

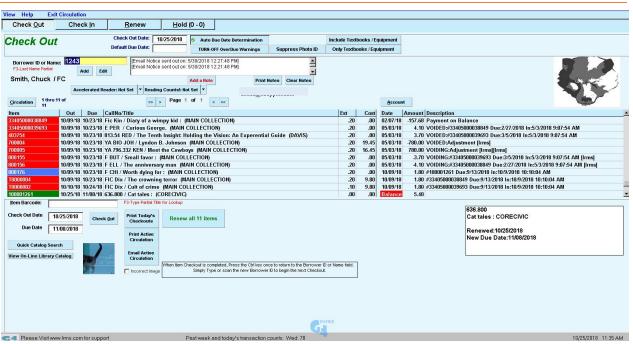
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#### Circulation

#### Manage multiple library functions from one Circulation display:

- Checkout, Check-in, Renew and place Holds
- Review or Manage Borrower/Patron Reserves & Hold Queue Status
- Manage Add new or Edit Borrower Profile information
- Manage Borrower Open Account information, Fees/Fines/Refunds
- Manage Borrower/Patron apply and enforce National Reading Programs
- Quick Catalog Search- to Query Collection Materials
- View and Access the On-Line Library Catalog (OPAC)
- Print Borrower/Patron Open Item Circulation
- Print Borrower/Patron Receipts
- Email Borrower/Patron Active Circulation

# Checkout Tab screen display



The following pages will explain the various functions shown within the Circulation displays

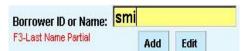
#### **Visual Circulation Stats:**

Past week and today's transaction counts: Fri: 134 Mon: 98 Tue: 178 Wed: 193 Thu: 284

are displayed at the bottom of the Circulation screen display.



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**Add a Borrower ID or Name:** Scan a Borrower ID Barcode number or Manually add the Borrower ID or type a Partial or Full last name and then the F3 or

Enter key to list matching borrowers. Using the Add or Edit buttons allows for adding a new borrower or managing the borrower listed.



barcode label using a barcode scanner for best results and automatic processing or manually type in a barcode number and processing by the Check Out button.

**Damaged or unreadable Barcode label:** 



If the barcode label is damaged/unreadable type in a Partial portion of the Title, use the F3 function key to receive a list this book or a list, select the available and proper Barcode number with a double click. The program will add the

number to the Item Barcode field, Click the Check Out button to complete the process.

#### Active Circulation Display:

Check Out, Check-in, Renew and Hold Item "Program Display" Review:

Active Circulation "Color" explanation; Display of a Barcode number by color coding

**Green Highlight** – Good Standing within Circulation period.

**Red Highlight** – Overdue item.

**Blue Highlight** – Item Status Code of "O" (Open/Out) has been manually changed incorrectly within the item cataloged Holdings while still in open circulation to this borrower. The proper method to manage Lost, Missing, Damaged items is to be entered into the Borrower Account.



**Enhanced Active Circulation screen:** Open circulation display area, includes Record information and Collection name, to visually assist with on-screen description notification.



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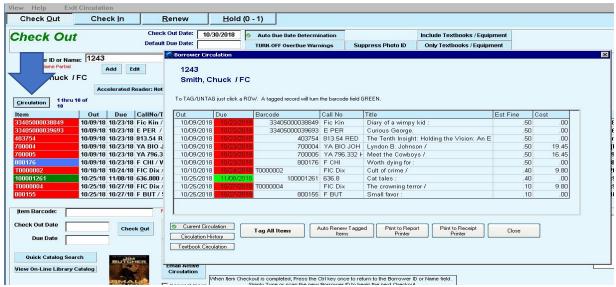


Using the mouse right click button; any barcode number listed within the Circulation Register can be Renewed, Checked in or Holdings displayed with a simple right click of the mouse as illustrated.



When the number of circulated items exceed the display area the Pagination Page 1 of XXX information is displayed. Use of the >> and > or < and << arrows will allow for the movement between pages. Very efficient when an individual has large counts of items (20-200+) checked out.

#### Circulation menu button:



Click the Circulation button to view current open circulation, circulation history of this individual and a host of additional options all from one program location. Tag All or individual items by clicking on the line item and then selecting Auto Renew Tagged Items can be helpful when items have different days of circulation. When requested or necessary Print a Report or Receipt for reference.



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A visual benefit exists within Circulation to display a Book Cover image when an image is available by matching the ISBN number to the item being managed through circulation. Images are drawn from

your local database or from an LRMS Master database. If the displayed image is incorrect identify this mistake; please check the Incorrect Image field.

#### **Account Button:**



Borrower/Patron Individual Account Fees/Fines and more.

