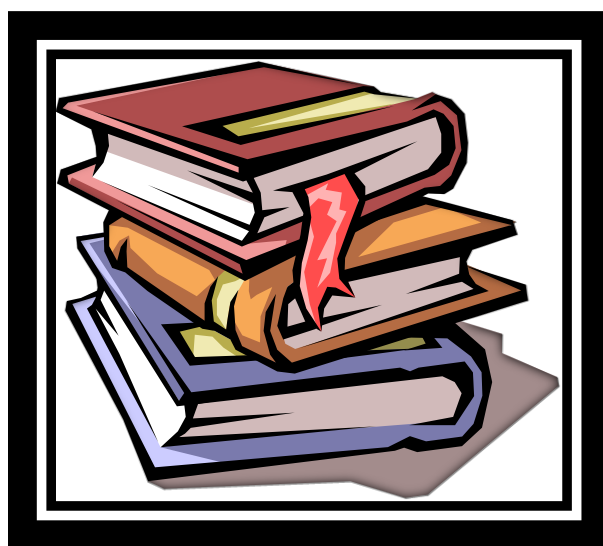


AUTOGRAPHICS

ILUMINAR/WISCAT

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Training and Reference Guide

Updated 2/2012

Auto-Graphics-Illuminar/WISCAT Help Files

Courtesy of:

Jennifer Bernetzke, Schreiner Memorial Library, Lancaster

Vicki Woolley, Dodgeville Public Library

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1. How to Activate the New Features in Illuminar

09 Feb 2012 AGent VERSO upgrade 3.9

[Courtesy of Vicki Woolley, Dodgeville Public Library]

- Patrons can now place item-level reserves.

Left Screenshot:

Title & Author: Mad men, season one [videorecording (DVD)] / Lions Gate Television Inc. ; created ...

Pickup Location: Dodgeville Public Library Pickup

Reserve Notes:

Reserve: ☒ Any Item

Specific Item	Location	Call Number	Barcode	Status
<input type="checkbox"/>	Mineral Point Public Library - Adult - DVD	DVD Mad	398960117040	Available
<input type="checkbox"/>	Platteville Public Library - Adult - Non-fic	DVD 791.45	398960110013	Checked Out
<input type="checkbox"/>	Platteville Public Library - Adult - Non-fic	DVD 791.45	398960110013	Checked Out
<input type="checkbox"/>	Dodgeville Public Library - Adult - DVD	DVD Mad 3107	398960120693	Checked Out

Right Screenshot:

Title & Author: Mad men, season one [videorecording (DVD)] / Lions Gate Television Inc. ; created ...

Pickup Location: Dodgeville Public Library Pickup

Reserve Notes:

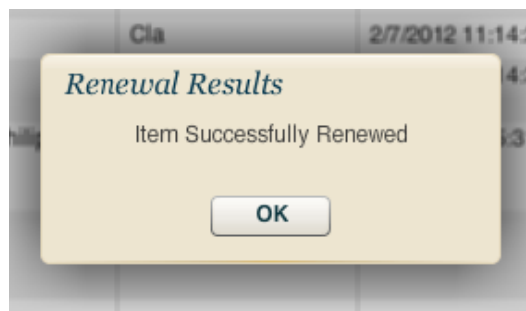
Reserve: ☐ Any Item

Specific Item	Location	Call Number	Barcode	Status
<input type="checkbox"/>	Mineral Point Public Library - Adult - DVD	DVD Mad	398960117040	Available
<input type="checkbox"/>	Platteville Public Library - Adult - Non-fic	DVD 791.45	398960110013	Checked Out
<input type="checkbox"/>	Platteville Public Library - Adult - Non-fic	DVD 791.45	398960110013	Checked Out
<input checked="" type="checkbox"/>	Dodgeville Public Library - Adult - DVD	DVD Mad 3107	398960120693	Checked Out



- When patrons renew items, they will see a notice that the selected items were “Renewed Successfully”. The system now limits the number of renewals a patron may submit for any *single item* to *one per day*.

There are no settings for this process



- Patrons can see the number of currently active reserves placed for a title. For Staff, the number of reserves becomes a LINK, displaying the actual reserves!


Title [Moneyball \[videorecording \(DVD\)\]](#)

Date 2011.

Publisher Columbia Pictures Industries,


Format Projected medium 

 Reserve this Title **[18 reserves]**

Showing 10 of 11 owned Print 

Moneyball [videorecording (DVD)] / director, Bennett Miller ; producers, Michael ...

Location	Call Number	Status
Barneveld Public Library - Newly Acquired - Newly Acquired	DVD Mon (DVD)	Due Date: 2/17/2012
Cassville Public Library - Newly Acquired - Newly Acquired	DVD Mon (DVD)	Due Date: 2/15/2012
Cobb Public Library - Newly Acquired - Newly Acquired	DVD MON (DVD)	Due Date: 2/9/2012
Darlington (Johnson Public	DVD Mon #3136	Due Date: 2/15/2012

 Reserve this Title **[18 reserves]** [See Full Record](#)



- Patrons no longer have to login to reserve an item. Patron clicks “Reserve this Item” button and the verification screen appears. Patron enters library card number and password to place hold. Patron is not logged in to the system with this feature.

There are no settings for this process

BRAD PITT

Verification Required

Please login to your library account.

[Select Your Library](#)


Dodgeville Public Library

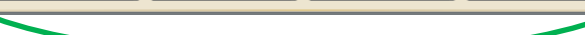
Enter your 14-digit library card number.

Enter password - first time users enter USERPASS

[Forgot Your Password?](#)

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- Test list 1 | ▼ (2) 
- [View Expanded Display](#)

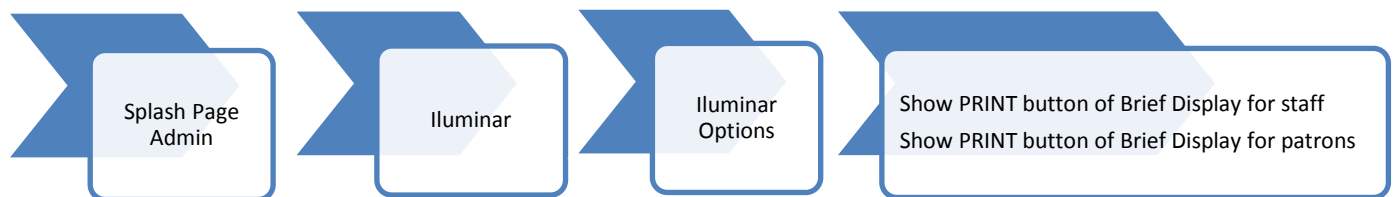
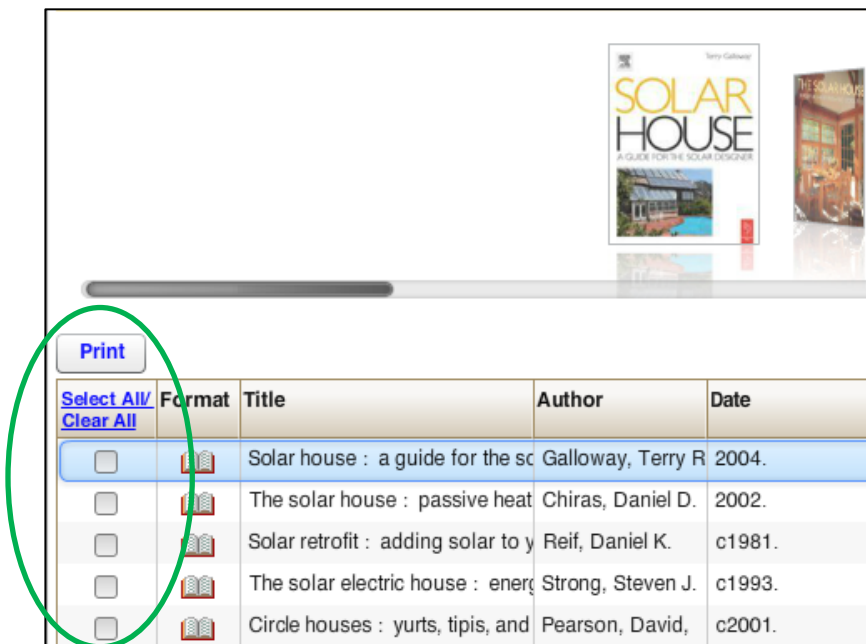


The screenshot shows the 'Print' dialog box with a green oval highlighting the action buttons. The buttons are arranged in two rows: 'Print All', 'Email All', 'Save All', 'Remove All' in the top row, and 'Print Selected', 'Email Selected', 'Save Selected', 'Remove Selected' in the bottom row.

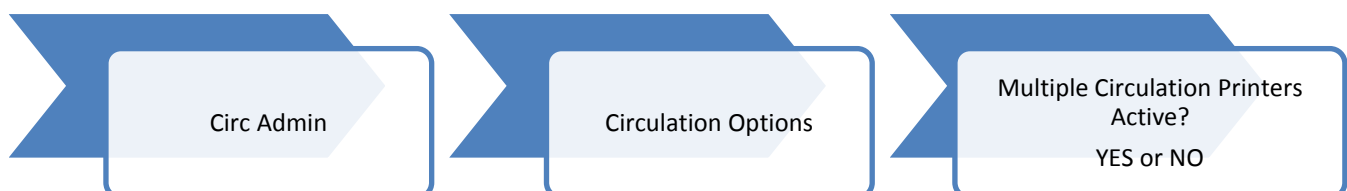


A few more settings...

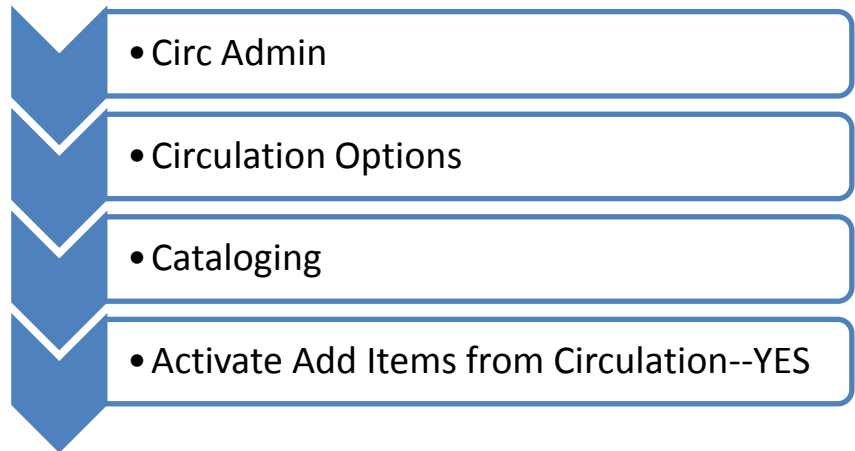
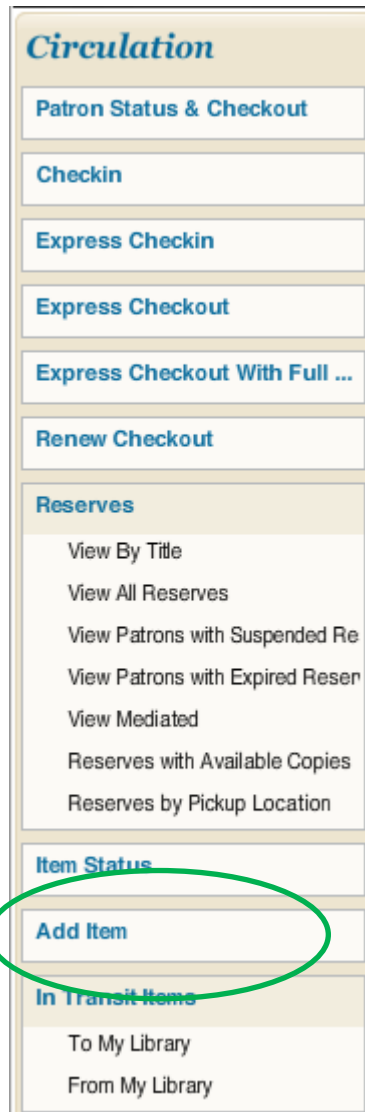
- **Allow Patrons to print from the Brief display**



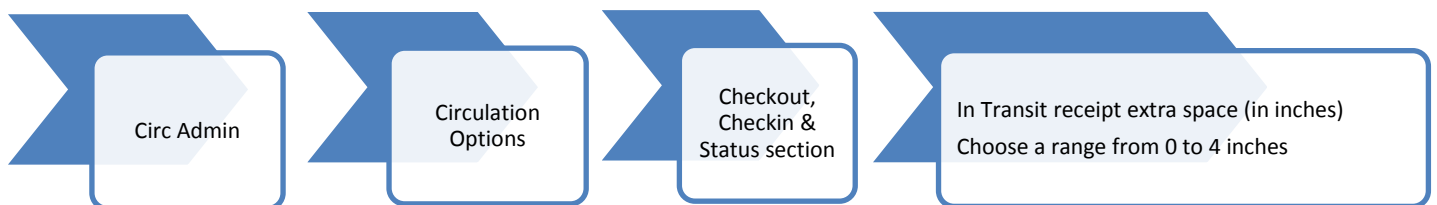
- **Is your library using multiple circulation printers? If you have one receipt printer attached to one computer, select NO.**




- Would you like Staff to add items to your collection from the Circulation menu?



