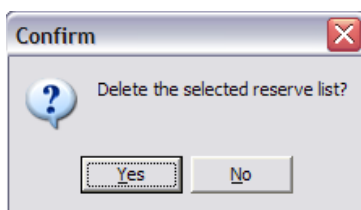
You can delete a reserve header and all items attached to that header, or just delete a single reserve item. Currently circulating Reserve items cannot be deleted.

Header

From the view reserves windows, highlight the course/instructor header

Click on the **Delete** button. A **Confirm** window will appear.

Note: If you delete the header, you will delete both the current and archived header.



Item

From the view reserves windows, highlight the item.

Click on the **Delete** button. A confirmation window will appear.

Click the **Select All** button and then the **Delete** button to delete all items on the reserve list.

Schedule Reserve Items

Sometimes you want to put things on reserve before their start date. When you do this the reserve items will appear on the **Scheduled** tab.

Item Barcode	Call Number	Course Number	Instructor Name	Begin Date
EKO2	E READER SEUSS	ENG214	O'Connell, Hannah O'Connell, Verity	1/17/2011
MKP2	J823 ROW FRENCH	Eng 510	Hristov, Mechka S	1/17/2011
RPM1	TEEN MEYER	LIS 5201	Morrisette, Rob Morrisette, Jack	1/17/2011

Item Barcode:

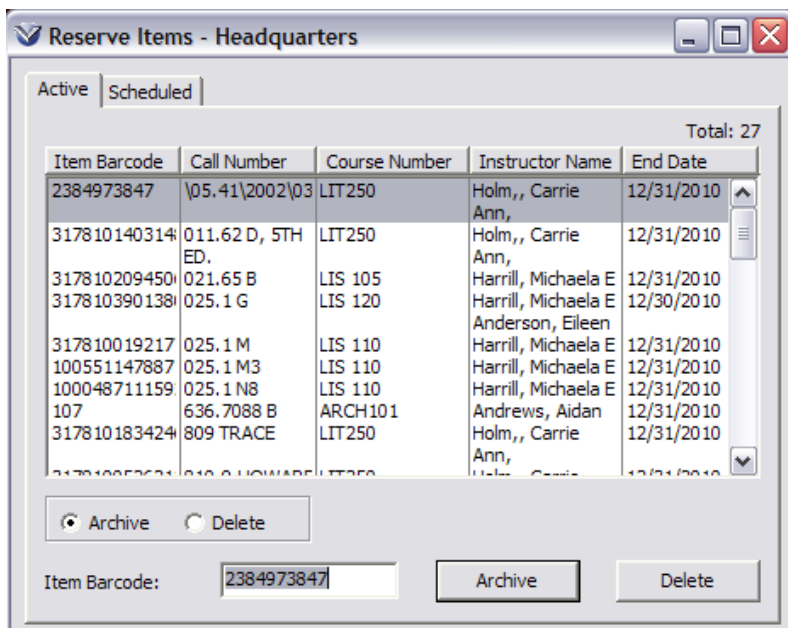
The system will automatically move the item from the **Scheduled** tab to the **Active** tab at the appropriate time.

Activate Scheduled Reserve

If you wish an item to be active **earlier** than it was scheduled from the scheduled tab, highlight the item to be made active and click the **Activate** button.

Archive Active Reserve

A list of all items currently on reserve can be seen on the **Active** tab.

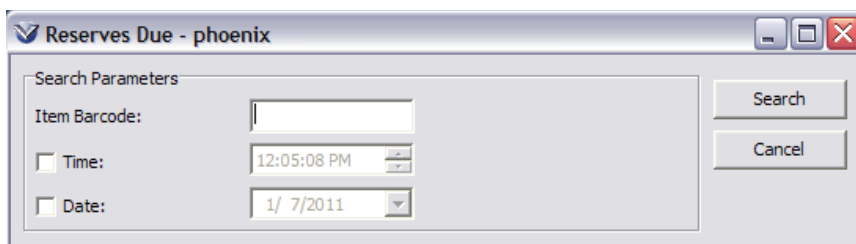


If you wish an item to be deactivated **earlier** that it was scheduled from the active tab, highlight the item to be made inactive and click the **Archive** button. This will archive the item.

Reserves Due

The **Reserves Due** window allows you to view information on reserves due at your location.

Select **Circulation** → **Reserves** → **Reserves Due** from the Virtua menu bar.



Enter a specific item, date or time.

Click the **Find Now** button. The **Reserves Due** list will be appended to the **Reserves Due** window.

Reserves Due - phoenix

Search Parameters

Item Barcode: 31781001921772

Time: 12:14:47 PM

Date: 1/ 7/2011

Search

Cancel

Item	Patron	Due Date/Time
31781001921772	vts411	1/7/2011 12:26 PM

What's This?

Patron Record

Patron Activity

Patron Account

Item Record

Item Requests

CallNumber: 025.1 M

Author: Martin, Lowell Arthur, 1912-

Title: Organizational structure of libraries / Lowell A. Martin.

BibId: 154724

Check-Out Date/Time: 1/7/2011 12:16:00 PM

Letter Date: 1/5/2011

Letter Type: Review

Renewals: 0

Owning Location: Headquarters

Shelf Location: Headquarters

Reserve Location: Headquarters

Item Bookings

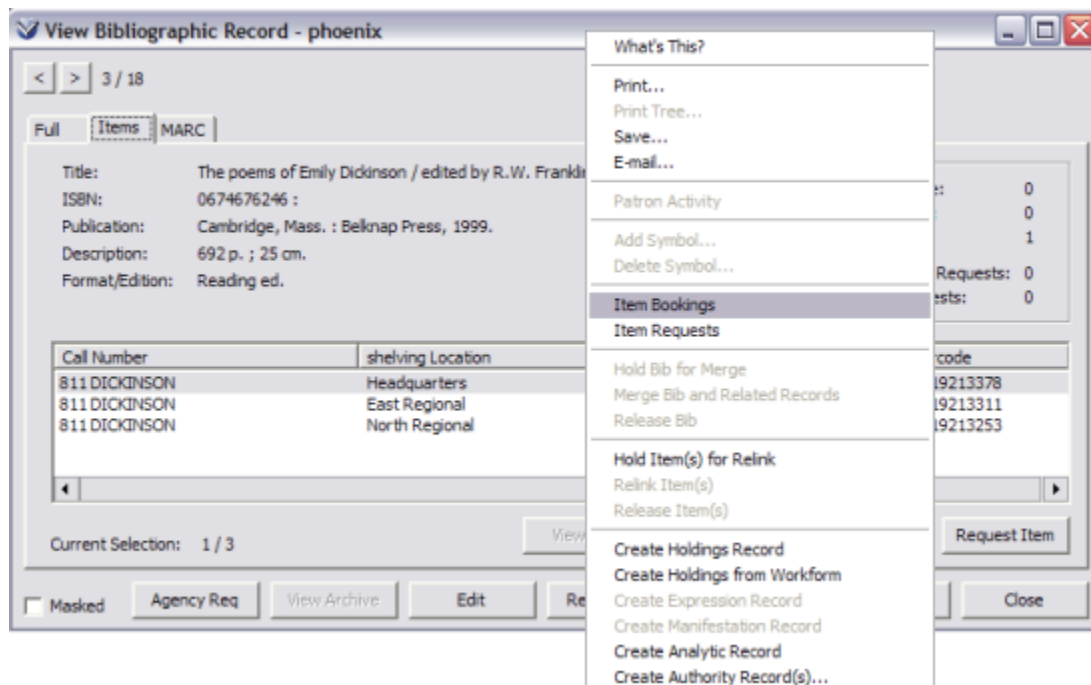
Outline	Explanation
<div data-bbox="207 449 433 531" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">View Item Bookings</div> <div data-bbox="207 594 433 676" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Schedule Item Bookings</div> <div data-bbox="207 739 433 821" style="border: 1px solid black; padding: 5px;">Modify/Delete Item Bookings</div>	<p>The Item Booking feature lets you book a particular item for use by a patron during a specific time period. Once an item has been booked, the item cannot be checked out to another patron if the loan period conflicts with the scheduled booking date/time.</p> <p>Summary</p> <ul style="list-style-type: none"> View all bookings for an item. Schedule an item booking. Modify or delete a scheduled item booking. <p>Key Terms</p> <ul style="list-style-type: none"> Item Bookings Materials Booking Bookings Pickup Location List Overview <p>Circulation Parameters</p> <p>Patron Type Settings: Add Patron Type window, Item Booking Limit</p> <p>Fine Code Definitions: MB, Materials Booking</p> <p>Circulation System Options: Bookings take priority over satisfied requests.</p> <p>Item Class Definitions: Class Type, bookable.</p> <p>System Parameters</p> <p>Bookings Pickup Location: Location Names, Location, Check box to allow location to be an Item Booking Pickup location.</p> <p>InfoStation Reports</p> <p>Expired Bookings Report: generates a list of expired bookings that meet the location and patron type criteria.</p> <p>Media Booking Pull List: generates a list of items that need to be prepared for scheduled item bookings.</p>

Viewing Item Bookings

View Bookings by Item

To view all bookings for an item, from the **Items** tab of the **View Bibliographic Record** window, highlight the item in the list box. You may also access the **Item Bookings** window from the **Item Information** window.

Click the **View Record** menu on the Virtua main menu or right mouse click and select **Item Bookings**.



View Bookings by Patron

Navigate to the **Patron Information** window, **Activity** tab, **Booked** sub-tab.

Select an item in the list box and right mouse click.

Select **Item Bookings** from the pop-up menu.

Add an Item Booking

From the **View Bibliographic Record** window, display the **Items** tab for the item to be booked.

In the list box, right click on the item you want to book.

On the **View Bibliographic Record** window pop-up menu, select the **Item Bookings** option. The **Bookings For Item** window appears.

The display panel at the left lists the item bookings that have already been scheduled.

Using the calendar interface, navigate to the desired booking date.

In the display panel at the left, click on an **Available** hour in the list.

Modify the default Prep Time, Start Time, Inspect Time, Duration, and Bookings Pickup Location setting.

Add a **Note** if needed.

Click the **Add** button.

Enter the barcode of the patron for whom you want to book the item.

Click the **OK** button.

The new item booking is scheduled, and the **Bookings For Item** window is refreshed to display the new booking.

When you have finished scheduling bookings for the item, click the **Close** button.

Modify/Delete an Item Booking

Go to the **Bookings For Item** window for the desired item.

Use the calendar to navigate to the date on which the item booking falls.

In the display panel at the left, select the scheduled item booking that you want to modify or delete.

To modify the item booking, edit the Prep Time, Start Time, Inspect Time, Duration, Bookings Pickup Location and Notes fields as necessary and click the **Update** button.

OR

To delete the selected item booking, click the **Delete** button.

Your changes are applied and the display panel at the left of the window is refreshed.

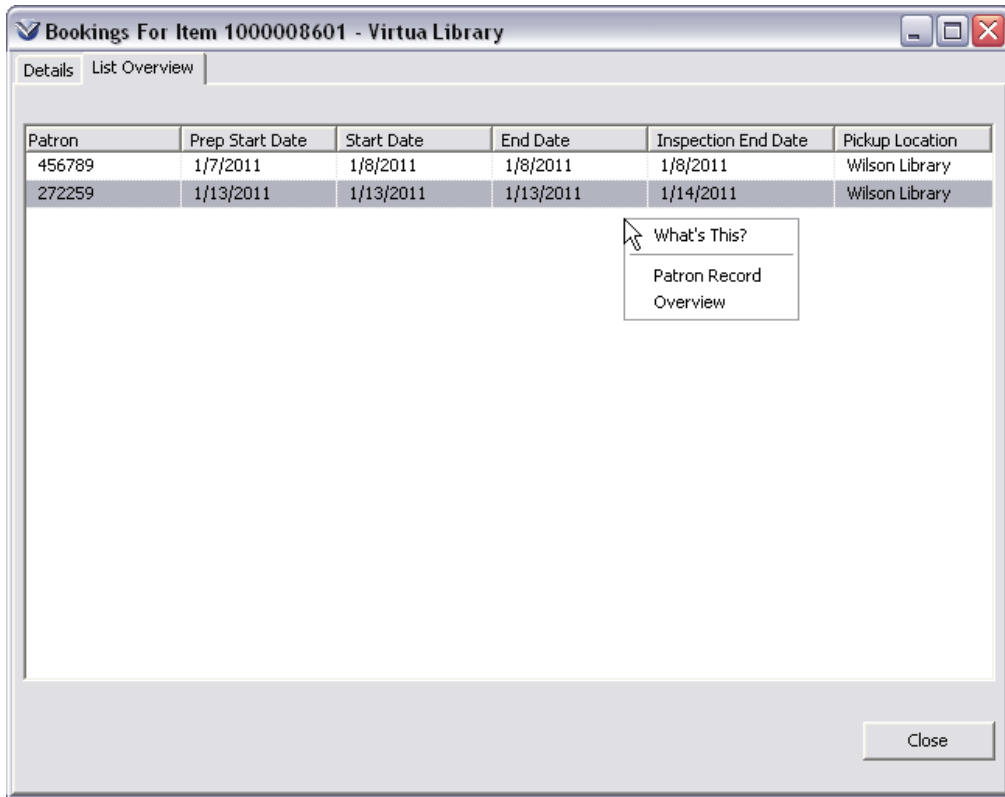
Displaying Bookings for an Item

The **List Overview** tab displays all upcoming bookings for the item.