Properly use Payment Codes to add service fees and apply fines for damaged or lost materials, this register represents a universal listing of descriptions that are used by most libraries. Options allow for Voiding a Transaction, creating a Refund, taking in a specific Line payment, adding a Fee/Fine Charge, making an account Adjustment and Printing an Account Statement.

#### On Screen management options:

#### Main Checkout Circulation & Suppression Screen options:



**Auto Due Date Determination:** by program Default this Option is turned on to honor the number of circulation days settings listed within each Borrower Group and Circulation code which is located under the Circulation Management menu of "Define Circulation Periods & Limits".



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# TURN-OFF this Auto Due Date Determination to Manually enter the new desired Check Out Date: 10/25/2018 Auto Due Date Determination Due Date, this new date TURN-OFF OverDue Warnings Will remain active until the

Auto Due Date Determination is reactivated or the Circulation screen is exited and reopened. Great for an End of Year check-in.

**Turn-off Overdue Warnings**: by program Default this option is turned off as the program will automatically display warnings about Overdue status, Fees/Fines owed or when activated Reading Levels Cautions. This function when activated (turned-on) will disable program Pop-up Warnings.

Suppress Photo ID: by program Default this option is turned off, and is represented by the presence of the green check mark. If your library uses Photo ID's this option would be un-checked to display photo's.

Include Textbooks / Equipment option is not active as it is used to display or not display special (long term circulated items) collection items amongst standard daily circulated library materials. Activate this button to display these special collection items within the "Circulation Register" listings of non-library specialized circulated items (Ex. Equipment, Textbooks, iPads, Chromebooks, etc.).

**Only Textbooks/Equipment**: by program Default this option is turned off, turning this option on has an opposite affect to what is displayed within the "Circulation Register" and would only display items from those special collections that are circulated out within Circulation.

#### **Print Receipts:**



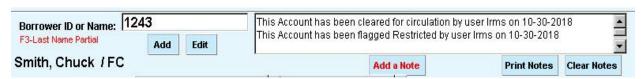
Print Today's Checkouts receipt for your borrower.

Print Active Circulation button, will print a listing of currently open circulation for your borrower that is listed within the Borrower ID field. Requires that a Receipt Printer be picked (Advanced Settings) for this ability.

Send an E-mail of Active Circulation button, does require an email address entry within the Borrower profile information.

#### "Add a Note" to the Patron/Borrower:

This option provides a space to place a comment which will display each time within any circulation option of this patron. Additionally, this Note area will also display Account Restriction information when authorized by a library staff person or optional automated Overdue restriction process.





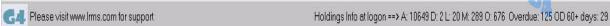
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Reading program being used to add the appropriate Reading Level Range. Collections materials containing the Reading Level within the MARC Tag 526 and Sub-field will be used to examine the borrower reading level against that of the collection item Reading level. If there is a mis-match of Reading levels for the item being Checked out to the Patron the program will provide an alert. See more... on page 10 and 11.

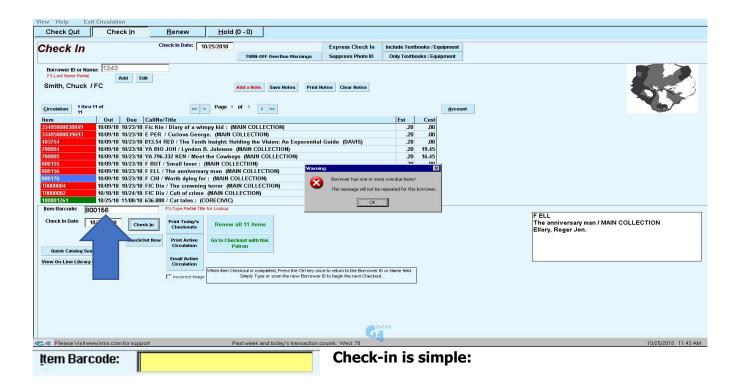
Review using Reading levels and Apps within the G4 Help documentation at <a href="https://www.lrms.com">www.lrms.com</a> for further details.

#### **Easy view Open Circulation Stats:**



When viewing the Catalog Menu, the above information will display at the bottom of the Catalog Menu screen display. This information would be very helpful with managing Open circulation.

#### Check-in Tab screen Display

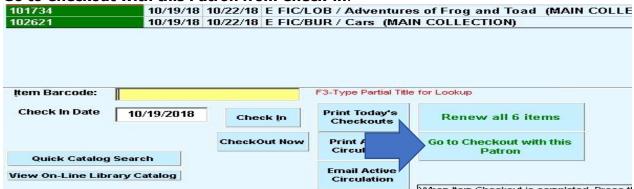




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When the Check-in Tab is used the program will automatically place the computer cursor within the Item Barcode (yellow highlighted) field. Material Barcode labels can be scanned or the Item barcode can be typed in manually. If you are using a barcode scanner begin to check-in the library items, details will automatically fill into the circulation screen. Borrower/Patron Name, ID and open circulation will appear along with any Warnings about open transactions. Answer or clear any warnings by clicking upon the OK button, if there are multiple items being checked in for this borrower continue to enter the Barcode number for each item being returned.

