Circulation A: Transactions and Items

Circulation A provides an introduction to the Aleph Circulation module. Course learning objectives include the following:

- Participants will be familiar with the major functions performed in this module
- Participants will be able to perform basic loans, renewals, and returns of library materials
- Participants will be able to place a request for loaned materials
- Participants will be familiar with item-related processing available from the Circulation Item tab

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Lesson 1: Circulation in the Aleph environment

1.1 Aleph database structure

Aleph is composed of various databases, known as "libraries." (Use the term "sublibrary" to refer to a specific library location, such as Widener.)

Each library is designated by a 3-letter code, plus a two-digit number designating the type of library. Circulation-related information is stored in HVD50 (the Administrative Library).

- HVD01 Main bibliographic file
- HVD02 Resource file (national)
- HVD03 Resource file (other)
- HVD05 Anthropological Literature (Tozzer library use only)
- HVD10 LC subject authority file
- HVD12 MeSH authority file
- HVD30 Reserves file
- **HVD50 Administrative file (includes items, patrons, loans, recalls/holds, billing) as well as data for acquisitions and serials**
- HVD60 Holdings file

Item records are an important component of Aleph circulation. As noted above, items are part of the HVD50 (Administrative) library. Items also have links to holdings in the HVD60 library. The following diagram illustrates how an item record is related to a bibliographic record through a link to holdings.

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1.2 **Staff client modules used in circulation**

Almost everything that needs to be done at a circulation desk can be accomplished from the Aleph Circulation module with the following exception:

- Most item record maintenance tasks (creation, update,) are performed in the **Item tab** of the Cataloging module. This includes adding notes to the Item record.

Also note that the HOLLIS Catalog supports some circulation “self-service” features for end-users (e.g., viewing materials on loan and outstanding fines, online renewals, HD requests, recalls). OPAC self-service information appears in Lesson 10 of this Guide.
Lesson 2: Tour of the Circulation module

2.1 Overview of Circulation module

The Circulation module supports loan (charge) and return (discharge) functions, as well as creation and maintenance of patron records, recall and hold functions, fine and fee management.

Below is a sample Circulation module screen with major screen elements labeled:
2.2 Toolbars

2.2.1 Title bar

The title bar is a standard Windows feature. It identifies the Aleph module and version as well as the database and server to which the module is connected.

2.2.2 Menu bar

The ALEPH and View menus

The menu bar lists circulation options. Note the location of two important functions (Exit and “End Current Session”).

Exit, which is under the ALEPH menu, will close the open module (Circulation in this case).

End Current Session (F4), under the View menu, clears the active session.

As with other Aleph modules, many of the functions available under these menu options also can be activated by a keyboard combination.

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2.2.3 Patron bar

Use the **patron bar** to retrieve information about a patron.

Click on the **Patron List** to access the Patron List to search for a patron:

![Patron List](image)

2.2.4 Item bar

The **Item bar** displays brief information about a selected item (title and author). Access the Item bar by clicking on it or pressing the <Ctrl> + 6 keys.

Click the **list button** to display the Item List by Call Number window to retrieve an item by call number.

**Note:** this function is problematic, especially during a Return session. Circulation staff are encouraged to browse call numbers in the Search tab instead or enter an item barcode in the box and click the blue arrow button (or press Enter) to display an item record.

There are two functions on the right end of the Item bar. The catalog card icon activates the **Catalog Record and Create Item** function which creates a quick bibliographic and item record.

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The **Full Screen** icon can be used to expand record displays and results lists to full screen. In the Circulation module, Full Screen mode is available for displays in the Search tab.

Enter an item barcode and click the **blue arrow** (or press Enter) to display an item record.

Click the **catalog card** button to create a quick bib and item.

Click the **Full Screen** button to maximize the display of a results list or record display.

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2.2.5 **Operations bar**

The **Operations bar** contains icons to exit completely out of Aleph, access other Aleph modules, and change a password.

**Note:** The module icons only open other modules the module will open. The title will NOT move to the module.

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2.3 **Panes**

Information displays in the Circulation module are arranged in **3 panes**: a **Navigation pane** on the left provides controls access to the major sections of the Circulation module, an **Upper pane** that usually displays lists of information, and a **Lower pane** that usually contains a record display or data entry form.

Advance from one pane to another by pressing the `<Ctrl> + `<Tab> keys. Move backward by selecting the `<Ctrl> + `<Alt> + `<Tab> keys. Select each individual pane by clicking on the pane or using the following keyboard equivalents:

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Note that a colored frame (red by default) will display around a selected pane.

2.3.1 Navigation pane

The following sections describe the **Main tabs**, **Modes**, and components of the **Navigation tree**.

**Main tabs**

The **Main tabs** are a row of six tabs with icons that correspond to the major activities in circulation. Mouse over a tab and a callout bubble will display the name of the tab.

Clicking on a tab invokes the display associated with that icon. Some of the 6 main tabs have a specific display color: Loan (green), Return (pink/red), Patron (blue/purple), Item (yellow). The active tab will display with its assigned background color; inactive tabs have a gray background.

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Each tab can be activated by a function key:

- Loan = F5
- Return = F6
- Patron = F7
- Item = F8
- Administration = F10
- Search = F9

**Functional / Overview Modes**

When the Item or Search tab is active, the Functional / Overview mode choices appear in the navigation pane just below the main tabs.

**Functional Mode:** Displays the functions available on the selected tab.

**Overview Mode:** Displays an “overview tree” of a title that allows movement within a record group (a bibliographic record and all its linked holdings, items, orders, etc.) and allows users to move or "push" a title from the overview node into another part of the module or to another module.

**Navigation tree:** Contains 2 or more nodes. Clicking on a node changes the display of options in other panes. A node surrounded by a gray box is the currently active node.
2.3.2 Upper and lower panes

The display of information in each pane is governed by the node selected in the navigation tree. Generally, the **upper pane** contains lists (list of loans, items, holds, search results, etc.) while the **lower pane** tends to contain a data entry form or record displays (or a combination).

Contents of the **upper** and **lower panes** change according to context. For example, display of information in the lower pane will change based on selection of data in the upper pane.

In the following example, the **lower pane** contains detailed information relating to the Lamont item record highlighted in the **upper pane**:

![Upper/lower panes when the Item list node is active (under the Item tab)](image)

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In the following example, the lower pane contains a data entry form for local patron information that is associated with the HVD50 entry selected in the upper pane:

Upper lower panes when the Local Patron Information node is active (under the Patron tab)
Lesson 3: Loans and Renewals

3.1 Tour of the Loan tab

With the Loan tab open and the Session node selected, users can loan materials by scanning (or typing) barcodes into the patron and item bar boxes:

To begin a loan, scan or enter the barcodes for the patron and item.

After performing a loan, the upper pane will contain information about the patron and the lower pane will contain information about the item and any errors that occurred during the loan. Remember to end each loan session by pressing the F4 key or by clicking on the End Session button:

Loan Tab/Session node, after a loan is performed

With the Loan tab open and the History node selected, the last 300 loans (or whatever the sublibrary decides) that have occurred at that particular workstation will display:
Loan Tab / History node, which will show recent loans on that workstation

Loan tab / Active Due Dates node, shows the due dates/hours for different item and patron combinations:

With the Loan tab open and the Active Due Dates node selected, the due date and due hour that will be given to items when they are loaned are visible. Note that the parameters presented are in relation to the sublibrary chosen in the Sublibrary drop-down list. The "Requested" columns show the due date and due hour that will be given to items that have hold requests.
3.2 Performing a Loan

3.2.1 Loan procedure

The steps to perform a loan appear below. When finished loaning items to a patron, remember to press the **End Session** button or **F4** to clear out information about the current patron and prepare for a new loan session.