The information on this tab can be sorted by clicking on a column header.

A right click menu offers choices for viewing other details about the selected booking.

Item bookings cannot be modified from this window.



Note: When an item is booked, the **View Bibliographic Record** window now displays "Booked" as the item status.

Floating Collections

Recommended Workflow	Explanation
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; text-align: center;"> Checkout an Item at One Location </div> <div style="text-align: center; margin-bottom: 10px;">↓</div> <div style="border: 1px solid black; padding: 5px; text-align: center;"> Checkin the Same Item at a Different Location </div>	<p>Floating collections allow libraries to float designated items of their collections to multiple locations. There are various options available to libraries for choosing which items circulate. These options may be configured for entire collections, specific item classes, or even individual items.</p> <p>When a floating item is checked in, the item's shelving location is reset to the check in location, if the check in location accepts floating items. Unlike rotating collections, floating collections are controlled by the actions of the patron.</p> <p>Profiler Circulation Parameters</p> <p>Profiler → Global Settings → Locations → Allow Floating Items Minimum item count threshold</p> <p>Profiler → Global Settings → Locations → Accept Floating Items Maximum item count threshold</p> <p>Profiler → Location + Item Matrix → Allow Floating Items Minimum item count threshold</p> <p>Profiler → Location + Item Matrix → Accept Floating Items Maximum item count threshold</p> <p>Circulation</p> <p>Virtua Client → Item Information → Circulation Rules → Floats check box</p>

Potential advantages for using floating collections for your library:

- Supplement inventory of smaller locations with items owned by more robust locations.
- Reach new patrons with materials they would not have seen if they only visit one location.
- Decrease delivery cost and time materials spend in transit.
- Allows for increased circulation of materials.
- Decrease in staff time spent handling materials.

Floating collections are directed by the actions of the patron. Materials can stay at the locations to which they are returned, instead of being placed in transit status and returned to the owning location. The **Owning** location for the floating item remains constant, but the **Shelving Location** reflects the change in location.

For an item to float 3 conditions *must* be met:

- The item's float flag must be enabled in the **Item Information** window.
- The current shelving location must be designated as allowing collections to float and its minimum thresholds must not be exceeded.
- The check-in location must be designated as accepting floating collections and its thresholds must not be surpassed.

In the **Profiler** → **Global Settings** → **Locations** there are two parameters that must be enabled to allow and accept floating collections. Enabling the **Allow Floating Items Minimum item count threshold** will permit items shelved at this location to float to other locations. When the threshold is set to 0 (default setting) there is no limit to the number of items belonging to this location that will be allowed to float. By entering a minimum number of items to keep at this location, the items belonging to this location will only float when the specified minimum number of items are shelved at this location.

The **Accept Floating Items Maximum item threshold** parameter enables a location to accept floating items from other locations. When the Maximum is set to 999,999,999 (default setting) the location will accept an unlimited number of floating items. When a floating item is checked in at an accepting location the system will check to determine if the location has met its maximum threshold of accepted items. If an item cannot float at the check-in location, Virtua attempts to send the floating item to a location that has a 'Max floating item count threshold' value of less than 999,999,999 and that is furthest from reaching the number of floating items specified in the threshold value. If a location is found, the item will be placed at in-transit status and sent to the qualifying location. If no such location can be found, the item will not float and will be returned to its shelf location.

Also in the **Profiler** → **Circulation** → **Location + Item** matrix will contain the same two parameters found in the Location configuration to allow control of which Item Classes are allowed to float and can be accepted. If library does not wish for specific item classes to float to other locations this is where the library would disable the floating collection feature.

Customer Support Library + Regular (I.C. 1) (1 day) ...

Item Info Lost/Damaged

Calendar: Default

Must Pickup At Shelving Location: Yes

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

Items Circulating One Day Or More Are Due At Closing: Yes

Replacement Cost At Billing: Price (Item Elements tab)

Default Item Price: \$35

Fines Accrue During Non-Operating Hours: No

Prep Time For Materials: 0 Hours

Hold Pickup Time: 14 Hours

Inspection Time For Materials: 0 Hours

Default Booking Time For Materials: 0 Hours

Minimum Booking Time For Materials: 0 Hours

Allow Renewal Within [] Days of Due Date.

Min floating item count threshold: 0

Max floating item count threshold: 999999999

Apply To Save Cancel

Last modified at 6/12/2012 2:22:18 PM by Root User

Additional control over specific items can be established in the Virtua Client in the **Item Information** window on the **Item Elements** tab by checking or unchecking the **Floats** checkbox in the Circulation Rules section. This may be used if the library has multiple items of a specific material and would like to allow some of the items attached to float, but not every item, therefore ensuring that at some items are always sent back to the owning location.

Item Information - Customer Support Library

Item Elements | Notes | Statistics | Status | Acquisitions

Bibliographic Information

Author: Green, Jen.
 Title: Vincent van Gogh / Jen Green ; [traducción: Miguel Iribarren Berrade].
 Edition: Primera edición en lengua española

Item Information

Item ID: 186870
 Barcode: 1000202671
 Barcode Type: Regular
 Item Class: Regular (I.C. 1) (1 day)
 Reserves Item Class:
 Item URL:
 Location: Customer Support Library
 Shelving Location: Customer Support Library

Call Number

Copy: 1
 Call #: 759.9492 G823v 2004
 2nd Call #:

Units

Free Text
 Enumeration and Chronology
 None

Preservation and Conservation

Preservation and Conservation
 Code:

Non-Parameterized Shelf Location

Non-Parameterized Shelf Location
 Location:

Circulation Rules

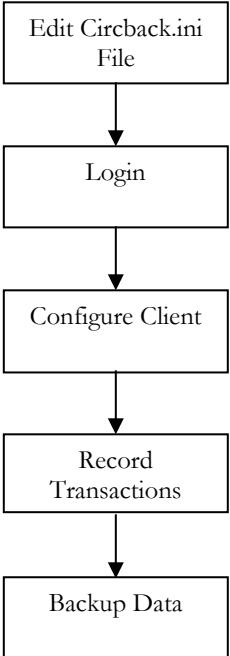
Use Matrix
 Use Loan Period: 28
 Allow Request
 Floats

Number of Pieces: 1 Circulate Pieces
 Price: \$0.00
 EPN Number:
 Accession Number:
 AV Accession Number:
 Collection Code:

Masked

Delete Save Refresh Close

Circulation Backup

Recommended Workflow	Explanation
 <pre> graph TD A[Edit Circback.ini File] --> B[Login] B --> C[Configure Client] C --> D[Record Transactions] D --> E[Backup Data] </pre>	<p>Currently, the Virtua Circulation Backup Client can perform the following transactions.</p> <ul style="list-style-type: none"> Check-ins Check-outs Renewals Accept Payment Reads a file of blocked patrons <p>To set up Circulation Backup you will need the following information</p> <ul style="list-style-type: none"> Location code for main locations; these can be found in the Profiler, Global tab. Operator ID numbers for any staff recording transactions in Circulation Backup. <p>Identifying Operator IDs</p> <ol style="list-style-type: none"> 1. Login to Virtua using your user name and password. 2. Do a circulation transaction (check-in, checkout, renew, etc.) noting the patron or item number in the transaction. 3. Select Circulation → Transaction Log from the Virtua main menu. 4. Enter either the patron or item number to search the Transaction Log 5. Highlight the transaction you just performed; on the right hand side of the window is information pertinent to the selected transaction. 6. Note the Operator ID number; this is the system assigned ID number associated with your user name and password. 7. Repeat for all staff using the Circulation Backup system.

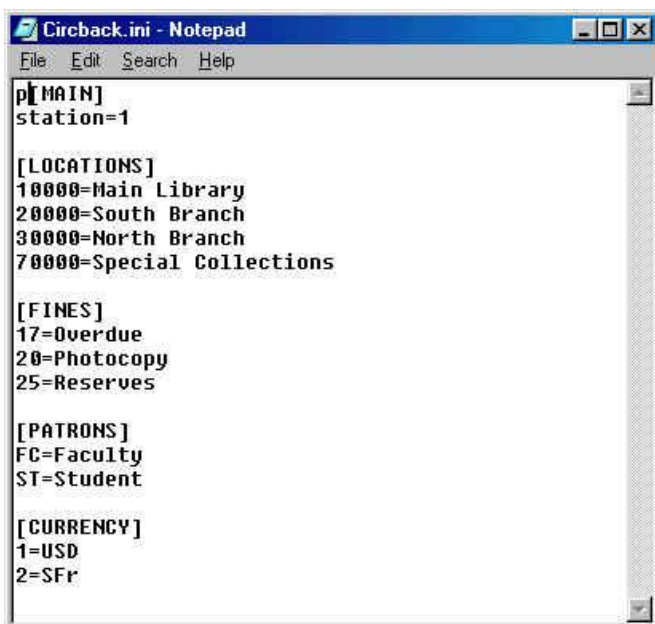
Edit the circback.ini file

Before using **Circulation Backup**, the circback.ini file will need to be edited for each circulation workstation. To change this file you will need to know the location codes that have been set in the Profiler:

Open the Circback.ini file in a text-editing program such as Notepad or WordPad. This file should be located under:

C:/Program Files/VTLS/Virtua/circback.ini

The following template will appear.



```

[Circback.ini - Notepad]
File Edit Search Help
p[MAIN]
station=1

[LOCATIONS]
10000=Main Library
20000=South Branch
30000=North Branch
70000=Special Collections

[FINES]
17=Overdue
20=Photocopy
25=Reserves

[PATRONS]
FC=Faculty
ST=Student

[CURRENCY]
1=USD
2=SFr
  
```

Edit the station number, giving each Circulation workstation a unique number.

Warning: Failure to assign unique numbers to each workstation will result in data loss.

Edit the Locations to conform to the settings in the Profiler. Use main location codes only. You cannot set up sub-locations in Circulation Backup.

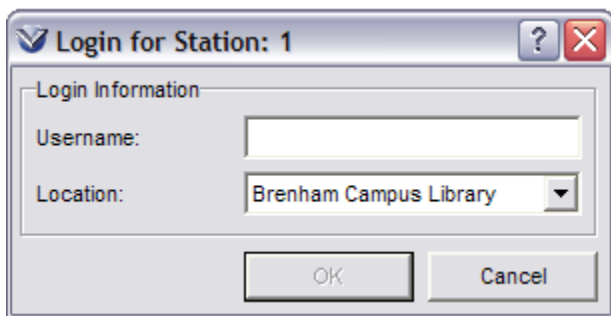
TIP: Edit the circback.ini file on one workstation and then copy it to the other workstations, remembering to change the station number.

Login to Circulation Backup

Locate **Circulation Backup** in the Virtua directory and double click or right mouse click and select open to run the program.

C:/Program Files/VTLS/Virtua/circback.exe

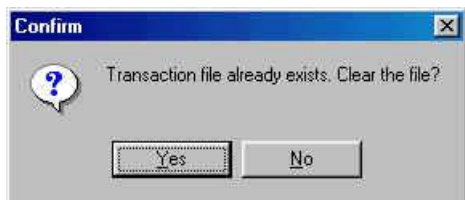
The **Login** window will appear:



Select a location from the Location dropdown menu.

