

Guide to the OLE Deliver Module

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Introduction

This guide provides information about using Deliver functions. The Deliver Module covers the interactions between the library and its patrons. The Deliver processes include check in, check out, renew, request, hold, manage patron accounts, notices, fines and fees, interlibrary loan and course reserves.

Note

To learn more about the Deliver Module, see the *Deliver Overview* in the wiki's [OLE Documentation Portal](#).

This guide is organized to follow the layout of the Deliver tab.

- The first section provides an explanation of Deliver Batch Processes. Though not included on the Deliver tab, it is important to understand some of these processes that occur behind the scenes.
- Circulation provides access to loaning, returning, requesting, and item bills
- Circulation Admin includes the maintenance documents (documents that control database tables) associated with circulation.
- Patron provides access to patron records and patron bills.
- Patron Admin includes the maintenance documents associated with patron records.

These sections are divided into subsections covering individual functions. For each function, the applicable subsection presents a breadcrumb trail showing how to access the function and information on the layout and fields on the related screen(s). As appropriate, some subsections include business rules and routing information for e-docs and/or special instructions for performing activities.

Note

In order to work efficiently in the system's Deliver screens, you need to understand the basics of the user interface. For information and instructions on logging on and off, navigating, understanding the components of screens, and performing basic operations in the screens, see the [OLE Basic Functionality and Key Concepts](#).

This guide as well as guides to other OLE modules are available for download from the [OLE Documentation Portal](#).

Tip

Bookmark any page within OLE. This will allow you to easily navigate back to an interface or e-doc in one click, just log in.

Chapter 1. Batch Processes



The following table summarizes the functions of the system's Deliver batch processes. These processes generate notices of various kinds, generate bills for lost items, delete temporary circulation histories and update reshelved materials' item status.

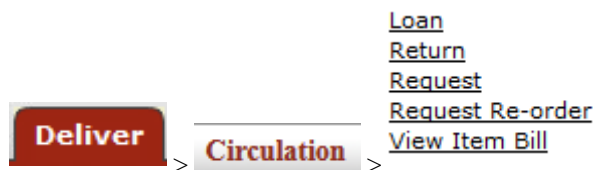
Each job may be scheduled by a library to run at any time. From the **Admin** menu, click **Batch Job** to enter the lookup. Click **Search**. Click **Edit** to change the schedule for any job. (As of now, the jobs are set to run at 2 AM Eastern time. A more user-friendly scheduling method will be developed.)

Output files from these jobs are stored at a location chosen by the library. The location is identified as the system parameter PDF_Location which can be found at Admin > Configuration > Parameter.

Deliver Batch Jobs

Job Name	Description
generateNoticesJob	Identifies overdue items and creates notices for delivery to patrons using their preferred delivery method. A first overdue notice is generated <i>n days/hours after the due date/time</i> ; subsequent overdue notices (how many determined locally) are then generated <i>n days/hours</i> after the last notice. Also generates replacement fee bills for items that have received <i>n</i> overdue notices.
deleteTemporaryHistoryRecordJob	If a library decides to store temporary circulation histories, this job purges those records systematically. (OLE runs this job at 2am every morning but this is locally configurable.)
generateRequestExpirationNoticeJob	A library may opt to send patrons notices when requested items have been removed from an on-hold status because the patrons never picked up the items. This job creates these notices for delivery to patrons using their preferred delivery method but only for patrons whose records have the courtesy notice flag turned on.
deletingExpiredRequestsJob	Identifies requested items that have been on hold but are now beyond the expiration date; the subsequent list then allows an operator to check-in these items to determine their next destination.
generateOnHoldNoticeJob	Creates on-hold notices for delivery to patrons using their preferred delivery method to inform them when a requested item has become available and at what pick-up location. If pdfs are generated for mail delivery, the PDF_LOCATION stores the directory location.
updateStatusIntoAvailableAfterReShelvingJob	Circulation Desks may set an interval to allow for the time lag between check-in and reshelving. When this interval is defined, items checked-in are given the item status "Recently returned". This job, following the interval, changes the item status to "Available".
generateHoldCourtesyNoticeJob	A library may opt to send patrons reminder notices when borrowed items are close to their due dates/times. This job creates these notices for delivery to patrons using their preferred delivery method but only for patrons whose records have the courtesy notice flag turned on.

Chapter 2. Circulation



On the Deliver menu, Circulation provides access to a number of circulation functions that allow users to view and maintain a variety of standard Circulation E-Docs.

Loan



A loan consists of identifying a patron and then creating temporary links to the item(s) being loaned to the patron. The Loan interface allows for staff to circulate materials to patrons.

Getting Started

OLE 1.0 breaks down circulation permissions into several roles. Unit Manager will have all loan privileges including override permissions. Operator will have only “create loan” permissions.