1. Open the Circulation module
2. Select the Loan Tab (on the navigation pane) by clicking on the tab or hitting the **F5** function key
3. Position the cursor in the **Patron bar** box by clicking in the field or pressing the `<Ctrl>` + 5 keys and scan or type in the patron barcode. If your scanner is not set to “press Enter” automatically, click the **blue arrow** button or press Enter to proceed
4. In the **Item bar** box scan or type in the item barcode

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If the combination of patron and item produces a valid loan for the sublibrary, information about the loan will display in the lower right pane:

Loan session, after a successful loan

### 3.2.2 Role of patron and item status during loans

A combination of patron status and item status determines if an item may circulate and for how long (due date/hour). Each sublibrary has a policy that defines the valid patron and item status combinations. A loan may be blocked because the item or patron status is invalid based on the sublibrary’s policy tables.

**Patron status** is a two-digit code that represents the relationship of a patron to the university. For example: 01 for faculty, 03 for staff, 13 for undergraduates, etc.

**Item status** is a code that represents the loan policy for a class of items (e.g., restricted loan, normal loan, 2 hour loan, etc.). Every sublibrary has a defined list of valid item status codes. The “Regular loan” status (for example) may mean something different from one sublibrary to another.

**Item processing status** is a separate code that indicates when an item has some type of “in process” status, such as “At bindery” or “On order.” Item processing status will override any item status in terms of what displays to the user in the OPAC.

**Simple circulation policies** are available for display in the Circulation module. Under the Loan tab, select the **Active Due Dates** node to view, by sublibrary, the due dates and due hours that the system would assign to various combinations of patron and item statuses.

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3.2.3 Overriding blocked loans

When loaning items, situations may occur where a particular patron is not allowed to borrow the item he/she has brought to the desk. To make an exception an operator with appropriate security clearance has the option to override the system and allow a loan. If a loan is blocked, a pop-up window explains the block and provides an Override button.

In this loan session, the system blocks a loan, but authorized staff have the option to override the block.

**NOTE:** When overriding a blocked loan, the system assigns a default due date that is 24 hours in the future. In some cases, an override is accompanied by an option to manually assign a due date/hour. In other cases, click the Change Date button (lower pane, on the Loan Session tab) to assign a different due date/hour.

3.3 Performing Renewals

A renewal can be performed several ways:

- Renewal from patron’s loan list
- Renewal from Item tab
- Renewal from the main menu (Circulation/Renew Loan by Barcode)

**Important note:** Renewing an item using the Loan tab is possible but not recommended. Any accrued fines will disappear but no cash transaction will be created. This behavior is intentional, based on settings recommended by the original Circulation Implementation Team.

3.3.1 Renewal from patron’s loan list

This procedure starts from the Loans node of the Patron tab.

1. Click to select the loan to be renewed from the list of loaned items in the upper pane.

2. Click on the Renew Marked button (on right side of loan list). A Renew Loan window will display. If applicable, type appropriate values in the Due Date and Due Hour boxes and click...
OK. Click OK and the system will consult the sublibrary’s policy tables and calculate a new due date/hour as if performing a regular loan.

The new due date/time will display for this item in the loan list.

### 3.3.2 Renewal from Items tab

This procedure starts from the Item tab.

1. **Scan** or type the **barcode** of the item to be renewed into the Item bar at top. If your barcode scanner does not have a “press Enter” programmed, you can click the blue arrow button or press Enter.

2. Click on the **Loan node**. Information about the loan of this item will display.

3. Click on the Renew button to renew this item.
Select the Loan node and click the **Renew button**.

4. A **Renew Loan window** will display. Type appropriate values in the **Due Date** and **Due Hour** boxes and click OK.

Renew Loan dialog box

Click OK without changing the date so the system will consult the sublibrary’s policy tables and calculate a new due date/hour as if performing a regular loan. The new due date/time will display for this item in the loan information pane.

**3.3.3 Renewal from the main menu**

1. Select **Circulation / Renew Loan by Barcode** from the Circulation module menu.
2. In the **Item Barcode** window, scan or type the barcode of the item to be renewed and press **OK**.

3. In the **Renew Loan by Barcode** window, supply a new due date/hour and press **OK**.

![Renew Loan by Barcode window](image)

The new due date/time will display for this item in the loan information pane.

### 3.4 Loaning unbarcoded materials

This lesson describes the Item tab’s **Catalog Record and Create Item** feature, which can be used by staff at the circulation desk to loan unbarcoded materials.

“Unbarcoded” material is material that does not have an item record in Aleph or the item record contains a barcode that is not recorded in the system. When scanning a barcode, the system will display this error message if barcode cannot be found:

![Error message appears when barcode cannot be found](image)

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Use the Aleph Catalog Record and Create Item feature to quickly create a brief bibliographic record and item record for the unbarcoded material. Part of this procedure includes adding a circulation note to the item, which will “pop up” at discharge and tells staff to route the material to cataloging review (or whatever process your unit decides to use to resolve the problem).

**Note:** Use of this feature is not required.

### 3.4.1 Make unbarcoded material ready to loan

Follow this procedure to create a quick bibliographic record and item record for unbarcoded material.

1. Select the Catalog Item option. There are two ways to do this. Select the Item tab, then click the Catalog Item option on the Item bar. Or, from the menu, click Items and then Catalog Item.

2. From the Choose Bibliographic Library window, select HVD01 and click OK.

3. Fill out the Document Information tab (first tab).
Fill out the Tab 1: Document Information

Definition of Document Information Form Fields

Author: Last name, comma, first name, etc.
Capitalize first letters

Title (mandatory): Main title from title page; do not include sub-title.
No initial articles (the, a, der, die, das, el, la, etc.)
Capitalize first word and all proper names

Publication date: Year only

ISBN: If available for books (usually on the reverse side of the title page)

ISSN: If available for periodicals

4. Fill out the Item Information tab (second tab).
Fill out tab2: Item Information Tab

Definition of Item Information form fields

- **Item Barcode:** Scan or type in the item barcode. If you do not put in a real barcode, ALEPH will assign a system-generated barcode number.

- **Sublibrary (mandatory):** Type in your sublibrary’s 3-letter code or choose it from the drop down list.

- **Item status (mandatory):** If sublibrary has been assigned, only the item statuses used by that sublibrary will appear in the drop down list. Most sublibraries will use “regular loan” (01) or “28-day loan” (28) for books.

- **Material type (mandatory):** For books, the material type is “BOOK.” See other material types from the drop down list.

- **Collection:** This is the collection of the item. If sublibrary has been assigned, this list will contain only codes valid for your sublibrary.

- **Item processing status:** Not normally used

- **Call number type:** 0=LC; 8=other. See drop down menu for other choices.

