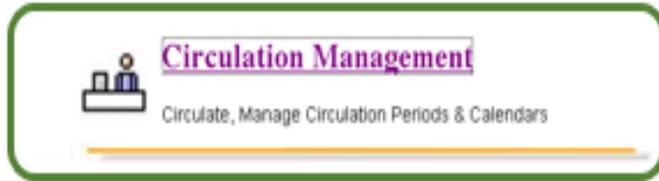




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Circulation requires Rules: Define Circulation Periods & Limits



Creating Circulation Rules; begin by using the Main Menu/Back Office menu Circulation Management.

The library program requires it to be “Taught” as to how your library is to function, use the Define Circulation Periods & Limits section to establish the following: (Note: LRMS is willing to establish this information for the Library, however requires a LRMS Questionnaire to be completed.)

- ✓ Before adding these rules, Patron Borrower Groups must be established within the Borrower Management/ Search Edit/Promote Groups. Group designations are flexible with the exception in the school environment Teacher/Faculty all require a FC code to designate so G4 can associate them properly.
- ✓ Define each Group of Patron Borrowers as to what library materials are available for circulation by a Circulation description and Circ Code is allowed.
 - Circ Codes and their descriptions is provided as a standard set of defaulted codes. These codes can be used as is or removed and new codes can be easily added.
 - A note to those of you who are replacing a former library staff person, often over the course of time multiple strategies and concepts (Coding) was created. This at times can present confusion; for this reason, G4 has the ability to easily and globally manage changes to create consistent continuity. Code management is found within the Catalog Management menu of [Maintain Holding Codes](#).
- ✓ Extended Circulation – G4 has a Forced Due Date feature use this option in place of setting a fixed number of days for an item to be returned. Add a Date will make an item Due back on the date entered. Example: any item checked out having a forced Due Date of return is due on this date, if checked out 3 days prior to the Forced Due Date it will be Due as of the Forced Due Date.



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Start Here: Review this document before applying additions or modifications.

LRMS(Build 3.6.15) : WHITE_ROCK (User: lrms) (Server: (local))

Logout Logon Previous Menu Main Menu [White Rock Montessori]

Circulation Menu

- Circulate
- Define Circulation Periods & Limits
- Define Circulation Calendars
- Labels & Cards
- Reports

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Create the Circulation Rules for each listed Group of Borrowers/Patrons

LRMS(Build 3.6.15) : WHITE_ROCK (User: lrms) (Server: (local)) - [Define Circulation Periods & Limits]

File Previous Menu Main Menu

Group: FC Circ Days: 21 Allow Grace Days: 0 Fine per Day: 0.00 Send Courtesy Notice

LE1 Max Fines: 0 Max Circulation Items: 10 Send Courtesy Due Notice X Days Prior to Due Date: 0 Serial or Periodical

LE2

Use the place: MS

P1

P2

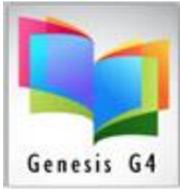
CIUE

CoX-Grads

	Send Courtesy Email	Courtesy Days	Set Due Date	Circ Days	Grace Days	Fine per Day	Max Renewals	Maximum Fine	Circ Limit
0 Regular Circulation	False	0		21	0	0.00	5	0.00	10
01 One Day Circulation	False	0		0	0	0.00	99	999.00	0
02 Three Day Circulation						0.00	99	999.00	0
03 Reference Material						0.00	99	999.00	0
04 Desk-In Library Materials, Short Term						0.00	99	999.00	0
05 Library Equipment						0.00	99	999.00	0
06 AV Materials						0.00	99	999.00	0
07 Video Materials						0.00	0	0.00	10
09 Professional Materials						0.00	99	999.00	0
10 Class Sets or Kits						0.00	99	999.00	0
18 Laptop Computer, other						0.00	99	999.00	0
91 Textbook Standard Schedule						1.00	99	999.00	0
96 Technology Equipment						1.00	99	999.00	0

Defining Circulation Rules does require Groups to be set-up prior to adding these rules. Groups and their codes are created through the Borrower Management Main menu option Search/Edit/ Promote Groups

Select the Group to be set-up and Add or Modify



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Begin to Edit each Group Code by selecting the Circ Code that this Group is allowed for Circulation.