#### Go to Checkout with this Patron from Check-in:



Switch to Checkout of the same patron from Check-in with one click of a mouse without the need to re-add Borrower information.

#### Renew all items (in Active Circulation):

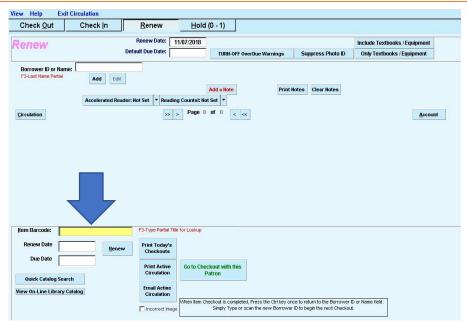


Renewal of All Items by a single click process. (Large numbers of renewals take a few moments), an efficient when an individual has large counts of items (20-200+) checked out.



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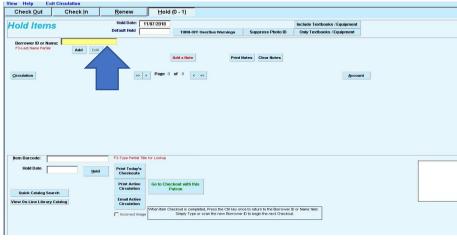
#### Renew Tab screen Display:



To Renew or Extend circulation of any item that is in Open circulation, use the Renew Tab.

The program will automatically place the courser within the Item Barcode field. Scan/type the item barcode into this field, the program will display the associated borrower and any warnings about the item being Renewed.

# Hold Tab Screen Display:



Use the Hold Tab to reserve an item that is currently circulated to another patron. The functionality of the Hold process is much similar to the Checking out of any item. Items placed on Hold are reserved and upon return to the library the program will alert the library staff of the open Hold for this item. The program will

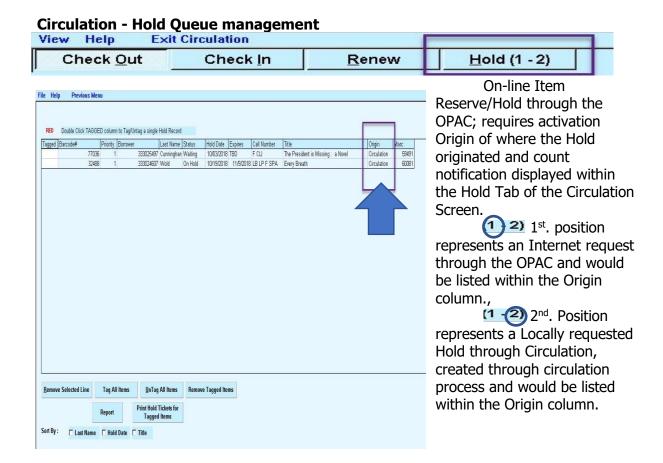
offer the printing of a Hold Ticket with the borrower information who requested the item for placement within the book.



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If the patron does not have their patron ID number or request is made by telephone, follow these steps:

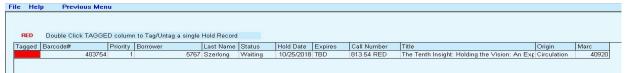
- Use the F3 key located in the top row of the keyboard towards the left to display a small screen called Lookup Borrower.
- Type in the first few letters of the patron's last name.
- Use the Enter key or single click on the select button on the right side of the screen.
- An individual name or list of all patrons with similar last name will appear.
- Place the mouse arrow on the correct patron name and single click the left mouse button to highlight it, or you can use the down arrow key to highlight the name.
- Use the Enter key after the correct patron name is highlighted
- This will return you to the hold screen and the patrons barcode number will be in the Borrower ID line near the top of the screen
- Use the Enter key again, this will bring up the name of the borrower





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Tagging of Hold Queue listed items allows for:



Removal of the Tagged item

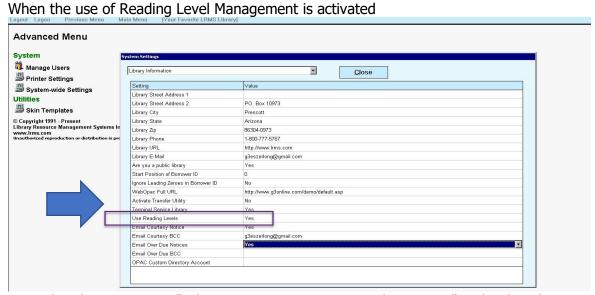
Print Hold Tickets for Tagged Items

Change the Priority of an item with a simple right mouse button click when more than one Hold exists for the same item.

