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Circulation

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Understanding the program elements in circulation

There are several program elements in the Circulation part of the program, including different windows that let you perform different circulation tasks, menu commands, and buttons.

For help performing circulation tasks, see "Understanding circulation" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

For more information about the elements in circulation, see the following sections:

- Menus and commands in circulation
- Components of the Circulation window
- Lookup window
- Material Inquiry window
- Patron Inquiry window
- Check In window
- Advance Booking window

Menus and commands in circulation

To help you perform circulation activities, circulation adds three menus to your program:

- Circulation
- Materials
- Patrons

Using these menus, you control all aspects of your library's circulation routines. Many of these commands may also be used with the buttons in the Circulation window itself. You can also use shortcut keys when available (they're listed on the menu next to their respective commands) or scan the printed command barcodes.





Please note that variations of the same commands may exist in each menu. Each command may display similar information from a different perspective. For example, when you select Reserve in the Circulation menu, a material is placed on reserve. Selecting Reserves in the Materials menu displays the patron(s) who reserved a particular material—and selecting Reserves in the Patrons menu displays the material(s) reserved by a particular patron.



You can choose to protect circulation activities with a password to prevent unauthorized access (see "Setting up passwords" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual* for more information).

Circulation menu commands

The Circulation menu lets you perform your library's main circulation activities, such as checking materials in and out. All of the commands on the menu have barcodes for scanning and some have corresponding buttons in the Circulation window.

The following table describes the available button and menu commands in the Circulation menu.

| Menu Command | Button | Description |
|--------------------|---|--|
| Check Out* |  The icon shows a blue book with a green arrow pointing right and a yellow arrow pointing left, indicating the checkout process. The text "Check Out" is written below the book. | Checks the selected material(s) out to the selected patron. It uses the checkout period set for each material—unless it's overridden by the patron type options. |
| Check Out/Set Date | N/A | Checks the selected material(s) out to the selected patron and lets you set the date the material is due. If you select more than one material, the same due date is assigned to all of them. |
| Renew Checkout* |  The icon shows a blue book with a red circular arrow around it, symbolizing renewal. The text "Renew" is written below the book. | Checks the selected material(s) out again to the same patron. |
| Check In* |  The icon shows a yellow bin with a blue book and a green arrow pointing down into it, representing checking a book in. The text "Check In" is written below the bin. | Checks in the selected material(s). |
| Reserve Title* |  The icon shows a blue book on a red carpet between two gold stanchions, representing a reservation. The text "Reserve" is written below the book. | Puts a flag on the selected material(s) to remind you that a patron wants to check it out. This is how you put a hold on a material that is currently checked out. Although a material is reserved for a patron, you can still check out the material to another patron. |



| Menu Command | Button | Description |
|-----------------|---|--|
| Reserve Holding | N/A | Puts a flag on the selected material's holding to remind you that a patron wants to check it out once it's available. This is how you put a hold on a particular copy of a material that is currently checked out. |
| Advance Booking |  | Reserves the selected material(s) for a specific date in the future over a specific time period, regardless of the material's loan period. |
| Clear All* |  | Resets the Circulation window to its original state by removing loaded patron and material records. |
| Print Receipts | N/A | If selected, prints checkout slips with the checkout receipt options and fine receipts options you set up. If not selected, no checkout or fine receipts print, regardless of what options you've set up. <i>Note:</i> This option is only available if you've purchased the SLIP printer for Spectrum CIRC/CAT. |


** If no materials are selected in the Materials entered list, then all of the materials are processed.*

Materials menu commands

The Materials menu lets you manage your material records in circulation. All of the commands on the menu have barcodes for scanning and some have corresponding buttons in the Circulation window.

The following table describes the available button and menu commands in the Materials menu.



| Menu Command | Button | Description |
|-----------------------------------|---|---|
| Look Up [Material] |  | Opens the Lookup window, so you can browse for material records. |
| Inquire [Material Inquiry] |  | <p>Opens the Material Inquiry window with the Itemized List tab active. It contains the following tabs:</p> <ul style="list-style-type: none"> • Itemized List • MARC Record • Card Image • Local Info • Reserves • Advance Bookings • Circ Log (if the option to log circulation transactions is selected in Circulation Setup) |
| Reserves | N/A | Opens the Material Inquiry window with the Reserves tab active. It displays a list of patrons who have the selected material(s) on reserve. |
| Advance Bookings | N/A | Opens the Material Inquiry window with the Advance Bookings tab active. It displays a list of patrons who have the selected material(s) booked in advance. |


| Menu Command | Button | Description |
|-------------------------------------|---|---|
| Messages | N/A | Opens the Material Inquiry window with the Messages tab active. It displays a list of messages attached to the selected material(s). |
| Circ Log | N/A | Opens the Material Inquiry window with the Circ Log tab active. It lists the circulation activity of the selected material. <i>Note:</i> This tab is only available if the option to log circulation transactions is selected in Circulation Setup. |
| Place on Special Reserve | N/A | Opens the Special Reserve window where you assign a temporary material type to materials that you want to use in a situation that differs from the regular routine. |
| Take off Special Reserve | N/A | Resets the selected material(s) to its original material type when the time of special use is finished. |
| Change Status to Lost | N/A | Changes the status of the selected material(s) to lost. |
| Clear Item [Clear Materials] |  | Removes the selected material(s) from the Materials entered list. |
| Clear List | N/A | Removes all materials from the Materials entered list. |

Patrons menu commands

The Patrons menu lets you manage your patron records in circulation. All of the commands on the menu have barcodes for scanning and some have corresponding buttons in the Circulation window.

The following table describes the available button and menu commands in the Patrons menu.

| Menu Command | Button | Description |
|------------------|---|--|
| Look Up [Patron] |  | Opens the Lookup window, so you can browse for patrons. |
| Inquire |  | Opens the Patron Inquiry window with the General tab active. It contains the following tabs: <ul style="list-style-type: none">• General• Reserves• Advance Bookings• Messages• Fines• Circ Log (if the option to log circulation transactions is selected in Circulation Setup)• Fine Log (if the option to log fine transactions is selected in Circulation Setup) |
| Reserves | N/A | Opens the Patron Inquiry window with the Reserves tab active. It displays a list of the items a patron has on reserve. |
| Advance Bookings | N/A | Opens the Patron Inquiry window with the Advance Bookings tab active. It displays a list of the items a patron booked in advance. |

| Menu Command | Button | Description |
|----------------------------------|---|--|
| Messages | N/A | Opens the Patron Inquiry window with the Messages tab active. It displays a list of messages attached to a patron's record, if any exist. |
| Fines | N/A | Opens the Patron Inquiry window with the Fines tab active. It displays a list of patron's fine, if any exist. |
| Circ Log | N/A | Opens the Patron Inquiry window with Circ Log tab active. It displays a patron's circulation activity log, if available. <i>Note:</i> This tab is only available if the option to log circulation transactions is selected in Circulation Setup. |
| Fine Log | N/A | Opens the Patron Inquiry window with the Fine Log tab active. It displays a patron's fine log, if available. <i>Note:</i> This tab is only available if the option to log fine transactions is selected in Circulation Setup. |
| Show Suppressed Materials | N/A | When selected, displays any material with a suppressed attribute (according to its material type) in the Circulation window. For more information, see "Setting up material types" in the <i>Setup</i> chapter of the <i>Spectrum CIRC/CAT User Manual</i> . |
| Renew Privileges | N/A | Renews a patron's library privileges by extending the expiration date. The date the expiration date extends to depends on the privilege options set up in Patron Type Setup for each patron type. |
| Clear Patron |  | Removes a loaded patron record from the Circulation window. |

Components of the Circulation window

The following are the four distinct areas of the Circulation window:

- Patron information
- Materials checked out list
- Materials entered list
- System statistics

Each part displays important information about the patron or material(s) that are currently loaded in the Circulation window. For instance, you can see if a patron has any materials on reserve, if a material has a message attached, if a patron's library privileges have expired, and so on.




