

Circulation requires Rules: Define Circulation Periods & Limits

лů	Circulation Management
	Circulate, Manage Circulation Periods & Calendars
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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 <u>Teacher/Faculty all require a FC code</u> 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 mange changes to create consistent continuity. Code management is found within the Catalog Management menu of <u>Maintain Holding Codes</u>.
- ✓ 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.



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



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



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.



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(Bu	ild 3.6.15) :	(User:)((Server: (l	ocal)) - [Def	ine Circulatio	on Periods &	Limits]								
le	Previous Menu	Main Menu													
roup F	TC Max Rei	Circ Days	3 O Max Fir	A A	dd the da Date	ite Due-in here		/ 0.0 Send Co Days Pri	IO <mark>I Se</mark> urtesy Du or to Due	nd Courtes e Notice X Date	v Notice	Save	e Sett	ings eriodical	Save your Entries
Use this	Forced Due Date in Circ Days:	06/01/2020												Se	ad a Courteev Notice
Code	Description			Send Courtesy Email	Courtesy Days	Set Due Date	Circ Days	Grace Days	Fine per Day	Max Renews	Maximum Fine	Circ Limit		requ	ires an Email address in the Patrons profile.
0	Regular Circulation			True	3		21	0	0.00	5	0.00	10	1		
01	One Day Circulation			False	0		0	0	0.00	99	999.00	0			
02	Three Day Circulation	r		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 Mater	ials, 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 Material	s		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			This is the Saved
18	Laptop Computer, oth	ier		False	0		0	0	0.00	99	999.00	0			result when these
91	Textbook Standard Sc	hedule		False	0		0	0	0.00	99	999.00	0			options are used.
96	Technology Equipment	nt		False	0		0	0	0.00	99	999.00	0			



How to reverse the Forced Due Date Circ Days?

File Previous Menu Main Menu																
Group FC Circ Days 21 Allow Grace Days 0 Fine per Day 0.00 Z Send Courtesy Notice Save Settings																
Max Renewals O Max Fines Max Circulation 10 Send Courtesy Due Notice X 5 Serial or Periodical Use this Forced Due Date in place of Circ Days: 06/01/2020 06/01/2020 06/01/2020 06/01/2020																
Circ Code	Send Courtesy Email	Courtesy Days	Set Du. Date	To a s	o chang specific	ge the F count,	orced simply	Due Date highlight	e back t the C	k to Dire						
0 Regular Circulation	True	3	Code to change and insert the number of													
01 One Day Circulation	False	0		desired Circ Days and choose Save												
02 Three Day Circulation	False	0	Settings to confirm the modification.													
03 Reference Material	False	0	This will black out the Forced Due Date													
04 Desk-In Library Materials, Short Term False 0 THIS WIN Drait N. Out on Professional Control Policed Due Date																
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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							
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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.

1 LRM5(Build 3.6.15) : (User:) (Server: (local)) - [Define Circulation Periods & Limits] in Men T. Circ Days 🛛 Allow Grace Days 🔲 Fine per Day 🛛 O.00 🗖 Send Courtesy Notice Save Settings Group FC Max Renewals 99 Max Fines 999 Max Circulation 0 Send Courtesy Due Notice X 0 Serial or Periodical Use this Forced Due Date in place of Circ Days: Circ Code Description Set Due Date Send Courtesy Email True False False False Courtesy Days Circ Days Grace Days Fine per Day Max Renews aximum Fine Circ Limit 0 Regular Circulation 01 One Day Circulation 02 Three Day Circulation 0.00 999.00 999.00 999.00 0.00 0.00 0.00 10 0 0 99 99 99 03 Reference Material 0.00 99 04 Desk-In Library Materials, Short Term False 0.00 999.00 0 10 05 Library Equipment True 21 0.00 0.00 99 06 AV Materials False 0.00 999.00 0 17 Video Mat 0.00 Class Sets or Kits Laptop Computer, other Textbook Standard Schedule 999.00 999.00 999.00 False False False 0.00 99 99 99 96 Technology Equipment False 0.00 999.00

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

