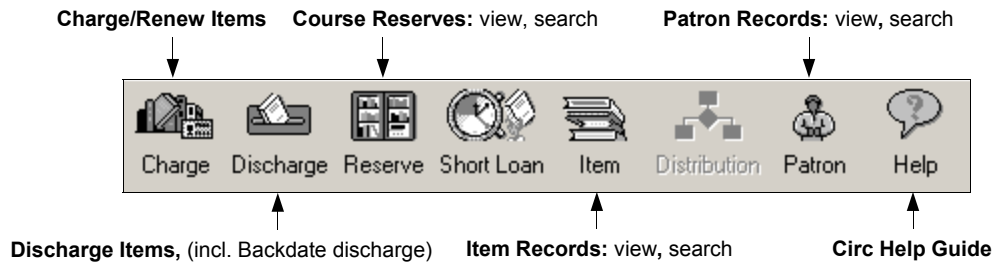


CIRCULATION TOOLBAR



CHARGE WINDOW

Charged Items: "3" is the no. of items currently checked out

Fines/Fees: view and/or pay

Holds/Recalls: (Fulfilled/Pending)

Proxy Patrons: Click here (if a number appears below) to select the sponsor's patron record

Requests: details requests placed by patron

Note: You may either **type** or **wand** in barcode information into the barcode fields

Wand the Patron Barcode here

Click on the ellipsis to Search for a Patron

Wand the Item Barcode here

Patron Name: Jane Doe

Barcode: [input field]

Group: Staff

Proxy: [input field]

Item Barcode: [input field]

| Title | Item Barcode | Due Date | Status |
|---|----------------|--------------------|--------|
| Beovulf, nebst den fragmenten Finnsburg und Valdere; kritische bearbeiteten texten neu hrsg. mit wörterbuch von Chr. W. M. Grein. | 39002005949517 | 9/29/2002 11:59 PM | C |

Charge

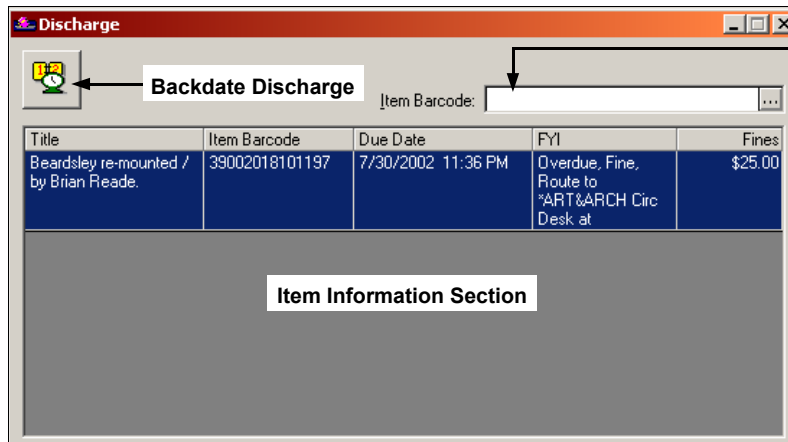
1. Click on the **Charge/Renew** button on the toolbar
2. The Charge window displays
3. Wand the Patron barcode
4. Wand the Item barcode
5. Item is **Charged**

Renew

1. Click on the **Charge/Renew** button on the toolbar
2. Wand the Patron barcode
3. Click on the **Charged Items** button (see above)
4. Select the title(s) to be renewed from the Charged Items Index window
5. Click on the **Renew** button to renew selected title(s)

(For information about Item Blocks, see pg. 4, "Item and Patron Blocks")

DISCHARGE WINDOW



Wand the Item Barcode here

Discharge

1. Click on the **Discharge** button on the toolbar
2. A Discharge window opens
3. Wand the Item Barcode into the Item Barcode field
4. The Item is **Discharged**

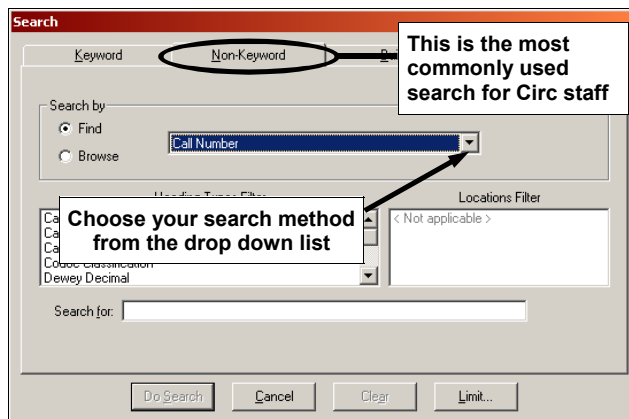
Backdate Discharge

1. Click on the **Discharge** button on the toolbar
2. A Discharge window opens
3. Click on the **Backdate Discharge** button on the Discharge window
4. Enter a **date/time** in the Backdate **Discharge Time to...** dialog box
5. Click **OK** or hit **Enter**
6. A message will appear beside the Backdate Discharge button: **"Discharge Date Override Set"**
7. Wand the Item's Barcode into the Item Barcode field
8. To **clear** the Discharge Date Override, click on the Backdate button