Enter your operator ID.

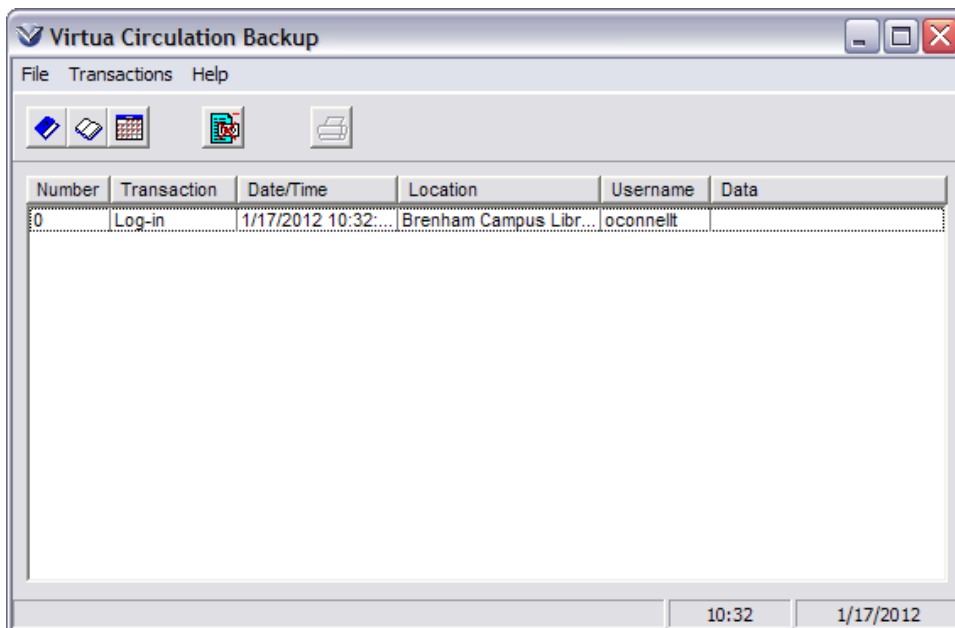
If a circulation transaction file already exists on your machine (any time after the first use), you will receive the following message:



If you answer yes the transaction file will be cleared and all transactions lost.
Only answer yes if you have transferred this file to the server.

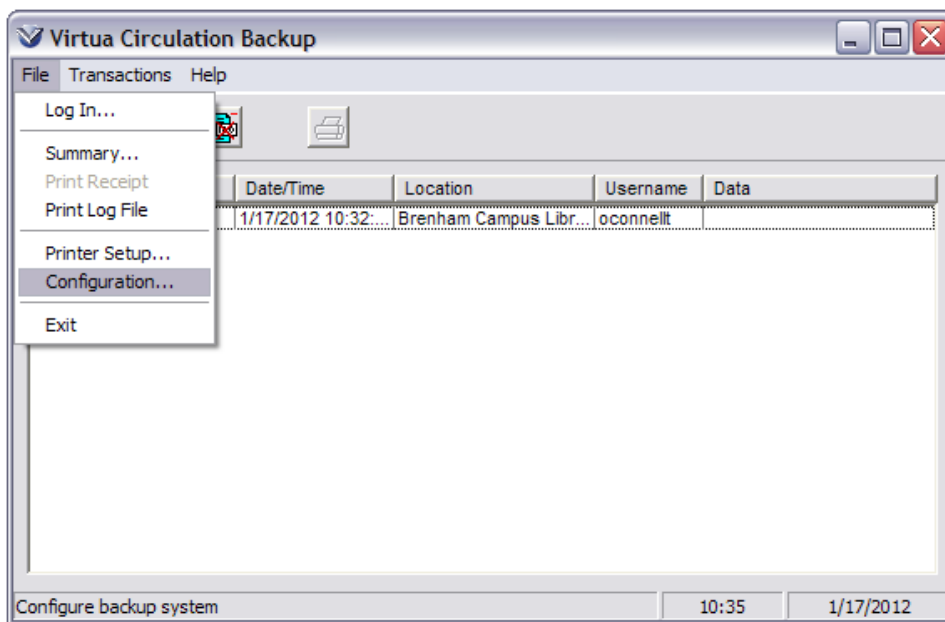
If you answer no, the new transactions will be appended to the transaction file.

The **Circulation Backup** window will appear:

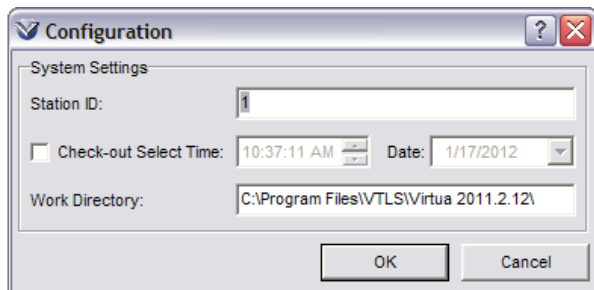


Configure the Client

To set the configuration of the Circulation Backup Client, on the Circulation Backup menu bar, click **File** → **Configuration**.



The **Configuration** window will appear:



Note: The unique station ID configured for the **Circulation Backup Client** and specified in the **circback.ini** file can be alphanumeric and of variable length.

If desired, type a new station number in the Station Number field.

Warning: Do **NOT** assign two PCs the same station number. Doing so could result in a loss of transaction data.

If you want to save the transaction file to a different directory, type a new path in the Work Directory field.

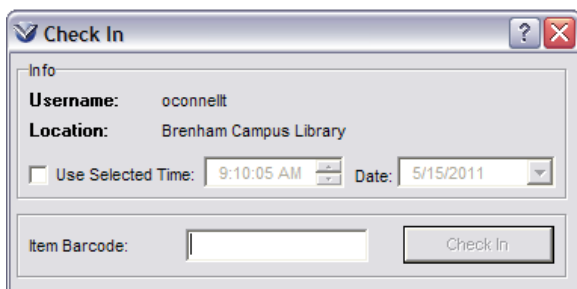
If you want to set a default time to appear in the Selected Time field of the Check-out or Check-in window, check the Checkout Select Time checkbox and enter a new time and date.

Click the **OK** button to save your changes and close the window.

Record Transactions

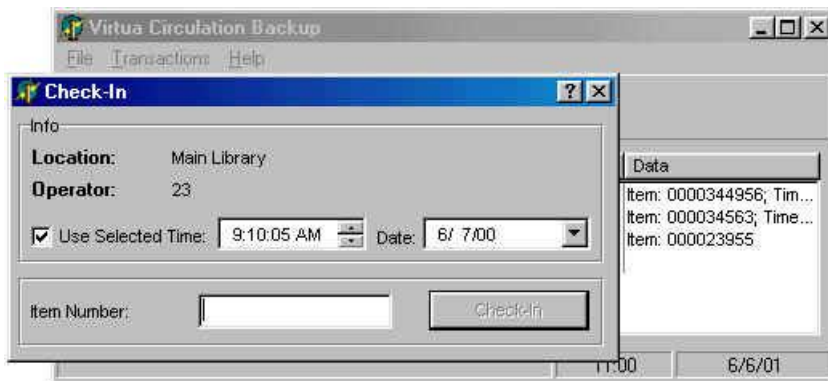
Checking In Items


To check in an item, click the **Check-In**  icon or select **Transactions** → **Check-In from the Circulation Backup main menu**, or press the **CTRL+I** key. The **Check-in Patron Access** dialog box appears.



If desired, select the **Use Selected Time** check box and manually select a check-in time and date.

Wand in the item barcode or type the barcode and press the enter key. The transaction displays in the **Circulation Backup** window.



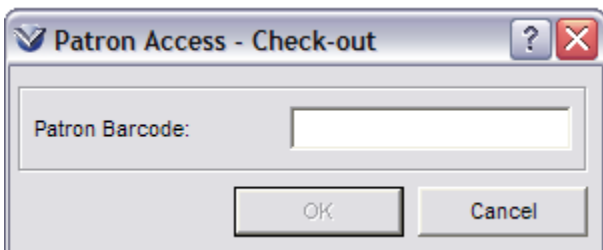
To close the Check-In window, click the  button in the upper right-hand corner of the **Check-In** window.

To print a receipt for the transaction, select a transaction on the Circulation Backup window list box. Currently you cannot multiple select transactions for printing.

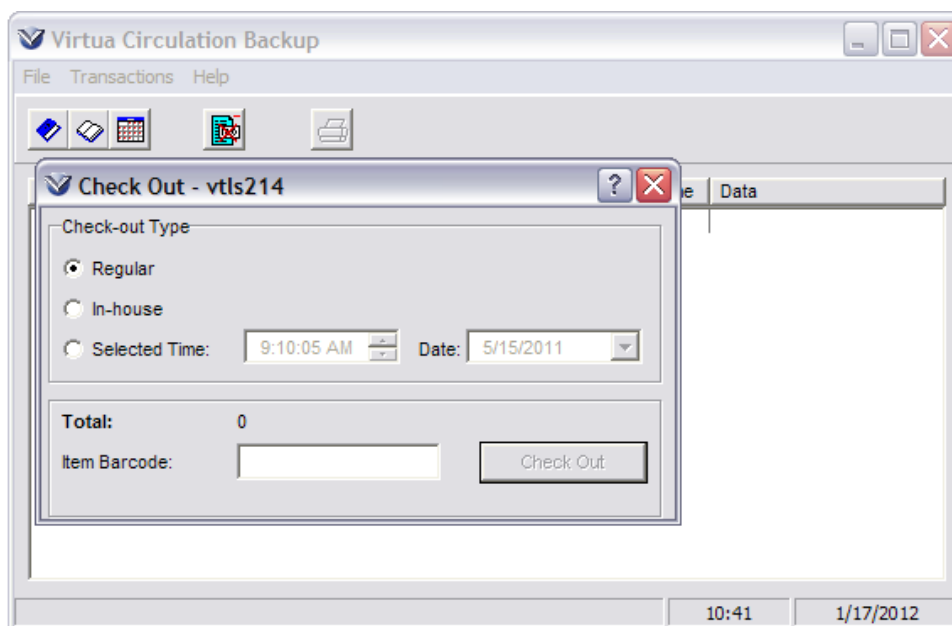
Click the **Print**  icon on the toolbar.

Checking Out Items

To check out an item, click the **Check-out**  icon, or select **Transactions** → **Check-out** from the **Circulation Backup** main menu, or press the **CTRL+O** key. The **Checkout Patron Access** dialog box appears.




Enter the patron's barcode or type the barcode and hit enter or **OK**. The **Checkout** window appears.



Select the Checkout Type you want to use for this transaction.

Note: The default Selected Time is the time and date you chose on the Configuration Window.


Wand in the item barcode, or type the barcode and the **Check-out** button or press the **Enter** key. The transaction displays on the **Circulation Backup** window.

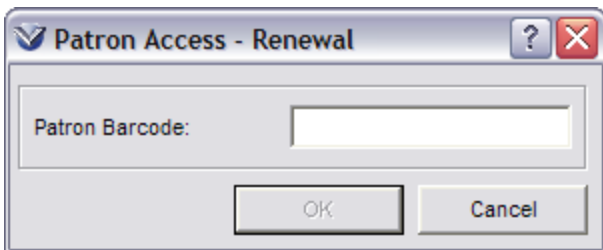
To close the **Check-Out** window, click the  button in the upper right-hand corner of the window.

To print a receipt for the transaction, select a transaction on the Circulation Backup window list box. Currently you cannot multiple select transactions for printing.

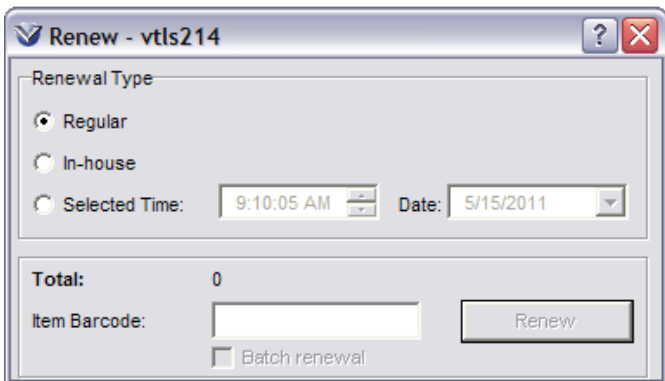
Click the **Print**  icon on the toolbar.