- This is how to add some extra space to your library's In Transit receipts. (Dodgeville has this set to zero.)



2. Adding a Patron

When you are logged in on Illuminar, click on the wrench to open the staff menu. 

Click the Circulation tab at the top of the screen.

Circulation

To add a new patron, first click the "Patron Status & Checkout" tab on the left.

Patron Status & Checkout

****First search for that person in the system to avoid duplicates. If none, then continue.**

Click the "New User" button on the top right side of the screen.

New User

The following is the screen that will pop up: (green text is an example of how to fill it out)

Add New User

Fields identified by * and red color must be filled in.

* Login Name or Barcode	29896001234567
* Home Location	Lancaster (Schreiner Memorial Library)
* Password	userpass
* Confirm Password	userpass
First Name	Michael
Middle Initial	J.
Last Name	Jordan
Address 1	23 Basketball Drive
Address 2	Apt. 4
City	Lancaster
State / Province	Wisconsin
Zip	53813
* Township Code	ac01 Bridgeport Twp
E-Mail	ballinthehoop@bulls.net

Cancel Submit

Use Township Finder to enter the correct township code for each patron. This is very important because the library gets money for some patrons based on this code.

Scroll down with the slide bar to continue filling out the form. (Continued on page 2.)

Add New User

Fields identified by * and red color must be filled in.

E-Mail

Home /Primary Phone

Cell Phone

Work Phone

Unlisted Phone Number

Date of Birth

Parent/Guardian

DL

Language

Expiration+Date

Borrower Group

Patron Category

Blocked ☐

Block+Reason

Comment

Notes

Message

Alternate Address Line 1

Alternate Address Line 2

Alternate Address Line 3

Show previously checked out items? ☐

Account Status

Notification Preferences

Email me on

Receive pre-overdues? ☒

Cancel

Submit

Primary Phone
Number goes here.

Secondary Phone
Number goes here.

For patrons under 18
years old.

Should be automatic. (5 years)

Lancaster (SML)

Choose res-adult or
res-juvenile for
those in Lancaster
city limits. Otherwise
choose non-res
juvenile or adult.

Ask patron if they'd
like this turned on.

None=overdues print
Email= overdues email


DO NOT CHOOSE PHONE!!


This setting allows a patron to
receive a weekly **account status
summary** email. They can choose a
day of the week, or if they prefer not
to receive this email, select "No."

Review entire form
before submitting.

3. Adding and Checking out a Brief Record (Fast-Add)

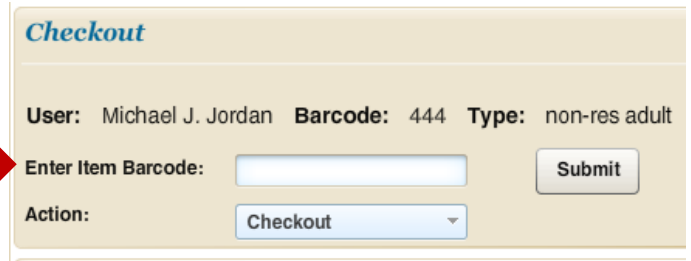
Click the wrench to enter staff functions. 

Click on the Circulation tab at the top. 

Click the Patron Status & Checkout tab at the left. 

Search for the patron who will be checking out the item (one which is not in the system)

Enter the barcode for the item that is to be added in the checkout screen. For WISCAT items, **use the owning library's barcode**. If you cannot find this barcode, use a new SWLS barcode on a piece of paper that is taped to the item. **(Do not use the WISCAT barcode. Some of these numbers have records attached in Illuminar.)**

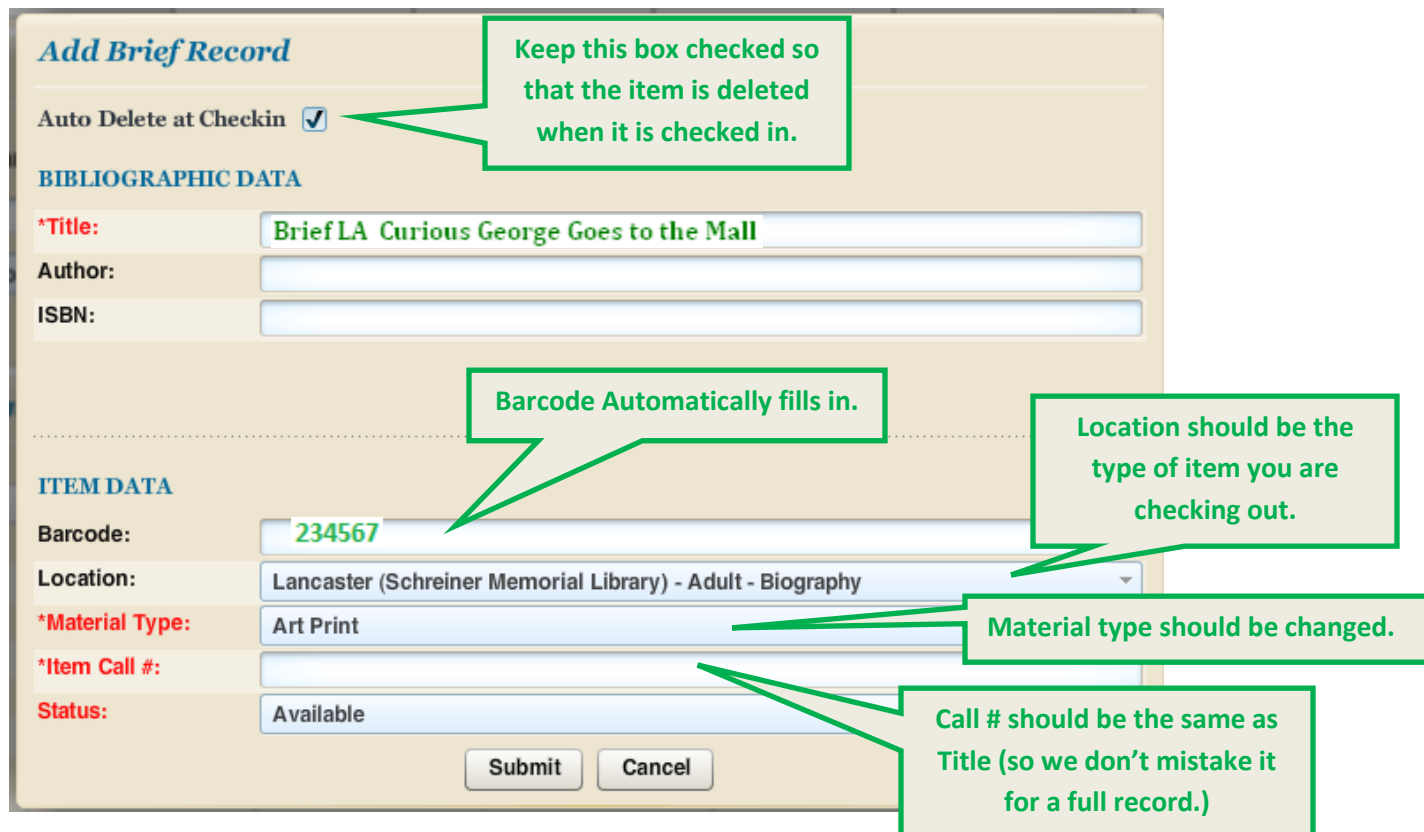


The screenshot shows the 'Checkout' form. At the top, it says 'Checkout'. Below that, it displays 'User: Michael J. Jordan Barcode: 444 Type: non-res adult'. There are two input fields: 'Enter Item Barcode:' and 'Action:'. The 'Enter Item Barcode:' field is empty, and the 'Action:' dropdown menu is set to 'Checkout'. A 'Submit' button is located to the right of the 'Enter Item Barcode:' field.


A screen will pop up that says “**Item Not Found!**”

Click the “Add Brief Record” button on this screen. 

A new form will pop up for you to fill out. **The title of the brief record must begin with “Brief LA” (or Brief PO, in Potosi) followed by the title of the book.** The following is an example of this form:



The screenshot shows the 'Add Brief Record' form. It has two main sections: 'BIBLIOGRAPHIC DATA' and 'ITEM DATA'. In the 'BIBLIOGRAPHIC DATA' section, there is a checkbox for 'Auto Delete at Checkin' which is checked. A green callout box points to this checkbox with the text: 'Keep this box checked so that the item is deleted when it is checked in.' Below this, there are input fields for '*Title:', 'Author:', and 'ISBN:'. The '*Title:' field contains the text 'Brief LA Curious George Goes to the Mall'. In the 'ITEM DATA' section, there are input fields for 'Barcode:', 'Location:', '*Material Type:', '*Item Call #:', and 'Status:'. The 'Barcode:' field contains the text '234567'. A green callout box points to this field with the text: 'Barcode Automatically fills in.' The 'Location:' dropdown menu is set to 'Lancaster (Schreiner Memorial Library) - Adult - Biography'. A green callout box points to this dropdown with the text: 'Location should be the type of item you are checking out.' The '*Material Type:' dropdown menu is set to 'Art Print'. A green callout box points to this dropdown with the text: 'Material type should be changed.' The '*Item Call #' field is empty. A green callout box points to this field with the text: 'Call # should be the same as Title (so we don't mistake it for a full record.)'. The 'Status:' dropdown menu is set to 'Available'. At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

Click Submit to complete the checkout for that item. 

4. Adding Periodicals/Magazines

Advanced Search: Title- Lancaster Collections (Type name of magazine and hit search)

Click the blue “Available” button to pull up the yellow text box.

109 Available...

Click the “Add Item” Icon on the top right side of that yellow box.



The following screen pops up: (red text is an example of how to fill it out)

Add Item

Title: _____
Author: Hadden, Briton, _____
Field: _____ Value: _____
Barcode: 39896001234567
Copy: _____
Material Type: Periodical
Current Location: Lancaster (Schreiner Memorial Library) Adult - Periodical
Permanent Location: Lancaster (Schreiner Memorial Library) Adult - Periodical
Categories: _____
Prefix: _____
Suffix: _____
Item Call Number: _____
Status: Available
Cost: _____
Alternate ID: _____
Comment: _____
Circ Note: _____

Enumeration

Caption	Value
Volume	_____
Issue	_____
Part	_____
Supplement	_____
Other	_____

Chronology

Chronology	Value
Year	2011
Month	February (Or Jan/Feb)
Season	_____
Day	17

Other Items

No.	Location	Barcode	Call Number	Status
1	Lancaster (Schreiner Memorial Library) - Adult - Periodical	39896011810971	31 January 2011	Available
2	Lancaster (Schreiner Memorial Library) - Adult - Periodical	39896011810708	7 Feb 2011	Available
3	Lancaster (Schreiner Memorial Library) - Adult - Periodical	39896011063761	Apr 6, 2009	Available
4	Lancaster (Schreiner Memorial Library) - Adult - Periodical	39896011064371	Apr 13, 2009	Available
5	Lancaster (Schreiner Memorial Library) - Adult - Periodical	39896011309438	Apr 19, 2010	Available

Barcode: The sticker you added to the cover of the magazine (You can scan it in)

Material Type: Periodical

Current Location: Lancaster(Schreiner Memorial Library) – Adult – Periodical (Juvenile-Periodical for kid’s magazines)

Permanent Location: Lancaster(Schreiner Memorial Library) – Adult – Periodical (Juvenile-Periodical for kid’s magazines)

Status: Available

Leave EVERYTHING else blank (even call #)

Chronology: VERY IMPORTANT

Fill in the **Year**, **Month**, **Season**, and **Day** (Depending on what the magazine uses for each issue.)

Use blue SUBMIT button when you’re finished. (Top right of screen)

You no longer have to check it in when you’re finished.

5. Changing Newly Acquired Status

(Directions on page 1, Example on page 2)

NOTE: When you enter new records, only current location needs to be “Newly Acquired” in order to keep the item from transit to other libraries. Permanent location should be whatever location the item will end up in eventually—after the “Newly Acquired” status is removed. In addition, the material type should be entered as the permanent type (ex: book)—“New Book” is not necessary unless you use that to change the loan period.