SEARCHING FOR ITEMS

By Barcode

1. Click on the **Item** button on the toolbar
2. The **Search by Item Barcode** window display
3. Type or Wand the Item's Barcode into the Item Barcode field
4. The Item record window will appear



By Headings/Keyword

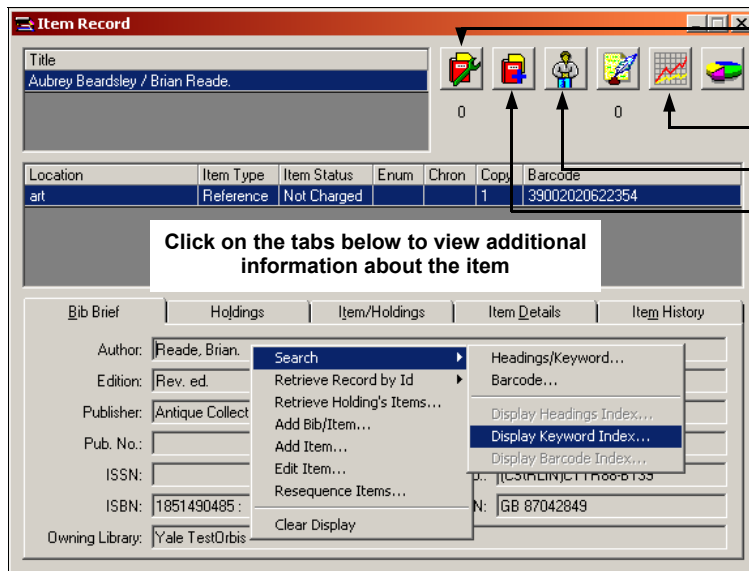
1. Click on the **Item** button on the toolbar
2. The **Search by Item Barcode** window displays; Click on the **ellipsis** to the right of the barcode field
3. The **Search by Headings/Keyword** window displays
4. The **Search** window defaults to **Non-Keyword** searches; other search methods include "Keyword" and "Boolean"
5. On the Search window, select a **Search by** method from the drop-down list
6. Enter your search information into the **Search for** field
7. Click on the **Do Search** button to execute the search

Search Methods Typically Used By Circ Staff:

- Call number
- Title
- Names (Author)

Tip: Voyager auto-truncates and is case-insensitive

ITEM RECORD WINDOW



Hold/Recall/Call Slip Information

Item Status: e.g. "Missing"

Charged To

Place Request on Item

Click on the tabs below to view additional information about the item

TIP:

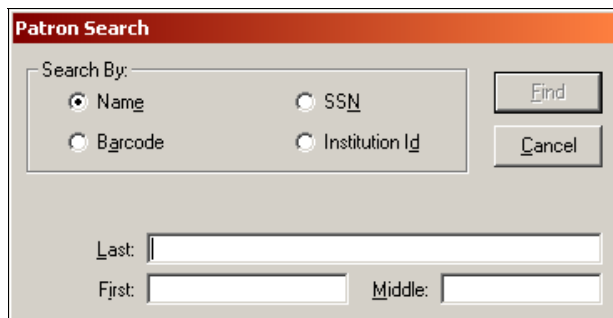
Right-Clicking within the Item Information section brings up a submenu from which you may:

- Search for more items
- Display Keyword Index (results of your previous search)

IMPORTANT:

The **Item Menu (ALT + I)** provides additional options. E.g. "View MARC Holdings" on the Item Menu allows you to see volume holdings, notes and information about "missing" items