Renew Items

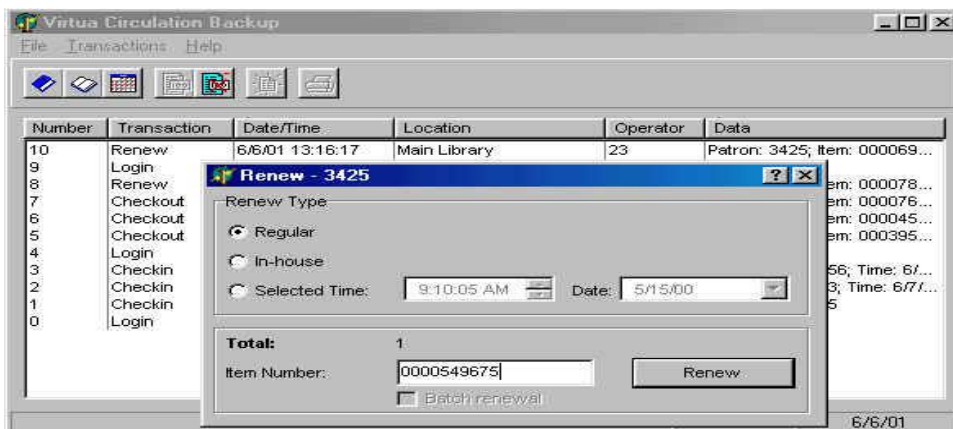
To renew an item, click the **Renew**  icon, select **Transactions** → **Renew** from the **Circulation Backup** main menu, or press the **CTRL+R** key. The **Renew Patron Access** dialog box appears.



Enter the patron's barcode. The **Renew** window appears.



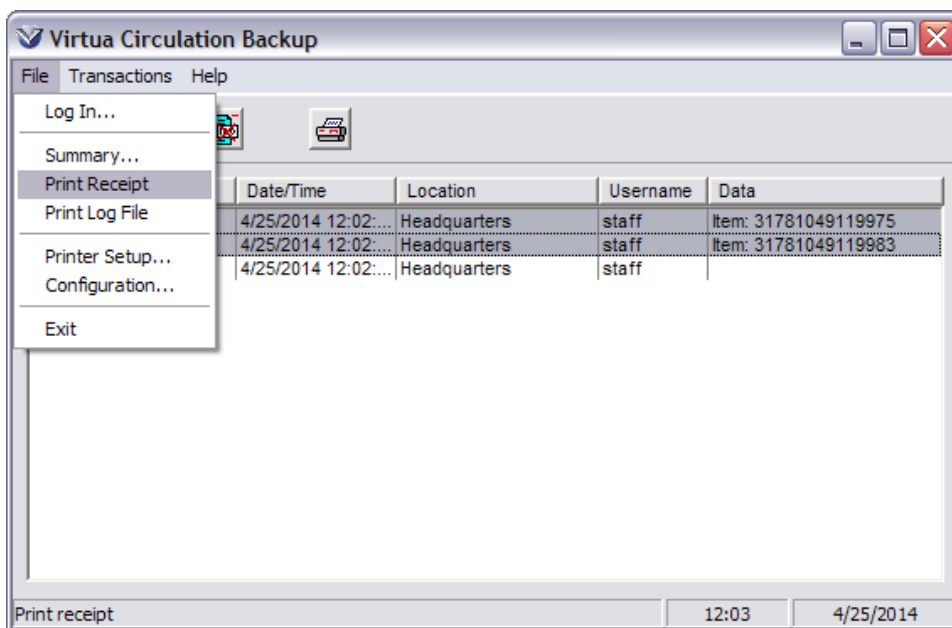
Select the renew type **Regular**. Type or wand in the item barcode. The transaction displays in the **Circulation Backup** window.




To print a receipt for the transaction, select a transaction on the **Circulation Backup** window list box.

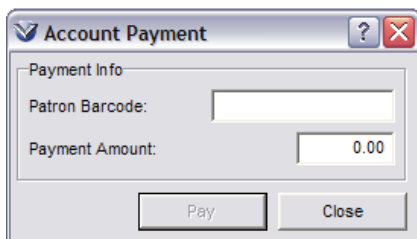
Click the **Print**  icon on the toolbar.

To print a single receipt for multiple transactions on the **Circulation Backup** window the selected transactions must be the same type (Check-out, Check-in, etc.) in order to enable the **Print Receipt** menu option.



Accept a Payment

To accept a payment for a fee, click the **Payment**  icon, or select **Transactions** → **Payment from the Circulation Backup** main menu, or press the **CTRL+A** key. The **Account Payment** window appears.

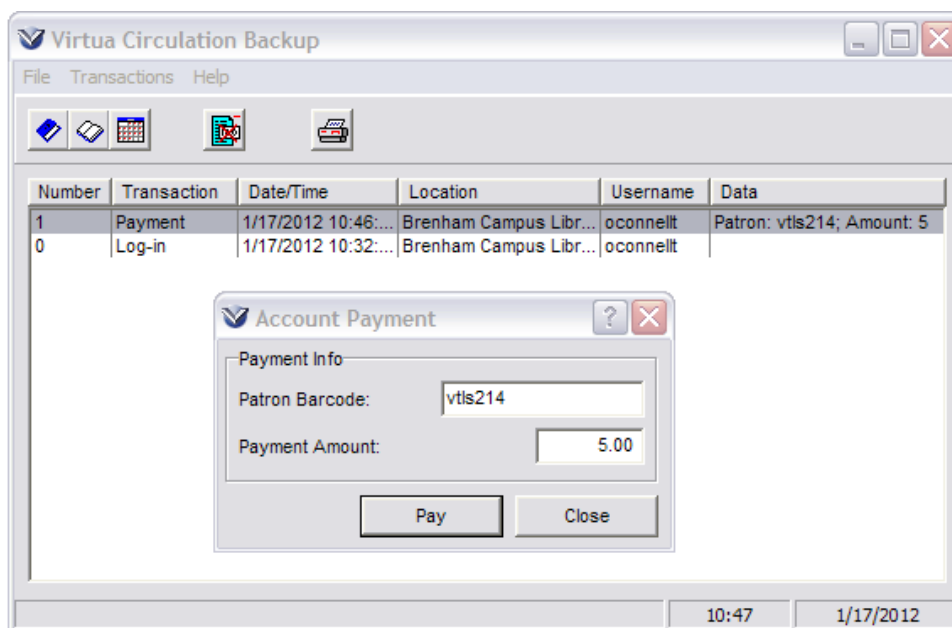


Enter in the patron's barcode.

Enter the amount to credit to the patron's account.

Click the **Pay** button. The transaction displays on the **Circulation Backup** window.

The currency format displayed in the Payment Amount field is determined by your regional settings in Windows. Selecting a currency in the currency pull-down list box does NOT change the currency in which the payment is recorded. All payments are processed by the Virtua server in your home currency.



To print a receipt for the transaction, select a transaction on the **Circulation Backup** window list box.

Click the **Print**  icon on the toolbar.

Backup Data

The Circ backup file should be copied each day and saved into another directory with the date in the filename. This safeguards the data in case someone answers, "yes" to the overwrite question. If the staff consistently answer "no" to the overwrite question, this means that ALL transactions from one PC are stored in the same transaction file; making data loading easier.

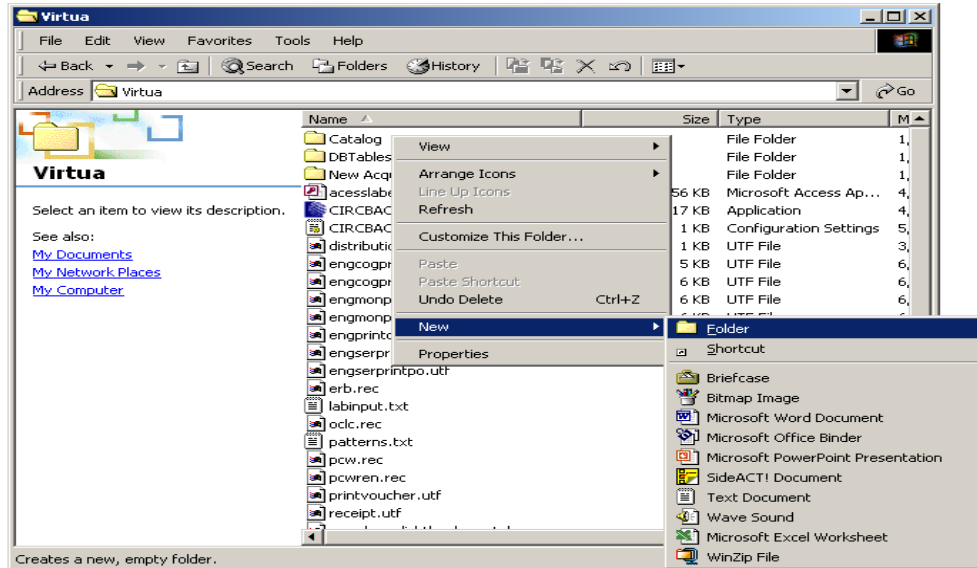
Circulation transactions are saved in the Virtua directory. The file name follows the convention of: Trans[*station number*].dat

For example: *Trans1.dat*

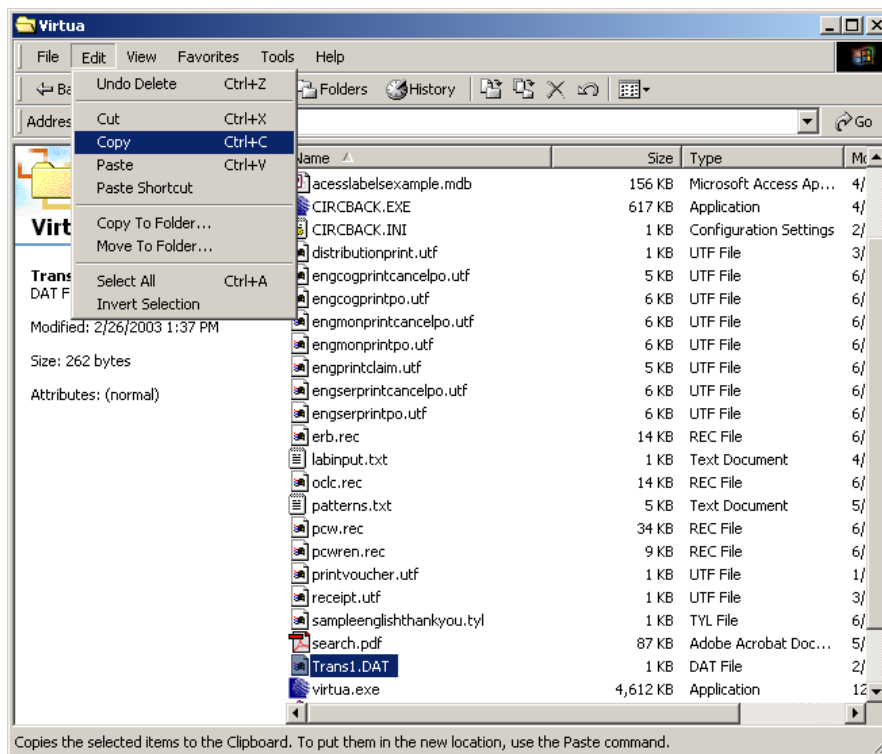
Note: The station number is defined in the CIRCBACK.ini file

Create Backups of Your Transaction Files

Within the Virtua directory, create a folder called *Circ Backups*

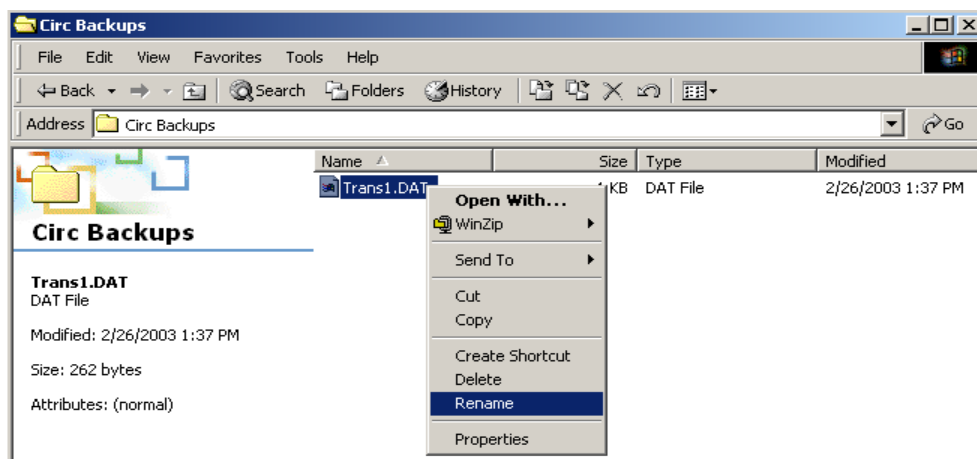


Create a copy of the transaction file in the Circ Backup Directory by clicking on the transaction file, then select **Edit** → **Copy**.