You can set up color options in Circulation Setup to have the information contained in these four areas display in different colors. See "Setting color options" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual* for more information.

Patron information

When you enter a patron number, information about that patron is displayed in the patron information area of the Circulation window. Several of the items in this window are links that directly open the corresponding tab of the Patron Inquiry window (Windows users only).

Patron information part of the Circulation window

In this part of the Circulation window, you can view information about the currently loaded patron record.

| | | | |
|------------------------------------|--------------------|-----------------------------|---|
| <input type="text" value="Ready"/> | Number: 100001 | Reserves: 1 |  |
| Name: Daryn Buchner | | Fines: 1 | |
| Expires: 09/19/02 | Type: 1 - Freshmen | Messages: 1 | |

The following table describes the information found in the patron area of the Circulation window.

| Element | Description |
|---------------------|---|
| Name | The patron's name. |
| Number | The patron's number, also known as a barcode number. A patron number can consist of up to 30 characters. You assign a patron number to each patron record. A patron and material can have the same number as long as you print your patron numbers with a leading "P". You can also use a partition to separate material and patron numbers. See "Setting your location's number options" in the <i>Setup</i> chapter of the <i>Spectrum CIRC/CAT User Manual</i> for more information. |
| Type | The patron's type as assigned to them in Patron Edit. |
| Expires | The date a patron's circulation privileges come to an end. |
| Reserves | The number of materials a patron has on reserve. To learn more about a patron's reserves, you can open the Reserves tab of the Patron Inquiry window by clicking this link. |
| Fines | The number of materials a patron owns fines on (not the total fine amount). To learn more about a patron's fines, you can open the Fines tab of the Patron Inquiry window by clicking this link. |
| Messages | The number of messages associated with a patron. To learn more about a patron's messages, you can open the Messages tab of the Patron Inquiry window by clicking this link. |
| Patron Image | Displays an image of a patron, if available. You can click it to view an enlarged version of the image. This button is only available after you enter a valid patron number and if patron image data is loaded. |

| Element | Description |
|--|---|
| Number of materials checked out | The number of materials a patron currently has checked out, including any suppressed materials. If the number displayed does not match the actual number of materials in the Materials checked out list, some materials are probably suppressed. Choose "Show Suppressed Materials" from the Patrons menu to see any items that are suppressed. |
| Materials checked out list | The scrollable list of all the materials a patron currently has checked out. |

Materials checked out list

When you enter a patron number, the materials a patron currently has checked out appear in the Materials checked out list, which is located immediately under the patron information.

Materials checked out list part of the Circulation window

In this part of the Circulation window, you can view information about the materials that are currently checked out to a patron.

| Materials checked out: 2 | | Due date |
|--------------------------|-------------|----------|
| 44 | Star Wars / | 10/26/00 |

The following table describes the information found in the Materials checked out list area of the Circulation window.

| Element | Description |
|------------------------------|--|
| Materials checked out | The number of materials a patron currently has checked out. |
| Number | The material's number, also known as a barcode number. A material number can consist of up to 30 characters. You assign a material number to each material record. A patron and material can have the same number as long as you print your patron numbers with a leading "P". You can also use a partition to separate material and patron numbers. |
| Title | The material's title. |
| Due date | The date or hour a material is due. |
| Overdue | Overdue holdings are color-coded and bolded. You can set up your color options in Circulation Setup. See "Setting color options" in the <i>Setup</i> chapter of the <i>Spectrum CIRC/CAT User Manual</i> for more information. |

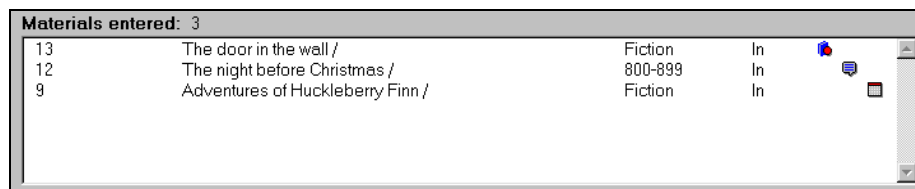
Materials entered list

When you enter material numbers, the materials appear in the Materials entered list (the bottom box of the Circulation window).

When you select a command in the Circulation menu, the program looks to the Materials entered list for items to process. The program processes only the materials you select from the list (or all materials if none are selected).




Materials entered part of the Circulation window

In this part of the Circulation window, you can view information about the currently loaded materials.



| Materials entered: 3 | | | | |
|----------------------|----------------------------------|---------|----|--|
| 13 | The door in the wall / | Fiction | In | |
| 12 | The night before Christmas / | 800-899 | In | |
| 9 | Adventures of Huckleberry Finn / | Fiction | In | |

The following table describes the information found in the Materials entered list of the Circulation window.

| Element | Description |
|--|--|
| Materials entered | The total number of materials loaded in the Materials entered list. |
| Number | The material's number, also known as a barcode number. A material number can consist of up to 30 characters. You assign a material number to each material record. A patron and material can have the same number as long as you print your patron numbers with a leading "P". You can also use a partition to separate material and patron numbers. |
| Title | The material's title. |
| Type | The material's type. |
| Status | The material's circulation status (such as In, Out, or Lost). This status is maintained by the program and cannot be edited. |
|  | This icon indicates that a material is on reserve. |
|  | This icon indicates that a material has at least one message attached to it. |
|  | This icon indicates that a material has been booked in advance. |

System statistics

Spectrum maintains checkout statistics, which are displayed in the bottom of the Circulation window.

System statistics part of the Circulation window

In this part of the Circulation window, you can view circulation statistic information.

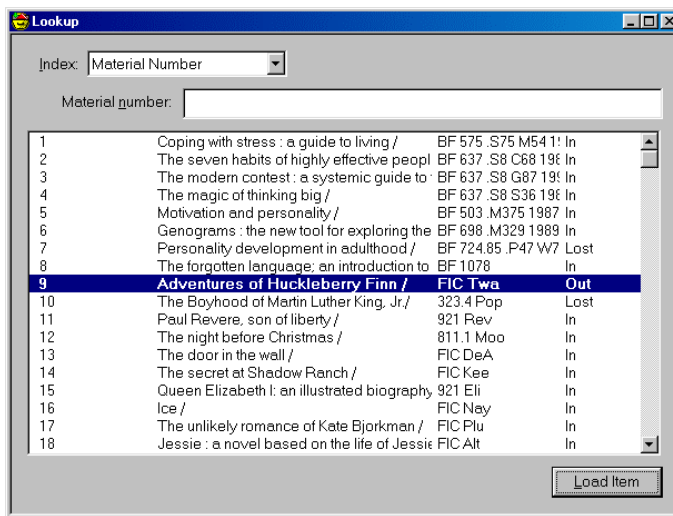
| | | |
|------------------------|-----------------|--------------------|
| Total checkouts | Today: 4 | To date: 55 |
|------------------------|-----------------|--------------------|

The following table describes the information found in the system statistics area of the Circulation window.

| Element | Description |
|----------------|---|
| Today | The total number of items checked out today. |
| To date | The total number of items checked out since the program started keeping track or since you reset the counter (if you want to reset this number, see "Clearing checkout totals" in the <i>Maintenance</i> chapter of the <i>Spectrum CIRC/CAT User Manual</i>). |

About the Lookup window

The Lookup window is one of several ways to load material and patron records into the Circulation window. When you enter text in the entry box of the Lookup window, the closest match to what you enter is selected in the list. To learn more about how to use the Lookup window, see "Loading records using the Lookup window" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Lookup window
Here you can look up materials and patrons to load into the Circulation window.