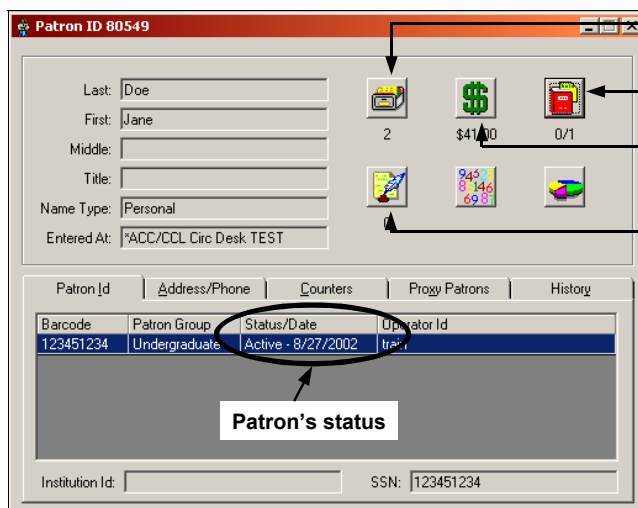
SEARCHING FOR PATRONS



Search for a Patron Record

1. Select **Patron (Ctrl + P)** from the Functions menu or click the **Patron button** on the toolbar
2. **Choose a searching method** by selecting the Name, Barcode, SSN, or Institution Id option button. The Patron Search dialog box updates to display the corresponding text box
3. Enter your search information and click **Find**

PATRON RECORD WINDOW



Charged Items: "2" is the total no. of items charged to this patron

Patron's Holds/Recalls: (Fulfilled/Pending)

Fines/Fees

Notes

TIP:

Right-Clicking within the Patron Record window brings up a submenu from which you may:

- View and/or Edit the Patron record

IMPORTANT:

If the patron's status is **NOT** active, refer the patron to the Privileges Office

PLACING HOLDS, RECALLS, CALL SLIPS

Types of Requests

Hold: request an unavailable item; use when the item status is “Missing”, “Lost”, “At Bindery”, etc.

Recall: request an item currently charged out (and not yet “Lost” [billed])

Call Slip: request an item in any location that is not charged out

Placing Requests (Eli Express, Paging, LSF Retrieval, Searches for items that are not on the shelf and not marked “Missing”)

1. From the Item Record window, click on the **Place Request** button
2. A **Place Request** window displays

3. Wand the patron’s barcode in the [Patron] Barcode field or click on the ellipsis to search for the patron

4. Select **Request Type** (e.g. Call Slip)

Important:

Choose **Copy** by clicking on the appropriate radio button; use **Title** only when any copy of a monograph will do. If **Title** is used for multi-vol. sets, all vols. will be requested

5. Select a pickup location from the **Pickup At** drop-down menu

6. The expiration date in the **Expires** field is system generated; **DO NOT** change the expiration unless procedures call for it

7. Enter additional notes in the **Comments** field

8. Click **OK** to generate the request

ITEM AND PATRON BLOCKS

Circulation of an item may be blocked as a result of either an Item or a Patron block. Before overriding a block, it is essential that you read the screen, understand the nature of the block, and override only when appropriate and in keeping with the established policies of your library. **DO NOT ignore pop-up notes** and check the **Notes** in the Patron’s Record for additional relevant information.

| Item Blocks | Action |
|---|--|
| <i>“Item is charged to another patron. Item will be discharged before charging out to this patron.”</i> | Before overriding the block, identify the patron to whom the item is currently charged and make a printout of the patron’s record for the supervisor At your library, certain procedures may be needed for follow up |
| <i>“Item is not authorized to circulate from this location.”</i> | Override for courtesy charge of items from other locations (e.g. Eli Express, LSF and other items routed to your pickup location) |
| <i>“Item has a loan period of 0”</i> | The block occurs when trying to charge non-circulating In-building items or Interlibrary loan items that do not leave the building 1. To override this block, click on Override 2. Due date prompt displays In-Building items: enter today’s date and a time (11.59 pm) and click OK ILL items: enter the date that corresponds with the lending library’s preferences and click OK 3. Discard printed due date slip Note: Other combinations of patron group and item type may cause this block (e.g. music cds to Faculty). Follow your library’s procedures |
| <i>“Item does not circulate”</i> | This block is not normally overridden unless your library’s procedures call for it. (E.g. exceptions made for photocopying, readers with only in-building privileges). Check with the supervisor before overriding this block. Cancel the charge by clicking Cancel on the Item Blocks and Information window |
| Patron Blocks | Action |
| <i>“Maximum fines owed.”</i> | Refer to the established policies at your library or check with a supervisor |
| <i>“Maximum overdue recalled items”</i> | Refer to the established policies at your library or check with a supervisor |
| <i>“Maximum items charged”</i> | As above; also refer patron to the Privileges Office |
| <i>“Patron registration expired”</i> | As above; also refer patron to the Privileges Office |
| <i>“Counter item reached.”</i> | Refer to the established policies at your library or check with a supervisor |