



Circulation Workflows in ALEPH v. 18

Note: to be used with the List of Circulation Data for Training (USMXX) – ALEPH version 18

Connect to the Circulation Module

Make sure you connect to the **xxx50** (Administrative) library

Before starting, you need to make sure that some Circulation defaults in your Circulation client will match the steps in the workflows. To do that:

- Click on the menu options ALEPH | Options | Set up Loan Options
- Check the first three boxes: *Display Circulation Note*, *Display "Item(s) on Hold for this Patron"* message, and *Display "Item is requested" Message*
- Click on the menu options ALEPH | Options | Set up Return Options
- Check the following boxes: *Display List of Hold Requests*, *Display "Item is not on Loan" Message*, and *Display Circulation Note*

1. Create a New Patron Record

Click on **Patrons** in the Menu bar, select **New Patron**

or, enter **CTRL + F7**

or, Click on  in the Patron Bar (far right side)

A. Fill in the Patron Registration Form to create the Global Patron Record

Use the following convention for the first four boxes in the form in order to recognize your new patron record:

EXAMPLE

User ID: 0101 (where 0101 is the month and day of your birth)

Pin code: P0101 (P + MMDD)

Barcode: B0101 (B + MMDD)

Barcode Verification: BV0101 (BV + MMDD)

>> Note the patron's codes (all four) for future reference:

Patron ID	_____
Pincode	_____
Barcode	_____
Barcode Verification	_____



Other mandatory fields to fill in are: Name, Language, and Profile.

Click on "Update" when you are finished.



B. Create the Local Patron Record

On the left pane, under Patron Registration, click on [O] Local Patron Information.

Click on Tab 1. Local Patron Details
Complete the Patron Status field.

Click on Tab 3. Local Privileges.
Click on the Get Defaults button.
Notice how default permissions will be assigned by the system.

Now click back on Tab 1. Local Patron Details
Notice that a default Expiration Date and Photocopy Charge will have been assigned as well.
Those are the only fields you need in this workflow.
Click on the Update button to finish the process.

C. Complete an Address for the Patron

On the left pane, under Patron Registration, click on [D] Address Information.
Complete address fields as desired, and click on Update.

2. Loaning and Returning

A - Loan a Book

Click on the **Loan Tab** or press **F5** to show the **Loan Session**.

Enter a Patron ID in the Patron Bar or use the *Patron List* to search for a patron.

Enter an item barcode.

Note: use items from the columns "Items not on Loan WID (01)" and/or "In Library Use (02)" in the List of Circulation Data for Training

Hit "Enter" to complete the loan transaction. You will see the Loan Transaction in the lower pane of your screen.

Enter a second item barcode if you like.

Note that a loan receipt will not be printed because that option was not checked when you set up the Loan Options.

B - Return a Book

Click on the **Return Tab** or press **F6** to show the **Return Session**.



Return the book(s) we checked out above by entering the barcode in the Item Bar and hit “Enter”.

Note that a return receipt will not be printed because that option was not checked when you set up the Return Options.

3. Place a Hold Request

Pull up a barcode of an item on loan using the **Item Bar**

Note: use items from the column “On Loan (Z36_Status L) for hold request” in the List of Circulation Data for Training

Click on Hold Request from the *Items List* (upper right pane) and enter your Patron ID or, choose your patron from the Patron List, and click “OK”.

Complete the *Create Hold Request* form; select options for the Pickup Location, Recall Type and Priority pull-down menus. Click on the “OK” button to submit the hold request.

On the left pane, under [I] Item, click on [H] Hold Requests

Look at the List of Hold Requests on the right pane, and note the Status and Priority listed.

Note: From the top menu bar, you can also select Requests | Hold Requests | Create Hold Request, or use CTRL + R as a shortcut.

4. Cash Transactions

A - Fines

In the **Patron Tab**, click on the **Cash node** and enter a Patron barcode.

Add a new cash transaction by clicking on the “New” button. Complete the following fields in the *New Cash Transaction* form: Sum, Debit and Description. Click on OK.

Click on the Waive button or on the Partial Waive button for one of the transactions:

- If you clicked on Waive: fill in the Waive Text and click on the OK button.
- If you clicked on Partial Waive: fill in the Partial Waive Text and the Partial Waive sum, and click on the OK button.

If there are any transactions left on the list, pay all of them by clicking on the “Pay Sum” button or, select one or more entries and click on the “Pay Selected” button.



- If you clicked on Pay Sum: select a Payment mode and click on OK.
- If you clicked on Pay Selected: select a Payment mode, enter an amount in the Pay Sum field (optionally), and click on OK.

B - Declare a Book Lost

Click on the Items tab.
Enter an item barcode.

Note: use items from the column "On Loan (Z36_Status L) for hold request" in the List of Circulation Data for Training

In the **Items List** click on the "Lost" button.
Answer "Yes" to the confirmation message in the *Confirm Lost* screen.
Accept the default amount for the *Replacement Cost*, or enter a different amount.
Click on OK.
You will get a Print Preview window for a *Lost Item Bill* – print it, or cancel its printing.

*Note: the same operation can be performed from the **Patron Tab, Patron Activity node**, under [L] Loans, by clicking on the "Lost" button to the right of the List of Loans.*

5. Fast Catalog an Item

Select **Items** from the Main Menu toolbar on top, and then **Catalog Record and Create Item** or, use **CTRL + F8**.

Select the USM01 library and click on OK.

Fill in the following mandatory fields:

- Tab **1. Document information**: bibliographic fields and one of the fields marked as NEW GROUP (035=System Control Number, 020=ISBN or 022=ISSN).
- Tab **2. Item information**: Sublibrary, Material Type and Item Status.

Note: If you don't fill in an item barcode, the system will provide one for you.

Write down the item barcode and system number from the *Barcode and Record Number* window here:

Now search for the newly cataloged item in the Search Tab.