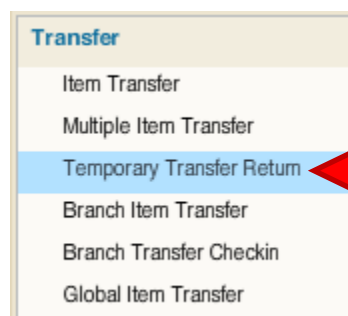
When you are logged in on Illuminar, click the wrench to open the staff menu. 

Click the circulation tab.



After you have gathered all the items you wish to take off of Newly Acquired status, click on “Temporary Transfer Return” on the left side of the screen.

***If you do not have the physical items, a list of the barcodes will suffice as well. (to run a shelf list, see “Running a Shelf List” in the Autographics Help File.)**



Scan the barcodes of the items you are changing. There is no need to click submit; just watch that each item record comes up as you scan it. Watch the new location of each item; if one appears to remain in “Newly Acquired” you will need to change the permanent location manually in the item’s record. When you are finished, you can check that it worked by clicking Item Status and scanning one of your items (or entering the barcode).

*If you only have a list of barcodes, you will have to press “Enter” after each barcode to submit.

Example of this process: Lancaster Adult Fiction

When we added our holdings, they looked like this:

Title	Minding Frankie /	
Author	Binchy, Maeve.	
Field		Value
Barcode	39896011816556	
Copy		
Material Type	Book	
Current Location	Lancaster (Schreiner Memorial Library) - Newly Acquired - Newly Acquired	Shelving Cart
Permanent Location	Lancaster (Schreiner Memorial Library) - Adult - Fiction	
Owner Location	Lancaster (Schreiner Memorial Library) - Adult - Fiction	
Categories		
Prefix		
Suffix		
Item Call Number	BINCH	
Status	Available	
Cost	\$26.95	
Alternate ID		

Current Location is Newly Acquired.

Permanent Location is Adult Fiction.

Do not use **New Book** as the material type unless your library has different loan periods for New Books.

To remove several of these items from Newly Acquired status, we go to **Temporary Transfer Return** and scan each barcode we would like to move back to their Permanent Locations.

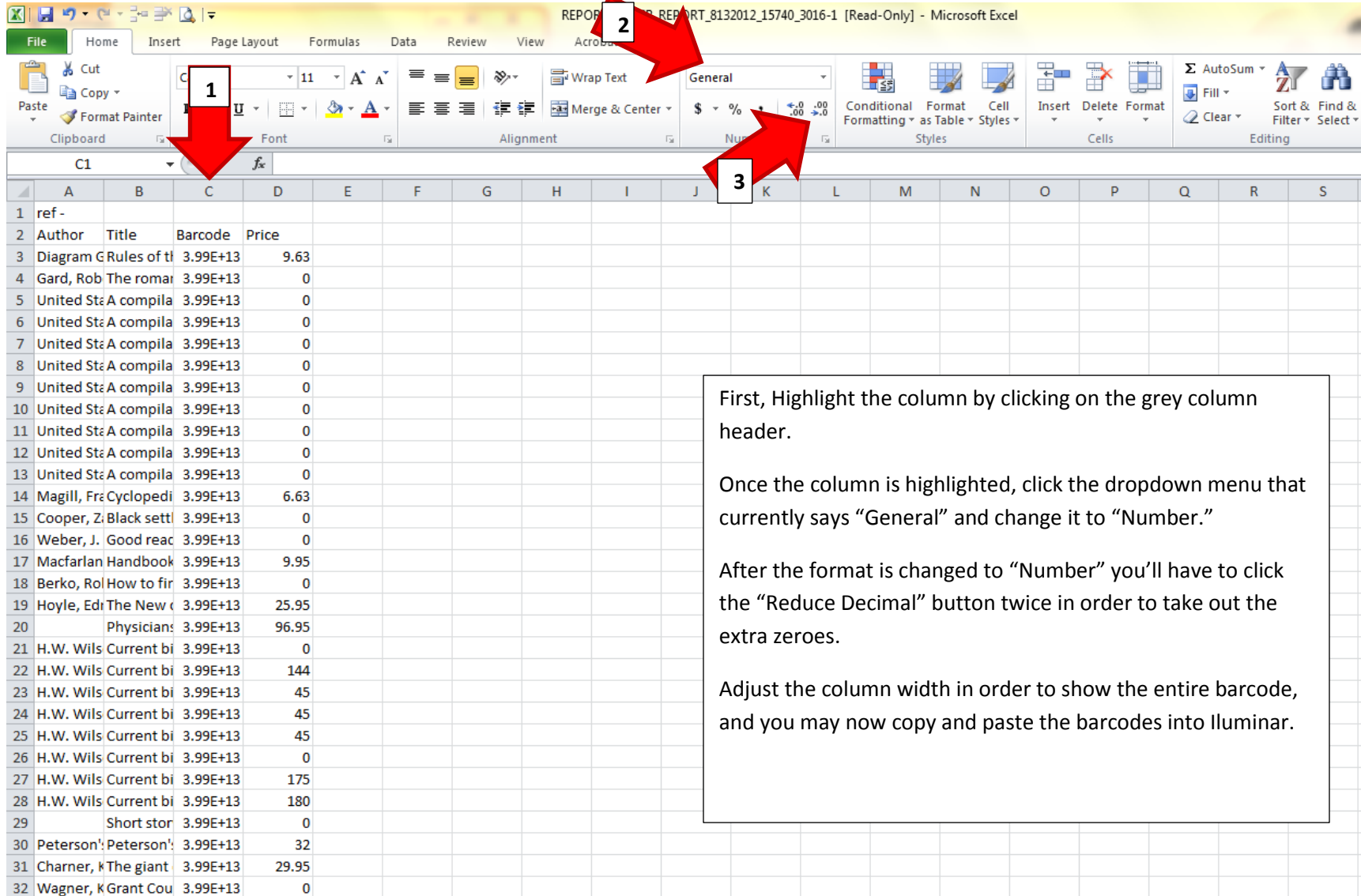
After each barcode, a record pops up to show the Last Item Returned (meaning it has been returned to its permanent location). The first book we scanned in this session was Full Black by Brad Thor. This is what the screen looks like:

TEMPORARY TRANSFER RETURN	
Enter Item Barcode:	<input type="text"/>
Item Barcode:	39896012110231
Action:	transfer completed
Title:	Full black : a thriller
Author:	Thor, Brad.
Permanent Location:	Lancaster (Schreiner Memorial Library) - Adult - Fiction
Call Number/Volume:	THOR
Last Item Returned	

*If you have your books listed as New Book in the material type, you'll have to go into each item record individually to change them.

Call Jen at the Lancaster PL if you need more help!! (608-723-7304)

6. Changing the Barcode Layout in Excel



1

2

3

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	ref -																		
2	Author	Title	Barcode	Price															
3	Diagram G	Rules of t	3.99E+13	9.63															
4	Gard, Rob	The roma	3.99E+13	0															
5	United St	A compila	3.99E+13	0															
6	United St	A compila	3.99E+13	0															
7	United St	A compila	3.99E+13	0															
8	United St	A compila	3.99E+13	0															
9	United St	A compila	3.99E+13	0															
10	United St	A compila	3.99E+13	0															
11	United St	A compila	3.99E+13	0															
12	United St	A compila	3.99E+13	0															
13	United St	A compila	3.99E+13	0															
14	Magill, Fr	Cyclopedi	3.99E+13	6.63															
15	Cooper, Z	Black settl	3.99E+13	0															
16	Weber, J.	Good read	3.99E+13	0															
17	Macfarlan	Handbook	3.99E+13	9.95															
18	Berko, Rol	How to fir	3.99E+13	0															
19	Hoyle, Ed	The New c	3.99E+13	25.95															
20		Physicians	3.99E+13	96.95															
21	H.W. Wils	Current bi	3.99E+13	0															
22	H.W. Wils	Current bi	3.99E+13	144															
23	H.W. Wils	Current bi	3.99E+13	45															
24	H.W. Wils	Current bi	3.99E+13	45															
25	H.W. Wils	Current bi	3.99E+13	45															
26	H.W. Wils	Current bi	3.99E+13	0															
27	H.W. Wils	Current bi	3.99E+13	175															
28	H.W. Wils	Current bi	3.99E+13	180															
29		Short stor	3.99E+13	0															
30	Peterson'	Peterson'	3.99E+13	32															
31	Charner, k	The giant	3.99E+13	29.95															
32	Wagner, k	Grant Cou	3.99E+13	0															

First, Highlight the column by clicking on the grey column header.

Once the column is highlighted, click the dropdown menu that currently says "General" and change it to "Number."

After the format is changed to "Number" you'll have to click the "Reduce Decimal" button twice in order to take out the extra zeroes.

Adjust the column width in order to show the entire barcode, and you may now copy and paste the barcodes into Illuminar.

7. Checking Holds/Reserves with Available Copies

When you are logged in on Illuminar, click on the Circulation tab at the top of the screen.

Circulation

Under the Reserves tab at the left of the screen,
click “View Reserves with Available Copies.”



Sort the list by Location.

Sort by: Location ▼

Click the  button at the top of the list. **DO NOT click File/Print- the format will be wrong.**

(Note: You may choose to increase font size through the Print options on your browser if the list prints too small.)

Find the items on the list from throughout the library. If there are any you can't find, circle it and keep the list.

Next click the Checkin tab on the left side of the screen.

Checkin

Check in the items, put the transit slips on them and rubberband them together by location, and then put them in the blue bin. Any reserves for home location patrons should be put by the phone.

Attention: You can ignore reserves that are in the Newly Acquired section that are *not* for home location patrons (red patron barcodes).

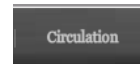
8. Checking in the Bookdrop

Log in on Illuminar at the front computer.

Click the Wrench Icon to enter Staff functions.



Click the Circulation tab on the top of the screen to enter Circulation functions.



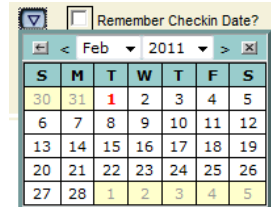
Click the Checkin tab on the left side of the screen.



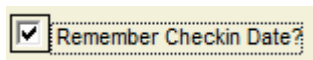
Change the Checkin date by clicking the blue arrow.



Choose the previous day's date (or the last day the library was open.)



Check the "Remember Checkin Date" box.



Check in each item as you normally would. Watch for items with reserves on them; deal with them normally.

When you are finished, change the checkin date back to today's date or uncheck the "Remember Checkin Date" box.

9. Deleting a Patron

After logging into Illuminar, enter the staff functions menu.



There are two ways to delete patron accounts.

Option One:

Enter the **Circulation** tab

Circulation

then scroll down to **Delete Patron.**

Delete Patron

Scan or enter the Patron Barcode or search by Patron last name.

Make sure you are selecting the correct patron; there is no “undo” feature. Click **Delete.**

Delete

Option Two:

Enter the **User Admin** tab

User Admin

then scroll down to **Edit User Accounts.**

Edit User Accounts

Scan or enter the Patron Barcode or search by Patron Last Name.

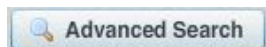
Make sure you are selecting the correct patron; there is no “undo” feature. Click **Delete.**

Delete

NOTE: You cannot delete an account which has fines attached to it. If the patron has been expired for over a year and the fines are under \$10.00, you may enter the patron account, clear the fines, and then delete the patron account. If the fines are over \$10.00 or there are lost items on the account, ask before deleting the patron.

10. Editing and Deleting Items *One at a Time*

Click Advanced search



(from the toolbar on the top of your screen OR from the home screen.



)

Search for the item that you need to edit or delete. It will be easiest if you narrow the search to “Lancaster Collections.” (For Potosi, “Potosi Collections”.)

In Grid view:

Click the Available Copies button to open the yellow text box.



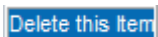
Next to our copy of the item, click the Edit Item button.



A new screen will pop up with the item information on it; you may edit that record and click “Submit” in the top right of the screen.



To delete the item, click [Delete this item](#) at the top right of the screen. Be sure that you are deleting the correct item before clicking this button. (There is no “undo” feature.)



In List view: (works better for items with multiple copies in your library)

Click on the [blue hyperlinked](#) title of the item you wish to edit. This will bring up the full record of that item.

Click the “Where to Find it” tab at the top of the screen.



Where to Find It

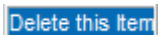
Scroll down to the item you want to edit or delete and click the Edit Item button.



A new screen will pop up with the item information on it; you may edit that record and click “Submit” in the top right of the screen.



To delete the item, click [Delete this item](#) at the top right of the screen. Be sure that you are deleting the correct item before clicking this button. (There is no “undo” feature.)



Editing and Deleting Items In Groups or On-Hand

After logging in with an administrator's permissions (all Lancaster staff should have this permission), click the wrench to open staff functions.