Navigate to the Circ Backup directory and select **Edit** → **Paste**. The file will appear in the Circ Backup directory. This file will be loaded to the server in the UNIX environment. UNIX does not allow spaces in file names. Rename the file to reflect workstation and the date of the backup.

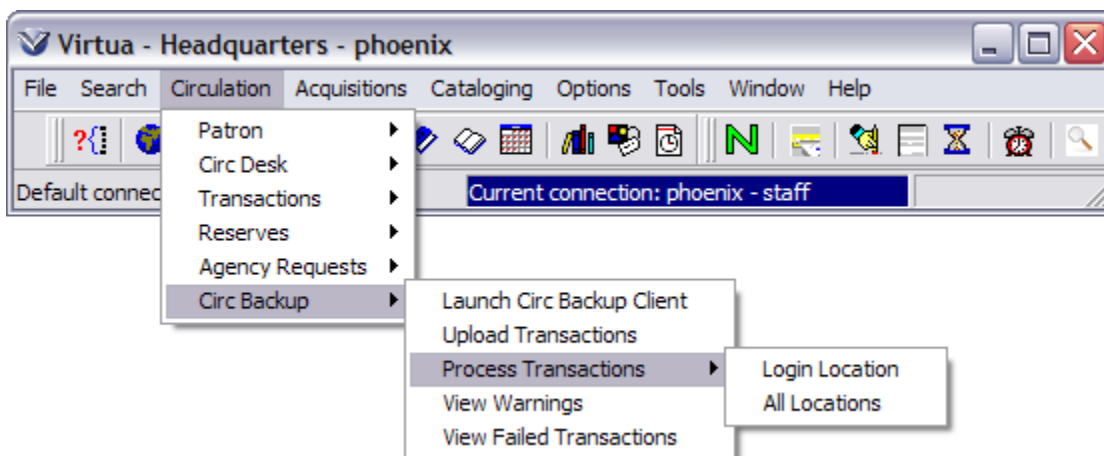
For example: Trans1_01_15_03.



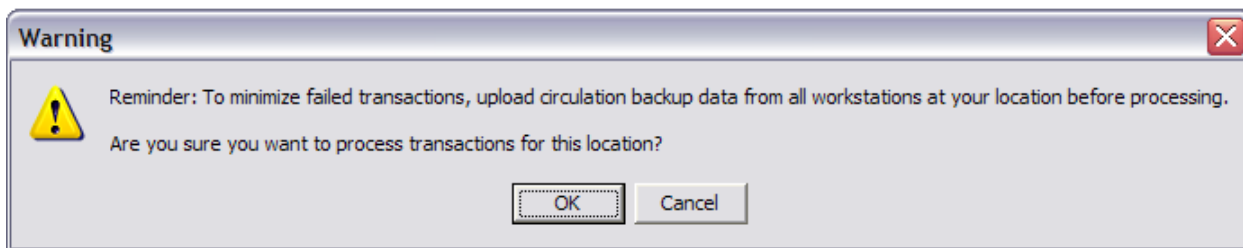
After Circ back-up files are loaded to the server, error messages generated once the system is back on line are automatically sent to circulation staff.

Process Transactions

The **Circ Backup** → **Process Transactions** option on the **Circulation** menu in the Virtua client has the options “Login Location” and “All Locations.” These options allow you to specify whether Virtua should process circulation backup transactions from the current login location only or transactions from all locations.



A warning message appears when you attempt to process circulation backup transactions to reflect the fact that **ALL** transactions for **ALL** locations will be processed.



Appendix A: Key Terms

Active Reserve Item: A reserve item entered into the system on a date that falls between the Begin Date and End Date of the reserve period. An Active Reserve Item remains on the Active tab of the Reserve Items window until you explicitly deactivate it.

Alert: a message displayed to the user during a transaction that indicates that an “alert” condition exists for the patron. Alert messages usually must be acknowledged or answered before staff can continue the transaction. Example of an “alert” condition: The patron has an excessive number of overdue items.

Alternate Conversion Factor: configures an alternate set of currency conversion factors to calculate the replacement cost of lost and long overdue items.

Archived Reserve Item: A reserve item that meets the following criterion: its' BeginDate and EndDate is before or equal to today's date.

Audio Signals: Two distinct sounds that can be set to occur during circulation transactions to alert staff to a successful/unsuccessful transaction.

Audit Trail: A tracking by the system of a sequence of financial events in Acquisitions and Circulation. Any transaction dealing with patron accounts, fund allocations, fund expenditures, fund transfers or the exchange of money is logged as a unique audit trail transaction.

Barcode Label: A printed label containing machine-readable data that is read by an optical scanning device and transmitted to a computer. In libraries, barcodes are used to identify books for circulation and inventory and to link a borrower's library card to the appropriate patron record in the library's computerized circulation system.

Barcode Number: A unique number up to 50 characters in length that corresponds to a barcode label (see above) and is assigned to an item record, a patron record, or a vendor record. The number is used to access the records or to identify the records in transactions involving the patron or item.

Begin Date: The date the item goes on reserves, i.e., becomes “active.” Active reserve items use the item class defined in the reserve record and use reserve rules in processing circulation transactions for this item.

Bib-ID (Bibliographic Identification Number): A system assigned, unique identifier for a bibliographic record. Bib-ids can be used to place requests.

Bib-Level Request (Bibliographic Level Request): any qualifying item attached to the requested bibliographic record will satisfy the request.

Bibliographic Record: A type of record that contains data for cataloging in the MARC bibliographic format. Bibliographic formats contain the following descriptive elements: title and statement of responsibility (author, editor etc.), edition, material type, publisher/distributor, publication date, physical characteristics, series, notes, standard number (ISBN, ISSN, etc.), and terms of availability, including price.

Block: A message displayed to the user that indicates a “block” condition—for example having an excessive number of billed items—exists for the patron. This condition blocks the staff from continuing the transaction for the patron. In a future release, authorized staff will be able to override the block.

Booked: Status assigned to a booked item in the View Bibliographic Record.

Bookings for Item: window that opens to schedule a booking’s Prep Time, Start Time, Inspect Time, Duration, and Bookings Pickup Location.

Bookings Pickup Location: location where booking will be picked up.

Check-in: Records the return of a checked-out item to the library or in the case of an in-house checkout, the return of the item to the Circulation Desk.

Checkout: Records the loan of a book or an item to a library borrower, or patron. Sometimes called a Charge.

Circ-on-the-fly: retrieves a workform in the MARC Editor for creating a brief bibliographic record to circulate an item on the spot even though it is not currently in the database. Often used to create reserve items that are not owned by the library.

Circulation Matrix: The circulation rules defined in the Virtua Profiler for different combinations of location, item class, and patron type. The rules include loan periods, fines, and notices.

Circulation Notes: Notes attached to the item record that can pop-up on check-in or check-out.

Closed Stacks: Any shelving area in a library that is restricted from public access. Retrieval of materials is usually by special request. In Virtua these are often designated as Paging locations.

Control Search Number Types: A patron’s birth certificate number or passport number.

Course ID: A character string used to identify an academic course (e.g. HISTORY 101). The combination of Course ID and Section Number uniquely identify a course in the Reserves module.

Course Section: The combination of Course Id and Section Number that uniquely identify a course in the Reserves module.

Current Active: Refers to an item in the Reserves module where today’s date falls between the item’s Begin Date and End Date.

Current Inactive: Refers to an item in the Reserves module where the item’s Begin Date occurs after today’s date.

Damaged Processing: System assigned status of an item that has been marked damaged.

Database Action: A setting for record loading that allows the user to dictate what will happen when the record is saved to the database, for example, overwrite an existing record, merge with an existing record, put any duplicate records in error state.

Delete Fees: fee is removed from the balance due and from the accounts window, and subsequently the transaction can only be traced through the Audit trail.

Denied Loan Request: The Denied tab lists those requests made *by* your patrons that could not be satisfied by any library. After a request makes one complete circuit of a defined group of libraries without being satisfied, the request is reported to the requesting library as a denied loan request.

Dispute Fee/Item: A check-out or fine that has been contested by a patron but no decision has been made to charge/not charge the patron for the item. Disputed fines/items do not count towards alerts and blocks, and fines do not accrue for disputed items. A disputed fine appears on the Patron Account tab; a disputed item appears on the Patron Activity tab.

Due Date: The date of the last day of the borrowing, or circulation, period for a checked-out item. Fines are charged for items returned after the due date unless the item has been renewed.

Duplicate Tests: The ability to determine whether a record being loaded into the database is a duplicate of a record that already exists in the system based on identical information in specified tags.

End Date: The date an item comes off reserves, i.e., becomes "inactive." At this point, the software will use the item's normal item class and regular circulation rules in processing circulation transactions for this item.

Fee/Fine Category: Virtua includes a set number of default fee and fine categories, but your library can define additional in the *Profiler*. The default fee and fine categories are: Overdue, Late Renewal, Item Price Fee, Damaged Item, Recall, Processing Charge, and Dispute.

Fines: Amounts assigned by the library to a patron account for a variety of delinquencies such as not returning a borrowed item, returning a borrowed item after the due date, losing an item, or damaging an item.

Fixed Due Date: A location-specific due date for all check-outs made during a set date range, or period. Generally, this setting is used by academic libraries that allow faculty or graduate students extended loan periods.

Grace: An amnesty flag setting in the Circulation parameters. If grace is ON, no overdue fines are assessed to users when the item is checked-in or renewed. The parameter is location specific.

Grace Period: A Circulation parameter that specifies a period of time following the expiration of the normal loan period during which no fines are assessed for overdue materials. Libraries can define the grace period in the Circulation parameters (location + user + item matrix) of the Virtua Profiler.

Guaranteed Circulation Period: A Circulation parameter that specifies the number of days that a patron is "guaranteed" an item before it can be recalled. If the patron has an extended loan period on the item, this parameter specifies the earliest possible due date (when calculated with the Mail Grace parameter) for the recall.

Holds: a request placed on a checked-out item or title where no action is taken until an item is checked in.

In Transit: A temporary status given to an item that is checked-in at a location other than its shelving location, or that is a satisfied loan or page request where the requesting library is a different location.

In Transit Requested: System assigned status to an item that is In Transit to fill a request at another location.

Indicator: Two character positions follow each tag (with the exception of Fields 001 through 009). One or both of these character positions may be used for indicators, which further define the field. In some fields, only the first or second position is used; in some fields, both are used; and in some fields, like the 020 and

300 fields, neither is used. When an indicator is undefined, the character position is represented by the character #, which stands for "blank space".

Instructor Number: used in the Reserves module in circulation. It is the Patron Barcode of the instructor who has items on Reserve.

Item: A unique physical or virtual piece or entity, e.g., a book, volume of a journal, a roll of microfilm, etc. that is part of a library's collection.

Item Booking: allows a patron to sign up for an item during a specific time period. Once an item has been booked, the item cannot be checked out to another patron if the loan period conflicts with the scheduled booking date/time.

Item Elements tab: Tab on the Item Information window that displays the basic descriptive information for the item: Item Information, Call Number Information, and Circulation Rules

Item ID: unique control number assigned *by the system* to an item record when the record enters the system. The item ID is stored in the 001 tag. (Not to be confused with Item Barcode)

Item Level Request: only the item bearing the specified barcode will satisfy the request.

