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Opening

1. Turn on the computers and the printers in the Circulation Desk area.


4. Check that the plasma screens and computers are turned on.

5. Unlock the equipment cabinets and carts. Unlock the iPad Bretford trays.

6. Check the book drops:
   a. Get book drop keys from the key cabinet in the office.
   b. Check the three book drops:
      • The book return inside the East library vestibule.
      • The after hours book drop located in the Grand Corridor (make sure this one is locked).
      • The book return outside the North entrance (river side).

7. Discharge books, reserve materials, and IMC materials from the book drop. Be sure to set the date back to the previous work day.

8. If Kindles are available in the safe file drawer, put them out in the drawer at the Circulation Desk so they are ready to be checked out.

9. Clear materials that have been on the One-Day Hold shelf for more than 24 hours.

10. Take any textbooks on the Lost & Found shelf over to the Textbook Library when they open.

11. Take the gate count at the scheduled time.
Closing

1. Take gate count at designated times on clipboard.

2. Play the half-hour closing message at 30 minutes prior to closing time.

3. Discharge all pickup and sort on carts.

4. Check the Media Booking System schedule (day view) for any items listed as overdue (orange). If the overdue item is a room key, check to see if that key is in the drawer and if so, discharge it. Leave a note with the name of the patron and the fine that should be cleared on the supervisor’s desk. If you have time, check any other equipment listed as overdue to see if it is here but not checked in and follow the same directions.

5. Play 15 minute closing message at 17 or 18 minutes prior to closing time. No charges should be done after 15 minutes prior to closing. For text of messages, see “Text of Announcements to use on the PA System,” on page 51.

6. If any laptops have/will not complete re-imaging, put them in the “overflow” cart with notes attached. Email the early morning supervisor alerting them that these laptops will need to re-imaged in the morning.

7. Lock all the equipment cabinets/carts (including the staff iPad cabinet behind the Circulation offices), and the iPad Bretford trays.

8. “Close” and lock the cash register.

9. If Kindles are in the drawer at the Circulation Desk, put them in the safe file drawer and push the key lock in to lock the safe file.

10. Discharge all of the books in the drop.

11. Check the inventory of room keys to be certain all have been returned. If not, check the room(s) and ask the students to leave. If no students are in the room, leave a note/email for the early morning supervisor.

12. Log-off Circulation terminals.

13. Turn off the printers.

14. Unlock the after-hours book drop in the Grand Corridor (in the key box in the supervisor’s office).

15. Turn off the CD player and the PA system.

16. Turn off the lights behind the Circulation desk.

17. Punch out. Make sure that you are the last person to leave and that the custodian has locked the doors and closed the gate. Notify the custodian if you think that there may be someone left in the building.

(Note: if a custodian is not here at closing time, follow the instructions under the telephone for contacting a custodian. Never leave the library until all exits are secured.)
Cash Register

OPENING

Unlock cash drawer

If register is shut down:

Tap “POS Register” twice. The computer will boot up.

If register is up:

Tap “Login”
Tap “Select From List”
Tap appropriate name
Type appropriate pin number, enter
Tap “Select Menu” key, enter
Tap appropriate menu

CLOSING

Tap “Print Reports”
Tap “POS Daily Audit”
Tap “Print”
Tap “Today”
Tap “Enter”
Tap “Logout”
Tap “Exit”
Tap “Start” (lower left corner)
Tap “Shut Down”
Turn off the power
Lock cash drawer
TRANSACTIONS

Ringing up a charge:

Tap item/items
Tap amount if needed
Tap “Subtotal”
Tap appropriate payment type (Cash, Check or Credit Card)
If selecting Cash or Check – enter amount of purchase
If selecting Credit Card – swipe credit/debit card
If selecting Blugold Account – swipe Blugold ID card
Tap “Continue” to return back to the Main Menu

Voiding an item:

Tap “Void Item”
Tap item that needs to be voided
Either continue with purchase procedure or if the purchase is complete:
Tap “Subtotal”
Tap appropriate payment type (Cash, Check or Credit Card) and continue with normal procedures

MISCELLANEOUS

To check the amount on a Blugold ID card:

Tap “Stored Value Balance”

To print a second receipt:

Tap “Last Transaction”

To clean the screen:

Tap “Wipe Screen” (you will have 10 seconds to clean the screen)

To turn the printer off/on:

Tap “Toggle Printer”
Cash Register Information

- If you enter wrong information, press [CANCEL TRANSACTION] and start over.
- If you discover an error before a transaction has been completed, press [VOID ITEM].
- If you discover an error after an entry has been completed, mark the receipt tape “VOID.” Place the voided receipt tape in the cash drawer.
- When the tape is running low and needs replacing: New tape rolls are located in the drawer to the left of the column and book return. Follow the directions underneath the printer cover for loading new tape.
- Selecting the correct payment method key is very important when entering a transaction. Be sure to use the “Blugold Account” key when you are entering a transaction that is being paid with a Blugold card. Use the “Credit Card” key when you are entering a transaction being paid with a credit/debit card: [Cash] for cash, [Check] for checks.

Reminders:

- The register is for fine and fee transactions only.
- Patrons’ checks must be for the amount due only.
- Do not cash checks.
- Refunds are not given from the cash drawer; they are done by the Business Office (Schofield 110).
- The minimum fine amount accepted is $.25.