- **Call number:** Type in the call number

- **Description:** Vol. and/or copy information goes here

- **OPAC note and Internal note:** Not normally used by Circulation staff

- **Circulation note:** This note will pop up when the item is being loaned. Each sublibrary should choose what to say here. “Circ. Review” or “Cat. Review” or “Send to cataloging when returned” are possibilities. The note can be 100 characters long.

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5. Once both tabs are filled out, click OK.

If a mandatory field does not have a value, the system displays a red error message at bottom of
the form and places the cursor in the field needing a value.

6. A confirmation window called **Barcode and Record Number** will display.

![Confirmation window](image)

Confirmation window

Double-check author, title, and barcode information. If correct, click OK to complete creation of
a short bibliographic and item record for this material. The newly-created item will appear in the
upper and lower panes of the Item tab.

Now you can charge out the item.

If something is incorrect, click Cancel. This will cancel the current form and you will have to
start from the beginning.

### 3.4.2 Unbarcoded items during charge and discharge

Now, go back to the Loans tab to loan the item as usual. If you did not End Session, then the
patron should still be there. If you did, just scan the patron barcode in again, and loan the
material as normal.

On loan and return, the circulation note appears in a pop-up box.

![Circulation note](image)

Circulation note on “quick cataloged” item

The bibliographic record is visible in the public catalog.

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In the Cataloging module, the record has a note “CIRC-CREATED” that was generated automatically by this process. Bibliographic record contains the “CIRC-CREATED” note

On patron record for “Cataloger” pseudopatron; note the hold request

### 3.5 Purging patron data from loan history

Patron ID data is by default associated with loan and request activity in Aleph. However, after 60 days, patron data is purged from online loan and request histories, as well as from the circulation events table (used to produce daily circulation statistics).

The purge process removes the Aleph ID and the Proxy Aleph ID by changing it to "Purged" 60 days after the history record has been created. The process applies to all patrons in our patron categories 01 through 59, and patron category 61 (carrels). With the exception of carrels, this process is NOT performed on records for pseudo-patrons. Once the ID has been changed to "Purged," it is no longer available to anyone, including OIS. The purge procedure is performed daily, but will only affect a history record that is 60 days old.

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3.6 **Email Icon**

Newly added to Aleph Version 16.02, the Loan Tab now contains an icon that will allow you to email a patron, if necessary. This email is an email directly to a patron and does not replace the regular delivery of circulation products (recall notices, overdue notices, hold requests, etc.) that a patron receives normally.

To use:

Click on the icon found on the Loan Tab: 💌

An email window will appear:

![Email Message Dialog box](image)

Note that the From address will be the library’s circulation department and the patron must have a valid email address in their patron record in order for this function to work.

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Lesson 4: Returns

4.1 Tour of the Return tab

With the Return tab active and the Session node selected (it is the default selection), you can scan barcodes of materials that are being returned. Notice that the patron barcode window is gray and cannot accept input.

During a return session, patron bar is deactivated

Return tab / Session node, after a return is performed

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After an item is returned, the **upper pane** provides information about the patron who borrowed the material, including any fine information. The **lower pane** provides information about the material being returned.

With the **Return tab** active and the **History node** selected, you can see the last 300 (or whatever your service unit decides) returns that have occurred at a workstation. Aleph tells you the ID number, barcode and name of the person who borrowed the materials, the material barcode, the return date and hour, and the due date and hour. Right mouse clicking on the headings of the upper pane will allow you to change what information is displayed in the upper pane during the current login session.

4.2 Performing a Return

Unlike the Loan tab, there is no “End Session” button on the upper pane. It is important to remember to end each session by pressing the F4 key to end the session as all the information (both item and patron) will continue to display until you end session or log out.

1. Open the **Return tab**.

To return an item, scan or enter its barcode into the Item bar search box

2. **Scan or type the barcode** into the item bar and **click Go**.

The item will be returned. Any circulation or in-transit messages will display at this point. Evidence of this return displays under the **History node** of the Return tab.

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Lesson 5: Patron information

This lesson provides a brief and selective overview of functions available under the Patron tab. For more detailed coverage of Patron tab functions, consult the training guide for the class Circulation B: Patrons and Billing: [http://hul.harvard.edu/ois/systems/aleph/docs/train_crb.pdf](http://hul.harvard.edu/ois/systems/aleph/docs/train_crb.pdf)

### 5.1 Tour of the Patron tab

The Patron tab displays information about a patron (ID, expiration dates, Harvard affiliations) as well as information about that patron’s circulation activities (loans, fines, holds placed, etc.). Choosing one of the nodes on the navigation pane (Loans, Cash, Hold Requests, etc.) changes what is displayed in the upper and lower panes.

Access to data under the Patron tab requires a specially-authorized Aleph login.

To open a patron’s record in the Patron tab, use the Patron List to search and retrieve a patron or pull up a patron by barcode – both options are available from the Patron bar. See [Section 5.2.1](#) for instructions on how to display a patron record while in the Patron tab.

#### 5.1.1 Loan node

The Patron tab opens by default to the loan node. The patron’s loan list appears in the upper pane and details of the highlighted loan appear in the lower pane. Back in the upper pane, a series of buttons to the right of the loan list allow you to act on a loan (renew it, change a due date, add a note, declare the item lost, etc.).

![Patron tab / Loans node, with loan list in upper pane and loan details in lower pane](image)

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5.1.2 Hold Requests node

With the **Hold Requests node** selected, the upper pane displays a list of current hold requests for this patron. Detailed information about the selected hold request displays in the bottom pane.

Patron tab/Hold Requests node, with list of holds in upper pane and details in lower pane

Additional item information about holds can be obtained by selecting the Go to Item button on the right hand side of the Hold Request list; this will open the Items Tab.

Details about placing hold requests appear in **Lesson 7** of this Guide.

5.1.3 Local Patron Information node

Under the **Patron Registration root**, selecting the **Local Patron Information node** will display information about a patron that can vary by sublibrary. The upper pane contains a sublibrary list with the “ALEPH Global user” highlighted by default. The lower pane contains details about a patron’s affiliation at the global (default) level.

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5.2 Working with the Patron tab

This section describes procedures for displaying a patron record in the Patron tab and also checking what a patron has out on loan.

Note about security: access to the Patron tab requires special security authorization. Only staff responsible for patron–related activities, including billing, should have such access. Note that the ability to perform loans and returns does not require authorization to access the Patron tab.

5.2.1 How to display a patron record

There are two methods to retrieve a patron record for display under the Patron tab:

- Scan or type the patron’s barcode (Harvard ID) into the Patron bar search box and press Enter (or click the blue arrow button).

- Use the Patron List to search for the patron’s name, barcode, or ID.

Each method is described below.

Use the Patron bar search box to retrieve by Harvard barcode

1. Open the Patron tab. In the left navigation pane, click on the Patron tab or press F7.
2. Position your cursor in the Patron bar search box by clicking in the box or typing the `<Ctrl>` + 5 keys.

3. Scan in or type in the patron barcode (Harvard ID) and press Enter (or click the blue arrow button).

Scan or type in the barcode and press Enter (or click blue arrow)

The patron record will display. The patron’s Loan List will be in focus by default (unless another node was displaying the last time you were on the Patron tab).