Item Barcode: unique alphanumeric assigned to the physical item by the library. The barcode is not required, but an item cannot circulate without a barcode. The barcode number can be entered manually in the system or scanned using a barcode reader

Item Record: database record in 2709 MARC Communications format that describes a physical or virtual piece. The description includes copy and volume, item class, barcode number, location, circulation rules, circulation statistics, and status.

List Overview: displays all upcoming bookings for an item.

Loans: placed on an available item at a location other than the log-in location.

Log-in Mode: Data gathered by the Circulation Transaction Log on logins made at Internet, OPAC, SelfCheck, and Other locations.

Lost Processing: System assigned status of an item that has been marked lost.

Mail Grace Period: A Circulation parameter that specifies the number of days needed for the delivery of a recall letter. This is used in conjunction with the Guaranteed Circulation Period to determine a recall due date (see also *Guaranteed Circulation Period*).

Main Location: A main location is represented by the first five digits of a library location code. The associated sublocation code for a main location is always 0000. Circulation rules are set by main locations, and request groups are formed with main locations. Main locations usually reflect a building or an organizational unit.

MARC-like format: a 2709 MARC Communications format (defined by VTLS rather than USMARC). Virtua supports 3 records types that use MARC-like formats: Patron, item, and vendor.

MARC Record: a record structured according to the MARC standard. Such a record contains a Leader, a Directory, tags, indicators, fixed fields, and variable fields (see also *MARC*). There are 4 MARC record types: bibliographic, holdings, authority, and Community information.

MARC Tags: A three-digit, zero left padded tag number in a MARC Record. Some tags also include two one-digit indicators. The data for a MARC tag is stored in a field, which may be subdivided into "subfields."

Material Booking: see Item Booking

Notes (Circulation): Notes added from the Item Information window that can trigger checkout and check-in alerts for circulation staff.

On hold: An item has the status of On Hold when there is a hold or recall request against the item at check-in or when a loan or page request against the item originated at the same location, and has been satisfied.

Other Document Number: Patron keyword search type that pulls information from the 029 tag subfield \$a.

Other Name: Patron keyword search type that pulls information from the 111 tag subfield \$a.

Overdue: One of the "reports" produced by the Virtua Reports Client that is sent to a borrower, or patron, requesting the speedy return of an item, which has been kept past its due date.

Page: request placed on an available item at a location or sub-location designated as a paging location, usually closed stacks, storage facilities, or document delivery.

Paging Location: A location from which library users may request materials via a page. Paging locations are designated in the Global Settings of the Profiler.

Parameters: A choice or setting that the library makes using the VSC that affects how the software operates either for a specific subsystem or system-wide. Example: The Circulation subsystem uses the value set in the Library Hours parameter to calculate hourly loans and fines.

Patron barcode: A unique alphanumeric assigned to a user **by the library**. It is stored in the 015 tag of the patron record and is the primary key to the patron record. The barcode can be entered manually in the system or scanned using a barcode reader.

Patron ID: A unique number sequentially assigned **by the system** to each patron record as it enters the database. This number is stored in the 001 tag of the patron record.

Patron-Initiated, Self-Renewals: Filter found in the Circulation Transaction Log to search for results of self-renewals.

Patron Keyword Search Types: Search types by a keyword for a patron record.

Patron Limits: Number of items a patron may have checked out at any given time. The number of check-outs allowed is defined by patron type and item class.

Patron Type: A category of user defined by the library for the purpose of assigning specific circulation rules. Examples: faculty, graduate student, undergraduate.

Permissions: Using the Virtua Profiler, the library can set up user permissions, or profiles, which are then downloaded from the server to the Virtua Client during initialization at startup. By way of a user name and log-in password, the server informs the Virtua client of the permissions your library has granted to a specific user. Based on this information the Virtua client allows or disallows specific actions or access to specific functions. For example, a guest user would not see the Edit button on the View Record window if it had been disallowed.

Previous Due Date: Data gather by the Circulation Transaction Log.

Processing Fee: A fee assessed to a patron's account when an item checked out to the patron is billed for replacement. The processing fee is generally determined by the cost in staff time and paperwork in handling the bill and replacing or withdrawing the item. It is part of the replacement bill.

Reading Program Nominator Code: Patron keyword search type that pulls information from the 303 tag subfield \$b.

Recalls: placed on a checked-out item, which may result in a shortened due date and a letter to the item's borrower.

Receipt: A printed confirmation given to the patron—for a check-in, check-out (including due date), or renewal.

Record States: functionality in Virtua that allows libraries to assign flags or "states" to records to facilitate the viewing, storing, and editing of the records. The software supports record states for authority, bibliographic, and patron records. Record states may be used to review work by novice catalogers, hold records for overnight processing, or hold records in error state until cataloging problems are fixed.

Renew: An extension of the due date for a book or other item.

Request: An online request for library material. The request may be defined by type and level. Currently, Virtua supports hold, loan, recall, and page request types. Also refers to the system-generated record that records a request by a patron.

Request Group: Main locations grouped for the purposes of placing and trapping requests. When used, only items within the location group will qualify for the request. Libraries can establish these groups in the Circulation System parameters in the VSC.

Request Level: Determines which records might qualify for the request, based on the relationship of records in the database. Depending on the request, relevant levels are bibliographic, holdings, and item.

Request Queue: The display of Hold/Recall/Loan/Page requests for a particular Bib-ID or Item-ID listed in the order in which they will be satisfied.

Request Type: The request type determines which records might qualify for the request based on the status and/or location of the materials. Current request types are Hold, Loan, Recall, and Page.

Request Wizard: A series of interactive dialog boxes for adding both item-level and bibliographic-level requests to the request queue

Reserves: Also known as course reserves. The body of material that is available for short-term loan for a specified length of time, usually in a restricted area of an academic library.

Reserve Header: The information that appears in the top portion of the View Reserves window. It consists of the Course Number, Course Section, Course Title and Instructor Name.

Reserve Item: An item that is on reserves for a particular course. You create a reserve item from the View Reserves window by entering the item number, item class, reserve period, and reserve location.

Reserve List: The list of reserve items that are displayed in the View Reserves window for a given course/instructor.

Resolve Fee/Item: A disputed fee or item can be resolved in one of two ways. It may be reinstated or waived. It may not be deleted. To delete a fee, waive it first and then delete the transaction.

Satisfied Loan Request: A request for an item that another library has agreed to loan.

Scheduled Reserve Item: A reserve item entered into the system on a date that falls between the item's Pull Date as calculated from library-defined parameters and the Begin Date of the reserve period. A Scheduled Reserve Item remains on the Scheduled tab of the Reserve Items window until you explicitly activate it.

Shelving Location: The current physical location of an item. The shelving location determines circulation properties for the item; that is to say, it is the location used in the Circulation matrices. The shelving location is also used in location filtering in the OPAC.

Section Number: A character string used to distinguish the different sections of an academic course (e.g. 1a). The combination of Course ID and Section Number uniquely identify a course in the Reserves module.

Session: Functionality that allows for multiple patrons to renew or pay fines in one transaction.

Statistics: The Statistics tab on the Item Information window displays statistical data about the item in *read-only* format. The tab is visible in both view and edit mode. The software creates, modifies, and maintains all the data that appears here.

Status: A library-defined code and definition that may be applied to an item record. The code is used to describe a physical condition or location. Libraries can define these statuses in the Circulation parameters of the Virtua Profiler. Examples: On Order, In Process, Missing, Billed for Replacement, At Bindery, Needs Repair. If the item has acquired a special or system-defined *circulation* status, such as, lost, damaged, missing, etc. the Status tab will appear on the Item Information window in view mode; otherwise, it is visible only in edit mode.

Transaction Log: A transaction history of a particular item or patron. It records all circulation transactions such as check-outs/renewals, requests, ILLs, and disputes.

Trapped: The condition of a requested item or title when it is checked in at the location where the requester is to pick it up. The system uses the checked-in item/title to satisfy the pending request and so "traps" it for the requester.

Unit Request: (WWW implementation only) - request within a paging location. For holdings, a request specifying which issue is needed. If a page request for a monograph is started at the bib level it will become a unit level request.

Views: Values set in the Views parameter in the Virtua Profiler are used to configure the OPAC window displays and the *iPortal* window displays. The MARC View Editor provides the point-and-click interface that lets you set and edit these values in **View** records. Virtua **View** records are designed to address three issues in regard to Virtua client/*iPortal* window displays: 1) Customized layouts, 2) Library-defined labels, and 3) Format of data in a MARC bibliographic or an item record. For example, the **View Record** window offers one view of bibliographic data on the **Full** tab, another on the **MARC** tab, and yet another on the **Holdings** tab. Similarly, the data on the item record can appear in a variety of tabular displays on the **Items** tab.

Virtua Client: the Virtua Windows-based graphical user interface that resides on each PC and provides access to the Virtua subsystems.

Virtua Profiler: A Virtua client that allows libraries to configure the Virtua software by setting parameters, views and permissions.

Waive Fee/fines: The fee/fine is removed from balance due so that the patron will not be charged, but it is kept on waive tab so that circulation staff have quick access to the transaction history.

Appendix B: InfoStation Reports for Circulation

Circulation Report Group	Update	Description
Availability	Y	List of requested items that are currently available.
Basic Circulation Statistics	N	Circulation Statistics by patron type and item type.
Bills	Y	Lists patrons with and/or generates notices for billable items.
Blocked Patrons	N	List of patrons that have a manual block in either the 043 tag or the 007 fixed fields of their patron record and meet the patron information criteria that you set for the report configuration.
Circulation by Call # Range	N	Circulation statistics by user defined call number ranges
Circulation Snapshot	N	Summary of current circulation statistics
Collected Fines	N	A list of the fine and fee transactions that exist in the database at the time you run the report
Delinquent Patron Accounts	N	List of fines and fees that are considered to be "delinquent," according to the information in the patron account and criteria that you specify in the report configuration.
E-mail Validation	N	Checks patron email addresses for valid (not correct) email structure, e.g. the @ sign is part of the address.
Expired Bookings	Y	List of expired bookings that meet the location and patron type criteria that you set in the report configuration.
Expired Requests	Y	Lists Available Requests with expired Hold times and Unavailable Requests with expired Expiration dates.
Excessive Requests	N	List of title with an "excessive number" of outstanding patron requests.
Expiring Patrons	N	List of patrons who meet the specified patron information criteria and whose patron records are due to expire within the amount of time specified for the report configuration.
Items by Status	N	List of items with the status set in the report configuration parameters.
Journal Circulation	N	Circulation statistics for serial titles in the database.
Media Booking Pull List	N	List of items that need to be prepared for scheduled item bookings, according to the booking Prep Start Time specified for a booked item.

Number of Patrons	N	Generate 1) a total count of patrons in the database and 2) a count of selected patrons based on specified criteria set in the report configuration parameters
Overdues	Y	List of overdue items meeting the criteria set in the report configuration parameters.
Patron Account Statement	N	Lists all transactions related to fine and fee assessments for patrons
Patron Barcode List	N	A list of patrons identified by barcodes that fall within a barcode range specified in the report configuration
Patron Lists	N	List of patrons meeting criteria set in report configuration.
Patron Statistics	N	Circulation statistics based on patron type
Recalls	Y	List of items for which recall requests have been placed
Requested Bills	Y	List of billable items requested by other patrons
Requested Overdues	Y	List of overdue items requested by other patrons
Reserves Activate List	Y	List of items that qualify for activation according to the scheduled Active Period
Reserves Current Active List	N	List of items that are currently on active reserve.
Reserves Pull List	N	List of item that need to be pulled form the shelves and moved to reserves.
Reserves Remove List	Y	List of active reserve items that have expired and need to be deleted or archived
Review Notices	Y	Generate review notices for patrons whose borrowed items are about to come due.
Shelving Pull List	N	List of items that need to be removed from their current shelving location and returned to their owning location.
Transition Disputed Items	N	Allows you to change items that are at a status of Disputed to a status of Overdue after a user-defined number of days.
Unique Management	Y	Generates information about delinquent patron accounts and sends it to Unique Management Services, Inc. The Unique Management report generates information about changes to the account balances of patrons who have a 27xx block.
Unsatisfied Requests Report	N	Generates a list of unsatisfied requests

Appendix C: Circulation in a Consortium Environment

Circulation Parameters Defined at the Institution Level

In the consortium environment, institutions (with their associated locations and sublocations) have the ability to define their own circulation policies. This is accomplished by allowing most circulation parameters to be set at the institution level. The following parameters affecting the Circulation subsystem are defined at the institution level:

General Circulation Parameters

Circulation Basic Options: defines a number of options including: 3M Error Message, Delete/Waive Options, Audit Trail, Automation e-mail availability notice, Use long loans, Minimum circulation question, Allow renewal of requests, Update request expiration date, Show total requests with request queue position, Each part of a multi-part is unique circulation, Bookings take priority over satisfied requests, Prohibit patrons from paying fines for items at a different location from the location where the fine was assessed, and Global request trapping.