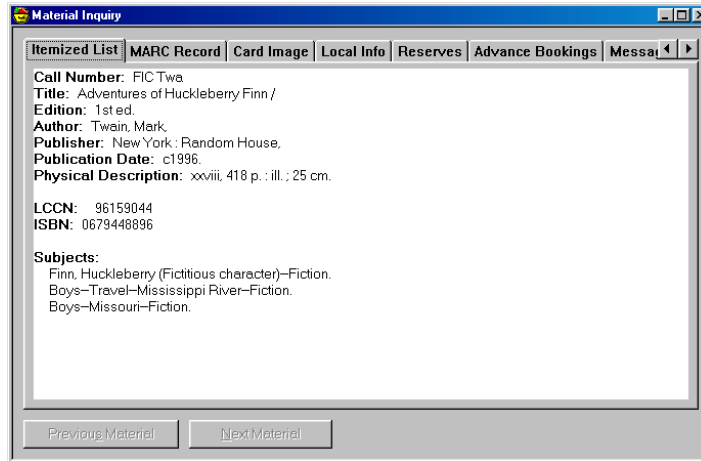
The following table describes the elements in the Lookup window.

| Element | Description |
|---------------|--|
| Index | Lists the available indexes you can use to look up item(s). The available indexes are: material number, title, author, call number, subject, patron name, and patron number. |
| Entry box(es) | Lets you type the item(s) you are looking for. After you pick the index, this box adjusts accordingly, so you can enter information that matches the selected index. |

| Element | Description |
|----------------------------|--|
| Item list | Lists items that match the information you type into the entry box(es). The closest match to what you enter is selected in the list. |
| Holdings found list | Lists the holdings that are associated with the items found. This is only displayed if you select the title, author, or subject indexes. |

About the Material Inquiry window

The Material Inquiry window is where you view and manage information for material records in circulation.



Material Inquiry window

This window contains several tabs in which you can view and manage material information in circulation.

The Material Inquiry window contains the following tabs:

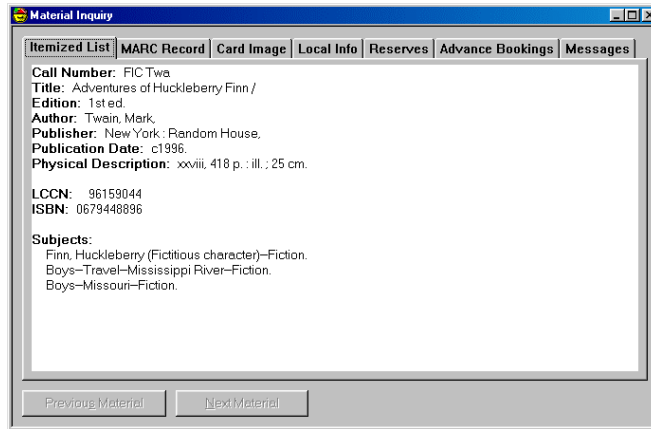
- Itemized List
- MARC Record
- Card Image
- Local Info
- Reserves
- Advance Bookings
- Messages
- Circ Log *

* May not be available if the option to log circulation transactions is not set up in Circulation Setup.

For help conducting a material inquiry, see "Inquiring about material records" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

Material Inquiry—Itemized List tab

The Itemized List tab displays a clearly labeled list of material information, including title, author, call number, publisher, ISBN, and so on. You edit this information in the Easy Entry window of Material Edit. See the *Materials* chapter of the *Spectrum CIRC/CAT User Manual* for more information.



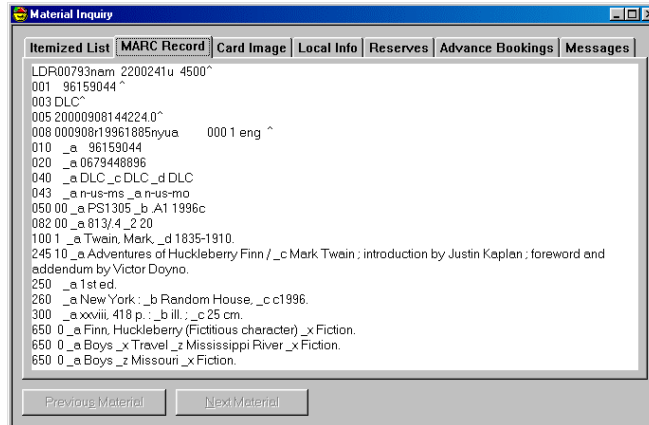
Material Inquiry— Itemized List tab

This tab displays a parts of a material's MARC record information in an easy-to-read format.

Note: Only the information that is listed in a material's MARC record is displayed here. If it's not included in the MARC record, it's not listed in the Itemized List tab.

Material Inquiry—MARC Record tab

The MARC Record tab of the Material Inquiry window contains a material's MARC record information as displayed in the Edit MARC window of Material Edit. You edit this information in Material Edit. See the *Materials* chapter of the *Spectrum CIRC/CAT User Manual* for more information.

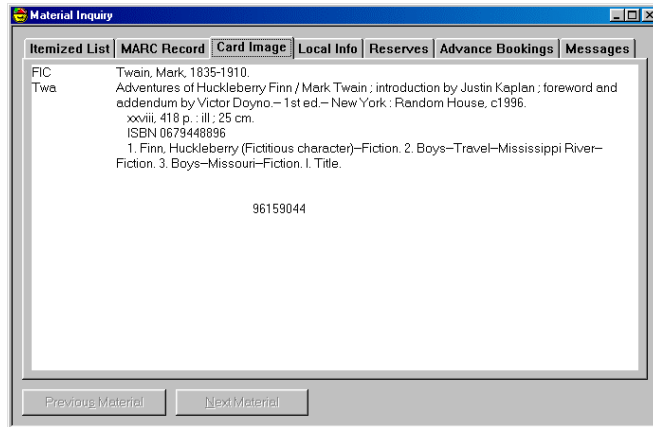


Material Inquiry— MARC Record tab

This tab displays specific information about a material's MARC record.

Material Inquiry—Card Image tab

The Card Image tab of the Material Inquiry window displays material record information in card catalog layout.



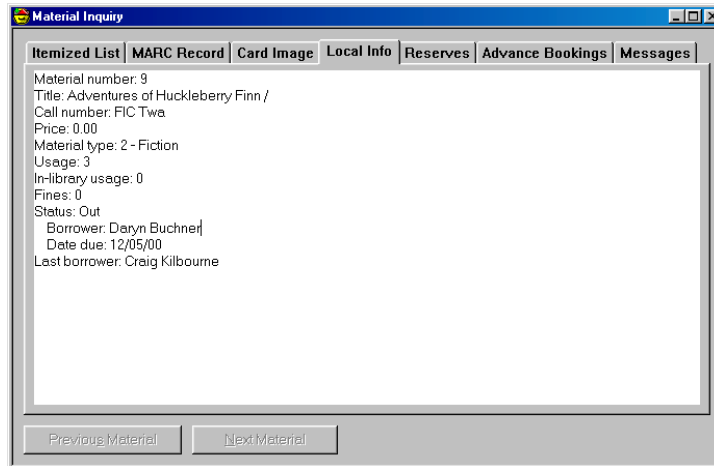
Material Inquiry— Card Image tab

This tab displays a material's information in card catalog format.