Making Change:

Do not make change for bills or coins. A dollar changer is located on 1st floor, near the photocopiers (Change $1 and $5)

Note: For bills of more than $5.00, have the patron visit the Service Center/Information Desk in the Davies Center.
Posting Fine Payments

Click on the Dollar icon (§) from the patron record. The Fine/Fee window will display.

1. If you want to post for a specific fine/fee, highlight it in the Fine/Fee window. To highlight more than one fine, hold down [Ctrl] and click on the specific fines. If you want the posting to apply to the total fines/fees, do not highlight any specific line items.

2. Click the Post... button. The Post Against Fine/Fee dialog box displays.

3. For either the Selected option or the Total Due option, select the appropriate radio button.

4. The posting type should be (Payment).

5. From the pull-down menu, select the appropriate method. For example: cash.

6. Type the payment amount.

7. Click in the Description dialog box to enter any additional information.

8. To exit and save, click OK. To exit without saving, click Cancel.

9. The computer record receipt will automatically print. Use this sheet to validate the payment on the cash register.
Making Payments on Selected Fines

1. Scan the patron’s card.

2. Click the Dollar icon ($).

3. Select the Outstanding Fines/Fees tab.

4. Select the first item that the patron wishes to make payment on. To select additional items, hold down [Ctrl] and click on the specific fines.

5. Click the Post… button. The Post Against Fine/Fee dialog box displays.

6. Choose the Selected option.

7. The posting type should be Payment.

8. Enter the payment amount in dollars and cents.

9. From the pull-down menu, select the desired method. For example: cash.

10. Click OK. This will generate the printout and remove the selected item(s) from the patron’s fine record.
Charging/Renewing an Item

The patron must have their Blugold card or a Library Patron card to check out items.

1. Click on the first icon or from the Functions pull-down menu, select Charge/Renew.

2. Swipe the patron's Blugold card.
   - The top of the head on the photo should be at the bottom of the card pointing towards the computer.
   - The Patron Information box will display the patron's name, ID number, and "group" such as:
     - "Staff"
     - "Undergraduate student"
     - "Graduate student"
     - "Community Patron"

3. Scan the barcode of the item to be checked out.
   - The system displays a message that includes the title, barcode, due date and time, and status "C" which means that the item is charged, or "R" which means that the item has been renewed.
   - All items are allowed to be renewed only once.
   - Time is displayed in military time (i.e., 1315 is 1:15 pm).

4. Desensitize the item in the desensitizer.

5. Inform the patron when the item is due back and give the patron a due date slip if they wish.

6. To clear the existing patron, click the X icon in the Charge/Renew window.
Renew

All patrons must have their ID card in order to renew items.

Renewals are available online for UW-Eau Claire students/faculty/staff through the McIntyre Library website (http://www.uwec.edu/Library/) using their Private ID number, which is available through the Blugold system.

If the patron has the item in-hand:

See “Charging/Renewing an Item,” page 12.

If the patron does not have the item in-hand:

1. Swipe the patron’s Blugold card.

2. If the patron has items checked out, there will be a number below the Charged Items icon (▔).

3. Click on the icon to see all items the patron has checked out.

4. Click on and highlight the item(s) the patron wants to renew.

5. Click Renew at the bottom of the display.

6. The Due Date should change, and the Status will say Renewed next to today’s date.

7. Follow the regular charge procedures:
   a. Tell the patron when their renewed materials will be due.
   b. Give them date due slips if they wish.
Item Charged to Another Patron

When charging an item, if a window appears saying that the item “is charged to another patron”:

1. Click **Cancel**.

   **Note**: This is very important. If you click **OK**, the item will be checked out to the new patron and we will not know who had it checked out first and they may get a fine added to their record.

2. Click on the Item icon and scan the barcode.

3. In the item record, click on the patron icon.

4. Make a screen print of this screen.

5. On the sheet that was printed:
   a. Write “Already Checked Out.”
   b. Initial the form.
   c. Place the form on the supervisor’s desk.

6. Discharge the item.

7. Charge the item to the patron.
Changing the Discharge Time for the Current Discharge Session

1. Open the *Discharge* window.

2. Click on the *Clock* icon (⏰) to the left of the *Item Barcode* bar.

3. A popup box will appear titled *Backdate Discharge Time To….*

4. When discharging items from the book drops, change the date to one day prior (or the last day we were open).

5. Click *OK*.

6. The new time will display next to the *Clock* icon with this message: "Discharge Date Override Set". Make sure the new date and time are correct.

7. To clear the changed discharge time, simply click on the *Clock* icon. The discharge time will change to the current date and time.
Media Discharge

When discharging media (CDs, DVDs, etc.), make sure that the call number on the outside matches the call number on the actual item before checking the item in. Take the item out of its case to make sure that the item and case match before checking it in. Please do not check the item in if there is a mismatch.

If there is a mismatch, place the item on the supervisor's desk with a note including:

- the exact time and date it came in
- the problem
- your initials

Always count to make sure that all of the parts for a board game are returned. The total number of pieces will be listed on the cover.
How To Discharge an Item

1. Click on the Discharge icon (◆) or from the Functions pull-down menu, select Discharge.

2. Scan in the barcode of the returned item. The title, barcode, due date, status, and any fine will display in the pane below the barcode window.

To see who had an item checked out that you have discharged:

1. In the Discharge window, highlight the title of the book you want to find information on.

   Note: Even if the title is highlighted in blue, click on the line to get a “box” around the title.