Locations

Location Names: defines library locations and sublocations, which represent the physical and/or virtual locations of library materials.

Patrons

Patron Types: defines a unique code and description for each type of patron that a library chooses to identify.

Patron Type Priority: provides a means of automatically selecting a patron type from the patron record when the patron is from another institution within the consortium. When your staff performs a circulation transaction for a patron that is not registered at your institution, Virtua chooses one of the patron types defined in the patron record based on the priority ordering that your institution defined in the Profiler.

Block Code Definitions: defines codes that your institution uses to block patrons from checking out items. These codes are inserted into the patron record.

Items

Item Class Definitions: defines unique identifiers for each type of item that a library chooses to identify.

Item Statuses: defines statuses that Virtua uses to prompt you or to block your action at specific points of activity, such as when you are checking out an item or placing a request.

Circulation Matrices

Alerts and Blocks Matrix: defines system-calculated alerts and blocks that trigger system-calculated alerts and blocks when you initiate various circulation transactions.

Check-out Limits Matrix Type: defines limits on the number of items that a particular patron type can check out.

Location + Patron + Item Matrix: defines values for particular Location/Patron Type/Item Class combinations, including: loan rules based on check-out type, overdue fines for requested and non-requested items, grace periods for overdue fines, schedules for sending overdue notices, schedules for sending bills for overdue items, renewal limits, request limits.

Location + Patron Matrix: defines values for each location/patron type combination in your library including: default date and time for fixed check-outs, default expiration date for the patron record, values that determine the processing fee, amount of the item price fee that remains at check-in and whether this fee is used to calculated blocks.

Location + Item Matrix: defines values for location/item class combinations, including: loan rules based on check-out type, overdue fines for requested and non-requested items, grace periods for overdue fines, schedules for sending overdue notices, schedules for sending bills for overdue items, and renewal limits.

Request Parameters in the Profiler

Request Groups represent the physical and/or virtual grouping of locations used for processing requests. Different institutions may define different request groups and the Request Group code and name must be unique. Requests placed in the consortium environment are prioritized and routed according to parameters set in the Profiler. The following parameters will affect requests placed in the Virtua client and in the *iPortal*.

Request Groups: define the physical and/or virtual grouping of locations used for processing requests.

Patron Type Values: works in conjunction with the Patron Type Priority parameter to determine the placement of a patron in a request queue.

Request Location Routing: specifies whether requests are permitted at the Institution level or the Global level

Location + Patron + Item Matrix, Request tab:

Circulation Parameters Defined at the Consortium Level

Fine Codes: defines codes for fines. All institutions within the consortium can see and may use any fine code defined in the Profiler.

Circulation Subsystem in the Virtua Client

Item Records in a Consortium Environment

Item records at locations or sublocations linked to the log-in institution will display first the list of item records

When a user edits an item record, only those item classes, locations, and shelving locations defined in the Virtua Profiler for the log-in institution will appear in the pull-down lists on the Item Information window

A user may view an item belonging to another institution but they will not be able to edit or delete the item record.

The barcode number of the item must be unique across the database.

Patron Records in a Consortium Environment

Patron Records are shared between institutions. Certain tags, however, contain information allowing the records to be linked to a specific institution usually via an institution code in subfield 5. All institutions of a consortium can modify ANY patron field except tags, which have a \5 (which determines institution's ownership). The following consortium information can be added to patron records:

Blocks: 007 tag

Patron Barcode: 015 tag.

Alternate Patron Barcode: 016 tag

Patron Type Code: 030 tag

System Control Number: 035 tag

Record Source: 040 tag

Dates: 042 tag

User-Defined Blocks: 043 tag

Patron Type: 245 tag

Patron's jurisdiction or home library: 247 tag

E-mail Address: 271 tag

Note field: 5xx tags

The barcode number and/or the alternate barcode number of the patron must be unique across the database.

When migrating patron data, if the software detects duplicate patron barcodes (in the 015 tags) or alternate patron barcodes (in the 016 tags), it will prefix the barcodes with the institution's code in parentheses, creating a unique barcode.

Barcodes with the institution prefix will be displayed as a list in the iPortal and client when a barcode with multiple institution prefixes is entered.

Editing Patron Records

In the consortium environment, the ability to edit patron records will depend on two factors:

The *Allow global editing of patron data by non-owning institutions* parameter set on the Cataloging Basic Options window of the Profiler.

Whether or not there is an institution code in subfield \$5 of those tags that support the institution code.

Allow global editing of patron data by non-owning institutions:

If the *Allow global editing of patron data by non-owning institutions* is set to OFF only staff at the institution that owns a patron record will be able to edit:

Global information, such as name and address.

Information that is specific to that institution, such as the patron barcode.

If the *Allow global editing of patron data by non-owning institutions* is set to ON, staff members across the consortium are able to edit:

Global information, such as name and address.

Information that is not specific to an institution (tags not containing an institution code).

Tags that support the institution code:

Staff at *any* institution can edit institution-specific information in a patron record as long as that information is specific to their institution as identified by their institution code in subfield \$5. Staff at other institution will not be able to edit these tags.

Request Notification

Consortium users can customize notice templates for use by different institutions. You can do this by creating one or more copies of the **availabilityNotice.utf** file and naming the new notice templates according to the naming conventions described in the Consortium User's Guide.

Circulation Backup

Circulation backup error logs are generated at the institution level and sent to designated staff via email.

Appendix D: Hong Kong Public Library Specific Information

Virtua Client and MASC Client Communications

The Virtua client communicates with the MASC client, making it possible for HKPL patrons to use a MASC card as an alternate barcode for circulation transactions. A patron's MASC card may be used for circulation transactions when:

The MASC client is running.

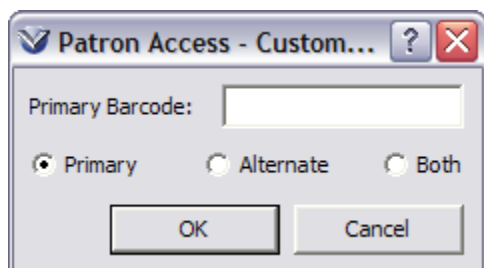
AND

The patron has opted in for the use of MASC card as an alternate barcode (indicated by the value of the 017 tag subfield \$o in the patron record). When a check-out or renewal transaction is initiated, the Patron Access window appears.

To use the library card number (patron record 015 tag subfield \$a), as the barcode, select the Primary radio button.

OR

To use the HKID (patron record 017 tag subfield \$a) from the patron's MASC card as the barcode, select the Alternate radio button. There will be a prompt to insert the patron's MASC card into the card reader.



Once the MASC card has been inserted, the HKID is validated:

The HKID (patron record 017 tag subfield \$a) must exist in the Virtua database as a valid patron identification number. There must be no Disabled Reason present in the HKID field of the patron record (017 tag subfield \$x). The opt in setting in the patron record 017 tag subfield \$o must indicate that the patron has opted in for the use of MASC card as an alternate barcode. The date of issue (DOI) from the MASC

card is checked against the Disabled Status Date (017\$d) associated with the HKID in the patron record to insure that the card is valid.

If the conditions described above are satisfied, Virtua proceeds with the circulation trans-action. If one or more of the conditions is not satisfied, Virtua displays an appropriate error message and the circulation transaction is not allowed.

HKPL Patron Editor

- Users are prevented from entering the same HKID for both patron's HKID and the guarantor's HKID.
- The date format in which the patron's birth date is displayed is the system-defined date format for the workstation.
- When creating a new patron, if the user attempts to save the record without entering a password, the Password field is automatically populated with the last four digits of the patron's home phone number. The PIN field is also automatically populated with the same data, if left blank.
- The Library Card Number is now required in order for a patron record to be saved successfully. (Library Card Number is no longer one of the document type options in the Required Document Type(s) parameter.)
- The HKID status is now stored in the patron record 017 tag subfield \$o (rather than in the subfield \$s, as in earlier versions of the software).
- The Note Content of *previously* created notes on the **Notes** tab cannot be modified; only Note Type, Print Notices, and Display/Alert values can be modified on previously created notes.
- Patrons created via the **HK Patron Editor** will have a patron date value added to the 042 tag, subfield \$e.

Item Barcode and Patron Barcode Validation

Item barcodes and patron barcodes are validated whenever an item record or patron record is saved. Both item barcodes and patron barcodes must be 14 digits in length, and must adhere to the additional validation requirements described in the HKPL Item Barcode and Patron Barcode Validation. An error message will be displayed if a user attempts to save an item record or a patron record with an invalid barcode.

Patron E-mail Address Validation

When a patron record is saved in the HKPL Patron Editor, the e-mail address present in the E-mail Address field will be validated. An error message will be displayed if the user attempts to save a record containing an invalid e-mail address.

The screenshot shows the 'HKPL Patron Editor - venus88' window. The top section displays a summary of the patron's information:

Name:	Cell Phone:
Address:	Email: oconnelle@vts.com
Home Phone:	Patron Type:
Alternate Phone:	Birthdate:
Registering Library: Hong Kong Central (*1000000)	Barcode:
	PIN:

Below the summary is a tabbed interface with the following tabs: Name, Main Address, Secondary Address, Guarantor, Email/Phone, Dates, Identification/Password, and B. The 'Email/Phone' tab is currently selected.

The 'Email/Phone' tab contains the following fields:

- Home Phone:
- Alternate Phone:
- Cell Phone:
- E-mail Address:
- Communication Preference:
 - Paper
 - E-mail
 - Text
 - Text and E-mail

At the bottom of the window are four buttons: Get MASC Data, Delete, Next, Submit, and Close.

Note: When a patron's **Communication Preference** is set to **E-mail** or **Text and E-mail**, the **E-mail Address** field must be populated before the patron record can be saved.

HKID Validation

When a patron record is saved in the **HKPL Patron Editor**, the HKID present in the HKID field on the Identification/Password tab will be validated. The guarantor's HKID, if one has been entered on the Guarantor tab, will also be validated. The HKID will be validated according to the validation rules provided by HKPL. An error message will be displayed if the user attempts to save a record containing an invalid HKID.

The screenshot shows the 'HKPL Patron Editor - venus88' application window. The window is divided into several sections. At the top, there are fields for Name, Address, Home Phone, Alternate Phone, Registering Library (set to 'Hong Kong Central (*1000000)'), Cell Phone, Email, Patron Type, Birthdate, Barcode, and PIN. Below this is a tabbed interface with tabs for Name, Main Address, Secondary Address, Guarantor, Email/Phone, Dates, and Identification/Password. The 'Identification/Password' tab is selected. This tab contains a table with columns for Library Card Number, Disabled Reason, and Disabled Date, with 'Add' and 'Delete' buttons. Below the table are fields for HKID (highlighted with a red arrow), Disabled Date (set to 1/18/2012), Password, PIN, Opt In (checkbox), Passport, Birth Certificate, and Other ID. Each of these fields has a corresponding 'Place of Issue' field below it. At the bottom of the window are buttons for 'Get MASC Data', 'Delete', 'Next', 'Submit', and 'Close'.