This information is drawn from the information contained in a material's MARC record. If the information needs to be modified, you can edit it in the Easy Entry or Edit MARC windows of Material Edit. See the *Materials* chapter of the *Spectrum CIRC/CAT User Manual* for more information.

Material Inquiry—Local Info tab

The Local Info tab of the Material Inquiry window displays the holding information of a material record. You edit this information in the Holdings window of Material Edit.



Material Inquiry— Local Info tab

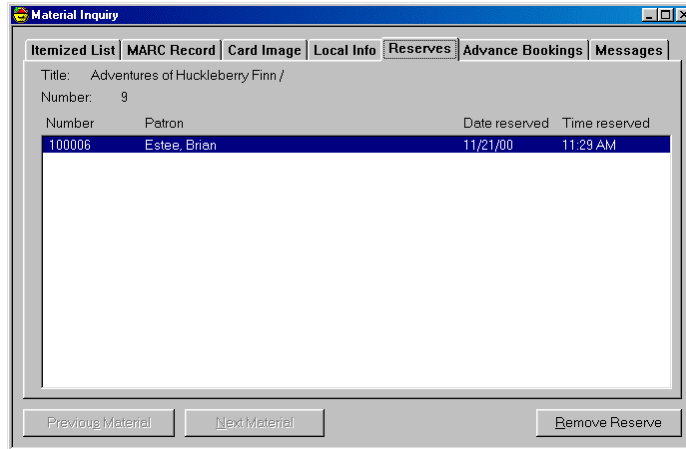
Here you can view a material's local information.

Here's an example of how local information of a material is displayed in the Local Info tab:

Material number: 10001
Title: Adventures of Huckleberry Finn
Call number: FIC Twa
Price: 12.95
Material type: 2 - Fiction
Usage: 24
In-library usage: 5
Fines: 0
Status: In
Last borrower: Chris Jones

Material Inquiry—Reserves tab

You manage material reserves in the Reserves tab of the Material Inquiry window. For help performing reserve tasks, see "Managing reserves" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



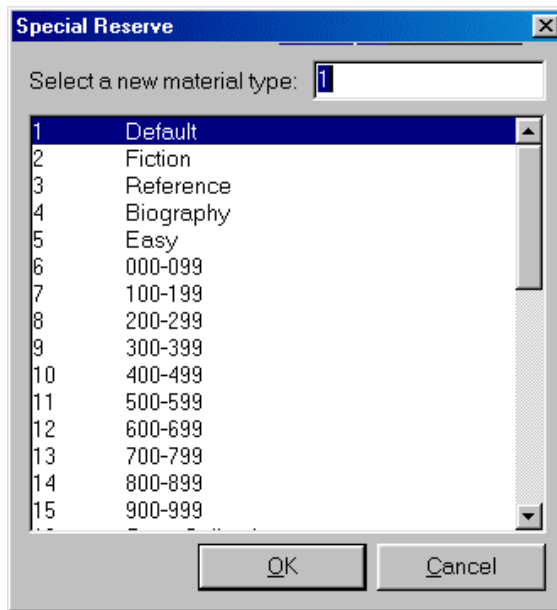
Material Inquiry—Reserves tab
In this tab, you manage your material reserves.

The following table describes the elements in the Material Inquiry—Reserves tab.

| Element | Description |
|------------------------------|---|
| Title | Title of the material on reserve. |
| [Material] Number | Material number of the material on reserve. |
| [Patron] Number | Patron number(s) of the patron(s) that reserved the material. |
| Patron | Name(s) of the patron(s) that reserved the material. |
| Date reserved | The month, day, and year that a reserve was placed. |
| Time reserved | The time of day that a reserve was placed. |
| Remove Reserve button | When clicked, deletes the selected patron(s) from a material's reserved list. |

Special Reserve window

The Special Reserve window is where you assign temporary material types to materials that you want to use in a situation that differs from the regular routine.



Special Reserve window

Here you can set up special reserves for materials.

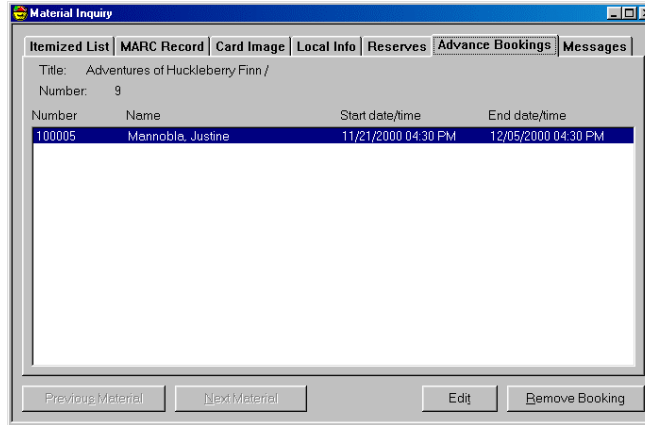
The following table describes the elements in the Special Reserve window.

| Element | Description |
|--------------------------------|---|
| Select a new material type box | Lets you enter a new material type to temporarily assign to the selected material(s). |
| Material type list | Lists all the materials types set up in your program. |

For more information about special reserves, see "Placing materials on special reserve" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

Material Inquiry—Advance Bookings tab

You view, edit, and remove material advance bookings in the Advance Bookings tab of the Material Inquiry window. For help performing advance booking tasks, see "Managing advance bookings" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Material Inquiry—Advance Bookings tab

Here you can view, edit, and remove advance bookings from a material's advance booking list.

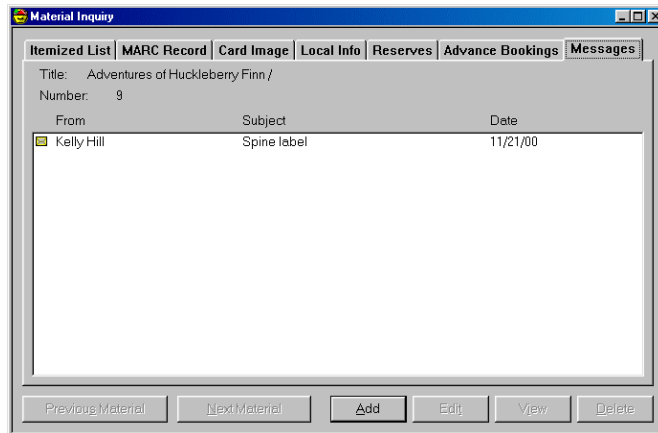
The following table describes the elements in the Material Inquiry—Advance Bookings tab.

| Element | Description |
|------------------------|--|
| Title | Title of the booked material. |
| [Material] Number | Material number of the booked material. |
| [Patron] Number | Patron number(s) of the patron(s) that booked the material in advance. |
| Patron | Name(s) of the patron(s) that booked the material in advance. |
| Start date/time | The month, day, and year that an advance booking was placed. |
| End date/time reserved | The time of day that an advance booking was placed. |

| Element | Description |
|------------------------------|--|
| Edit button | Opens the Edit Advance Booking window where you can modify the selected advance booking. |
| Remove Booking button | When clicked, deletes the selected patron(s) from a material's advance booking list. |

Material Inquiry—Messages tab

You manage material messages in the Messages tab of the Material Inquiry window. See "Managing messages" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information on how to add, edit, and remove messages.