2. Right click on the highlighted box. Choose collect fines. This will bring up the patron who had the book checked out even if no fines were assessed.

   Note: You can find this information only when the book is still listed on the discharge screen.

3. Another method: Bring up the item record. Choose item in the top menu line. Choose View Circulation History to see the last person who had the item checked out.
Item Information

This section will tell you the following:

- How to determine who has a charged item.
- How to determine when a charged item is due.

1. From the Voyager Circulation screen, click the Item icon (🔍).

2. You will first be prompted for the barcode of the specified item.

   **If you have the item in hand:**
   
   a. Scan the barcode into the system.

   **If you do not have the item in hand:**
   
   a. Click on “…” to the right of the barcode line. A search screen will appear to let you search for the item.
   
   b. Scanning the barcode will bring up the record or you may search and select to bring up the item.

3. Item information will appear on the screen.

4. If the Item Status displays "charged" or "renewed", you may click on the Patron icon (👤) in the Item Record window.

5. A Charged To window will appear giving you the patron's name, ID number, email address, and the item's charge and due dates. This screen will also tell you if the item has been renewed.
Items Marked As Lost

When discharging an item, if a window appears saying "ITEM MARKED AS LOST", do the following:

1. Use Hypersnap’s “Capture Window” function to select the pop-up window. See “Printing with Hypersnap,” page 45.

2. In Hypersnap, print out the captured window.

3. Clear and close Hypersnap.

4. Navigate back to the Voyager screen.

5. Click No to not clear the lost status.

6. Discharge the item.

7. Place the printout with the item on the supervisor’s desk.
Logging On/Off of the Computer

Logging on to the computer:

1. *User name* --- *circuser*.
2. *Password* -- type ____________________.

Logging on to Voyager:

1. On the task bar, click the *Voyager Circulation* icon.
2. In the *Operator* text box, type your operator ID _________________.
3. In the *Password* text box, type your password _________________.
4. Click **OK** and maximize the screen.

Logging off Voyager:

1. Close any open windows.
2. Close the *Voyager Circulation* program.

Logging off the Computer:

1. Close any open applications.
2. From the *Start* menu, select **Log Off**.
   The *Log Off Windows* dialog box appears.
3. Click **Log Off**.
Computer Failure

During normal business hours
(Monday – Friday 7:45 am to 4:30 pm):

Call the Library Systems Office at 36-4961. If no one answers, call the LTS Help Desk at 36-5711.

Other times

Call the LTS Help Desk at 36-5711.

If you are told that the system will be down for awhile, go ahead with the off-line check out as prompted on the Voyager system.

After the computers come back up:

1. Log off the off-line system and log into Voyager. You will be prompted to restore the off-line charges.

2. Enter information for any patron registrations that were done when the computers were down. This must be done before you perform any other functions.

3. Key in all the manual transactions from the manual checkout sheets. Be extremely careful to accurately enter patron names and material titles.
   - If you have a problem with a number that doesn’t give you a match or a renewal that can’t be done, clearly mark that item on the manual sheet so a supervisor can address it later. Key in all the items from the paper sheets before you do any discharges.
   - Be especially careful when interrupted. Do not lose track of which entries you were updating on the computer.

4. Save all of the manual checkout sheets and put them on the supervisor’s desk with a note stating the problem and time.

5. Once all the manual charges are entered, slowly begin doing the discharges. If you tackle the discharges slowly, it will give the previously-entered charges time to file.

   Note: If you come across any items that give you the message “NOT DISCHARGED--ITEM NOT CHARGED,” set that item aside and try to discharge it again later. It might just be a simple matter of a charge not being filed yet.

6. Clearly label any items you have problems with and put a note on the supervisor’s desk.

   Note: Always watch your screens. Make sure item numbers actually come up and that they always match the item you have in hand. The extra care you take during this cleanup process following a down time will save us a great deal of checking at a later date!
Locker Rentals

To rent a locker:

1. Have the patron fill out a “Locker Rental Form”.
2. Have them sign it after reading the conditions.
3. The Circulation Desk employee should complete the rest of the form.
4. Inform the patron that a one-semester renewal is available and that a $1.00 per day fine is assessed if the key is not returned on time.
5. Have the patron pay the $10.00 fee.
6. Ring up the payment on the cash register with the Locker keys.
7. Give the yellow copy to the patron.
8. Take the key out of the envelope and check it out to the patron using the barcode on the envelope.
9. Clip the envelope and the white form together. Put them in the holder on the small desk.
10. Give the key to the patron.

To renew a locker rental:

1. Have the patron fill out a new rental agreement form and sign it.
2. The Circulation Desk employee should complete the rest of the form.
3. Have the patron pay the $10.00 fee.
4. Ring up the payment on the cash register.
5. Give the yellow copy to the patron.
6. Pull out the key envelope and check in the barcode. Check out this barcode again to the patron.
7. Clip the envelope and the new white form together. Put them in the holder on the desk.
8. Complete the old form (key returned date filled in as “renewed” + date). Leave this form with the other one in the holder on the desk.

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When the key is returned:

1. Pull out the envelope and rental agreement.
2. Place the key in the envelope. Check in the key using the barcode on the envelope.
3. On the rental agreement, indicate that the key was returned.
4. Leave the key envelope and the rental agreement in the holder on the desk.

If patron loses the key:

1. Write “lost key” on the form and place in on the supervisor’s desk.
Maps

If there is a barcode on the back of the map, check it out to the patron on the computer.