**Use the Patron List to search by name, barcode, or ID**

1. Open the Patron tab. In the left navigation pane, click on the Patron tab or press F7.

2. Open the Patron List window. Click the ellipses button on the Patron bar. The Patron List window will display.

3. Select a sort option under **Sort by**… Patron name is the default sort option.

4. Type your search terms in the **Enter Starting Point** box and press Enter (do not press the Select button).

Searching for a name from the Patron List

Revised: March 18, 2009
5. After pressing Enter, the patron that matched your search will be highlighted in the Patron List. If this is the correct patron, click the **Select button** or double-click on the highlighted entry and the patron record will display.

![Patron List]

Selecting the patron record for display

6. If you want to choose a name from farther down the list, scroll down the list using the scroll bar.

The patron record will display. The patron’s Loan List will be in focus by default (unless another node was displaying the last time you were on the Patron tab).

If you close out of the patron list and then need to return to the list, the list will open up to the last patron that you searched.
5.2.2 Interpreting patron data

Checking a patron's loans

In this little procedure, you are looking for any overdue items that are on loan to the patron. The Patron tab should be open and a patron record displaying.

1. Select the Loans node. Use the patron Loan List in Figure 52 below to answer these questions:
   - How many loans are there? The number in parentheses on the node label indicates there are 11 current loans for this patron.

2. Review the list of loans in the right upper pane.
   - How many loans were overdue as of 9/7/06? Look for dates earlier than 9/7/06 under the Due Date column.
   - What is the total amount owed in fines? Technically, no fines are owed yet by this patron. Look under the Fine column to see fines that are accumulating. But these fines won’t become billable until the books are returned.
   - Sublibraries that owns the overdue books? The Sublibrary column indicates Lamont and Widener owns the overdue books.

![Image of Loan List with overdue books highlighted]

Looking for overdue books on a patron’s Loan List

Revised: March 18, 2009
Checking the status of a patron’s Harvard ID card

In this little procedure, you will verify the status of the patron’s Harvard ID card. The Patron tab should be open and a patron record displaying.

1. Select the **Local Patron Information** node.

2. In the lower pane, click the **Local Patron Details** tab to put it in focus.

3. Review the information on this tab, and in the sublibrary list in the upper pane.
   - *What is the expiration date of this patron’s Harvard ID?* The ID expires 09/27/07. You can see this in the **Aleph Global User** entry (upper pane) or in the **Expiration Date** field (lower pane).
   - *Is this patron faculty, staff, or student?* Patron is an undergraduate student. You can see this in the **Aleph Global User** entry (upper pane) and in the **Patron Status** field (lower pane). The Patron Status field displays only the code (13) -- click the list arrow next to this field to see the code’s description.
   - *What school is he affiliated with?* The school of Arts and Sciences. The code “AS” in the field **Patron Type** stands for this school. If you don’t recognize the type code, click the list arrow next to this field to see the code’s description.

Checking the status of a patron’s Harvard ID

Revised: March 18, 2009
Lesson 6: Item information

This lesson provides a closer look at the functions of the **Item tab** in the Circulation module.

Use the Item tab to view, update, and place hold requests; view and renew loans; view item circulation status and history; and restore previous values.

### 6.1 Tour of the Item tab

#### 6.1.1 Item bar

When the Item tab is selected, the Item bar is activated (and the Patron bar is deactivated).

![Image of Item bar options]

**Options on the Item bar**

The **item barcode search** is **NOT case sensitive**. Letters that you type in the search box will always display in upper case. Other details about the Item bar appear in [Section 2.2.4](#) of this Guide.
6.1.2 Navigation pane

There are two root nodes, Items List and Item. The **Items List node** displays all items associated with the title, whereas **Item node** displays circulation information for the item that is highlighted on the Items List.

Note that each node on the Item tab navigation pane can be activated by a keyboard combination. To activate a node from the keyboard, press Ctrl+Alt and the letter that appears in brackets next to a node label. For example, Ctrl+Alt+h will activate the Hold Requests node.

The Item tab also offers Functional and Overview modes. The **Functional Mode** shows the functions available on that tab. **Overview Mode** displays an “overview tree” of a title that allows you to see and move within the title’s record group (a bibliographic record and all its linked holdings, items, orders, etc.). For example, if while viewing an item from the Item tab, you decide there is a need to edit the associated holdings record, you could switch to Overview mode, select the holdings record and “push it” into the Record Editor of the Cataloging module.
6.1.3 Items List root node

Under the Items List root node, you will find information on all of the items attached to a bibliographic record, for all sublibraries. Also available here are functions that are performed on individual items, such as placing hold requests, recording lost items, etc. Also part of this root node is history of loans, holds, and record modifications for all items.

**Items list**

The **upper pane** displays a list of items attached to the bibliographic record, for all sublibraries. If you retrieved this information by a barcode search, the individual item record you searched for will be highlighted on the list.

Next to the List of items is a parenthesis showing how many items are on loan and how many items there are in the Items List.

The **lower pane** contains information specific to the item highlighted in the upper pane.

---

**Features of the Items List**

You can **change column headings** to control the information that displays for an item. Move your cursor over the existing column header and right-click to display the Header Configuration window. Then select/deselect header options and click OK. The columns will change, and those changes will remain persistent on your workstation.

Revised: March 18, 2009
You can also filter the Item List to only see those items that are currently on loan by checking off the **Loan Filter box** underneath the Item List tab:

**Item List functions**

- **Booking Req**: not used at Harvard.
- **Photo Request**: not used at Harvard.
- **Hold Request**: places a hold on the highlighted item. A Request will be placed only if the patron has hold privileges and if the item can be requested, according to the sublibrary’s policy tables.
- **Claim Return**: Sometimes, a patron claims that s/he returned an item, although there is no record of the return. To register this claim, click the Claim Return button. You will be asked to confirm that the item was claimed returned. Instead of a due date, the item will now appear as "Claimed Returned". After a set number of days, this “claimed returned" status will revert to “lost” if the item is not found and discharged. The number of days is controlled by the sublibrary’s policy table.
- **Lost**: declares a loaned item as lost. You will be asked to confirm that the item is considered lost. A "Lost Item Bill" will be sent automatically to the person who borrowed (and lost) the item. The message "Lost" will display in the Due Date column on the item list.
- **Print Slip**: prints an item slip.
- **Edit Item** “pushes” the selected item record into the Items tab of the Cataloging module for editing.
- **Refresh**: reloads the items list from the server so the display reflects any changes you have made.

Revised: March 18, 2009
**All Items History node**

The All Items History node provides information about previous loans, holds, and record changes for all items on the Items List.

All Items History node contains historical information about loans, holds and record changes for all items.

**6.1.4 Item root node**

Options under the Item node allow you to view and modify specific aspects of an individual item record.

**Item root node**

When an individual item record is highlighted on the Items List, clicking on the Item parent node will display details about the item in an expanded upper pane.
Selecting the Items root node display details about the item highlighted on the Item List.

The functional buttons on the right allow you to perform specific tasks related to the selected item. These are the same functions available from the Items List (see Section 6.1.3 for function definitions).

**Hold Requests node**

When the Hold Requests node is selected, the upper pane displays any current hold requests on the selected item. The lower pane displays a two-tab hold request form with details about the hold. An operator with appropriate authorization can modify aspects of the hold request from this form.