Material Inquiry—Messages tab
In this tab, you manage material messages.

The following table describes the elements in the Material Inquiry—Messages tab.

| Element | Description |
|---------------|---|
| Title | Title of the material you're inquiring about. |
| Number | Material number of the material you're inquiring about. |

| Element | Description |
|---------------|---|
| From | Person's name that added the message. This is usually a library staff member. |
| Subject | A word or phrase that describes what the message is about. |
| Date | The date the message was added to the material record. |
| Add button | Opens the New Message window in which you add a message to a material record. |
| Edit button | Opens the Edit Message window in which you can modify the selected message. |
| View button | Opens the Messages window in which you can view the selected message. |
| Delete button | Removes the selected message. |

New/Edit Message window

You add and edit messages in the New or Edit Message window. See "How to add and edit a material message" and "How to add and edit a patron message" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information on adding and editing messages.

New / Edit Message window
Here you can add or edit messages.

The following table describes the elements in the New Message window.

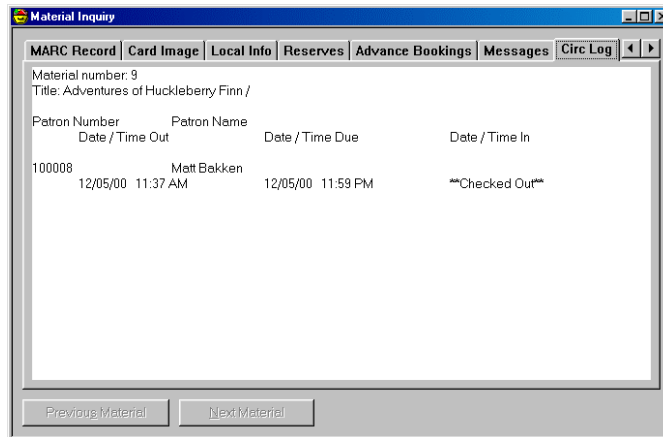
| Element | Description |
|-------------|---|
| From box | Here you enter your name. You are required to fill in this box in order to save the message. |
| Subject box | Here you enter a word or phrase that describes the message. This box is optional. |
| Message box | Here you enter the full message. You are required to fill in this box in order to save the message. |

Material Inquiry—Circ Log tab

You can view details of a specific material's circulation activities in the Circ Log tab of the Material Inquiry window. See "Viewing circulation log information" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information.



Important! This information is only available if you already enabled the logs in Circulation Setup and then generated log data by performing circulation transactions in circulation. If you don't set up circulation logs in Circulation Setup, this tab is not available. For more on setting up circulation logs, see "Setting log options" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual*.



Material Inquiry—Circ Log tab

You can view circulation transaction information for materials in this tab.

The Circ Log tab displays the following information:

- Material number
- Title of material
- Patron number
- Patron name
- Date and time the material was checked out
- Due date and time
- Date and time the material was returned

About the Patron Inquiry window

The Patron Inquiry window is where you view and manage information for patron records in circulation. It contains several tabs in which you can view and manage patron information in circulation.

The Patron Inquiry window contains the following tabs:

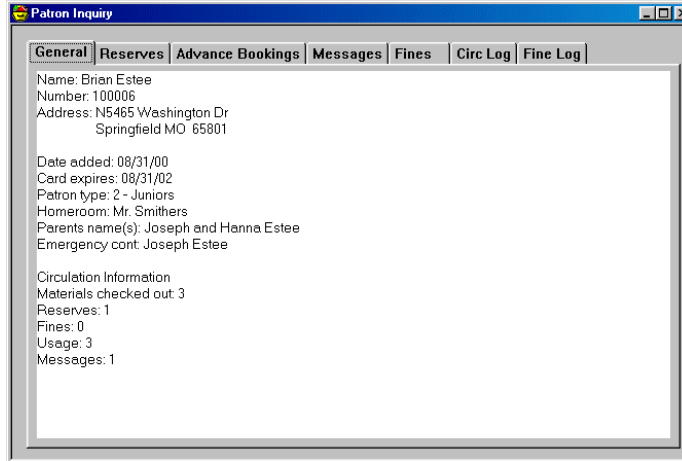
- General
- Fines
- Reserves
- Advance Bookings
- Messages
- Circ Log *
- Fine Log *

** May not be available if the option to log circulation and fine transactions is not set up in Circulation Setup.*

For help conducting a patron inquiry, see "Inquiring about patron records" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

Patron Inquiry—General tab

The General tab in the Patron Inquiry window gives you overview information about the patron currently loaded into the Circulation window.

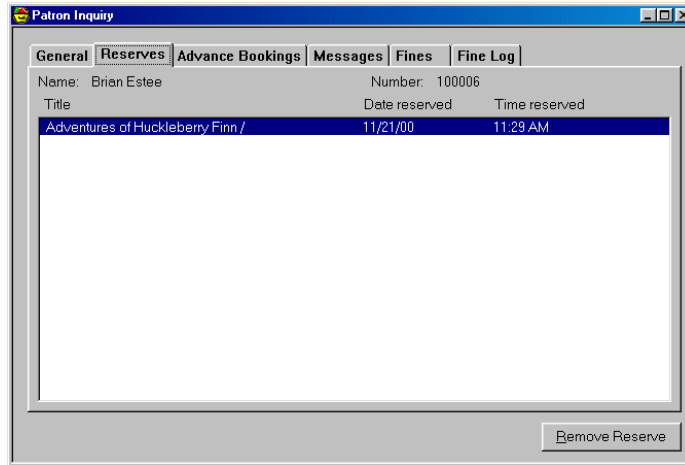


Patron Inquiry— General tab

Here you can view specific information about patrons.

Patron Inquiry—Reserves tab

You manage patron reserves in the Reserves tab of the Patron Inquiry window. For help performing reserve tasks, see "Managing reserves" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



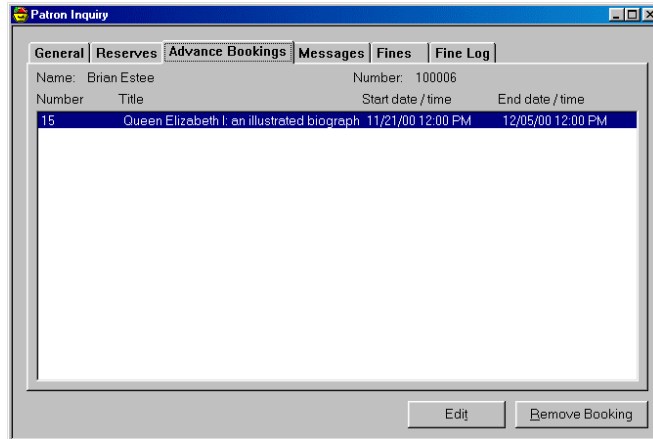
Patron Inquiry—Reserves tab
In this tab, you manage patron reserves.

The following table describes the elements in the Patron Inquiry—Reserves tab.

| Element | Description |
|------------------------------|---|
| Name | Name of the patron that reserved the material(s). |
| [Patron] Number | Patron number(s) of the patron(s) that reserved the material(s). |
| Title | Name of the reserved material(s). |
| Date reserved | The month, day, and year that a reserve was placed. |
| Time reserved | The time of day that a reserve was placed. |
| Remove Reserve button | When clicked, deletes the selected material(s) from a patron's reserved list. |

Patron Inquiry-Advance Bookings tab

You view, edit, and remove patron advance bookings in the Advance Bookings tab of the Patron Inquiry window. For help performing advance booking tasks, see "Managing advance bookings" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Patron Inquiry— Advance Bookings tab

Here you can view, edit, and remove advance bookings from a material's advance booking list.