If there is no barcode, proceed as follows:

1. Fill out the blue Problem Item slip for each map. These are located in the holder next to the printer and phone.

2. Be sure to include the map number, especially on Canadian maps.
   - US maps have numbers like N4537.5-W9137.5/7.5 or 36118-E8-TF-024 under the map name (i.e., Nobleton, Wis) in the lower-right corner. The year is located under the number. The scale appears in the middle, under the map and is something like 1:24000.
   - Canadian maps have a name in the lower-right corner (i.e., Split Lake) under which is a number like 64 A/1 edition 2. The year is often near the name and number in the lower-right corner. It often appears after a © sign. If you find the © year but there is a more recent year near it, use the more recent year. The scale appears in the middle under the map and is something like 1:50000.

3. Determine the due date:
   - For undergraduates and community users, the item is due in 4 weeks (28 days) with one renewal allowed.
   - For graduates and faculty/staff, the item is checked out for the semester with one renewal allowed.

4. Be sure the date borrowed and date due are accurately recorded.

5. Place the blue slip in the holder on the small desk.

6. Place the map in a map tube if one is available and record the date due on the sheet attached to the tube. (Cross out any previous due dates.)

7. Make certain the patron knows when the map(s) is/are due and that they must be returned in the tube.

When maps are returned:

a. Use the barcode to discharge the map.
b. Put maps on the Government Publications shelf or cart for re-filing.
c. Place the empty tube back on the shelf.
d. If there is no barcode: Give map to supervisor.
Newspapers

If a newspaper needs a barcode, it should be charged and discharged manually after receiving a barcode. Use the lavender sheet at the Circulation Desk to manually check out newspapers.

Only the entire newspaper can be charged (no individual sections should be checked out).

**Charging a newspaper:**

1. Place a barcode on the newspaper.
2. Record all information on the lavender manual checkout sheet by the terminals.

   **Note:** Make sure you include the title and date of the newspaper.

**Discharging a newspaper:**

1. Locate the charge on the manual checkout sheet.
2. Cross out the information.
3. Place the newspaper on the Periodicals shelf.
Reserve and Double-Sided DVDs

Reserve materials and equipment behind the Circulation Desk circulate for varied periods of time. Double-check the due date and time for each item checked out.

Double-Sided DVDs:

These are kept behind the Circulation Desk after the reserve collection since there is currently no good way to sensitize them. They circulate for 2 weeks.

When the patron brings the empty case to the desk to check out the DVD, find the green DVD case on the shelf. Replace the green case with the empty one. Check out the green case to the patron.

When the green case is returned, check it in, pull the empty case from the shelf and replace it with the green one. Place the empty case on the DVD shelf for shelving in the DVD collection on first floor.
Library Community Patron Card – Missing or No Record

This section will tell you how to proceed in the following situations:

- The patron has a Community Patron Card, but their number does not bring up a match on the computer, or
- The patron does not have a current Community Patron card.

If a patron comes to the desk to check out materials with their Community Patron Card, but their number does not bring up a match on the computer, check the patron processing record by their name to see if they are on the system with another number and/or category.

If you find a computer record for them:

1. Have the patron complete a new “Patron Registration Form.” Find the previous registration form in the black boxes. Pull the form from the box.

2. If the patron already has been assigned a 900 number, use the same number again. If they do not have a 900 number, assign one from the notebook and write the patron’s name in the notebook next to the number. On the back of the “Patron Registration Form,” write the 900 number as the Library ID number and fill out the rest of the information including the date and your name.

3. Follow procedures for “Editing a Patron Record,” page 33. Make sure the New Barcode is the 900 number. Make any other necessary changes (name spelling, etc.). Make sure the patron’s address matches the address on the form they just filled out. If the computer information is incorrect, update it.

4. Create a new patron card.

5. Collect the $20.00 library fee from the patron using the “COMMUN USER” key on the cash register. Indicate the amount paid on the back of the registration form.

6. Clip together the old card, the old registration form, and the new registration form and place them in the holder on the desk.

If you do not find a computer record for them:

1. Have the patron complete a new “Patron Registration Form.” Find the previous registration form in the black box. Pull the form from the box.

(continued on next page)
If the patron already has been assigned a 900 number, use the same number again. If they do not have a 900 number, assign one from the notebook and write the patron's name in the notebook next to the number. On the back of the “Patron Registration Form,” write the 900 number as the Library ID number and fill out the rest of the information including the date and your name.

2. Follow procedures for “Adding a Patron Record,” page 38.

3. Type a new patron card.

4. Collect the $20.00 library fee from the patron using the “COMMUN USER” key on the cash register. Indicate the amount paid on the back of the registration form.

5. Clip together the old card, the old registration form, and the new registration form and place them in the holder on the desk.

If the patron comes to the desk to check out materials with an expired Library Patron card:

1. Have the patron complete a new “Patron Registration Form.”

2. Search by their name on the computer. If a match is found, proceed with step 4. If no match is found, proceed as follows.

3. Assign a 900 number from the notebook and write the patron’s name in the notebook next to the number. On the back of the “Patron Registration Form,” write the 900 number as the Library ID number and fill out the rest of the information including the date and your name.