Support for Additional HKID Opt-in Status Values

Virtua supports expanded opt-in values in the patron record 017 tag subfield \$. The opt-in value represents the patron's permission to use the HKID for circulation and authentication. The following values are supported:

\$ value	Label	Description	HKID valid for authentication?
1	Opted in as new patron	Indicates that the patron opted in at the time his/her patron record was created. The Patron Record Creation Date = the MASC Opt-in Date.	Yes
2	Opted in as existing patron	Indicates that an existing patron chose to opt in at a later date. The Patron Record Creation Date is before the MASC Opt-in Date.	Yes
3	Replaced	Indicates a patron who registered but subsequently lost his card, and whose card has now been replaced by a new card. The Date of Issue => the Disabled Date.	Yes
0	Not opted in	Indicates a patron who has not opted in.	No
4	Discontinued	Indicates a patron who opted in at one time, but has since opted out.	No
5	Lost	Indicates a patron who opted in at one time, but subsequently lost his card and no valid MASC has been replaced. The Date of Issue < the Disabled Date.	No
6	Lost and discontinued	Indicates a patron who opted in at one time, but subsequently lost his card and decided to opt out when he reported the card as lost. The Date of Issue => the Disabled Date.	No

In addition, the "status" field has been added to the **Patron_Barcode_v** Ad Hoc view, allowing you to report on patrons' opt-in status values.

Storing a History of Changes Made to Patron

Barcode/Library Card Number and HKID

Virtua stores a history of the changes made to the patron barcode (the patron record 015 tag, known to HKPL users as the library card number) and the HKID (patron record 017 tag).

When an HKID (017 tag) is created or modified, Virtua stores the following information:

- HKID number (017 tag subfield \$a)
- Disabled Status Date (017 tag subfield \$d)
- Opt-in Status (017 tag subfield \$o)
- Disabled Reason (017 tag subfield \$x)
- Operator ID of the user who made the change (from the 039 tag subfield \$a of the patron record)
- Date/time stamp

When a patron barcode/library card number (015 tag) is added or modified, Virtua stores the following information:

- Barcode/library card number (015 tag subfield \$a)
- Disabled Status Date (015 tag subfield \$d)
- Disabled Reason (015 tag subfield \$x)
- Operator ID of the user who made the change (from the 039 tag subfield \$a of the patron record)
- Date/time stamp

The new **Patron_Barcode_Status_Chnge_v** [sic] Ad Hoc view allows reporting on the stored history of changes to the barcode or the HKID.

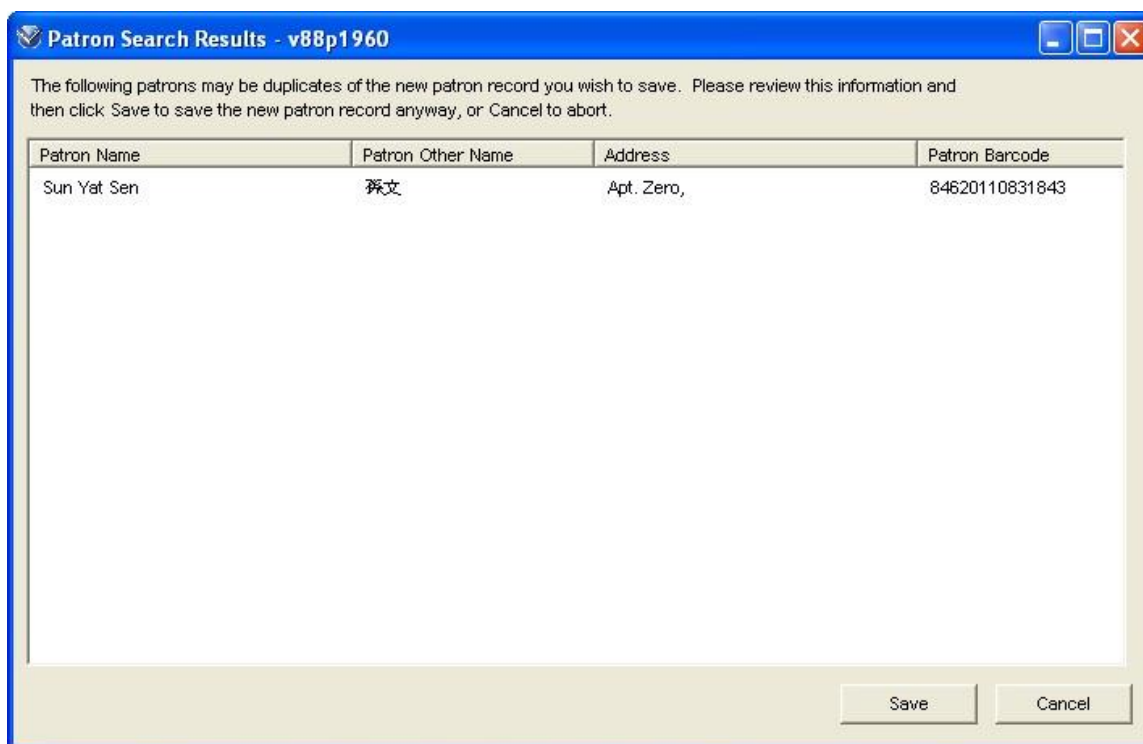
Storing the Octopus Receipt Number in the Audit Trail

The **Audit Trail** stores the Octopus Receipt Number associated with an Octopus payment.

In addition, the **octopus_receipt_number** field has been added to the **Patron_Audit_Trail_v** Ad Hoc view.

Ability to Display Chinese Name on Patron Search Results Window

The **Patron Search Results** window displays the contents of the 111 tag subfield \$a of the patron record in the **Other Name** field.



Other Elements Tab in Item Information Window

The **Other Elements** tab shows miscellaneous information about the item, including binding status and withdrawal list information.

The **Bibliographic Information** area displays information such as the author and title from the parent bibliographic record.

The **Source** textbox is a text-entry field that allows the user to enter a text description of the original source of the item.

The **Lamination** area displays the **Lamination Type** drop-down list that allows the user to select the lamination type that applies to the item.

The **Withdrawal** area displays the **Withdrawal Authority** text-entry field that allows the library to store data about items that will be withdrawn from the system in the future, the **Withdrawal Date** (the Withdrawal Quarter will be displayed using the format YYYY QQ), **Withdrawal Type**, and **Withdrawal Location**. The **Saved List Name** is a read-only display of the name of the saved list (configured via Chamo) that the item belongs to, if any.

The screenshot shows a software window titled "Item Information - phoenix". It has four tabs: "Item Elements", "Statistics", "Status", and "Other Elements". The "Other Elements" tab is selected. The window is divided into three main sections:

- Bibliographic Information:**
 - Author: Smith, Andrew (Andrew Anselmo), 1959-
 - Title: Ghost medicine / Andrew Smith.
 - Edition: 1st ed.
- Source:** An empty text input field.
- Lamination:**
 - Lamination Type: A dropdown menu currently showing "None".
- Withdrawal:**
 - Authority: (empty text input field)
 - Date: 2011 Q3
 - Type: Missing
 - Location: Bellefonte
 - Saved List Name: Poetry

At the bottom of the window, there is a "Masked" checkbox (unchecked) and four buttons: "Delete", "Edit", "Refresh", and "Close".

Audit Trail

The **Adjustment Notes** right-click option available on the circulation **Audit Trail** displays the entirety of any **Adjustment Notes** associated with the selected entry.

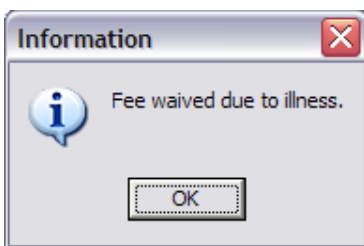
Audit Trail - venus88

Search Criteria Results

Item Barcode: 2010082112

Patron	Type	Fee	Date/Time	Amount	Balance	Payment Method	Item Barcode	Assessment ID
20100819	Modify - Item Price Fee	HK\$98.00	2/15/2011 11:57:33 ...	-HK\$98.00	HK\$0.00		2010082112	208
20100819	Assessment - Item Price Fee	HK\$98.00	8/27/2010 12:14:14 ...	HK\$98.00	HK\$98.00		2010082112	208
20100819	Modify - Processing Fee	HK\$100.00	2/15/2011 11:57:33 ...	HK\$0.00	HK\$100.00		2010082112	209
20100819	Assessment - Processing Fee	HK\$100.00	8/27/2010 12:14:14 ...	HK\$100.00	HK\$100.00		2010082112	209
20100819	Assessment - Overdue	HK\$130.00	2/15/2011 11:57:32 ...	HK\$130.00	HK\$130.00		2010082112	525
38888168741449	Modify - Item Price Fee	HK\$11.00	1/5/2012 12:55:52 PM	+HK\$1.00	HK\$10.00		2010082112	2022
38888168741449	Assessment - Item Price Fee	HK\$11.00	1/5/2012 12:44:52 PM	HK\$11.00	HK\$11.00		2010082112	2022
38888168741449	Modify - Processing Fee	HK\$15.00	1/5/2012 12:55:52 PM	+HK\$10.00	HK\$5.00		2010082112	2023
38888168741449	Assessment - Processing Fee	HK\$15.00	1/5/2012 12:44:52 PM	HK\$15.00	HK\$15.00		2010082112	2023
38888168741449	Dispute - Overdue *	HK\$130.00	1/16/2012 11:01:08 ...	-HK\$130.00	HK\$0.00		2010082112	2024
38888168741449	Assessment - Overdue	HK\$130.00	1/5/2012 12:44:52 PM	HK\$130.00	HK\$130.00		2010082112	2024

Operator: User, Staff
 Location: Hong Kong Central (*1000000)
 Transaction Reference Num: 57501
 System Generated: No
 Account Adjustment Note: Fee waived due to illness.
 Machine Name: oconnelle.vtis.com



Transaction Log Information

The **Transaction Log** stores information about the addition or deletion of a patron note via the HKPL Patron Editor. Two new transaction types have been added: **Patron Note Added** and **Patron Note Deleted**. For each transaction, the following information is also logged: Username, Machine Name, Log-in Location, and Note Content.

Transaction Log - venus88

Search Criteria Results

Patron Barcode: 38888168741456

Date/Time	Transaction	Patron Barcode	Location	Item Barcode
11/18/2011 11:10:50 AM	Regular Check-in	38888168741456	Hong Kong Central (*1000000)	2390847309848
11/18/2011 11:10:08 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2390847309848
11/18/2011 11:07:23 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2011012801
11/18/2011 11:06:52 AM	Regular CkOut	38888168741456	Hong Kong Central (*1000000)	2010082311
11/18/2011 11:03:59 AM	Patron note deleted	38888168741456	Hong Kong Central (*1000000)	
11/18/2011 11:02:18 AM	Patron note added	38888168741456	Hong Kong Central (*1000000)	
11/18/2011 11:01:40 AM	Patron note added	38888168741456	Hong Kong Central (*1000000)	

Username: User, Staff
 Patron Class: Adult Patron
 Transaction Location: Hong Kong Central (*1000000)
 Note Type: General
 Note: Loses card often
 Machine Name: oconnelle.vtls.com

Modifying the Request Expiration Date

HKPL users can modify a request's expiration date if the request has a status of Pickup, Pending, or In Transit. On the Activity tab of the Patron Information window, Change Expire Date buttons appear on the Pickup subtab, the In Transit subtab, and the Pending subtab.

Patron Information - Pandy, Andy

Card Format | MARC Format | Activity | Account

Barcode	Position i...	Req. Expiration Date	Request ...	Title	Active Status	Request Sta...	Total Items: 2
4561	2/2	6/2/2018	Hold	From Vienna to Versailles.		Pending	
	2/2	6/2/2018 5:05:26 AM	Loan	Psychiatry / editor, James H. Scully, Jr.		Pending	

Summary Pending

Change Expire Date Change Pickup Loc Deactivate Activate Delete Info

Print Receipt Update Renew All Refresh Close

Appendix E - Changes in this Guide

Changes for Version 16.1

No changes were made.

Changes for Version 16.0 SP2

["Modifying the Request Expiration Date"](#) – Added this section to describe request expiration date functionality for HKPL users.

["Open an Existing Item Record"](#) – Updated to describe the new Location filter, which allows you to filter the list of items shown on the Items tab of the View Bibliographic Record window by location.

Changes for Version 15.2

["Satisfy or Deny Loan Request"](#) – Updated to note that you can now process multiple requests at once by multi-selecting lines on the Loans/Pages window and then clicking the Deny or Satisfy button.