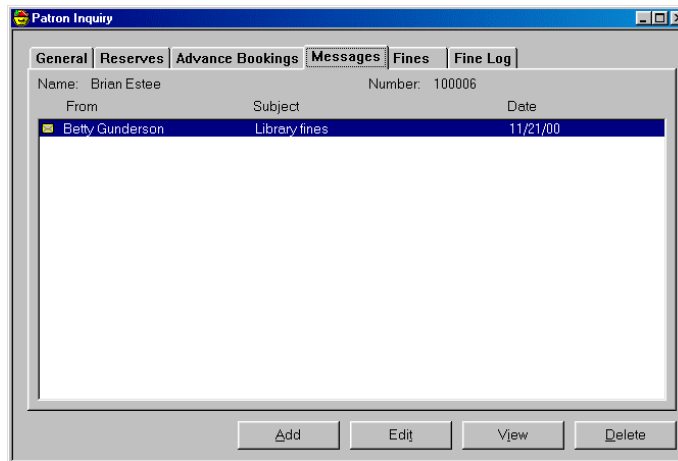
The following table describes the elements in the Patron Inquiry—Advance Bookings tab.

| Element | Description |
|------------------------|---|
| Patron | Name of the patron that booked the material(s) in advance. |
| [Patron] Number | Patron number of the patron that booked the material(s) in advance. |
| Title | Title(s) of the booked material(s). |
| [Material] Number | Material number(s) of the booked material(s). |
| Start date/time | The month, day, and year that an advance booking was placed. |
| End date/time reserved | The time of day that an advance booking was placed. |

| Element | Description |
|------------------------------|--|
| Edit button | Opens the Edit Advance Booking window where you can modify the selected advance booking. |
| Remove Booking button | When clicked, deletes the selected materials(s) from a patron's advance booking list. |

Patron Inquiry—Messages tab

You manage patron messages in the Messages tab of the Patron Inquiry window. See "Managing messages" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for information on how to add, edit, and remove messages.



Patron Inquiry—Messages tab
You manage patron messages in this tab.

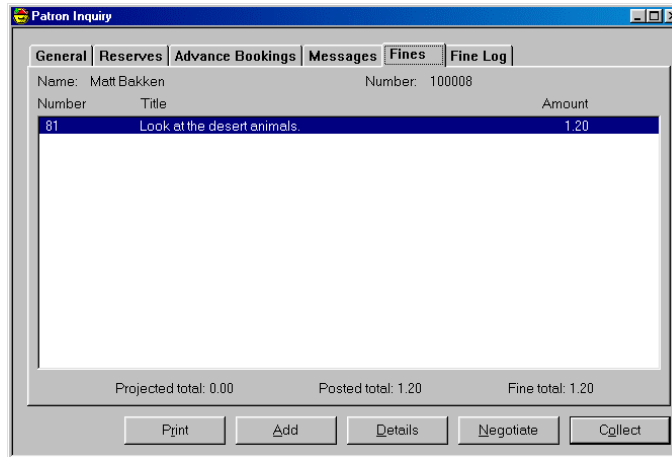
The following table describes the elements in the Patron Inquiry—Messages tab.

| Element | Description |
|---------------|---|
| Name | Name of the patron you're inquiring about. |
| Number | Patron number of the patron you're inquiring about. |
| From | Person's name that added the message. This is usually a library staff member. |

| Element | Description |
|----------------------|--|
| Subject | A word or phrase that describes what the message is about. |
| Date | The date the message was added to the patron record. |
| Add button | Opens the New Message window in which you add a message to a patron record. |
| Edit button | Opens the Edit Message window in which you can modify the selected patron message. |
| View button | Opens the Messages window in which you can view the selected patron message. |
| Delete button | Removes the selected patron message. |

Patron Inquiry—Fines tab

The Fines tab of the Patron Inquiry window shows the total fixed amount currently due and the projected total amount which would be due if all the materials with fines were returned that day. Projected fines (for overdue materials) are color-coded. For more information, see "Managing fines" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Patron Inquiry—Fines tab

You manage patron fines in this tab.

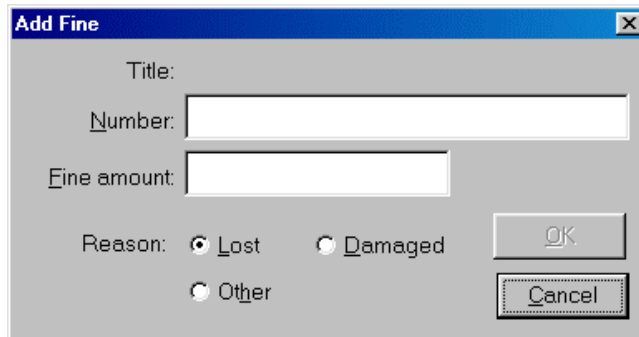
The following table describes the elements in the Patron Inquiry—Fines tab.

| Element | Description |
|-------------------|--|
| Name | Name of the patron you're inquiring about. |
| Number | Patron number of the patron you're inquiring about. |
| [Material] Number | Material number(s) of the material with fines. |
| Title | Title of the material(s) that have fines attached to them. |
| Amount | Quantity of the individual fines. |

| Element | Description |
|-------------------------|---|
| Projected total | Sum of the possible fine amount calculated on an overdue material <i>before</i> the material is checked in (and so is subject to change before being posted). |
| Posted total | Sum of the payable fine amount calculated when an overdue material is checked in. A posted fine is system-generated at checkin or manually added by library staff. |
| Fine total | Grand total of all the fines. |
| Print button | Lets you print either a fine notice or receipt (available if you have the Spectrum SLIP program). |
| Add button | Opens the Add Fine window where you can manually add fines to a patron's account. You might want to add a fine to a patron's record for a lost or damaged material. |
| Details button | Opens the Fine Details window where you can view specific information about each fine. |
| Negotiate button | Opens the Negotiate Fine window where you can adjust the amount of the fine. |
| Collect button | Opens the Collect Fine window where you can accept payment for the fine. |

Add Fine window

If you click the Add button in the Fines tab of the Patron Inquiry window, the Add Fine window opens. In this window you can manually add a fine to a patron's record. You might want to add a fine to a patron's record for a lost or damaged material. For more information, see "Adding fines manually" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Add Fine window

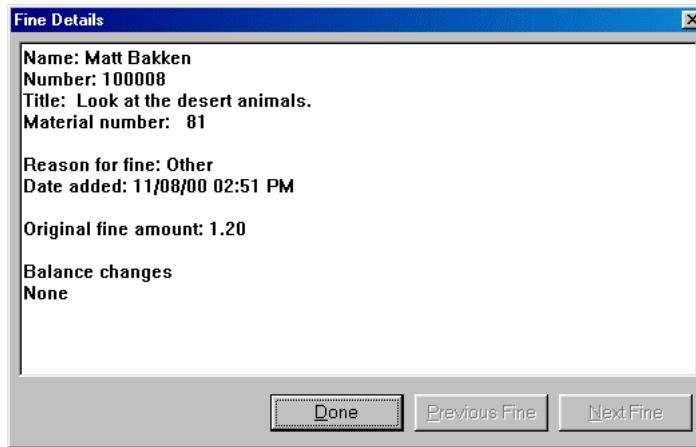
Here you can manually add a fine to a patron's account.