4. Follow directions for “Adding a Patron Record,” page 32.

5. Collect the $20.00 library fee from the patron using the “COMMUN USER” key on the cash register.

6. Clip together the old card, the old registration form, and the new registration form and place them in the holder on the desk.
Patron Registration

This section will describe what the different patron categories are and how to issue patron cards to each type of patron:

- Community Patron
- Faculty/Staff
- Faculty/Staff Dependent
- Faculty/Staff Spouse
- Student Spouse
- Student with One Class
- Adjunct Faculty/Staff
- Alumni
- Emeriti Faculty/Staff or Spouse
- High School Student
- TemporaryCourtesy (Special Groups)

Community User:

Registering a new patron and making a Community Patron card:

1. Ask the patron for a picture ID such as a driver’s license or other ID card.
2. Have them fill out a “Patron Registration Form.”
3. Complete the information needed on the back of the registration form including the library ID number (900 number) and register the patron on the system.
4. Follow procedures for “Adding a Patron Record,” page 32.
5. Create a patron card.
6. Collect the $20.00 library fee from the patron using the “COMMUN USER” key on the cash register. Indicate the amount paid on the back of the registration form. Put the form in the holder on the desk.
7. Refer the patron to the library web page for pertinent information.

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Renewal of a Community Patron card:

1. Have the patron fill out a new “Patron Registration Form.”

2. Pull the old patron registration form out of the black filing box and clip to the new registration form.

3. Assign a 900 number if the patron’s previous card did not already have one.

4. Change the expiration and purge dates on their computer record to 2 years from the current date. Check for any other information that needs updating, such as their address or telephone number.

5. Create a new Community Patron card for the patron with the new expiration date.

6. Collect the $20.00 library fee from the patron using the “COMMUN USER” key on the cash register. Indicate the amount paid on the back of the registration form.

7. Clip the old library card and form to the new “Patron Registration Form” and put them in the holder on the desk.

Replacement of a lost Community Patron card:

1. Ask the patron for a picture ID such as a driver’s license or other ID card.

2. Verify that they are on the system.

3. Pull out their old registration form from the black filing box.

4. Have the patron fill out a new “Patron Registration Form.” Attach a note stating that this is for the replacement of a lost card.

5. Collect a $10.00 charge for replacing the lost card, and ring it up on the register using the “COM USE REPLAC” key on the register.

6. Note the fee collected on the new form. Clip the old and new forms together. Put them in the holder on the desk.

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Faculty/Staff:

These are people currently employed at UW-Eau Claire. They must have a UW-Eau Claire picture ID. The card will indicate Faculty/Staff. If they do not have this form of ID, they must obtain one at the Blugold Card Office before they can check out library materials.

1. They should have an ID from the Blugold Card Office for charging items from the library.

2. LTEs must purchase a off-campus patron card unless they are eligible for WRS (Wisconsin Retirement System). If they are eligible for WRS, they will be issued a Blugold card -- their category is Emeriti. See “Emeriti,” page 35. Have them fill out a “Patron Registration Form”. On the back of the registration form note “LTE in (Dept.).” Use their Blugold ID number. Ask a supervisor to determine their expiration date. To verify employment, call Human Resources at 36-2018.

Faculty/Staff Dependent:

These are dependent children (ages 12-17 only) of people currently employed at UW-Eau Claire.

1. The faculty/staff member must fill out the blue registration form.

2. Assign a 900 number and record it on the back of the blue registration form.

3. Follow procedures for “Adding a Patron Record,” page 32. Make sure the expiration and purge date is ONE YEAR from the days’ date. In the address field, enter “ATTN: (faculty/staff members name)” on the first line. Put the street address on the second line.

4. Type a patron card and put a BLUE label protector on the card. Follow exactly the example on the 2nd page of the label sheet.

5. The expiration date will be a year from the date issued.

Faculty/Staff Spouse/Partner:

These are spouses or partners of people currently employed at UW-Eau Claire. They must have a UW-Eau Claire picture ID card with the designation Spouse/Partner.

1. They should have a UW-Eau Claire picture ID card from the Blugold Card Office.

2. Have them fill out a “Patron Registration Form.” On the back of the form, indicate the name of their spouse/partner.

3. Assign a 900 number and record it as the library ID on the back of the form, as well as any other information requested.
4. Follow procedures for “Adding a Patron Record,” page 32.

(continued on next page)

5. Type a patron card.

6. The expiration date will be 2 years from the date issued. At that time we will update their status and other information.

   **Note:** They will have ILL privileges. The supervisor will add a note to the faculty/staff member’s record stating “Spouse/Partner Card for [spouse name].”

**Student Spouse/Partner:**
These are spouses/partners of current students at UW-Eau Claire.

1. They should have a UW-Eau Claire ID card from the Blugold Card Office.

2. Have them fill out a “Patron Registration Form.” On the back of the form, indicate the name of their spouse/partner.

3. Assign a 900 number and record it as the library ID on the back of the form, as well as any other information requested.

4. Follow procedures for “Adding a Patron Record,” page 32.

5. Type a patron card.

6. The expiration date will be the end of the current semester.

   **Note:** They will have ILL privileges.

**Student with One Class:**

They should have a UW-Eau Claire ID card from the Blugold Card Office. If they do not have this ID, they must obtain one at the Blugold Card Office in order to check out library materials.

**Adjunct Faculty/Staff:**

Usually these people supervise UW-Eau Claire students engaged in field experiences. They will have a card containing the following:

- their name
- the university name
- the expiration date
- the title Adjunct Faculty/Staff

1. Ask for a valid Adjunct Faculty/Staff card with a current expiration date.

2. Have them fill out a “Patron Registration Form.”
3. Assign a 900 number and record it as the library ID on the back of the form, as well as any other information requested.