Normal Circ Code Set-up: by adding the number of days to the Circ Days field. Circ days is entered based upon each Circ code description.

LRMS(Build 3.6.15) (User:) (Server: (local)) - [Define Circulation Periods & Limits]

File Previous Menu Main Menu

Group: [E1] Circ Days: [14] Allow Grace Days: [0] Fine per Day: [0.10] Send Courtesy Notice

Max Renewals: [2] Max Fines: [5] Max Circulation Items: [2] Send Courtesy Due Notice X Days Prior to Due Date: [0] Serial or Periodical

Use this Forced Due Date in place of Circ Days: []

Circ Code	Description	Send Courtesy Email	Courtesy Days	Set Due Date	Circ Days	Grace Days	Fine per Day	Max Renewals	Maximum Fine	Circ Limit
0	Regular Circulation	False	0		14	0	0.10	2	5.00	2
01	One Day Circulation									
02	Three Day Circulation									
03	Reference Material									
04	Desk-In Library Materials, Short Term									
05	Library Equipment									
06	AV Materials									
07	Video Materials									
09	Professional Materials									
10	Class Sets or Kits									
18	Laptop Computer, other									
91	Textbook Standard Schedule									
96	Technology Equipment									

Circ Codes are Added or Removed using the Catalog Management Main Menu/Back Office menu.

Circ Limit is the Max number of items allowed to be checked out for the selected "Circ Code"

Setting the circulation detail for any Group requires selecting a Group from the "Group Drop Down List", once selected fill-in each field for each selected "Circ Code" that applies for this Group.
If you want to use Courtesy Notices add an email address to the Patron Borrower personal information.

Extended Circ Code Set-up: using the Forced Due Date option provides a good option for items checked out that would not be Due back outside of normal circulation settings.

LRMS(Build 3.6.15) (User:) (Server: (local)) - [Define Circulation Periods & Limits]

File Previous Menu Main Menu

Group: [FC] Circ Days: [0] Allow Grace Days: [0] Fine per Day: [0.00] Send Courtesy Notice

Max Renewals: [0] Max Fines: [] Send Courtesy Due Notice X Days Prior to Due Date: [5] Serial or Periodical

Use this Forced Due Date in place of Circ Days: [06/01/2020]

Add the date Due-in Date here

Save your Entries

Send a Courtesy Notice requires an Email address within the Patrons profile.

This is the Saved result when these options are used.

Circ Code	Description	Send Courtesy Email	Courtesy Days	Set Due Date	Circ Days	Grace Days	Fine per Day	Max Renewals	Maximum Fine	Circ Limit
0	Regular Circulation	True	3		21	0	0.00	5	0.00	10
01	One Day Circulation	False	0		0	0	0.00	99	999.00	0
02	Three Day Circulation	False	0		0	0	0.00	99	999.00	0
03	Reference Material	False	0		0	0	0.00	99	999.00	0
04	Desk-In Library Materials, Short Term	False	0		0	0	0.00	99	999.00	0
05	Library Equipment	True	5	06/01/2020	0	0	0.00	0	0.00	10
06	AV Materials	False	0		0	0	0.00	99	999.00	0
07	Video Materials	False	0		21	0	0.00	0	0.00	10
09	Professional Materials	False	0		0	0	0.00	99	999.00	0
10	Class Sets or Kits	False	0		0	0	0.00	99	999.00	0
18	Laptop Computer, other	False	0		0	0	0.00	99	999.00	0
91	Textbook Standard Schedule	False	0		0	0	0.00	99	999.00	0
96	Technology Equipment	False	0		0	0	0.00	99	999.00	0

Want to use a Long Term Checkout date in place of Circulation Days? This is a better option as using days setting will always be a potential issue as the end of the Circulation Last Day of circulation draws near, the Forced Due Date eliminates any potential issues as any Checkout of any Circulation Code using a Forced Due Date will make the item due on the date entered.



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How to reverse the Forced Due Date Circ Days?