Revised: March 18, 2009
Details available from the Hold Requests node

**Hold Request node functions**

- **Delete**: deletes the selected hold and removes the entry from the List of Hold Requests.
- **Go to Patron**: takes you to the list of holds for the patron associated with the selected request (takes you to the Hold Requests node of the Patron tab).
- **Letter**: print out a letter notifying the requesting patron that the item is available for pickup. Use this option only if there is some kind of failure with the automatically-generated notice. “Item Available” notices are generated at the point a requested item is returned and may be printed or sent by email if there is an email address in the requesting patron’s record.

**Photocopy requests node**

Harvard has not implemented Photocopy functions.

**Loan node**

The Loan node displays details about the loan of the selected item (if it is on loan) as well as details about the borrower and any blocks in place.
Loan node provides details of the loaned item that is highlighted on the Item List

**Loan node functions**

**Go to Patron:** takes you to the loans node of the Patron tab (for the patron who borrowed this item), with information about the loan of the selected item highlighted.

**Renew:** will renew the loan of this item to current borrower (unless there are blocks, recalls, or your sublibrary’s renewal limit is exceeded). System will display a Renew Loan window, where you can accept the defaults or change the due date and hour, then click **OK.** System will then adjust the due date in the Loan node display.

**Circ Log:** Harvard has not implemented the Circ Log function.

Prompt to renew a loan

In the example above, the item has been recalled so any attempt to renew will lead to an “Item has holds” message.

Revised: March 18, 2009
History node

The History node provides a history of circulation activity (loans, holds, changes to the item record) for the selected item. Remember that this is history; that is, information reflects previous activity and not current activity (for example, current loan).

The figure below shows the **Item Changes** tab, which displays the log of changes made to the selected item. The “Cataloger” column contains the login user name of the operator who made the change.

Revised: March 18, 2009
**Item Changes tab functions**

- **View**: displays the item form as it looked before the change that was logged in the currently highlighted line.

- **Remove**: deletes the log entry permanently. You will get an alert box asking if you are sure you want to do this; generally the answer is no.

- **Restore**: brings back the item record settings associated with the highlighted log entry.

**Circ Summary node**

The Circulation Summary node provides a summary about current and historical circulation activity.

The first tab is Current Summary, which displays the number of hold requests and loans of the item, along with item’s current status.

Circ summary, Current Summary (tab 1)

The second tab is History Summary, which lists events for statistical use. Use the Summary From/To date fields in order to limit the summary to a particular range of dates and then click Refresh.

Revised: March 18, 2009
Circ Summary, History Summary (tab 2)

**Booking** - Harvard has not implemented Booking node functions.

**Record Maintenance** - Harvard has not implemented the Record Maintenance node functions.

6.1.5 Bibliographic Info root node

Brief bibliographic information associated with the item displays when the Bibliographic Info root node is selected.
6.2 Working with the Item tab

This section describes procedures for displaying an item record in the Item tab and also for checking the loan status of an item.

6.2.1 How to display an item record

In the Circulation module, there are three methods to display an item record under the Item tab.

- **Retrieve an item by its barcode** using the Item bar search box,
- Use the **Search tab** to retrieve the bibliographic record, then push it to the Item tab, and
- Use the Item List by Call Number, from the Item bar (not recommended).
In addition, it is possible to push an item record from other Aleph modules into the Item tab of the Circulation module.

This section describes the two recommended methods of displaying items that are available within the Circulation module.

**Retrieve an item by its barcode**

1. Open the Item tab. In the left navigation pane, click on the Item tab or press F8.
2. Position your cursor in the Item bar search box.
3. Scan in or type in the item barcode and press Enter (or click the blue arrow button).

![Scan or type in the barcode and press Enter (or click blue arrow)](image)

The item you requested will display on the Items List, along with all other items associated with that bibliographic record, for all sublibraries. The item you specified will be highlighted.

**Retrieve an item by using the Search tab**

1. Open the Search tab -- click on the Search tab to select it or press F9.
2. Perform a Find or a Browse on author, title, call number or whatever access point you know. Look at your search results under the Show node.
3. Highlight the appropriate record in the Brief List.
4. In the lower pane, click the **Circulation** button. The Item tab will open, and a list of the item records for this title will display. If there are no item records available, you will get the message “There are no items attached to this doc”.

Revised: March 18, 2009
6.2.2 Interpreting item data

Checking an item’s loan status

In this little procedure, you are checking on the availability of all copies of a work, including due dates and whether any copies have been requested. The Item tab is open and items for the work have been retrieved.

1. Click on the Items List node or type <Ctrl> + <Alt> + m to put it in focus (if it isn’t already in focus).

2. Review information on the Items List in the upper pane. Use the Item List in Figure 67 below to answer the following questions:

   - How many copies are there of this work? How many of these are on loan? There are 2 copies, 1 of which is on loan. A quick way to determine this is to look at the numbers in parentheses next to the Items list node label (1/2).

   Another approach would be to count entries on the Items List (upper pane). To determine those on loan, look for a date in the Due Date column.

   - What copies is currently available? 1 copy belonging to Lamont Library To determine this, find the item that has no date in the Due Date column, then look in the Sublibrary column for the holding library.

Revised: March 18, 2009
• Has a request been placed for any of these copies? Yes, the Widener copy has one request on it. Look for a number in the Requests column.

Checking the loan status of items on the Items List

3. On the Items List, click to select the Widener item record with the request. Then click on the Loan node (or press Ctrl+Alt L). A detailed display of information about this loan appears in the right pane. Use the Loan node display in Figure 70 below to answer these questions.

• When was the request placed? 9/28/2006. Look in the Recall Date field.

To determine who placed the recall, you would need to check the Hold Requests node.

• What type of request is it (Recall or Hold)? This request is a recall. Look in the Recall Type field. A recall is a request that can cause the system to recalculate the original due date of the item. A hold request does not affect the item’s due date.

• What is the item’s due date? The original due date was 2/10/2007, but because of the recall, the system calculated a recall due date of 10/08/2006. So the effective due date is 10/08/2006. In the loan details display, look for the Recall Due Date and the Original Due Date fields.

Revised: March 18, 2009
Checking loan details for a specific item, under the Loan node
Lesson 7: Requests (recalls, holds)

This lesson covers placing, updating, deleting, and managing hold requests, both by staff at the circulation desk and by patrons using the HOLLIS Catalog.

Terminology

In Aleph, the term “Request” refers to placing a hold or recall against an item.

Recalls may cause the system to shorten the original due date (when appropriate) and prevent renewal by the original borrower. Recalls will send a notification to the original borrower and a notification to the requestor when the item is returned.

Holds will prevent renewal of the item but will not recalculate the original due date. No notification is sent to the current borrower.

A recall request shows as “Requested” or “In process” until a nightly job runs that turns the request into a recall, changes the due date when appropriate, and sends a letter to the original borrower who has the item.

Request methods

There are several methods available to staff for placing a recall on a book out on loan.

- If you know the barcode for the patron and the item, the quickest method is to work from the Requests menu (described in Section 7.1.1).
- Or, you can place a request from the Item tab by opening the item and using the Hold Request feature next to the Item list (described in Section 7.1.2 below).

Also, patrons can request materials on loan while using the HOLLIS Catalog. To do this, a patron must have a valid Harvard ID/PIN and must be logged into the Catalog using the “Your Account” feature. This is described in Section 7.3 below.

7.1 Staff-initiated requests

7.1.1 Placing requests from the Requests menu

The most direct way to place a request is via the Requests menu option in the Circulation module.