4. Follow procedures for “Adding a Patron Record,” page 32.

5. Type a patron card.

**Note:** Checkout privileges for adjunct faculty are the same as for students, but they do not have ILL privileges unless they talk to the ILL librarian. The departments issue their own Adjunct Faculty cards.

**Alumni:**

Alumni do not have special library privileges. Recommend that they purchase a Community User card. See “Off-Campus User,” page 26.

**Emeriti Faculty/Staff or Spouse:**

These are retired UW-Eau Claire faculty and staff. They must have a Blugold card; if they do not, they must obtain one at the Blugold Card Office before they can check out library materials.

1. Ask to see their Blugold card from the Blugold Card Office.

2. They should already be on the system, so they will just need to have the Emeriti status added to their existing record.

3. Have them fill out a “Patron Registration Form.”

4. Follow procedures for “Editing a Patron Record,” page 33.

5. Use the same number that is on their ID card with the addition of two leading zeros.

6. Fill out the information requested on the back of the form.

**Note:** They will have ILL privileges.
High School Student:

1. High school students must present:
   a. The honor card issued from their high school (currently only Memorial, North, and Altoona high schools). Be sure that the card is for the current year. A valid driver’s license or other ID with a picture and a permanent address.
   b. Social Security Number.

2. Follow procedures for “Adding a Patron Record,” page 32.

3. Register the student as “High School Honor”:
   a. Have the student fill out a “Patron Registration Form.”
   b. Assign a 900 number and fill out the information required on the back of the form. The expiration date is posted.
   c. Type a patron card for the student.
   d. Refer the student to the library web page for pertinent information.
      Explain the fine system to the student.

      Note: They do not have ILL privileges.

Temporary Courtesy:

This category includes special groups such as Upward Bound, English as a Foreign Language, Summer Science Institute, auditors, visiting scholars, etc.

1. They might already be on the system. They may have either a UW-Eau Claire ID card from the Blugold Card Office or a patron card that was sent to them.

2. If they are not already on the system, check with the supervisor to verify their eligibility.

3. Have them fill out a “Patron Registration Form.”

4. Follow procedures for “Adding a Patron Record,” page 32.

5. Assign a 900 number and record it as the library ID number on the back of the form, as well as any other information requested.

6. Type a patron card.

Note: They do not have ILL privileges unless they talk to the ILL librarian.
Adding a Patron Record

If you have already performed a patron search and received no matches, you will need to add a patron record.

1. Select the Patron icon (👩). From the Patron Record pull-down menu, select Patron » Add Patron.

   **Note:** Make sure the [Caps Lock] key is on. Information should be entered in all capital letters.

2. Complete the Name tab.
   a. Fill in the patron’s last name, first name, and middle initial.
   b. From the The Patron Type pull-down menu, select **Personal**.
   c. In the Institution Id field, type the patron’s 900 number.
   d. In the Expires text box, enter the patron’s expiration date. Clicking … brings up a calendar to select the month, day, and year.
   e. In the Purge Date text box, type the same expiration date from Step d.

3. Complete the Barcode tab.
   a. In the New Barcode field, type the patron’s 900 number.
   b. In the Patron Group pull-down menu, select the appropriate patron group.

4. Complete the Address tab.
   a. Complete lines 1-5 (a minimum of one line is required).
   b. In the City text box, type the patron’s city.
   c. In the State/Prov. text box, type the patron’s two-letter state abbreviation.
   d. In the Zip/Postal text box, type the patron’s zip code.
   e. The Country text box is not required.

5. Complete the Phone tab.
   a. Type the patron’s phone number (i.e., 715-555-1234).

6. To save the new record, click **Save**.

7. To exit Add New Patron Record, click **OK**.
Editing a Patron Record

To change the patron’s information:

1. Select the Patron icon (🎉). From the Patron Record pull-down menu, select Patron » Edit Patron.

2. Click on the appropriate tab(s) you want to change.

3. Correct the desired information.

4. To add additional addresses, barcodes, and phone numbers:
   a. From the items from the Patron Record list on the right side of the window, select the desired item (in red).
   b. Click Addresses <new>, Barcodes <new> or Phone Number <new>.
   c. From the Type and Patron Group pull-down menus, make the appropriate selections.

5. To save the changes to the patron record, click Save.

To add a new category and use the same 900 number:

1. Click Barcodes <new> on the right side of the screen.

2. In the New Barcode text box, type in the current 900 number.

3. From the Patron Group pull-down menu, make the appropriate selection.

4. Click Save.

5. Click the previous category that uses the same 900 number (listed on right side of the screen).

6. From the Status pull-down menu, select expired.

7. Click Save.

8. Click OK.

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To add a note to a patron’s record:

1. In the Patron Record, click Note.

2. In the Notes dialog box, click New.

3. From the Note Type pull-down menu, select Pop-Up. (This note will now appear each time the patron record is brought up.)

4. In the Notes text box, type the message.

5. Click Save.

6. Click OK.

Notes: The note will appear each time the patron checks out materials or the Note icon will appear when the patron record is looked at. To delete the note from the patron record, click on the Note icon and click Delete.
Reading the History Tab of a Patron’s Fine/Fee Record

1. To survey a patron’s fine history, bring up the patron's record and click the Dollar icon ($). If the patron has outstanding fines or fees, the dollar amount will appear below the icon.