The following table describes the elements in the Add Fine window.

| Element | Description |
|-----------------|---|
| Title | The title of the material that you want to add a fine for displays after you enter a valid material number in the Number box. |
| Number box | Lets you enter the material number of the material that you want to add a fine for. You must enter a valid material number in this box, otherwise the program does not save the added fine. |
| Fine amount box | Lets you enter the amount of the fine. You can enter a digit with up to seven integers before the decimal point. |
| Reason | Lets you choose either lost, damaged, or other for the reason you are adding the fine. You must choose one of the three options. |

Fine Details window

If you click the Details button in the Fines tab of the Patron Inquiry window, the Fine Details window opens. In this window you can view details about a patron's fine(s). Only one fine can be viewed at a time in the Fine Details window. For more information, see "Viewing fine details" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

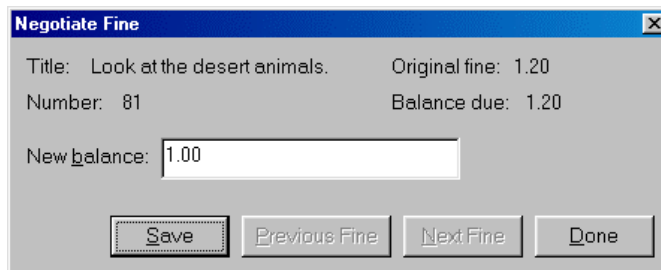


Fine Details window

In this window, you can view specific information about a patron's fines.

Negotiate Fine window

If you click the Negotiate button in the Fines tab of the Patron Inquiry window, the Negotiate Fine window opens. In this window you can adjust a patron's fine(s). Only one fine can be negotiated at a time in the Negotiate Fine window. For more information, see "Negotiating fines" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Negotiate Fine window

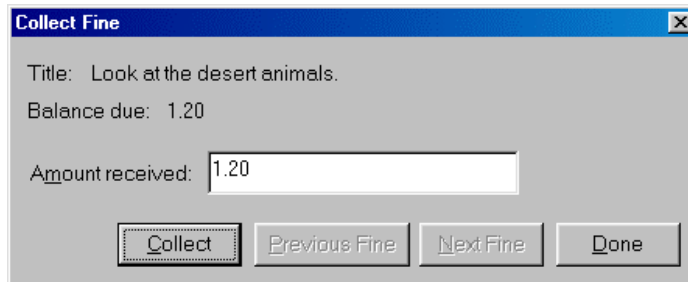
In this window, you can adjust the amount of a patron's fine.

The following table describes the elements in the Negotiate Fine window.

| Element | Description |
|-----------------|---|
| Title | The title of the material whose fine you want to negotiate. |
| Number | The material number of the material whose fine you want to negotiate. |
| Original fine | Total amount of the initial fine before any payments or negotiations were made. |
| Balance due | Current fine amount that needs to be paid. |
| New balance box | Here you can enter a new amount for the fine. After you enter a new amount and click the Save button, the Balance due updates to show the new amount due. |

Collect Fine window

If you click the Collect button in the Fines tab of the Patron Inquiry window, the Collect Fine window opens. In this window you can accept payment for a patron's fine(s). Only one fine can be collected at a time in the Collect Fine window. For more information, see "Collecting fines" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Collect Fine

Title: Look at the desert animals.

Balance due: 1.20

Amount received: 1.20

Collect Previous Fine Next Fine Done

Collect Fine window

You can accept payment for a patron's fine in this window.

The following table describes the elements in the Collect Fine window.

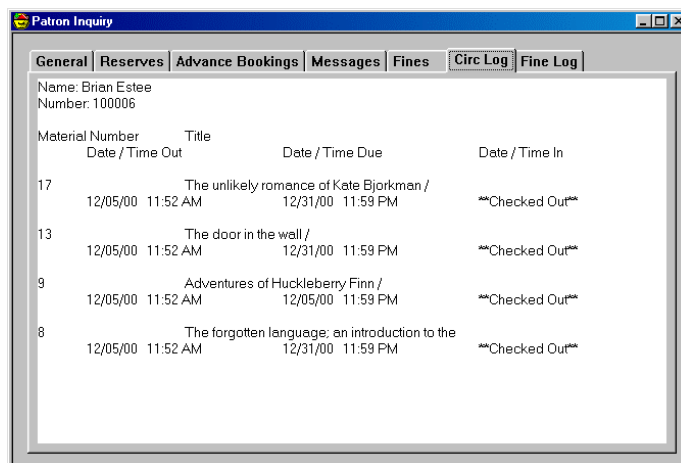
| Element | Description |
|---------------------|--|
| Title | The title of the material whose fine you want to collect. |
| Balance due | Current fine amount that needs to be paid. |
| Amount received box | You enter the amount of the fine the patron wants to take care of in this box. |

Patron Inquiry—Circ Log tab

You can view details of a specific patron's circulation activities in the Circ Log tab of the Patron Inquiry window. See "Viewing circulation log information" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information.



Important! This information is only available if you already enabled the logs in Circulation Setup and then generated log data by performing circulation transactions in circulation. If you don't set up circulation logs in Circulation Setup, this tab is not available. For more on setting up circulation logs, see "Setting log options" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual*.



Patron Inquiry—Circ Log tab

Here you can view circulation transaction information for patrons.

The Circ Log tab displays the following information:

- Patron name
- Patron number
- Material number
- Title of material
- Date and time the material was checked out
- Due date and time
- Date and time the material was returned

Patron Inquiry—Fine Log tab

You can view details of a patron's fine transactions in the Fine Log tab of the Patron Inquiry window. See "Viewing fine activity" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information.



Important! This information is only available if you already enabled the logs in Circulation Setup and a patron has generated fines. If you don't set up fine logs in Circulation Setup, this tab is not available. For more on setting up fine logs, see "Setting log options" in the *Setup* chapter of the *Spectrum CIRC/CAT User Manual*.

| Material Number | Date | Title Action | Amount | Code |
|-----------------|----------|---|--------|----------|
| 62 | 09/10/00 | I want to be a basketball player, Payment | 1.20 | 52958885 |
| 9 | 09/10/00 | Adventures of Huckleberry Finn / Payment | 1.40 | 52958884 |
| 9 | 09/08/00 | Adventures of Huckleberry Finn / Payment | 1.00 | 52958883 |
| 9 | 11/08/00 | Adventures of Huckleberry Finn / Addition | 2.40 | 52958882 |
| 62 | 11/08/00 | I want to be a basketball player, Addition | 1.20 | 52958881 |
| 81 | 11/08/00 | Look at the desert animals, Addition | 1.00 | 52958880 |

Patron Inquiry— Fine Log tab

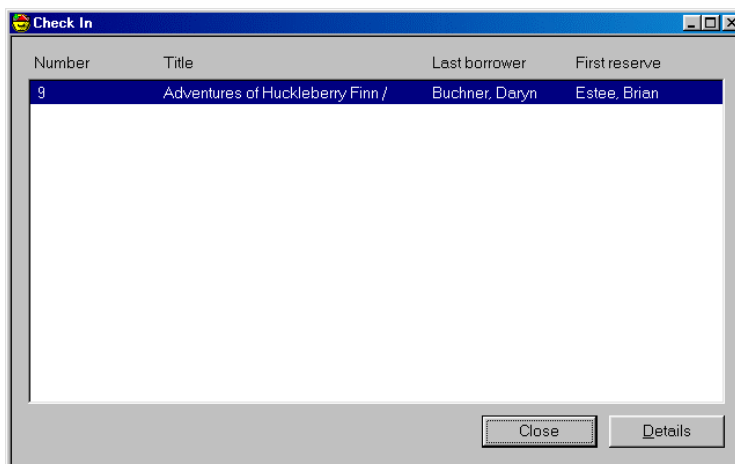
In this tab, you can view patrons' fine transactions.