1. From the main menu, select Requests > Hold Requests > Create Hold Request (or press <Ctrl>+r).

Place a hold request using the Requests menu

Revised: March 18, 2009
2. The **Enter Patron & Item Information form** will display. Enter the item and patron barcodes, then click OK.

![Enter Item & Patron Information form](image)

Enter barcode or ID of patron and barcode of item to be requested

![Search for an Administrative Record](image)

Searching for the item to be requested

If you do not know the item barcode at this point (often the case), click on the arrow at the right end of the Item Barcode field to activate the “mini-Find” function (Search for an administrative record). **Type in the most unique information** you have about this item and click the **Search** button. Mini-find results are limited to 100 records, so a broad search yielding more than 100 hits will fail. If you are unable to get results from mini-Find, you can use the Search tab.

If you get multiple hits from a search, a **Brief List** of results will display. Highlight the appropriate record and click **Select** to display the **Item List** for this record.

If you get a single hit from a search, an **Item List** will display.

Highlight the appropriate item and click on **Select**.

3. After you have entered the item and patron barcodes and clicked OK, a two-part **Create Hold Request** form displays. Fill out this form (see details below) and click **OK**.

Revised: March 18, 2009
Note: after you complete a request, system will redisplay the Enter Patron and Item Information form so you can place another request. Click on Cancel or close the window to end the request.

Filling out the Create Hold Request form

In the Create Hold Request form, the system supplies details about the item and the patron.

Under From Date and To Date, note that the span of these “interested in” dates will default to six months but can be changed by the operator. For rush recalls on reserves items, placed via the web reserves module, the To Date will be the course end date (as coded on the course record).

Under Recall Type, select 01 for Regular Recall. Rush recall is generally used for reserves. No recall is used to place a hold (renewal of an item is prevented but due date is not recalculated).

Under Priority, note that the default will be 30 (regular priority). Priority determines the position of a request in a queue of requests.

The rest of the first tab on this form is optional and should be filled in according to local policy. Staff should ignore the second tab (Item Filter Information) since this feature is not used at Harvard.

7.1.2 Placing requests from the Items tab

This is a variation on the procedure described in Section 7.1.1 (Using the Requests menu option). Only difference is that you identify the item (and the patron) using options within the Item tab.

1. Select the Item tab.

Revised: March 18, 2009
2. **Display the item.** If you know the item’s barcode, enter it into the search box on the Item Bar and click the blue arrow (or press Enter).

   ![Retrieve item by barcode](image)

If you do not know the item’s barcode, **use the Search tab** to search for the item. Browse or Find the item by author, title, call number, etc.

3. **Start a request** for the item.

   You should be on the Item tab, with the Items List displaying in the upper pane. Click to select the item to be requested. Then click the **Hold Request button** (to the right of the Items List).

Revised: March 18, 2009
Placing a hold request form the Item List of the Item tab

Enter the barcode or ID of the patron placing the request.

Entering the requesting patron’s barcode

Revised: March 18, 2009
Fill out the **Create Hold Request** form (details below) and click **OK**.

In the **Create Hold Request** form, the system supplies details about the item and the patron.

Under **From Date** and **To Date**, note that the span of these “interested in” dates will default to six months but can be changed by the operator. For rush recalls on reserves items, placed via the web reserves module, the **To Date** will be the course end date (as coded on the course record).

Under **Recall Type**, select 01 for **Regular Recall**. **No recall** is used to place a hold (renewal of an item is prevented but due date is not recalculated). **Rush recall** is generally used for reserves. Note: if you use the reserves request function, place these requests from the web reserves module only.

Under **Priority**, note that the default will be 30 (regular priority). Priority determines the position of a request in a queue of requests.

The rest of this form is optional and should be filled in according to local policy. Staff should ignore the Item Matching Filter section at bottom since this feature is not used at Harvard.

Revised: March 18, 2009
7.1.3 Results of a request

Recall request

- When the recall is placed
  - that night, a job activates the request
  - original due date may be recalculated
  - recall notice is generated (will be available in sublibrary’s print queue next day)
  - staff member prints the notice and sends it to original borrower

- When book is returned
  - pop-up warns circulation staff that book is requested
  - system generates available notice for requestor “on the fly”; will be printed or emailed based on local workstation setup

- When book is loaned to requestor
  - original recall request is deleted by the system

Hold request

- When the hold is placed
  - that night, a job activates the request
  - original due date IS NOT recalculated

- When book is returned
  - A pop-up warns circulation staff that book is requested
  - system generates available notice for requestor “on the fly”; will be printed or emailed based on local workstation setup

- When book is loaned to requestor
  - original recall request is deleted by the system

Revised: March 18, 2009
7.2 Viewing/Updating Requests

There are two places in the Circulation module where staff can view and modify requests. A view of all hold requests for an item is available from the Hold Requests node of the Item tab. A view of all hold requests for a patron is available from the Hold Requests node of the Patron tab.

From a list of hold requests, you can delete or modify a request.

7.2.1 Viewing hold requests from the Item tab

1. Select the Item tab.

2. Display the item. If you know the item’s barcode, enter it into the search box on the Item Bar and click the ellipses button (or press Enter).

   Retrieve item by barcode

If you do not know the item’s barcode, use the Search tab to search for the item. Browse or Find the item by author, title, call number, etc.

Select the item from your search results (the Brief List) and click the Circulation button in the lower pane. This will open the item in the Item tab.
3. Highlight the item on the Item List, then click the Hold Requests node (on the navigation pane).

The **List of Hold Requests** displays in the upper pane on the right. Requests are listed by priority (highest priority at the top) and within the same priority, oldest requests are at the top.

In the lower pane, details display for the hold request that is highlighted in the upper pane.

From the Items Tab, you can view a Hold Request from the Hold Request Node:

![Hold Request Node](image)

Hold Request Node

If you wish to see older or future hold requests on the item, you can check off the Non Active requests button to see this information:

---

Revised: March 18, 2009
7.2.2 Viewing hold requests from the Patron tab

1. **Select the Patron tab** and retrieve information about the patron. Do this by scanning/typing the patron’s ID barcode into the box on the Patron bar, or by searching from the Patron List.

   ![Barcode Scanner]

   **Option 1:** Enter patron barcode or ID in the box, click the blue arrow or press Enter.

   **Option 2:** Click the ellipses button to display Patron List, then search by name, ID, or barcode

   **Options for opening a patron record**

2. Select the **Hold Requests node** to display the list of holds for this patron. Click on an individual request to see details about it in the lower pane.
Display of requests placed by a patron, from the Patron tab

Hold requests are listed in priority order (highest priority at top) and requests with the same priority are listed in the order they were placed, with oldest requests first.
7.4 Patron-initiated requests from the OPAC

Patrons can request retrieval of an item from the Harvard Depository or recall an item checked out to another borrower. To place an HD or recall request a patron must have a Harvard ID and PIN and must have borrowing privileges at the library that owns the item.

To place a request, from the full record display, the patron must click on an Availability link, either for “All Locations” or for a specific Location. In the Availability window, patron clicks the Request link for the item. Patron will be prompted to supply a Harvard ID and PIN if not already logged in via Your Account. From the Request window patron clicks Send Request to place the request.