2. Select the Fines/Fees History tab.

3. There are two lines for each fine/fee cleared from the patron's record.

4. The top line includes the title of the item and the reason for the charge, such as “overdue.” Click on the top line.

5. The following details appear in the bottom part of the window:
   - the date the item was checked in
   - the charge and due dates
   - who checked it in and at what location

6. Clicking on the empty field below the title line will change the box in the lower-right area to display the time and initials of the person clearing the fine. Any notes attached to the fine will appear in the Description box.
Searching Patron Records

Searching for a Patron:

1. Click on the Patron icon (.scan). The Patron Search dialog box displays.
2. Choose a searching method by clicking either Name or Barcode.
3. Enter the information required. Click OK to begin your search, and click Cancel to exit without searching.
4. If you search for a patron and the patron has more than one active barcode, the multiple barcode list displays. Select a barcode to use.
   
   **Note:** If you wish to abort the search and try to find a different patron, you can use [Ctrl + S].

Searching Charged Items for a Patron:

1. Click the Charged Items button in the patron record.
2. You can sort by Title, Due Date, or Status by clicking on the appropriate bar.
3. To print from this screen, click Print.
4. To select all items, click Select All.
5. To discharge from this screen, select the item you want to discharge or select all. Then, click Discharge.
6. To renew from this screen, select the item you want to renew or select all. Then, click Renew.
7. To exit this screen, click OK.

Searching Fine Records for a Patron:

1. Click on the Dollar (dollars) icon in the patron record.
2. To look at current fines, click the Outstanding tab. To look at previous fines, click on the History tab.
3. To print from this screen, click Print.
4. To post payments from this screen, see “Posting Fine Payments,” page 7.

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Searching Hold/Recall Information for a Patron:

1. Click on the **Patron Hold/Recall** button in the patron record.

2. *Requests Pending* lists all holds/recalls the patron has placed. *Items Available for Pickup* lists all holds/recalls available for the patron to pick up.

3. To print from this screen, click **Print**.

4. To charge an item, select the item from the *Items Available for Pickup* list and click **Charge**.
Printing with Hypersnap

If you do not see a Print button, you can print using Hypersnap:

1. Open Hypersnap.
2. Click Capture from the menu bar.
3. From the menu choices of Full Screen, Window, or Region, Select Window.
4. Move borders to include only the portion you want to print.
5. Select Print.
Proxy Service

Proxy authorization permits faculty and academic staff to send a student assistant to the library to pick up materials to be used by the staff member. The following terms apply:

- Faculty and academic staff currently employed at UW-Eau Claire may designate up to two people per semester to have proxy checkout privileges.
- Proxies must be currently enrolled or employed at UW-Eau Claire.

Proxy Procedures:

1. When proxies arrive at the Circulation Desk they will present their Blugold card and indicate that they are checking out the material for a specific staff member.
2. Blocks on personal records will invalidate (cancel) the proxy privilege.
3. Proxies may not use the proxy privilege to charge materials for their own personal use.
4. All normal due dates will apply.

   **Note:** The faculty member must submit a completed “Proxy Authorization Request Form” to the Circulation Desk before sending a student to pick up materials. A supervisor will enter the information and notify the faculty member by email that the proxy has been added.

The proxy authorization form is available online or in the circulation counter drawer.
Security System

Troubleshooting:

If the security system lattice corridors are not operating correctly, call 3M services if necessary. (See file folder in file cabinet for current information.)
When the Security Alarm Is Activated

Always watch for the following:

- items being held above the security gate
- items being handed around the ropes
- people stepping over/under the ropes

The detection system is virtually free of false alarms. Occasionally the alarm will go off and you may find that the patron does not have unauthorized library materials. If the following items have active security strips, they may cause alarms:

- books from another library or the bookstore

  **Note:** This is the most common reason for the alarm.

- CDs, and DVDs from video rental and music stores
- other items from retail stores

Because it is not possible to distinguish between unwanted alarms and actual theft, all responses to alarms must be consistent and follow the library’s policy:

1. When the audible alarm goes off, the light at the top of the panel will indicate which gate the alarm occurred in.

2. Ask the patron to return to the counter.

3. You should say something like “Excuse me, did I forget to check out one of your items?” OR “Did you perhaps pick up one of the library’s books with your own things?”

  **Note:** These are courteous questions, and they don’t accuse the patron of theft. Ask the questions in a friendly, non-threatening manner.

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If you decide that an active strip on an item from outside the library has caused the alarm, follow these steps:

1. Explain the problem to the patron.
2. Verify that all of the patron’s library materials are properly checked out.
3. If the item setting off the alarm is not media, desensitize the item. Remember to never put media (such as videotape or items from another library) on our sensitizers/desensitizers.
4. If a media item is causing the alarm, have the patron exit without the item and then hand the item to the patron on the other side of the exit gates.
5. Tell them to hand it around the next time they enter or exit the library.

If the patron has a McIntyre Library item that is not properly checked out, follow these steps:

1. Ask for the patron’s ID card.
2. Record all necessary information on the yellow “Security Gate Violations Form.”
3. Inform the patron that he/she will receive a mailing explaining the seriousness of leaving the Library with materials that have not been checked out properly.
4. If the item has been damaged in any way (i.e., torn cover, missing barcode or label), fill out the yellow “Security Gate Violations Form.” Put both the form and the item on the supervisor’s desk.
Texts of Announcements to use on the PA System

Instructions for using the PA are located on the PA System. To use, turn the system on and press the button on the base of the microphone to speak.