Click on the **Cat Admin** tab at the top of the screen.

Cat Admin

Click on **Edit Item** on the left side to open this function. It should be the fourth option.

Edit Item

Scan or enter the barcode of the item you would like to edit or delete. If you scan it, the scanner will automatically submit the number. If you enter the barcode yourself, you will have to click **Submit**.

Submit

Edit Item

Enter Title or Barcode:

The item's record will appear.

Title	The drummer's bible : how to play every drum style from Afro-Cuban to Zydeco /	
Author	Berry, Mick.	
Field	Value	
Barcode	39896012122848	
Copy		
Material Type	Book	
Current Location	Lancaster (Schreiner Memorial Library) - Adult - Non-fic	
Permanent Location	Lancaster (Schreiner Memorial Library) - Adult - Non-fic	
Owner Location	Lancaster (Schreiner Memorial Library) - Adult - Non-fic	
Categories		
Prefix		
Suffix		
Item Call Number	786.9193 BERRY	
Status	Available	
Cost	\$32.95	
Alternate ID		
Comment		
Circ Note		

To edit the item, change the necessary areas and then hit **Submit**.

Submit

To delete the item, check that it is actually the record you wish to delete, then click **Delete This Item**.

Delete this Item

There is no undo feature.

11. Expired Patron Report

I run this report every year on my birthday. I am looking for patrons whose cards expired over 3 years ago. I can sort it by expiration date and fine amount.

Patrons whose cards expired over 3 years ago are deleted from the database.

If a patron comes in with an old card that doesn't scan to a patron record, we give them a new application and add them back into the database.

Patrons with outstanding fines are not deleted.

Dodgeville has many patrons with SWLS cards who live on the border and use the Spring Green or Mt. Horeb libraries. Those patrons whose cards are expired are contacted by letter about updating their card. If the letter comes back undelivered or the patron does not respond by a cutoff date, the patron is deleted. The only way we can tell the patron is one of these cases is to check their home address. I've begun putting "(SCLS card)" after the patron's middle name.

Patron Reports	
Patron Listing	A list of all patrons from a particular patron category.
Patron Check-Out Listing	A list of all checked out items by patron.
Overdue Items	A list of all overdue items.
Indefinite Items	A list of all indefinite checked out items.
Expired Patrons	A list of all patrons with expired dates.

Expired Patrons

SubmitResetCloseHelp

Patron Category:

All

Cutoff Date:

06/11/2009

▼

Limit By Group:

Dodgeville Public Library

▼

Set to three years before my birthday.

Limit to your library patrons only.

There is a function in Circ Admin called “Expired Patron Maintenance”. I don’t use this because I prefer to look at the individuals before deleting expired patrons. I don’t want to accidentally delete any SCLS dual patrons. It is not clear if this report impacts my library’s patrons only, or all of SWLS.

Dodgeville Public L...

Fine Amounts

Fine Limits

Checkout Fees

Calendar Setup

Library Hours

User Defined Exceptions

Hard Block Limits

Fines Suspension

Circulation Options

Define Pickup Locations

Item Categories

Expired Patron Maintenance

Edit Receipts Text

Modify/Delete Patron Expiration Date

Submit

Option:

Change Expiration Date

Patron Category:

Change Expiration Date

Delete Selected Patrons

Select patrons with expiration date prior to (mm/dd/yy):

New expiration Date (Modify option only):

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Two options: modify the patron's expiration date or delete the expired patrons.

Dodgeville Public L...

Fine Amounts

Fine Limits

Checkout Fees

Calendar Setup

Library Hours

User Defined Exceptions

Hard Block Limits

Fines Suspension

Circulation Options

Define Pickup Locations

Item Categories

Expired Patron Maintenance

Modify/Delete Patron Expiration Date

Option:

Change Expiration Date

Patron Category:

All

Select patrons with expiration date prior to (mm/dd/yy):

New expiration Date (Modify option only):

Co

Patron category is All, which means all types of patrons (staff, homebound, resident adult...etc.).

12. In Transit Items To My Library/From My Library

Occasionally items are scanned improperly or skipped altogether which leaves an item's status "In Transit" even though the physical item is on a shelf somewhere. In order to maintain our collection, each library should regularly check the In Transit lists in the **Circulation** Tab (about halfway down the page on the left side).



You will need to look through the items in both the "To My Library" and "From My Library" categories. The items will appear in chronological order from oldest to newest (see example below). Go through the appropriate steps with each item that has been in transit for longer than two weeks, since it should not take that long to get an item from any one library to another.

<i>Items in transit - From my library</i>						
Print						
Title	Barcode	To Library	Type of In	Patron	Patron Barcode	Date
Shot in the heart	39896008796498	Darlington (Johnson Public Library)	Check-in In Transit			1/29/2013
This Calder sky	39896000458667	Richland Center (Brewer Public Library)	Check-in In Transit			5/22/2013
Each kindness	39896013051475	Soldiers Grove Public Library	Check-in In Transit			8/5/2013
Eating the alphabet : fruits and ve	39896009367646	Potosi Branch (branch of Schreiner Memorial))	Check-in In Transit			8/21/2013
Flawless : a pretty little liars nove	39896010286694	Darlington (Johnson Public Library)	Reserve In Transit	Hastings, Tabitha	29896002272886	9/3/2013
Forbidden falls	39896011529068	Dickeyville (Brick Memorial Library)	Reserve In Transit	KRESS, MADONNA	29896001905858	9/3/2013
Colorado camping	39896012870412	Soldiers Grove Public Library	Check-in In Transit			9/9/2013
John Carter [videorecording (DVD)]	39896012479123	Soldiers Grove Public Library	Reserve In Transit	DOUDNA, AMANDA	29896001835618	9/10/2013
The Chinese language for beginn	39896006126680	Lone Rock Public Library	Check-in In Transit			9/11/2013
Indian mounds of the middle Oh	39896008787851	Barneveld Public Library	Reserve In Transit	Lancaster, Heather	29896002239901	9/11/2013
Alone [sound recording (CD)]	39896012771594	Potosi Branch (branch of Schreiner Memorial))	Reserve In Transit	Oyen, Aleise	29896002196143	9/11/2013
Bad apple : a tale of friendship	39896012482820	Shullsburg (McCoy Public Library)	Reserve In Transit	Daentl, Katie	29896002298154	9/11/2013
Little apple goat	39896010290068	Shullsburg (McCoy Public Library)	Reserve In Transit	Daentl, Katie	29896002298154	9/11/2013
Dog behavior	39896007416874	Blanchardville Public Library	Check-in In Transit			9/12/2013
Montana, Wyoming and Idaho ca	39896012870263	Soldiers Grove Public Library	Check-in In Transit			9/12/2013

Steps to take in order to complete In Transit Item Maintenance:

1. Check your library's shelves for the item.
2. Email the specific "From" or "To" library in the item's record and ask them to check their shelves. (For example, in the screen shot above, Lancaster would contact Darlington about "Shot in the Heart" and "Flawless," etc.)
3. If item is not found at either location, the owning library should check the item in and mark it Missing. If there is a reserve on the item, that reserve should be deleted and a new reserve placed on a different copy of the item.

Terminology:

Reserve In Transit = item is filling a request at the receiving library

Check-In In Transit = item is returning to its home location for shelving

13. Item Exception Listing

Use this report to show everything at your library that is in an Exception state.

Run Reports	
Patron Reports	
Patron Listing	A list of all patrons from
Patron Check-Out Listing	A list of all checked out
Overdue Items	A list of all overdue item
Indefinite Items	A list of all indefinite che
Expired Patrons	A list of all patrons with
Overdue Notices	Generate Patron Overdu
Item Due Notices	Generate Patron notices
Fines/Fees Notices	Generate Fine/Fee notic
Remove Overdue Items	Move all overdue items t
Item Reports	
Bibs Without Items	A list of all bibliographic
Delete Bibs Without Items	Delete bibliographic recd
Brief Bibs from Circulation	A list of all brief bibliogra
Item Exception Listing	A list of all items that ha
Delete Item Exceptions	Deletes all items that ha



Item Exception Listing [Submit] [Reset] [Close] [Help]

Item Exception: All

Sort By: Call Number

Enter Start Date for Listing: [] [Calendar Icon]

Enter Stop Date for Listing: [] [Calendar Icon]

Select Location: Dodgeville Public Library

Sort by call number to easily find items on shelves.

Leave the start and stop date boxes empty to report all items.

Dodgeville uses this report to list items that have been in Missing for over 1 year. After the year, I delete these missing items from our holdings. At DO, items are put into Missing when they appear on “Items with available copies” and cannot be located on the shelf.

The report is also good for checking items that are in Mending or At Bindery. Sometimes staff forgets to return them to Available status when the items are shelved.

Another resource for checking item exceptions is the Statistics tab. Lancaster uses this weekly to check activity in their collection.

Jen from Lancaster says: It gives you the number of items in each category. If you click on a certain category, it lists them and gives barcode numbers (although not location or call number.) We use this about once a week to make sure nothing weird happened. We often end up with things that are "In process" or "mending" even though we almost never use those categories-- just careless record holdings adding. It also shows how many items you have checked out at a given time- kind of interesting!

AGent Menu STAFF MENU Pac Admin Cat Admin User Admin Statistics Circ Admin Circulation Circ Reports Serials Acquisitions Splash Page Admin Help			
Dodgeville Public L...			
Circulation Statistics			
Patron Type			
Patron Group			
Item Type			
Item Location			
Item Category			
Patron Activity			
Fine Activity			
Library Defined Patron Stats			
Item Activity			
Bib Activity			
Item Exceptions			
In Transit Items			
Floating Items Add			
Floating Items Remove			
Floating Items Material Types			
Patron Statistics			
Patron Categories			
Patron Groups			
Database Statistics			

Item Exception Statistics Print Save Email Close Help			
Date: 12/29/2011			
Seq	Exception	Number	Action
1.	Available	42569	
2.	Checked out	3011	View Items
3.	At Bindery	33	View Items
4.	Claim Returned	21	View Items
5.	Discarded	0	
6.	In Process	0	
7.	Missing	122	View Items
8.	Noncirculating	8	View Items
9.	On Order	0	
10.	Deleted	0	
11.	Patron Lost	664	View Items
12.	Damaged	35	View Items
13.	Lancaster Programs	0	
14.	Mending	74	View Items
15.	Order Pending	0	
16.	Platteville Program Items	0	
17.	Summer Library Program	15	View Items
18.	Director Desk	7	View Items
19.	Storage	264	View Items
20.	Snag	0	

14. Moving Items into Storage/Taking Items out of Storage

Note: The **Current Location** and **Permanent Location** of these books should not change. For a fiction picture book, for example, the current **AND** permanent locations should remain "Lancaster(Schreiner Memorial Library)- Juvenile-Picture Book-Fiction."

When you are logged into Illuminar, click the wrench to open the staff menu.



Click the Circulation tab.


Circulation

After you have gathered the books that you would like to move into Storage, click the **Multiple Item Exceptions** tab on the left side of the screen (*you may have to scroll down a little to see it.*)



Change the Item Status to "Storage."

(For items you'd like to take out of Storage, choose "Available" instead)

MULTIPLE ITEM EXCEPTIONS	
Change to Item Status:	Storage 
Enter Item Barcode:	

Scan the barcodes of the items you are changing. There is no need to click "Submit," just watch that each item record comes up as you scan it. When you are finished, you can check that it worked by clicking **Item Status** and scanning one of your items.

15. Moving Overdue Items to Patron Lost Status

This is a two part process which will be relatively simple if it is done on a regular basis.

Part One: Running the **Remove Overdue Items** Report.



From the staff functions menu, choose **Circ Reports**,

Circ Reports

then click on **Run Reports**.

Run Reports

Under Patron Reports, choose **Remove Overdue Items**.

Patron Reports
Patron Listing
Patron Check-Out Listing
Overdue Items
Indefinite Items
Expired Patrons
Overdue Notices
Item Due Notices
Fines/Fees Notices
Remove Overdue Items



This is not just a report- it completes the action of moving items from Overdue to Patron Lost.

Remove Overdue Items		Submit	Reset	Close	Help
Enter Minimum Number of Days Overdue:	<input type="text" value="60"/>	<div>Choose your own library.</div> <div>Lancaster (Schreiner Memorial Library)</div>			
Default Book Cost:	<input type="text"/>				
Patron Category:	<input type="text" value="All"/>				
Limit By Group:	<input type="text" value="Lancaster (Schreiner Memorial Library)"/>				

Lancaster does this report once a month. We change any item overdue for more than 60 days to Patron Lost.

Default Book Cost is an ADDITIONAL fine added to these records. Any book cost that is in an item record will be applied to the patron's account if your fines are set up this way.

This report does not give you an option to schedule it more than once.