The Fine Log tab displays the following information:

- Patron name
- Patron number
- Material number of the material that has fines
- Title of the material that has fines
- Date of the transaction
- Action - Possible actions are "increase" or "reduction" if you negotiate a fine, "addition" if you manually add a fine, and "payment" if you collect a fine.
- Fine amount
- Code - Each fine transaction has a unique number assigned to it. If anyone has a question about a fine transaction, you can use this number to locate the transaction in the fine log.

About the Check In window

You check in materials in the Check In window of the Circulation part of the program. See "Checking materials in" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual* for more information.



Check In window
This is where you check in materials.

The Check In window sorts materials in the following order:

- 1 Materials with reserves
- 2 Materials with reserves and overdues
- 3 Materials with overdues
- 4 Materials with none of the above

The following table describes the elements in the Check In window.

| Element | Description |
|---------------|--|
| Number | Material number of the material being checked in. |
| Title | Title of the material being checked in. |
| Last borrower | Name of the patron who last checked out the material being checked in. If the material was last recorded as in-library, the last borrower is listed as "In-Library." |

| Element | Description |
|-----------------------|---|
| First Reserve | Name of the patron who is next on the reserve list for the material being checked in. |
| Details button | This button opens the Check In Details window where you can view specific information about each material being checked in. |

Check In Details window

If you click the Details button in the Check In window, the Fine Details window opens. In this window, you can view details about the material(s) you check in. Only one material can be viewed at a time in the Check In Details window. For more information, see "Viewing checkin details" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Important! In order to view checkin details, you must have the "Display additional material information after check in" option selected in Circulation Setup. See "Circulation Setup—General tab" in the *Setup* chapter of this manual for more information.

The screenshot shows a window titled "Check In Details" with the following information:

- Material number: 9
- Title: Adventures of Huckleberry Finn /
- Last borrower: Buchner, Daryn Number: 100001
- Date out: 11/21/00 Time out: 11:24 AM
- Date due: 12/05/00 Time due: 11:59 PM
- Fine amount due: 0.00
- First reserve for: Estee, Brian Number: 100006

At the bottom of the window are five buttons: Previous Material, Next Material, Negotiate Fine, Collect Fine, and Done.

Check In Details window
In this window, you can view specific information about each material being checked in.

The following table describes the elements in the Check In Details window.

| Element | Description |
|------------------------|---|
| Material number | Material number of the material being checked in. |
| Title | Title of the material being checked in. |

| Element | Description |
|-----------------------|---|
| Last borrower | Name of the patron who last checked out the material being checked in. If the material was last recorded for in-library usage, the last borrower is listed as "In-Library." |
| Number | Patron number of the patron who last checked out the material being checked in. |
| Date out / Time out | Date and time the material was checked out. If the material is being recorded for in-library usage, this information is not available. |
| Date due / Time due | Date and time the material being checked in was due. If the material is being recorded for in-library usage, this information is not available. |
| Fine amount due | Lists any fines associated with the material being checked in. |
| First reserve for | Name of the patron who is next on the reserve list for the material being checked in. |
| Number | Patron number of the patron who is next on the reserve list for the material being checked in. |
| Negotiate Fine button | This button opens the Negotiate Fine At Check In window where you can adjust any fines during the checkin process. |
| Collect Fine button | This button opens the Collect Fine At Check In window where you can accept payment for any fines during the checkin process. |

Negotiate Fine At Check In window

If you click the Negotiate Fine button in the Check In Details window, the Negotiate Fine At Check In window opens. In this window, you can adjust the fine amount associated with the material being checked in. For more information, see "Managing fines at checkin" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Important! If you want to have the option to take care of fines at checkin, the "Allow payment of fines at check in" option must be selected in Circulation Setup. See "Circulation Setup—General tab" in the *Setup* chapter of this manual for more information.

Negotiate Fine At Check In window
Here you can adjust a patron's fine at checkin.

The following table describes the elements in the Negotiate Fine At Check In window.

| Element | Description |
|------------------------|---|
| Title | The title of the material whose fine you want to negotiate at check in. |
| Number | The material number of the material whose fine you want to negotiate at check in. |
| Original fine | Total amount of the initial fine before any payments or negotiations were made. |
| Balance due | Current fine amount that needs to be paid. |
| New balance box | Here you can enter a new amount for the fine. After you enter a new amount and click the Save button, the Balance due updates to show the new amount due. |

Collect Fine At Check In window

If you click the Collect Fine button in the Check In Details window, the Collect Fine At Check In window opens. In this window, you can accept payment for the fine associated with the material being checked in. For more information, see "Managing fines at check in" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.



Important! If you want to have the option to collect fines at check in, the "Allow payment of fines at check in" option must be selected in Circulation Setup. See "Circulation Setup—General tab" in the *Setup* chapter of this manual for more information.

Collect Fine At Check In

Title: Jessie : a novel based on the life of Jessie Ben

Balance due:

Amount received: 5.10

Collect Done

Collect Fine At Check In window
 Here you can collect a patron's fine at check in.

The following table describes the elements in the Collect Fine At Check In window.

| Element | Description |
|----------------------------|--|
| Title | The title of the material whose fine you want to collect at check in. |
| Balance due | Current fine amount that needs to be paid. |
| Amount received box | You enter the amount of the fine the patron wants to take care of in this box. |

About the Advance Booking window

You book materials in advance in the Advance Booking window. For help performing advance booking tasks, see "Managing advance bookings" in the *Circulation* chapter of the *Spectrum CIRC/CAT User Manual*.

Advance Booking

Patron: Brian Estee
Title: The secret at Shadow Ranch /

Start date: 11/21/2000 Start time: 4:30 PM
End date: 12/5/2000 End time: 4:30 PM

Possible conflicts:

Previous Material Next Material Place Booking Close

Advance Booking window
In this window, you place advance bookings

The following table describes the elements in the Advance Booking window.

| Element | Description |
|---------------------------|--|
| Patron | Name of the patron who wants to book a material in advance. |
| Title | Title of the material that a patron wants to book in advance. |
| Start date box | Lets you enter the beginning date for the advance booking. |
| Start time drop-down list | Lets you select the beginning time from the list of times for the advance booking. |
| End date box | Lets you enter the ending date for the advance booking. |

The following table describes the elements in the Advance Booking Conflict window.

| Element | Description |
|--|---|
| Allow check out, but assign the date and time entered below as the due date | This lets you specify a different loan period that doesn't overlap with the advance booking. |
| Due date box | You enter a different loan period that doesn't overlap with the advance booking in this box. This box is only available if you select the "Allow check out, but assign the date and time entered below as the due date" option. |
| Allow check out using the calculated due date | This lets you check out the material even though there's a conflict. If you select this option, you have to either notify the patron who booked the material in advance that it might not be available when they want it or edit the advance booking so it doesn't conflict with the loan period of the checkout. |
| Do not allow check out | This stops the checkout from happening, allowing the advance booking to remain free from conflicts. |
| Material number | Material number of the material being checked out. |
| Calculated due date | Due date for the material being checked out. This is based on the loan period you set up for the material's type. |
| Title | Title of the material being check out. |
| Patron | Name of the patron who booked the material in advance. |
| Start date / time | Start date and time for the advance booking. |
| End date / time | End date and time for the advance booking. |