In the OPAC, requests are placed from the Availability window

A patron can view and cancel current requests by selecting the Your Account option from the main menu.

List of hold requests from My Account View

Revised: March 18, 2009
Lesson 8: Handling lost and claimed returned materials

This lesson covers procedures used to declare materials lost, claimed return, or found.

8.1 Declaring material lost

In Aleph, materials that were circulating and not returned have a due date of lost, rather than an item status of Lost. The material is still listed as checked out to a patron, but with this special due date.

Aleph can be set up to automatically declare a loaned item lost after being overdue for a set period of time. Or, the system can be set up to notify the sublibrary when a loaned item is eligible and a staff member would manually declare the item lost. This is a configuration choice at the sublibrary level.

There are some occasions when a patron will come to the desk and state that they have lost a book, or that their car was stolen and the book was in it. To manually declare a loaned item as lost, open the patron’s record, select the material from their list of loans, and then click on the “Lost” button.

Use this patron record procedure to declare an item lost

1. Click on the Patron tab on the left navigation pane.

2. Type in or scan in the patron’s barcode (ID number) and press Enter.

   Type or scan in patron’s barcode/id number and press Enter.
   Or, click the ellipses button and perform a search from the Patron List window.

   Retrieving a patron record by barcode from the Patron search box

The patron record will display and by default, the Loans node should be in focus (unless another node was in focus the last time you viewed a patron record).

3. Under the Loans node, view the list of loans in the upper pane. Click to select the loaned item that has been reported as lost.

   Information about the highlighted item will appear in the lower pane. Use this information to confirm that the highlighted item is the one that the patron wants to declare lost.

4. Declare the item lost by clicking on the Lost button (on the right side of the upper pane).

Revised: March 18, 2009
Under the Loans node, select the item that has been reported as lost and click the Lost button.

5. A **Confirm Lost** window will display. Click **Yes** to proceed.

Figure 90 Confirming the declaration of lost
6. A **Replacement Cost** window will display. Sublibraries have set up default values. If this amount does not suit your needs, type in the preferred amount and click **OK**.

Specify a replacement cost

7. The system will generate a **Lost Material Bill**.

A bill for replacement charges is generated automatically

Revised: March 18, 2009
If your workstation is set to print preview mode, the bill for the replacement charge will display on the screen with an option to Print or to Close.

If your workstation is not set to print preview, the bill will immediately print out at the printer connected to your workstation.

Note that in the upper pane of patron’s Loan node, the due date has been changed to “Lost”. However, the display of due date in the lower pane does not change.

Note also that the accumulated overdue fine remains. Aleph will only bill for the overdue fine if the “lost” item is returned.

Result of declaring an item list: Due Date is set to “Lost” in upper pane, but original due date is preserved in lower pane loan details.

In the HOLLIS Catalog, “Lost” will appear in the due date column for this item in both the holdings and availability displays.
8.2 Declaring material “Claimed Returned”

This lesson covers declaring overdue material as “claimed returned” and declaring lost material as “claimed returned”. It also covers declaring these materials “found”. This process is nearly identical to declaring material lost in that the due date for material is changed, in this case to “Claimed Returned”.

“Claimed Returned” is when a patron claims material is returned although a loan is still active and the material may not be on the shelf. Using the claimed returned function keeps the material checked out to the patron and stops fines from accruing.

After a certain number of days, all items with a Due Date of “Claimed Returned” will convert to “Lost”. The number of days before this happens is determined by each library and equals the number of days that it takes for overdue material to be converted to “Lost”. The process of “Claimed Returned” turning into “Lost” can be stopped, if a sub-library requests that it not happen, and this is something that circulation managers and libraries will decide.

8.2.1 Declaring overdue material “claim return”

1. Click on the Patron tab on the left navigation pane.

2. Type in or scan in the patron’s barcode (ID number) and click Go or press Enter.

Retrieving a patron record by barcode from the Patron Bar

The patron record will display and by default, the Loans node should be in focus (unless another node was in focus the last time you viewed a patron record).
3. Under the **Loans node**, view the list of loans in the upper pane. Click to select the loaned item that has been claimed returned.

   Information about the highlighted item will appear in the lower pane. Use this information to confirm that the highlighted item is the one that the patron wants to declare claimed returned.

4. Once you have selected the correct item in the upper pane, click the **Claim Return button** on the far right of the upper pane.

Under the Loans node, select the item that has been reported as claimed returned and click the **Claims Returned button**

5. **A Confirm Claim Return** window will display. Click **Yes** to finish.

When the process is complete, the loan node of the patron record redisplay. In the upper pane of patron’s Loan node, the item’s due date has been changed to “Claimed Returned”. However, the display of due date in the lower pane does not change.
Note also that the accumulated overdue fine remains. Aleph will only bill for the overdue fine if the “claimed returned” item is returned.

Confirming the declaration of claimed returned

Item’s due date is changed to “Claimed Returned” in the upper pane, but original due date remains in the lower pane loan details

Note that the accumulated overdue fines remain

Original Due Date information from Patron Tab

Revised: March 18, 2009
In the HOLLIS Catalog, the item now has a due date of “Claimed Returned”.

<table>
<thead>
<tr>
<th>Location</th>
<th>Call Number</th>
<th>Description</th>
<th>Due date</th>
<th>Item status</th>
<th>Wait list</th>
<th>Note</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lamont</td>
<td>RC280.B8 W47 1992</td>
<td>Claimed returned 28-day loan 1</td>
<td>32044051842136</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lamont</td>
<td>RC280.B8 W47 1992</td>
<td>Not checked out 28-day loan</td>
<td>32044046776159</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In the OPAC, “Availability” window lists the item as “Claimed Returned”

8.2.2 Declaring “lost” material “claimed returned”

“Claimed Returned” material converts to “Lost” after a set period of time. “Lost” is a kind of an end-point for a loan, and the only thing that can trump it is a return. So, if you want to move back a step from “Lost” to “Claimed Returned”, you have to do one of several workarounds.

- You could reset the clock by returning the item, re-loaning it to the patron, and claiming returned—which has fine implications, as there is the possibility that they could be billed for the material again.

- You could discharge the material, and then charge it to a Claimed Returned Pseudopatron — which would save the fine information, but the original patron information might be lost unless a further workaround involving the note fields was devised.

- You could also tell the patron that there is nothing you can do unless they can go to the stacks and bring back the item right now.

These are only three ways of dealing with the problem, and more may be devised. As there is no “Best Practice”, any methods devised will be local or shared.

8.3 Declaring material found

This section describes procedures to follow when material that has been declared “lost” or “claimed returned” is found.

8.3.1 Material found in the book drop

When material that has been declared “Lost” is returned in Aleph, the pop-up Item Return message will warn you about its status.

Pop-up warning that the item in this Return session was originally declared lost

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Click **Yes** and the system will return the material. The default is No, so pressing Enter will cancel the return.

The Return tab redisplays after you acknowledge that the item was declared lost, but there is nothing to indicate what if anything has happened.

But, if you go to the Patron tab and check the Cash node, you can see that the Lost Material—Handling and Lost Material—Replacement fee were forgiven, but any fines (Lost Material—Notice) would not have been forgiven.

8.3.2 “Claimed Returned” materials in the book drop

When material that has been declared “Claimed Returned” is found in the book drop and returned, the pop-up Item Return message will warn you about its status.