Viewing Your Report:

To see the items that were moved to Patron Lost, look under **View Reports** for the report with a blue hyperlinked File Name. It will open as an Excel file which you can view. Lancaster occasionally uses this to decide if there are items which we need to reorder.

See the next page for Part Two of this process.

[illegible]

Circ Reports

Run Reports

Patron Reports
Patron Listing
Patron Check-Out Listing
Overdue Items
Indefinite Items
Expired Patrons
Overdue Notices
Item Due Notices
Fines/Fees Notices
Remove Overdue Items

Overdue Items		Submit
Enter Minimum Number of Days Overdue:	60	Minimum should be the same as you used in the first report.
Enter Maximum Number of Days Overdue:	1000000	
Sort By:	Patron	Maximum should be outrageously high.
Detail Listing Location:	All	
Include Anticipated Fines:	No	
Include Book Cost ?	No	
Include ILL Items only ?	No	

Sort your Excel file A to Z by **Column N: This is Item Location**. Then scroll to find your library's items. These are the items from your library that are still overdue. You will need to go into the corresponding patron records and move your library's items to Patron Lost manually.

To check your fine settings for Patron Lost items, go to the **Circ Admin** and then scroll down to **Circulation Options**. The Fines and Fees section is near the bottom.

16. Paying a Fine

Click the wrench to enter staff functions. 

Click on the Circulation tab at the top.

Click the Patron Status & Checkout tab at the left.

Search for the patron whose fine you are going to pay. Click on the correct person to enter their account.

A **Warnings** box will pop up to tell you the patron has fines. You will have to close this box:

WARNINGS

Close

Patron: Michael J. Jordan **Barcode:** 444 **Type:** non-res adult

Outstanding Fine Balance: \$12.60

The patron's account will come up on the screen.

Click the Payments/Fines History button at the top of the screen.

The default transaction type is Pay All. Enter the amount paid in the Transaction Amount space and click Submit.

TO PAY ONLY SPECIFIC FINES:

Change the Transaction Type to **Item Payment**. Enter the amount paid for each item separately. You have the option of leaving a comment. (If you pay the whole balance on one item, the patron will end up owing money for the other items and having a credit on his/her account for that one item.)

Example:

Payments/Fines History

User: Michael Jordan Barcode: 444 Type: non-res adult

Transaction Type:

Transaction Amount:

Comments:

Current Balance: \$12.60

Delete history from oldest to

Date	Type	Comments	Rate	Amount	Amount Paid	Payment Comment	Amount Due	Checkout Da
2/3/2011 7:10:34 AM	Fee Added			\$12.60	<u>\$0.00</u>		\$12.60	

Click the submit button that is in the middle of the screen.



17. Paying for Lost Items

When a patron comes in to pay for an item that is lost, first go to his/her account to see whether the item has been marked lost yet. If not, click the “Lost” button next to the corresponding item.

Lost

Enter the Payments/ Fines History tab in the patron’s account.
This will bring up a pop-up screen.

Payments/Fines History

First check that the item is ours. You can do this by clicking “Show Owning Library” at the top. Click it again to return to the normal view.

If the item is NOT ours, you will have to call the owning library to ask them how they’d like to handle the transaction.

If the item IS ours, change the transaction type to Item Payment.

Payments/Fines History

Show Owning Library Receipt Show Active Print Email

User: Nissa Enloe Barcode: 29896002087292 Type: resident adults

Transaction Type: Item Payment

Transaction Amount:

Comments:

Submit

Current Balance: \$104.44 Delete history from oldest to Delete

Date	Type	Comments	Rate	Amount	Amount Paid	Payment Comment	Amount Due
12/2/2011 2:04:40 PM	Patron Lost Item Fines	Lost Book - The princess bride [videorecording (DVD)]		\$16.98	\$0.00		\$16.98
12/2/2011 2:04:40 PM	Patron Lost Item Fines	Lost Book - The spy next door [videorecording (DVD)]		\$16.99	\$0.00		\$16.99
12/2/2011 2:04:39 PM	Patron Lost Item Fines	Lost Book - Barbie. A fashion fairytale [videorecording]		\$21.98	\$0.00		\$21.98

Close

Type the amount paid into the correct space for each lost item being paid for. In the “**Payment Comment**” section, write that the item has been paid for and withdrawn from the system followed by your initials.

Example: “Paid; item withdrawn. JLE”

Click “Submit” and then close the pop-up screen.

Copy the barcode number for the lost item from the “Items Out” screen.
(If the item does not appear in the lost items part of this screen, it has already been deleted.)

Lost Items

Title	Author	Barcode	Call Number
Fabulously fit moms. The new mom workout [videorecording (DVD)]	Lee, Jennifer Nicole.	39896010281687	DVD 613.7 FAB

Edit Item

Enter Title or Barcode:

Go to “Edit Item” in the **Cat Admin tab** and paste the barcode, then click “Submit.”

Double check that this is the lost item, then click “Delete Item.” **There is no undo feature.**

Lancaster/Potosi staff: write down the item that you withdrew and get it to either Tara or Jen.

18. Printing Overdue Notices (After they've been scheduled and run.)

Log in on Illuminar (if the computer isn't already logged in.)

Click the wrench to enter Staff Functions.



Click the Circ Reports icon along the top of the screen.




Click "View Reports" on the left side.




Scroll down past the four "Scheduled" overdue notices (no file names)


There should be four overdue notices that have file names. Click on the blue hyperlinks to open each notice, then print them. Make sure you choose the correct printer.



<input type="checkbox"/>	Overdue Notices	OVERDUE NOTICES_212011_442_3016.HTML	Once	2/1/2011 1:18:00 PM	Completed	Notice Number: 1;Start Period: 1;End Period: 1;Notice Type: Output non-Email;Patron Group: All;Home Location: Lancaster (Schreiner Memorial Library);	Lancaster (Schreiner Memorial Library)	
--------------------------	-----------------	--	------	------------------------	-----------	---	--	--

Look for the books on the notices. If they are on the shelf, check them in and pay/exempt the fines. If not, fold them and send them. (*Margins should be adjusted so the names fit inside the envelope window.*) **In Lancaster: Top margin down to 0.9"**

Delete the four completed overdue files on Illuminar by clicking the boxes on the left side and then clicking  at the top of the screen.



<input type="checkbox"/>	Overdue Notices	OVERDUE NOTICES_212011_442_3016.HTML	Once	2/1/2011 1:18:00 PM	Completed	Notice Number: 1;Start Period: 1;End Period: 1;Notice Type: Output non-Email;Patron Group: All;Home Location: Lancaster (Schreiner Memorial Library);	Lancaster (Schreiner Memorial Library)	
--------------------------	-----------------	--	------	------------------------	-----------	---	--	--

REMEMBER: Do NOT delete the top four notices in "View Reports." They are the ones that are scheduled to run every day.

19. Reserve Deletion Report

NOTE: In Circ Admin—Circulation Options is a setting: *Time period Reserve will auto-expire if not filled.* Dodgeville has the reserve expiration set for 6 months.

Circulation Parameters Loan Periods Renewal Periods Renewal Limits Checkout Limits Fine Amounts Fine Limits Checkout Fees Calendar Setup Library Hours User Defined Exceptions Hard Block Limits Fines Suspension Circulation Options Define Pickup Locations	Allow Automatic Check In of Items?	Yes	Yes ▾
	Activate Receipt Option in Circulation?	On Demand (With Prompt)	On Demand (With Prompt) ▾
	Include Phone Number on Receipt?	No	No ▾
	Print Patron name on Receipt?	No	No ▾
	Print Patron barcode on Receipt?	No	No ▾
	Include Checked-out items on Receipt?	Yes	Yes ▾
	Include Reserved items on Receipt?	No	No ▾
	Abbreviate Receipt Printing	No	No ▾
	Time period Reserve will auto-expire if not filled:	6M	6 Months ▾
	Number of days to cancel Reserve if not picked up:	8	8
	Number of days to display expired Reserves:	10	10
	Automatically assign reserve to next patron in line:	Yes	Yes ▾
	Automatically notify next patron in line for Reserve:	Yes	Yes ▾
	Use Reserves with Available Items report at:	No	No ▾



The Reserve Deletion report will cancel reserves that are in transit. It is a good report for catching reserve requests that are placed on records without holdings.

Run Reports View Reports About Agent Agent News	Fines/fees notices	Generate Fine/fee notices for mailing to the Patron.
	Remove Overdue Items	Move all overdue items to a Patron Lost status.
	Item Reports	
	Bibs Without Items	A list of all bibliographic records on the system that do not have a
	Delete Bibs Without Items	Delete bibliographic records on the system that do not have at least
	Brief Bibs from Circulation	A list of all brief bibliographic records on the system that were ac
	Item Exception Listing	A list of all items that have been given an exception.
	Delete Item Exceptions	Deletes all items that have been given a particular exception.
	Location Holdings	A list of all items within a location.
	New Item Activity	A list of new items for a designated location sorted by title or call
	New Titles	A list of new titles on the system sorted by title or call number.
	Changed Titles	A list of changed titles on the system.
	Temporary Transfer Listing/Return	A list of all items which have a temporary transfer. This report al
	Item Circulation Report	A list of all frequently or infrequently circulated items.
	Reserve Listings	A list of all outstanding reserves sorted by patron or title.
Reserve Deletion	This report will delete all reserves older than a designated age. Y	
Database Activity	Current database sizes for bibs, items, patrons, and check outs.	



Choose “Report Only” and count backwards 6 months. Today is January 20, so set it for July 20, 2011. The report shows all holds placed prior to July 20. You can sort by the date it was placed or by the patron’s name. I check the patron’s request to see why it is unfilled and take action accordingly.

If, based on the report, you want to delete all the old reserves, choose “Delete Reserves and Report”. This action is useful for cleaning up the very old reserves that were moved over from Horizon. Remember, though, that it will delete all reserves created before the date you selected.

Also see in Circulation:

View Patrons with Expired Reserves should give you useful follow-up to cleaning up patron reserves. *I don't think this works.*

View All Reserves		
	Items	
Tallchief	Library doesn't own any items	McCa
Prairie courtship	Library doesn't own any items	Clark,
The innocent	Library doesn't own any items	Small,
The final key	Library doesn't own any items	Asarc
The historian	Library doesn't own any items	Kosto
The Reserve	Library doesn't own any items	Banks
	Library doesn't own any	

Peggy is managing the reserves that display “Library doesn’t own any items”

20. Running a Shelf Lis

After logging in on Illuminar, click the wrench to enter staff functions.



Click on the **Circ Reports** tab at the top of the screen.



Click on **Report Writer** on the left hand side of the screen.



First look at the list of existing reports on this screen. Many shelf list reports may already exist that you can edit or schedule.

If the shelf list you are looking for does not exist:

Choose “Items” and click New Report.



A screen will come up that says **Choose starting search group**. Choose **Items**. (Shown below)

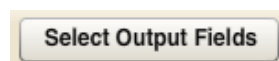
Under **Select field to search**, choose **Permanent Branch Loc Coll**. (To run a list of newly acquired items, choose **Current Branch Loc Coll**.)

Under value, leave the drop-down tab as **equal**. Then choose the collection for which you wish to run your shelf list.

To add another section to your list, (For example, to run a list of Adult Nonfiction AND Adult Biography) click on **Add Another Parameter**. Repeat the previous steps until you have included all of the desired sections.



When you have finished adding parameters, scroll back to the top right corner and click **Select Output Fields**.



To add an output field, highlight the field and then click Add. You will be able to move these options up and down on your list to reorder the columns of your report.

The following fields should be on your Shelf List:

Select fields and click the add / remove buttons to add or remove them from the report

List of Available Fields		Selected Fields	
Number of In House All Items This Y	<div>Add</div> <div>Remove</div>	Call Number	<div>Move Up</div> <div>Move Down</div>
Number of In House This Item This Y		Barcode	
Permanent Branch Loc Coll		Author	
Price		Title	
Serials Day		Date Item Added	
Serials Issue		Last Checkout Date	
Serials Month		Status	
Serials Number		Number of Circ This Item This Year	
Serials Part			
Serials Season			
Serials Supp			
Serials Volume			
Serials Year			
Status Item Date			

There is not currently a field for “**Number of Circ This Item**” other than “**This Year.**”

After selecting the output fields, scroll to the top and click **Save Report**.

Save Report

Name the report: For a shelf list, make sure to describe the contents in case we wish to use this report again in the future. Then click **Save**.

Save Report For Future Use

Name of this report:

Save

Cancel

A screen will pop up asking whether you’d like to schedule the report now. Click yes.

Your report has been saved. Do you want to schedule it now?

Yes

No

Choose **Once** for the frequency, then choose the start time and click **Schedule**. Remember that the schedule runs on Pacific Time, so if you want the report immediately, run it 2 hours earlier than the time it currently is here.