LRMS(Build 3.6.15) (User:) (Server: (local)) - [Define Circulation Periods & Limits]

File Previous Menu Main Menu

Group: FC Circ Days: 21 Allow Grace Days: 0 Fine per Day: 0.00 Send Courtesy Notice Serial or Periodical Save Settings

Max Renewals: 0 Max Fines: Max Circulation: 10 Send Courtesy Due Notice X Days Prior to Due Date: 5

Use this Forced Due Date in place of Circ Days: 06/01/2020

Circ Code	Description	Send Courtesy Email	Courtesy Days	Set Due Date
0	Regular Circulation	True	3	
01	One Day Circulation	False	0	
02	Three Day Circulation	False	0	
03	Reference Material	False	0	
04	Desk-In Library Materials, Short Term	False	0	
05	Library Equipment	True	5	06/01/2020
06	AV Materials	False	0	
07	Video Materials	False	0	
09	Professional Materials	False	0	
10	Class Sets or Kits	False	0	
18	Laptop Computer, other	False	0	
91	Textbook Standard Schedule	False	0	
96	Technology Equipment	False	0	

To change the Forced Due Date back to a specific count, simply highlight the Circ Code to change and insert the number of desired Circ Days and choose Save Settings to confirm the modification. This will blank out the Forced Due Date upon Save.

When adding or removing the Forced Due Date; G4 will present a Caution statement when there is active circulation open using this specific Circ Code. Answer its question, if unsure of the answer always contact LRMS for assistance.

LRMS(Build 3.6.15) (User:) (Server: (local)) - [Define Circulation Periods & Limits]

File Previous Menu Main Menu

Group: FC Circ Days: 0 Allow Grace Days: 0 Fine per Day: 0.00 Send Courtesy Notice Serial or Periodical Save Settings

Max Renewals: 99 Max Fines: 999 Max Circulation Items: 0 Send Courtesy Due Notice X Days Prior to Due Date: 0

Use this Forced Due Date in place of Circ Days:

Circ Code	Description	Send Courtesy Email	Courtesy Days	Set Due Date	Circ Days	Grace Days	Fine per Day	Max Renewals	Maximum Fine	Circ Limit
0	Regular Circulation	True	3		21	0	0.00	5	0.00	10
01	One Day Circulation	False	0		0	0	0.00	99	999.00	0
02	Three Day Circulation	False	0		0	0	0.00	99	999.00	0
03	Reference Material	False	0		0	0	0.00	99	999.00	0
04	Desk-In Library Materials, Short Term	False	0		0	0	0.00	99	999.00	0
05	Library Equipment	True	5		21	0	0.00	0	0.00	10
06	AV Materials	False	0		0	0	0.00	99	999.00	0
07	Video Materials	False	0		21	0	0.00	0	0.00	10
09	Professional Materials	False	0		0	0	0.00	99	999.00	0
10	Class Sets or Kits	False	0		0	0	0.00	99	999.00	0
18	Laptop Computer, other	False	0		0	0	0.00	99	999.00	0
91	Textbook Standard Schedule	False	0		0	0	0.00	99	999.00	0
96	Technology Equipment	False	0		0	0	0.00	99	999.00	0

- Circ Codes** can be modified, added new or removed to serve the Library for circulating any Cataloged Item.
- Group** = Borrowers/Patrons category
- Circ Code** = designates and is assigned to certain library materials
- Circ Days** = The number of days a specific item with this Circ Code can be Checked out
- Allow Grace Days** = when applied provides these additional days to act as a buffer adding to the Circ Days before declare an item as overdue, there is a setting that will allow for Fines assessments to be charged to include the Grace Days.
- Fine Per Day** = The amount entered to be charged for each overdue day.
- Send Courtesy Notice** = This is an email sent as a reminder so many days prior to the Due to return date of any item, does require an email address within the Borrowers/Patrons information.
- Max Renewals** = allows for an item to be Renewed by the number inserted.
- Max Fines** = Value entered becomes the Max Fine and will not exceed this amount entered.
- Max Circulation** - represents the number of items that a Group member can Check out at any one time.
- Send Courtesy Due Notice X Days prior to Due Date** = The value (number of days) added sets the release of a friendly email sent to the email address within the Borrowers/Patrons information.
- Serial or Periodical** = When checked provides for circulation of items with these descriptions.
- Use this Forced Due Date in place of Circ Days** = This option provides for long term Check out making items using this specific Circ Code to be come Due on the Date Entered.
- Save Settings = Always SAVE your work**