Click **Yes** to acknowledge that the item has been claimed return. The Return tab redisplays. A check of the patron’s loan list shows that this item is no longer present. If there were overdue fines pending for this item at the time it was “claimed returned”, these will now be billed to the borrower.

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8.3.3 Missing materials during a loan

This is a description of what happens when a patron brings material to the desk that is listed as being on loan to someone else, or has been declared lost, claimed returned, or missing.

If material is on loan to patron A and patron B brings the material to the desk to check out, and this material is not overdue, lost, or claimed returned, there will be no notification or error messages.

If a patron brings to the desk from the stacks material that was declared “lost” or “claimed returned” an error message will display.

![Item Loan]

You will get this pop-up warning when trying to loan an item declared lost or claimed returned

You must return the item, then deal with any errors and dialog boxes that pop up. Then you can loan the item once again.
Lesson 9: Adding circulation notes

There are four types of note fields available on the item record. Three of them – **OPAC**, **Circulation**, and **Internal notes** – can be added or edited from the Item module or added when using the Catalog Item feature in the Circulation Module. The fourth – **Loan note** – can be created in the Circulation module as the item is circulating.

### 9.1 Types of notes

- **Loan notes** can contain up to 30 characters; cannot be set up as alerts; and only display in the lower pane when the item is returned. The button for Loan notes appears in the lower pane of the Loan tab after a successful loan, but use of this note is not advised as these notes will print on all notices sent to the patron regarding this loan. This note is part of the loan record – note will disappear when the item is returned.

Loan notes are added to the item record by clicking here:

![Loan notes button](image)

Loan notes can be added from the Loan tab.

- **OPAC** notes can contain 130 characters and will display in the public OPAC at the holdings/item sub-library display level. An OPAC note must be added in the items module. You cannot add these notes in the Circulation module. Notes must be added and deleted manually. It is thought that the likeliest use of this field would be by Technical Services or Preservation staff who may wish to use the note field to add (more or less permanent) information about the item that is desirable for display in the OPAC.

- **Circulation notes** can contain up to 200 characters. This note will display as a pop-up message if “Display Circulation Note” has been selected on the set up menu for loans and/or returns (from the main menu, ALEPH>Options). The Circulation note is on the “General Information 2” tab of the item record. This note is created and updated from the Item tab of

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the Cataloging module. The Circulation note cannot be associated with any alert sounds on loan or return.

Circulation notes remain in an item record until removed, so only information that either remains as a permanent part of the record, or comments that will be removed as part of an action taken on the item should be entered as a note. The Circulation note is likely to be used by a number of sub-library departments. The Circulation Managers Group recommends that usage be standardized at the local or sublibrary level. Items in HULPR that were flagged for circulation, cataloging, or preservation review were converted with those messages in this note field.

- The **Internal note** can contain up to 200 characters. Internal notes can only be added to the item record in the Items tab of the Cataloging module. The note must be added and deleted manually. It is generally intended as an optional free text note; but in the case of serial item records created in Aleph, the internal note field will be automatically populated with text from the Item Arrival Form in the serials module.

Text will convert from HULPR item records into the Aleph Internal note in the following order. 1) Any text from the HULPR item record note field; 2) data entered into HULPR item record reporting fields; date from item record report code; HD and/or Preservation report codes; and, 3) Any barcodes from HULPR item records that are not included in Aleph barcode field.

### 9.2 Adding notes to an item (from the Items tab)

The following procedure can be used to add a circulation, OPAC, or internal note to the item via the Items tab in the Cataloging module. This procedure starts in the Circulation module.

1. Open the Item tab by clicking on it.

2. Retrieve the item of interest. In the Item bar search box, scan in or type in the item’s barcode and press Enter.

3. In the upper pane, click to select the item of interest, then click the **Edit Item button**.

In the Circulation module / Item tab, highlight an item and click Edit Item to open the item for editing in the Cataloging module

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This will open the item for editing in the Cataloging module Item tab.

4. In the lower pane, click on the second tab of the item form (General Information 2) to open it.

5. Position the cursor in the **Circ. Note** field and type the note. Click the **Update button** to save this change to the item record.

The Item List redisplays, but now there is a red check in the **Notes column**. If you do not see a Notes column, right click on the column header area and select this column for display.
After adding the circulation note, a red check appears in the Item List entry for this item (assuming you have the Notes column turned on)
When this item is loaned or returned, a pop-up window with the circulation note will appear.

Circulation note will appear as a pop-up during loan and return

This circulation note will continue to pop up during loan and return until the note is deleted from the item record.
Lesson 10: Updating the item record

This lesson covers how to change item information from the Circulation module. Generally, item editing should be done in the Item tab of the Cataloging module. But the Circulation module does offer a very limited set of editing options.

A subset of item record fields can be changed using the menu option Items > Change Item Information. These include:

- Sublibrary
- Item status
- Item processing status
- Remote storage ID
- Collection
- Call number
- Call number 2

Changes to item record fields made from the Circulation module are by default temporary (unless you select a checkbox indicating that changes are permanent). Temporary changes will revert back to original values once the material is returned.

This function can be used to change many item records at once. After new values are specified, it is possible to change multiple items by scanning the barcode, clicking OK (or pressing Enter), and then scanning another barcode.

How to change item information from the Circulation module

1. From the main menu, select Items and then Change Item Information.

   Note: you can start this function from anywhere in the Circulation module.

   Selecting “Change Item Information” from the main menu

2. In the Change Item Information – Step 1 window, make the necessary changes to one or more fields and click OK.

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Note: you MUST supply a sublibrary value so that drop-downs for other fields in the form contain appropriate options.

In the following example, the operator has selected the WID sublibrary and changed the item status to “01” (regular loan).

Completing the form to change item information

If you want these changes to be permanent, check off the Permanent Change box. Otherwise, these changes are only temporary and will revert to original values when the material is returned.

3. In the Change Item Information – Step 2 window, verify the changes and scan or type in the barcode of item to be changed. Then click OK to make the change.

Verify changes, then supply barcode of item to be changed

The Step 2 window continues to display, but the entry box at bottom is now empty, awaiting another barcode. To apply this change to another item, scan in the next barcode and click OK.

When you are done, click the Close button. System will return you to the Step 1 window in case you need to make another set of changes.

4. Click the Close button to end this process.

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Lesson 11: Circulation self-service in the HOLLIS Catalog

The HOLLIS Catalog offers several circulation-related “self-service” options to users. The **Your Account** option gives users access to their library circulation records, and allows them to renew and request items online. Access to Your Account requires a Harvard ID and a PIN number.

**To activate Your Account options**, click **Your Account** on the main menu and supply a Harvard ID and PIN when prompted. You will be returned to the HOLLIS Catalog search screen. Once logged in, circulation self-service features will be available.

"Your Account" display in the OPAC allows patrons to see their loans, requests, and fines owed.

To **view your circulation activity** (information about materials checked out, existing requests, existing fines), click **Your Account** on the main menu (after you have logged in).

To **request retrieval of material from HD or recall material checked out to another borrower**, first log in to Your Account. Then locate the record describing the material, display the **Availability window** for the specific copy and click the **Request** option. More information about patron-initiated requests is available in Lesson 4 of this Guide.

More information about Your Account options is available from HOLLIS Catalog online help.

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