Schedule This Report

Frequency to run:

Once

Start Time:

02/25/2011

10

 h

30

 m

AM

PM

Schedule

Cancel

Viewing your Shelf List:

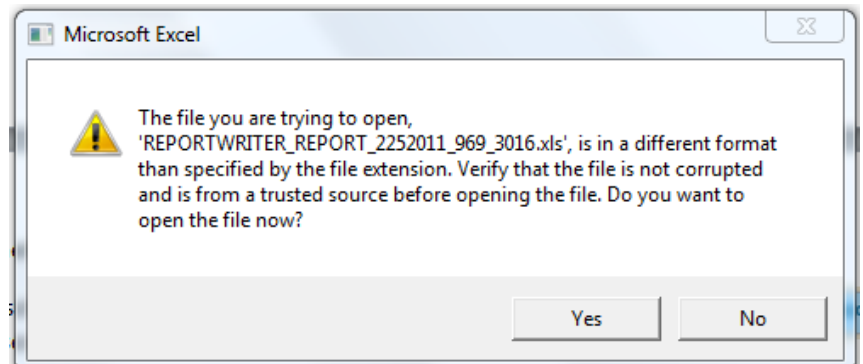
Once you have scheduled your shelf list to run, Click on the **View Reports** tab on the left side of the screen.

View Reports

Scroll until you find the name of your report. If it is ready for viewing, it will have a blue hyperlink under file name. Click on that link.

View Reports									
								Submit	Close
Delete	Name	File Name	Frequency	Run Date	Status	Specifications	Home Location	Comments	
<input type="checkbox"/>	Test Report	REPORTWRITER_REPORT_2252011_969_3016.XLS	Once	2/25/2011 8:35:00 AM	Completed	Permanent Branch Loc Coll = Lancaster (Schreiner Memorial Library) - Juvenile - DVD;	Lancaster (Schreiner Memorial Library)		

The report will open in Excel. You have the option to open or save the file. If Excel asks you to verify that the file is not corrupted and you want to open it, click **Yes** to open the file.



Adjust the columns in Excel so that you can see your information. Change the format for the barcode column to "Number" and take the decimal places out. You can print or save the file as needed. If you accidentally close this file without saving, you can still open it from the hyperlink under **View Reports**.

When you are finished with the report, put a checkmark in the box next to the file in **View Reports**, then hit **Submit** in the upper right corner to delete the file.

Submit

	<input checked="" type="checkbox"/>	Test Report	REPORTWRITER_REPORT_2252011_969_3016.XLS	Once	2/25/2011 8:35:00 AM	Completed	Permanent Branch Loc Coll = Lancaster (Schreiner Memorial Library) - Juvenile - DVD;	Lancaster (Schreiner Memorial Library)	
--	-------------------------------------	-------------	--	------	-------------------------	-----------	--	--	--

Reminder: DO NOT DELETE Overdue Notices OR Item Due Notices.

21. Running a Shelf List 2 Bibliographic Data

After logging in on Illuminar, click the wrench to enter staff functions.



Click on the **Circ Reports** tab at the top of the screen.

Circ Reports

Click on **Report Writer** on the left hand side of the screen.

Report Writer

To create a new report, scroll down to “Bibliographic” and click **New Report**.

Create a New Report

Bibliographic

New Report

A screen will come up asking which field you want to search. Scroll down to the correct field. In this example, I will use **Author**.

After you choose your search field, a value indicator will pop up. Scroll down to “Like.”

Type in the author for whom you want a shelf list: use the format Last Name, First Name.

WHAT TO SEARCH...

Select field to search:

Value:

Use the author name that appears in the Marc Record under the 100\$a heading. This is how the system searches. In most cases, that is Last, First.

Click **Select Output Fields** in the top right corner.

Select Output Fields

Choose the fields you wish to appear on your report. To add a field, highlight the field and then click **Add**. You will be able to move these options up and down to change the order of the columns in your report.

Select fields and click the add / remove buttons to add or remove them from the report

List of Available Fields		Selected Fields
Date Bib Record Added		Author
Date Bib Record Modified		Title
ISBN		Date of Publication
ISSN		
Control Number (001)		
	<input type="button" value="Add"/>	
	<input type="button" value="Remove"/>	
		<input type="button" value="Move Up"/>
		<input type="button" value="Move Down"/>

After selecting the output fields, scroll to the top and click **Save Report**.

Name the Report: describe the contents of the list you are running. Then click **Save**.

Save Report For Future Use

Name of this report:

A screen will pop up asking whether you'd like to schedule the report now. Click yes.

Your report has been saved. Do you want to schedule it now?

Choose Once for the frequency, then choose your start time and click Schedule. Remember that the schedule runs on Pacific Time, so if you want the report immediately, change the time to 2 hours earlier than the current time here.

Schedule This Report

Frequency to run:

Start Time: ☐ AM ☐ PM

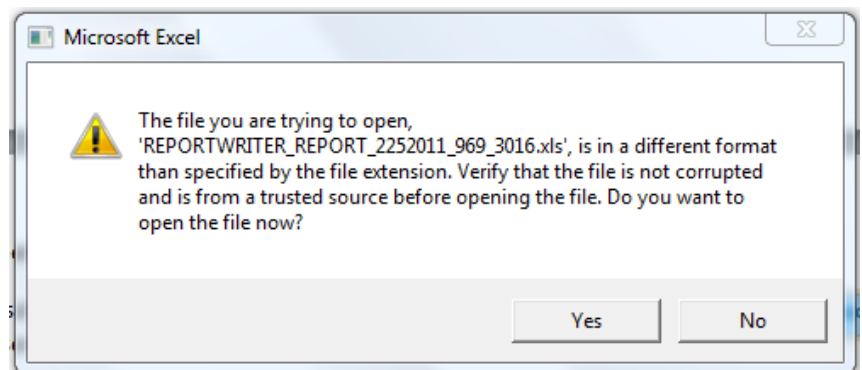
Viewing your Shelf List:

Once you have scheduled your shelf list to run, Click on the **View Reports** tab on the left side of the screen.

Scroll until you find the name of your report. If it is ready for viewing, it will have a blue hyperlink under file name. Click on that link.

View Reports <input type="button" value="Submit"/> <input type="button" value="Close"/> <input type="button" value="Help"/>								
Delete	Name	File Name	Frequency	Run Date	Status	Specifications	Home Location	Comments
<input type="checkbox"/>	Test Report	REPORTWRITER_REPORT_2252011_969_3016.XLS	Once	2/25/2011 8:35:00 AM	Completed	Permanent Branch Loc Coll = Lancaster (Schreiner Memorial Library) - Juvenile - DVD;	Lancaster (Schreiner Memorial Library)	

The report will open in Excel. You have the option to open or save the file. If Excel asks you to verify that the file is not corrupted and you want to open it, click **Yes** to open the file.



Adjust the columns in Excel so that you can see your information. Change the format for the barcode column to “Number” and take the decimal places out. You can print or save the file as needed. If you accidentally close this file without saving, you can still open it from the hyperlink under **View Reports**.

When you are finished with the report, put a checkmark in the box next to the file in **View Reports**, then hit **Submit** in the upper right corner to delete the file.

Submit



Test Report	REPORTWRITER_REPORT_2252011_969_3016.XLS	Once	2/25/2011 8:35:00 AM	Completed	Permanent Branch Loc Coll = Lancaster (Schreiner Memorial Library) - Juvenile - DVD;	Lancaster (Schreiner Memorial Library)
-------------	--	------	-------------------------	-----------	--	--

Reminder: DO NOT DELETE Overdue Notices OR Item Due Notices.

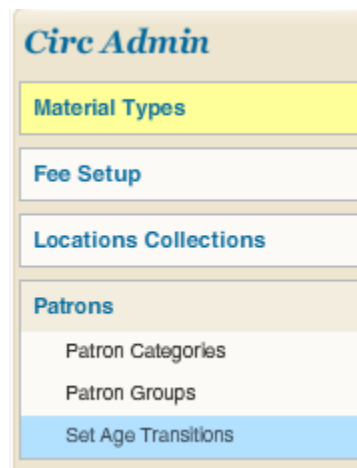
22. Setting up Automatic Age Transitions

When a juvenile turns 18, he/she should be changed to an adult in our system to maintain accuracy in annual report statistics. Previously, we had to do this manually on a case-by case basis.

Now, however, there is a report that you can schedule. You can choose to set it up on a daily, weekly, monthly, or annual basis.

After signing in on Illuminar, go to **Circ Admin** and then **Set Age Transitions**.

The screen that appears will give you options to set your age transitions. You will need to set up two different events. Below is an example of Lancaster's events.



Set Age Transitions
Close Help

Existing Age Transaction

Age	Patron Category	Patron Group	Remove Family	Option
18	from non-res juvenile to non-res adult	from Lancaster (Schreiner Memorial Library) to Lancaster (Schreiner Memorial Library)	No	Delete
18	from resident juvenile to resident adults	from Lancaster (Schreiner Memorial Library) to Lancaster (Schreiner Memorial Library)	No	Delete

Add New Transition

At Age:

With Patron Category:

With Patron Group:

Set Patron Category to:

Set Patron Group to:

Remove Family: ☐

[Add](#)

[View Report of Latest Batch](#)
[Set Report Schedule](#)

Make sure you change the patron group to your library. Also make sure that each transition keeps the patron in either resident or non-resident status. Once you've done that, click "Add."

After the Age Transitions are set up, you will need to schedule the report to run. Do this by clicking "Set Report Schedule" at the bottom of the screen.

Here is the setup that Lancaster uses for its age transitions. You will see a completed report notice in your "View Reports" screen, although there will not be a viewable report at this time. Autographics is working to make the report available to us.

NOTE: This is an ACTION report, meaning that the system automatically makes changes in your patron records based on your setup. You will no longer have to manually change your patrons from juveniles to adults.

Set Age Transitions - Schedule Batch Run

Schedule the Batch Run

Run Frequency:	Monthly
Start Date:	6/17/2015
Start Time:	5 h 45 m
Day of Month:	20
Update Batch	

23. Setting Up Item Due Notices

In the staff functions menu, choose **Circ Reports**,

Circ Reports

then **Run Reports**.

Run Reports

Choose **Item Due Notices**- in the *Patron Report* section.

Patron Reports
Patron Listing
Patron Check-Out Listing
Overdue Items
Indefinite Items
Expired Patrons
Overdue Notices
Item Due Notices
Fines/Fees Notices
Remove Overdue Items

You will want to set up this notice for only one or two days before an item is due; an email is sent every day during the time frame you choose. Below is an example of how Lancaster set up their Item Due Notices.

Item Due Notices		Submit	Reset	Close	Help
Number of days for notice: (counting forwards from today)	1	This setup means that a patron gets an email the day before an item is due as well as the day it is due.			
Type of Notice:	Send Email				
Limit By Group:	All	We suppress those with no email.			
Sort By Patron Group ?	No				
Suppress Notices with no address ?	Yes				
Skip Email and only Print if Expired ?	No				
Bundle Family Group notices ?	Yes				
Home Location	Lancaster (Schreiner Memorial Library)				

After this report is set up, you will have to schedule it. You should schedule it daily so that patrons consistently get Item Due Notices. Many patrons come to rely on them.

Item Due Notices		Submit	Reset	Close	Help
Schedule this report ...					
Report Frequency:	Daily	We schedule this report to run daily.			
Start Date:	1/16/2012				
Start Time:	3 h 30 m	We schedule our report to run at the same time as our Overdue Notices.			

Viewing your Item Due Notices:

In the staff functions screen, go to **Circ Reports**

Circ Reports

Then click on **View Reports**

View Reports

Look for the Item Due Notices that include hyperlinked File Names. Click on the hyperlink to retrieve your list of sent emails. Check that they do not contain *Failure To Deliver* notes.

When you're done with your Item Due Notice Files:

You can delete the Item Due Notices that include the hyperlinked File Names.

DO NOT DELETE the Item Due Notices that are scheduled to run. There will be Reports in "View Reports" permanently to reflect your Item Due Report schedule.

24. Setting Up Overdue Notices

In the staff functions menu, choose **Circ Reports**,

Circ Reports

then **Run Reports**.

Run Reports

Choose **Overdue Notices** in the *Patron Report* section.

Patron Reports
Patron Listing
Patron Check-Out Listing
Overdue Items
Indefinite Items
Expired Patrons
Overdue Notices
Item Due Notices
Fines/Fees Notices
Remove Overdue Items

You will need to set up each Overdue Notice separately. For example, Lancaster sends 1st, 2nd, 3rd, and 4th notices. We run them daily. Below is an example of how our FIRST notice is set up.