30 minutes before closing:

- “May I have your attention please? The library will close in one half hour. You have 15 minutes to check out library materials.”

15 minutes before closing:

- “May I have your attention please? The library is now closing. You must leave the library at this time.

At closing:

- “May I have your attention please? The library is now closed. Anyone remaining in the building will be reported to the campus police.”

In case of a severe weather warning:

- “May I have your attention please? The weather service has issued a (tornado, storm, etc.) warning for Eau Claire. Everyone should immediately go to the basement of the building.”

In case of a building evacuation:

- “May I have your attention please? There is a building emergency. Everyone must evacuate the building immediately. Take your things with you. Everyone must leave the building at this time.”
Universal Borrowing (UB) Guidelines

To determine if a patron is eligible:

1. Only specific groups are eligible for UB. These groups include UW-Eau Claire faculty and staff, undergraduate and graduate students, and emeriti faculty.

2. A patron who is blocked for any reason on their home campus is not eligible for using UB. (i.e., If a UW-Eau Claire student has more than $10.00 in fines at McIntyre Library, they could not request or check out material on UB from another UW library.)

3. No ID, No checkout. We will hold the items for 24 hours to allow time for the patrons to get their ID cards and return to check out their materials.

4. If a UB patron’s ID does not bring up a patron record, you will not be able to check any items out to that patron using that ID.

   Note: Some ID cards from other campuses can’t be “swiped”; instead, scan the barcode or type in the number or name to see if you can get a match. If there is not a match, they will not be able to check out items using that ID. They may instead purchase a $20.00 Community User card. (Since the UB system connects directly to the home institution’s patron database, we assume the UB patron is not in good standing on their home campus library system and therefore would not be eligible for UB at UW-Eau Claire.)

5. Periodicals, reference books, special collections items, maps, and reserve materials do not circulate on UB.

6. Most items that circulate on UB have a 28-day circulation period. Some items, such as DVDs, IMC textbooks, multimedia, pictures, and CDs, only circulate for 14 days.

7. The following UW-Eau Claire patron groups are not eligible for UB privileges. These groups will continue to follow the existing off-campus circulation policies and must still use the McIntyre Library patron card:
   - Community Patrons
   - Adjunct Faculty
   - High School Honor
   - Spouse of Faculty
   - Spouse of Student
   - Temporary

8. UB materials may only be renewed one time. The patron needs to renew the materials online, not at the Circulation Desk.
Universal Borrowing (UB) Charging

To charge UB materials to UW-Eau Claire students:

Items to be checked out are on the hold shelf in alphabetical order by patron name. You will be able to distinguish UB items from regular UW-Eau Claire holds by the yellow band/sheet on the item.

1. Determine the institution from which the book has been borrowed.
   
   **Note:** The name of the holding library should be on the bottom portion of the yellow UB band/sheet. If not, check the barcode label or look for a property stamp on the edges of the book or inside the item.

2. In the **Charge** screen, bring up the patron’s record by scanning in their UW-Eau Claire ID card.

3. Scan in the barcode from the book.

4. Inform the patron of the due date and write it on the yellow wrapper on the **Due Date** line.
   
   **Note:** Do not desensitize these materials. Never pass any audiovisual items over a desensitizer (i.e., videos, audiocassettes, CDs, computer disks)

To charge UB materials to other UW System students:

- Patron groups from other UW system schools may request books from other UW libraries participating in UB and have the books *delivered* to UW-Eau Claire for pick up here. These books will be on our regular hold shelf and will be identified by the yellow UB band/sheet. These patrons will have to present their ID card from their home library before you may retrieve books from the hold shelf for them.

- Students, faculty, and staff from other UW campuses may also come *in person* to McIntyre Library and select books from our collections to check out. Although these books would not have a yellow UB band/sheet on them, you should still follow the UB checkout procedures.

- On the **Charge** screen, select the name of the institution where the patron is registered as a patron and type in their home campus ID number.

If the patron is picking up a book requested from another library:

1. Scan in the barcode.

2. Inform the patron of the due date and write it on the yellow band/sheet if the item has one. If it is a UW-Eau Claire item, insert a properly marked date due slip.
Universal Borrowing (UB) Discharging

1. When an item is returned to the desk and it has a yellow UB band/sheet on it, take the item and place it on the designated UB return shelf.

   **Note:** Do *not* do a normal discharge.

2. When discharging items from the book drop you might occasionally find a UB item without a yellow UB band/sheet. You will not know if it is a UB item until you have done the discharge. In *Discharge* screen, the *FYI* column will indicate that the item should be routed.

3. The discharge process automatically prints the routing slip.

4. Take the routing slip out of the printer and put it in the UB item.

5. Place the item on the UB return shelf.

6. You will be able to distinguish UB items from regular returns by the yellow band/sheet on the item. Look at the bottom of the yellow band to determine which library the item came from.

   **Note:** Before doing any discharge, verify contents. Account for all parts before discharging. If parts are missing or the wrong video is in a case, do not discharge the item. Notify the borrowing patron.

**To discharge UB materials:**

1. Determine the name of the library that owns the book and select that name using the *Library* pull-down menu.

2. Scan the barcode from the book.

3. The *Discharge* screen will register the discharge and display information about where the book is to be routed. A routing slip will print out automatically.


5. Prepare the item for routing back to the holding library or for re-shelving at UW-Eau Claire.