## Do you use a Reading Program?

#### **G4 Reading Level Management and the ISBN number**

<u>Circulation & Borrower Reading Level Management</u> for those who subscribe to using Reading Program Management within their School Libraries or Public Libraries.



within the Main menu "Advance Settings – System-wide Settings" under the Library Information – Use Reading Levels and a Reading level range is also added to an individual's account.\_

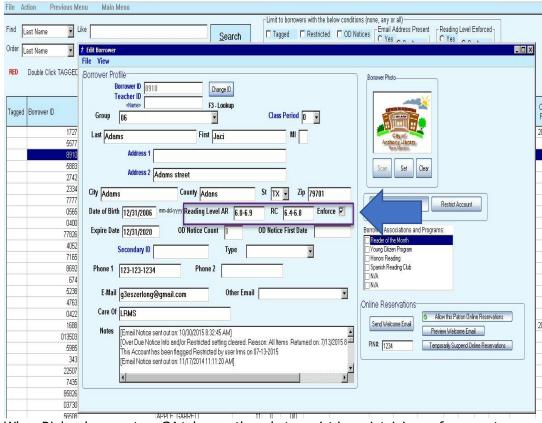
Any borrower having a Reading Level will be automatically monitored by the program.

During Circulation G4 will apply AR or RC Reading Program requirements to the individual borrower by matching the cataloged book ISBN number and its Reading Level information to that of within the borrower information.



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#### Set-up & Enforce of Borrower Reading Level Range



When RL levels are setup, G4 takes on the role to assist in maintaining enforcement

The G4 Reading Level system looks for an ISBN number within the item being Checkout for the presence of a 526 MARC Tag and Sub-field for a reading level and if not found converts the existing 10 or 13digit ISBN number and instantly queries a master database and uses that data to verify and apply a reading level.

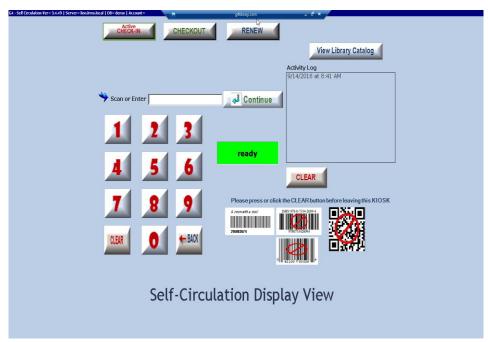
Within a second of time G4 uses your library record ISBN number and existing 526 & 521 tag information or when no information exists within in your MARC record G4 goes even further to match that ISBN number against our major database. If there is no possible RL match then alternate information is offered so that student will receive the benefit of reading something that struck their interest.



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#### Add Self Circulation to the library

Is your library unattended at times or closed to usage? Could the library use some additional help? How about allowing this computer generation of Patrons, Students and Teachers to have independent access to Circulation?



This popular option has proven itself within the library as a time saver and allows the library staff to devote more time working with patrons or students.

Self-Circulation does encourage library attendance and offers a simple solution to Circulation and can be setup to assist with Check-in only, allowing your patrons to check-in their materials as

they come into the library and can be setup to provide full service of Check-in, Checkout and Renewal, it is flexible enough to work with most Smart Devices and allows the numeric entry of Barcode numbers by a scanner or on screen 10-key pad or 10 key USB device (can operate without a keyboard).

E-Mail: Setup allows Libraries who would like to include an E-mail Receipt button to send the Borrower their Circulation Transaction, plus a setting for recognizing Reading Level enforcement that will direct the borrower to honor a different action.

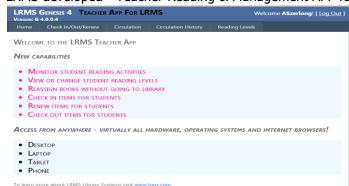
**Apply this Circulation Kiosk** to any PC, Mac, Tablet, Chromebook or Touch**-screen** compatible device. Turn the Circulation desk computer into a Self-Service Kiosk workstation when a library staff person is unavailable. Set-up in any one circulation mode or implement all four modes of Check-in, Checkout, Renew and allow access to the OPAC catalog.



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# Teacher Reading Level and Management APP

LRMS developed - Teacher Reading & Management APP for use with any device. This APP allows the



Teacher to monitor, manage and modify student Reading Levels in Real-time.

The App can be used for circulation of Reading materials in the classroom and library, the APP provides real-time management of what is currently being checked out through the library to students. It allows the educator to adjust the borrower reading level information within the Library borrower record. This App provides real-time circulation functions and can manage items checked out through the library or classroom.

Educators can use their Smart Device or laptop to assist with library circulation.