BuildFrameset - Mozilla Firefox

swls-verso.auto-graphics.com/files/BuildFrameset.aspx?w=RON&myses=1708652&cuid=SWLS&cusvr=

Overdue Notices Submit Reset Close Help

Notice Number: First

Notice Start Period: 7
(in days, counting backwards from today)

Notice End Period: 7
(in days, counting backwards from today)

For example, to produce notices for the past two weeks:
Notice Start Period = 1 and Notice End Period = 14.

Type of Notice: Output Print and Email

Limit By Group: All

Sort By Patron Group ? No

Suppress Notices with no address ? Yes

Skip Email and only Print if Expired ? Yes

Bundle Family Group notices ? Yes

Home Location All Options

Because we run overdues daily, Starting and Ending periods should be the same.

We mail overdues to those with no email.

Make sure to set the Home Location to "All Options." This will ensure that ALL patrons who checked out at your location will receive overdues from you, not just YOUR patrons.

After this report is set up, you will have to schedule it. You can schedule the report to run Daily, Weekly, or Monthly.

Overdue Notices Submit Reset Close Help

Schedule this report ...

Report Frequency: Once

Start Date: 1/16/2012

Start Time: 3 h 30 m

We schedule this report to run daily.

Schedule the report to run before you open so the report is ready when you arrive.

On the next page, you will find information on how to set up specific notices for your library, how to view them, and what to do when you're done.

Daily Notice Setup:

To schedule your notices to run daily, your Starting Date and Ending Date should be the same. Below are the numbers Lancaster uses for their daily Overdue Notices.

1 st Notice:	Starting Date – 7	Ending Date – 7
2 nd Notice:	Starting Date – 14	Ending Date – 14
3 rd Notice:	Starting Date – 21	Ending Date – 21
4 th Notice:	Starting Date – 45	Ending Date – 45

In the scheduling screen, choose **Daily**. Change the **Time** to sometime before the library is open so that the report is ready when you arrive.

Weekly Notice Setup:

To schedule your notices to run weekly, your Starting Date and Ending Date should not overlap with your other notices. Below is an example of how you could set up your notices.

1 st Notice:	Starting Date – 7	Ending Date – 13
2 nd Notice:	Starting Date – 14	Ending Date – 20
3 rd Notice:	Starting Date – 21	Ending Date – 27
4 th Notice:	Starting Date – 45	Ending Date – 52

In the scheduling screen, choose **Weekly**. Change the **Time** to sometime before the library is open so that the report is ready when you arrive.

Monthly Notice Setup:

To schedule your notices to run monthly, change your Starting and Ending Date parameters accordingly. Feel free to ask for help if you aren't sure.

Other Options:

You have the option to **ONLY** send overdues to those with email addresses. To do this, change your **Type of Notice** to *Email Only*. You will also want to say "yes" to **Suppress Notices with no address**.

Viewing your Overdue Notices:

In the staff functions screen, go to **Circ Reports**



Then click on **View Reports**



Look for the Overdue Notices that include hyperlinked File Names. Click on the hyperlink to retrieve your notices. After the print overdues will be a list of emails that were sent. Check that they do not contain *Failure To Deliver* notes.

In Lancaster, we print all our overdues, check the shelves for the items on each one, then mail those which need to be mailed out. Emails are sent automatically, so we don't need to check those items.

When you're done with your Overdue Notice Files:

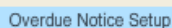
You can delete the Overdue Notices that include the hyperlinked File Names. **DO NOT DELETE** the Overdue Notices that are scheduled to run. There will be Reports in "View Reports" permanently to reflect your Overdue Report schedule.

Setting up Overdue Notice Text:

Go to **Circ Admin**,



then click on **Overdue Notice Setup**.



Set the text you wish to be printed on each notice, then click Submit. Feel free to ask for examples of text for these Notices.

25. Taking Items Off “Newly Acquired” Location and “New” Material Type

At Dodgeville, there are blue “New” stickers placed on the front of new items when they are purchased. The month the item was processed is written on the sticker. When two months has passed, the items to be taken “off new” are physically collected, scanned into “Temporary Transfer Return”, and the stickers removed for shelving with the rest of the collection.

Open Circulation. Look for the Transfer box and select “Temporary Transfer Return”

Scan the barcode of the “Newly Acquired” item into the box. Item is now returned to its permanent branch location.

Not sure? Scan the item into “Item Status” and you can see the change.

The screenshot displays the AGent Menu interface for Dodgeville Public Library. The top navigation bar includes 'AGent Menu', 'STAFF MENU', 'Pac Admin', 'Cat Admin', and 'User Admin'. The left sidebar menu is organized into sections: 'Patron Status & Checkout' (with links for Checkin, Express Checkin, Express Checkout, Express Checkout With Full ..., and Renew Checkout), 'Reserves' (with links for View By Title, View All Reserves, View Patrons with Suspended Re, View Patrons with Expired Reser, View Mediated, Reserves with Available Copies, and Reserves by Pickup Location), 'Item Status', 'In Transit Items' (with links for To My Library and From My Library), and 'Transfer' (with links for Item Transfer, Multiple Item Transfer, Temporary Transfer Return, and Branch Item Transfer). The 'Temporary Transfer Return' option in the Transfer section is highlighted with a blue arrow pointing to it. The main content area is titled 'TEMPORARY TRANSFER RETURN' and contains a text input field labeled 'Enter Item Barcode:'. A blue arrow points to this input field. A text box with a black border contains the instruction: 'Scan the barcode of the item that is “Newly Acquired”. The item will be returned to its permanent location.'

After removing the items that are physically present, you need to run a shelf list for Newly Acquired items. The shelf list will provide the barcodes for items that are Newly Acquired, but not physically present.

Run a shelf list for Newly Acquired items.

The report catches items that are Newly Acquired, but weren't physically present to scan.

(There is a canned report "Temporary Transfer Listing/Return", but it does not provide the item's creation date and it returns ALL items from Newly Acquired. There is no ability to pick a cutoff date for the items I want to return; it's all or none.)

I wrote a report titled "Newly acquired items report" and it stays in Report Writer. I can run it at the beginning of the month.

Report Writer - Items - Newly acquired items report[Back To Reports](#)[Select Output Fields](#)

WHAT TO SEARCH...

Choose starting search group:

Select field to search:

Value:

Dodgeville Public Library - Newly Acquired

Dodgeville Public Library - Newly Acquired - DO patron request only

Dodgeville Public Library - Newly Acquired - Newly Acquired

Dodgeville Public Library - Storage

Dodgeville Public Library - Storage - Storage

Dodgeville Public Library - Technical Services

Dodgeville Public Library - Technical Services - Review

[Add Another Parameter](#)

Report Writer - Items - Newly acquired items report[Back to Report Parameters](#)[Save Report](#)

Select fields and click the add / remove buttons to add or remove them from the report

List of Available Fields

Bibliographic

Author

Date Bib Record Added

Date of Publication

ISBN

ISSN

Control Number (001)

Items

Alternate Item ID

Call Number Prefix

Call Number Suffix

Comments

Current Library Branch Loc

Current Library Loc

Date Item Modified

Add

Remove

Selected Fields

Title

Barcode

Call Number

Current Branch Loc Coll

Date Item Added

Material Type

Permanent Branch Loc Coll

Status

Move Up

Move Down

Run the report, then open it in Excel and sort by “Date Item Added”.
Delete the Newly Acquired items that I do not need to change (I don’t want to take them “off new”).

REPORTWRITER_REPORT_11292011_7808_3064 [Read-Only] - Microsoft Excel

File

Home

Insert

Page Layout

Formulas

Data

Review

View

Clipboard

Font

Alignment

Number

Styles

Cells

Editing

	C1		Call Number						
	A	B	C	D	E	F	G	H	
1	Title	Barcode	Call Number	Current Branch Loc Coll	Date Item Added	Material Type	Permanent Branch Loc Coll	Status	
2	The little rascals [39896012064586	DVD + Lit family 3060	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:41	DVD	Dodgeville Public Library - Juvenile - DVD	Checked Out	
3	Matilda [videorec	39896012064594	DVD + Mat family 3059	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:42	DVD	Dodgeville Public Library - Juvenile - DVD	Checked Out	
4	Soul surfer [videor	39896012064578	DVD + Sou family 3061	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:43	DVD	Dodgeville Public Library - Juvenile - DVD	Checked Out	
5	Protect your visior	39896012064552	DVD 617.7 Pro 3063	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:44	DVD	Dodgeville Public Library - Adult - DVD	Available	
6	The links to chroni	39896012064560	DVD 616.61 Lin 3062	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:44	DVD	Dodgeville Public Library - Adult - DVD	Available	
7	Vietnam, America	39896012064545	DVD 959.7 Vie 3064	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/3/2011 9:46	DVD	Dodgeville Public Library - Adult - DVD	Available	
8	Lola & Tiva : an unl	39896012064768	Easy + 636.966 Hat	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:43	Book	Dodgeville Public Library - Juvenile - Non-fic	Available	
9	Farm animals	39896012064750	Easy + 636.000 Goo	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:44	Book	Dodgeville Public Library - Juvenile - Non-fic	Checked Out	
10	Monster trucks!	39896012064644	Easy + 796.7 Goo	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:44	Book	Dodgeville Public Library - Juvenile - Non-fic	Available	
11	Dinosaurs	39896012064636	Easy + 567.9 Zoe	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:45	Book	Dodgeville Public Library - Juvenile - Non-fic	Available	
12	We love you, Straw	39896012064651	+ Easy1 Har	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:46	Book	Dodgeville Public Library - Juvenile - Easy reader	Checked Out	
13	Front page news	39896012064677	+ Easy1 She	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:47	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
14	Now you see me	39896012064719	+ Easy1 Rab	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:47	Book	Dodgeville Public Library - Juvenile - Easy reader	Checked Out	
15	The Boo Crew	39896012064701	+ Easy1 McM	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:48	Book	Dodgeville Public Library - Juvenile - Easy reader	Checked Out	
16	Move out!	39896012064693	+ Easy1 Jor	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:49	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
17	A picnic adventure	39896012064602	+ Easy1 Gal	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:50	Book	Dodgeville Public Library - Juvenile - Easy reader	Checked Out	
18	Gettysburg : the bl	39896012064446	+ 973.7 Joh	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:51	Book	Dodgeville Public Library - Juvenile - Non-fic	Checked Out	
19	Lonesome George	39896012064776	+ 597.9246 Kos	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:51	Book	Dodgeville Public Library - Juvenile - Non-fic	Available	
20	Angelina, prima be	39896012064743	+ Easy2 Hol	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:52	Book	Dodgeville Public Library - Juvenile - Easy reader	Checked Out	
21	Transformers : tra	39896012064792	+ Easy2 Tei	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:53	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
22	Rio : Blu and friend	39896012064735	+ Easy2 Hap	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:53	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
23	Superman, Superm	39896012064727	+ Easy2 Tei	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:54	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
24	Angelina's new sch	39896012064610	+ Easy2 Hol	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:55	Book	Dodgeville Public Library - Juvenile - Easy reader	Available	
25	In a pickle	39896012063612	++ Sha	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:56	Book	Dodgeville Public Library - Juvenile - Picture Book Fiction	Checked Out	
26	The big tooth myst	39896012063604	++ Sha	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:56	Book	Dodgeville Public Library - Juvenile - Picture Book Fiction	Checked Out	
27	Nature's little help	39896012064669	++ Pos	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/6/2011 12:56	Book	Dodgeville Public Library - Juvenile - Picture Book Fiction	Checked Out	
28	Jake	39896012064396	+ Cou	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/7/2011 9:32	Book	Dodgeville Public Library - Juvenile - Fiction	Checked Out	
29	Big Nate on a roll	39896012064388	+ Pei	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/7/2011 9:33	Book	Dodgeville Public Library - Juvenile - Fiction	Checked Out	
30	The Australian boc	39896012064404	+ Gre	Dodgeville Public Library - Newly Acquired - Newly Acquired	9/7/2011 9:34	Book	Dodgeville Public Library - Juvenile - Fiction	Available	

Manually enter the barcodes into Temporary Transfer Return in Circulation.

AGent Menu

STAFF MENU

Pac Admin

Cat Admin

User Admin

Statistics

Circ Admin

Circulation

Circ Reports

Serials

Acquisitions

Splash Page Admin

Help

Dodgeville Public L...

View Patrons with Expired Reser

View Mediated

Reserves with Available Copies

Reserves by Pickup Location

Item Status

In Transit Items

Transfer

To My Library

From My Library

Item Transfer

Multiple Item Transfer

Temporary Transfer Return

Branch Item Transfer

Branch Transfer Checkin

TEMPORARY TRANSFER RETURN

Submit Reset Close Help

Enter Item Barcode:

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And now all of my “Newly Acquired” items are “off new”.

But what if my library also uses “New Book” material types with these Newly Acquired items?

Run a shelf list for any material types you want to change from “New”.

At Dodgeville, we only use “New Book” to limit the new adult fiction to two-week checkout. At the end of the month, I need to change them from “New Book” to “Book”.

Report Writer - Items - New book items report [Back To Reports](#) [Select Output Fields](#)

WHAT TO SEARCH...

Choose starting search group:

Select field to search:

Value:

Music on CD

New Book

New Book on CD

New Digital Audio Device

New DVD

New Music on CD

Pamphlet

[Add Another Parameter](#)

Report Writer - Items - New book items report [Back to Report Parameters](#) [Save Report](#)

Select fields and click the add / remove buttons to add or remove them from the report

List of Available Fields

Bibliographic

- Author
- Date Bib Record Added
- Date of Publication
- ISBN
- ISSN
- Control Number (001)

Items

- Alternate Item ID
- Call Number Prefix
- Call Number Suffix
- Comments
- Current Library Branch Loc
- Current Library Loc
- Date Item Modified

Selected Fields

- Title
- Barcode
- Call Number
- Current Branch Loc Coll
- Date Item Added
- Material Type
- Permanent Branch Loc Coll
- Status

[Add](#) [Remove](#) [Move Up](#) [Move Down](#)

Run the report and open it in Excel. Sort by “Date Item Added” to find the items you want to change.

The Material Type is edited by using Cat Admin-Edit Item. Or, it can be edited by entering the barcode into the Catalog and editing the record from the edit icon next to your library’s holding.

	A	B	C	D	E	F	G	H	I
1	Title	Barcode	Call Number	Current Branch Loc Coll	Date Item Added	Material Type	Permanent Branch Loc Coll	Status	
2	Back of beyond	39896012061848	Box	Dodgeville Public Library - Adult - Fiction	8/9/2011 13:56	New Book	Dodgeville Public Library - Adult - Fiction	In Transit	
3	Canyons of Night	39896012064438	Cas	Dodgeville Public Library - Adult - Fiction	9/3/2011 10:47	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
4	Kill me if you can	39896012066862	Pat	Dodgeville Public Library - Adult - Fiction	9/27/2011 13:01	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
5	The night circus : a nc	39896012066870	Mor	Dodgeville Public Library - Adult - Fiction	9/27/2011 13:02	New Book	Dodgeville Public Library - Adult - Fiction	Reserve In Transit	
6	Girls in white dresses	39896012066888	Clo	Dodgeville Public Library - Adult - Fiction	9/27/2011 13:03	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
7	Borkmann's point : ar	39896012066789	Nes	Dodgeville Public Library - Adult - Fiction	10/4/2011 8:47	New Book	Dodgeville Public Library - Adult - Fiction	Available	
8	Mind's eye : an Inspe	39896012066771	Nes	Dodgeville Public Library - Adult - Fiction	10/4/2011 8:48	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
9	The return : an Inspe	39896012066763	Nes	Dodgeville Public Library - Adult - Fiction	10/4/2011 8:50	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
10	Late edition	39896012066755	Mic	Dodgeville Public Library - Adult - Fiction	10/4/2011 8:50	New Book	Dodgeville Public Library - Adult - Fiction	Checked Out	
11	The dog who knew tc	39896012066730	Qui	Dodgeville Public Library - Adult - Fiction	10/4/2011 8:51	New Book	Dodgeville Public Library - Adult - Fiction	Reserve In Transit	

26. Using the New Catalog

To access the new catalog, you will still click the same link on the website you've used in the past. The link will take you to the new catalog.

To Log in:

You will log in with your full 14 digit barcode number. The first time you log in, your password will be **userpass** and you will be immediately prompted to change it to a password of your choice. If **userpass** does not work, try **USERPASS** next. If you still have problems, please call the library at **723-7304**.

To Search:

You have the option to do a "quick search," which will use the keywords you type in to find titles, authors, and subjects with those words.

You also have the option to do an "advanced search," which is much more specific. You can even restrict the search to your home library.

To Reserve Items:

You may reserve items by clicking on the record for the item of your choice, then looking for the "Reserve this Item" button. On the screen that pops up, you will be able to choose the library at which you'd like to pick up your item as well as which copy you'd like to receive, if you have a preference.

****For items that have more than one holding attached (like TV series or multi-volume books) you have the option to choose which copy (or volume) you receive. Uncheck the "Any Item" box and checkmark the desired item(s).**

You also now have the option to add items to a list in your account. This list does not automatically reserve items; it just serves as a place to keep titles that you may want to look at in the future. Ask your librarian for more information on your lists.

To keep a Checkout History:

Some people will find it convenient to keep a list of the books that they have checked out in the past. If you would like to do this, follow these steps:

- 1: Log in with your barcode and password
- 2: Click on the "My Account" tab at the top of the screen, and then the "Checkout History" tab on the left of that screen.
- 3: Click on the "Show Checkout History items" button. Read the confirmation warning, and then click "yes." You have the option of turning this history off at any time. Your history will start from the day you turn it on. Checkouts from our old system will not transfer over.

For more information, or if you have any questions about using the new catalog, call the library or come in and ask your librarian!

27. Where Information Appears in Illuminar Records

In Patron Records:

A **message** pops up on the screen as a warning when an account is called up. You must delete the message from the **Patron Edit** screen to make it stop popping up each time that account is accessed.

A **note** appears in the **Notes** tab in a patron's account. This tab turns red when there is a note in that tab. You must delete the note from **Notes** or the **Patron Edit** screen to make the **Notes** tab turn black.

A **comment** appears in the **Patron Summary** tab. This tab does not turn red. You must delete the comment from the **Patron Edit** screen to remove it from the **Patron Summary**.

REMINDER: Patrons CANNOT see notes, messages, or comments from their personal account. Only library staff can see them.

Primary/Home Phone Number is the only number to appear in the patron search screen AND the only number to print on reserve receipts.

Cell Phone, Work Phone, Unlisted Phone, and Phone 2 only appear in the Patron Summary and Patron Edit screens.

Linking Households:

When you link a household, it is important to begin the process from the Adult record (mother or father, etc.) This is because overdues and hold notices are mailed or emailed to the "head" of the household. Therefore, if you start with a child, that child could potentially be receiving overdue notices for his/her parent's items.

Passwords:

When you add a new patron, you can type the default password in on their account as you fill in other information.

You can also set a default password in your **User Admin** tab.

User Admin

On the left side, click on **Set Default Password**.

Default User Password

Enter the default password (userpass) and click **Submit**.

Submit

Notification Preferences(NEW):

At the bottom of the Patron Edit screen, there is a Notification Preference dropdown menu.

None: Overdues will print out for mail

Email: Overdues will be emailed automatically (the patron must have an email address to choose this option.)

Paper: Overdues will print out for mail

Phone: **DO NOT CHOOSE.** This is for library systems that have automatic phone messaging systems.

Notification Preferences

Email me on

Receive pre-overdues?

Date Added

Date Updated

Email

None

Email

Paper

Phone

Where Information Appears in Illuminar Records

In Item Records:

Current Location: Where the item is being shelved currently. Newly Acquired Items are marked Newly Acquired in this location ONLY.

Permanent Location: This is the home location of an item. Even Newly Acquired items should be marked with their home locations here. For example, a Newly Acquired Adult Fiction book would be listed as "Adult Fiction" in the Permanent location. This helps speed up the process of taking materials off of the Newly Acquired status.

Enumeration and Chronology: This includes Volume, Issue, Part, Supplement, Other, Year, Month, Season, and Day. These should be reserved for records which are serial in nature. They should only be used when two or more unique items are attached to the same record. For example, a TV season on DVD would use volume numbers to differentiate the discs. If you circulate the whole season together but other libraries do not, the volume number should reflect that it is the complete season.

New Book: This is a *Material Type*. That means that depending on how your material types are set up in Illuminar, New Book (or New Music on CD, New DVD, New Book on CD, etc) could potentially have a different loan period, fine schedule, or other restrictions. The New Book material type WILL NOT prohibit other libraries or their patrons from successfully requesting an item. This material type will need to be changed manually when the library decides it should be integrated into the regular collection.

Newly Acquired: This is a *Current Location*. That means that no matter the material type, permanent collection, or other information attached to these items, they will appear in this specific collection. It is used to temporarily (2 months has been agreed upon in our system) prohibit other libraries and their patrons from successfully requesting popular new materials. This location can be changed using *Temporary Transfer Return* in the Circulation tab.

28. Processing WISCAT Deliveries for Checkout

When WISCATs come in the bin, they need to be processed and checked out on Illuminar.

Go to the **Staff Menu** at the top of the page.

Staff Menu

Choose the **Borrower** tab at the left to expand its options. You can search by the barcode on the WISCAT slip (the white paper that comes with the item) or by title.

Change the status on the item record to **“Received.”** Remember to click **Submit**.

The screenshot shows the 'BORROWER'S FULL RECORD DISPLAY' form. It has a header bar with navigation buttons (left, right, refresh) and buttons for 'Format to Print', 'ALA Form', 'Submit', and 'Go Back'. The form fields are as follows:

Request Number	1074623
Status Options	Received
Borrower	WTCA (Lancaster Public Library)
Request Date	6/15/2012

Next, go to Illuminar and check the item out to the correct patron.

Use the barcode that came on the item itself if possible rather than the barcode on the WISCAT slip.

Scanning this barcode will bring up a brief bib option; make sure that you change Location and Material Type to the correct options and start the title with “Brief LA”

The screenshot shows the 'Add Brief Record' form with several green callout boxes providing instructions:

- Auto Delete at Checkin** is checked. Callout: "Keep this box checked so that the item is deleted when it is checked in."
- *Title:** Brief LA Curious George Goes to the Mall
- Barcode:** 234567. Callout: "Barcode Automatically fills in."
- Location:** Lancaster (Schreiner Memorial Library) - Adult - Biography. Callout: "Location should be the type of item you are checking out."
- *Material Type:** Art Print. Callout: "Material type should be changed."
- *Item Call #:** (empty)
- Status:** Available
- Buttons: Submit, Cancel

Click **Submit**. Make sure you give the patron one extra week for the checkout and write “checked out” on the WISCAT slip.

29. Shipping Pending WISCAT Requests

Log into Wiscat. (www.wiscat.net) Log in information is on the Passwords page of the binder.

Choose **Staff Menu** at the top of the page.

Staff Menu

Go to the **Status Browse** tab on the Left. You may automatically arrive here. If there are any Pending requests, the **Pending** tab will be a blue hyperlink. Click on it to get a list of the requests.

STATUS BROWSE		Close	Help
Borrower Requests (Status Browse)		Lender Requests (Status Browse)	
Action items		Action items	
Status	Count	Status	Count
Awaiting Approval	0	Pending	2
Not Received	10	Will Supply/In Process	0
Not-Received/Overdue	0	Renew/Overdue	0
Accepted Renewal	5	Pending Cancel	0
Recalled	0	Renew Pending	0
Unfilled	0	Returned	17
Shipped	8	Lost	3

Find our copies of each of the items listed. To print this list, click the **Pick List** tab in the top right corner. Then print this list—it includes call numbers to make it easier to find the items.

Pick List

When you find the items, change them from “Pending” to “Shipped.” If our copy is checked out, choose “Will Not Supply” and in the **Reason/Condition** area, choose “In use/On Loan.” Remember to click submit when you are finished in order to complete this step.

LENDER'S PENDING LIST		Barcode Processing	Submit	Reset	Close	Help			
Print All: With Lenders Without Lenders		New Requests	New Requests with History	Pick List					
Sort this Status by: Title		Pending							
Apply this status to All Requests on this page:									
	Title	Req. No.	Borrower	Status	Reason/Condition				
	The Nashville sound [videorecording (DVD)]	1027633	WI05 (Chippewa Falls Public Library)	Pending					
	A rogue by any other name	1027594	05AT (Sayner Public Library)	Pending					

Lancaster Public Library	
Status Browse	
Borrower	
Lender	
Maintain Participant Record	
Blank Request Form	
Maintain Shipping Labels	
Maintain Bookstraps	
Configure Pick List	
Configure Loan Form	
Configure Copy Form	
Search Library Information	
ILL Request Limits	
AGent News	

Next go to the **Maintain Shipping Labels** tab on the left. Select each of the items you just “shipped” and click **Print**. Tape these shipping labels to the front of the items and highlight their destinations.

IMPORTANT STEP: Check out the items in Illuminar to the Library systems to which they are going. For Correctional facilities, use the name of the facility instead. Change the loan period to one month. For items travelling within our system (other SWLS libraries, schools, etc) tape a blue intrasystem loan slip on top of the WISCAT slip.

Put one rubberband around each item and put it in the blue bin. Only items that are going to the same LIBRARY (not just system) can be rubber banded together.