To loan and return items, please sign into OLE as:

Role	Login
Unit Manager	dev2
Operator	edna, eric
Super Circulation Supervisor	admin, admin1

Warning

You will receive errors if not logged in with one of the above sample users. Login before selecting Loan.

Each staff operator can be authorized to work at one or more circulation desks; one must be set as the default. If they have more than one circulation desk, they will be able to change from one circulation desk to another to indicate where they are. When an operator changes a circulation desk during a session, the change will persist for the rest of the session. The next time the operator logs in OLE will return them to their default location.


Note

For more information about Circulation Desk maintenance and mapping, see [Circulation Desk](#) and [Circulation Desk Mapping](#).

Impersonating User: edna Login Logout

Circulation Desk:


Process Overview

1. Once you have opened the **Loan** interface, enter the Patron Barcode and press Enter or search for it from the lookup . If you search for a patron record from the lookup, the resulting display will show a Return Value link to the left of each patron. Click on that link to populate the patron field on the Loan screen. Press Enter.

Tip

Clicking on the green **Return** button will take you to the return menu, allowing you to check-in materials.



Patron: 


2. Once the patron barcode is entered, details about the patron will appear above the Patron field. If there is a block on the patron or some other problem, then an error message will appear. You may need to access the patron record to address the error or, in some cases an override is permitted for you to continue.

Note

For more information about Patron Documents, see [Patron](#).

If text exists in a user note field in the patron record, this message displays immediately whenever the patron's barcode is scanned into the system. (The purpose is to be able to deliver a message to the patron in person.) The operator has the option to acknowledge and delete the message or simply acknowledge--

in the latter case, the message remains and continues to display each time the patron barcode is entered until the text is removed.


3. Enter the Item Barcode or search for it from the lookup .
4. Press **Enter**


Return

Close
Clear Patron
Alter Due Date
Claims Return
Renew

Patron Details

Name	Type	Preferred Address	Phone	Email	Photograph
Joann Temple	UnderGrad	P.O. Box 9, Richgrove, CA, 93261	6612299999	temple10@uchicago.edu	

Patron: 

Item: 

Fast-Add item

Current Session Item(s)

SELECT	BARCODE	TITLE	AUTHOR	LOCATION	CALL NUMBER	NO OF RENEW
<input type="checkbox"/>	123454321	The Lorax	Dr. Seuss	Blmgtn - Herman B Wells Library-Blmgtn - Herman B Wells Library - Research Coll. - Stacks	pc1234 .c234 1954	0

Showing 1 to 1 of 1 entries

Select All
Deselect All
First
Previous
1

OLE will calculate the due date and time and update the item status to "Loaned". This information displays in the **Current Session Item(s)** section of the screen. A sound will notify staff of successful check-outs or alert them of issues to address (provided the sound parameter AUDIO_OPTION is turned on and your computer has speakers).

When loaning an item to a patron, an alert may appear to inform you of any problems based on local configurations settings. OLE provides a pop up screen to assist staff to correct these errors and/or override them so that the loan can proceed.

5. If the patron has presented more than one item to borrow, enter the next item barcode and press Enter. Each new item checked-out will appear at the top of the **Current Session Item(s)** list.
6. Clear the patron information to prepare for the next patron.

Tip

Each Circulation Location also defines a timeout interval which has the same effect as manually ending a session. This can be locally configured.

Fast Adds

If an item does not have a barcode or cannot be found by a search, click **Fast-Add item** to create a brief record. This will open a record editor on top of the **Loan** window:

Fast-Add item

Rectangular Snip

* Title:

Author:

* Location: Type * for all locations, other letters for matching locations

* Barcode:

* Item Type:

* Call Number Type: # - No information provided

* Call Number: X

Copy Number:

Copy Number Label:

* Checkin Note:

Note:

Enumeration:

Number Of Pieces:

1. You must enter all fields that have asterisks (*) before their labels.
2. Click **Add**.

OLE will provide you with an error message if you forget to enter a value for required field. If the system accepts the data, the window closes and supplies the item barcode in the Item field of the Loan screen.



3. Press Enter

The Loan now proceeds.

Renew and Modify Due Dates/Times

From the top of the loan screen, you can renew items or modify due dates/times.

Circulation Desk: BL


Patron Details

Name	Type	Preferred Address	Phone	Email	Photograph
Joann Tample	UnderGrad	P.O. Box 9, Richgrove, CA, 93261	6612299999	tample10@uchicago.edu	

Patron: 

Item: 

Items Currently Checked Out

SELECT	BARCODE	TITLE	AUTHOR	LOCATION	CALL NUMBER	NO OF RENEW	DUE DATE	CLAIMS RETURN NOTE	CLAIMS RETURN DATE
	123454321	The Lorax	Dr. Seuss	Blmgtn - Herman B Wells Library-Blmgtn - Herman B Wells Library - Research Coll. - Stacks	pc1234	0	06/14/2013 09:36 AM		

Showing 1 to 1 of 1 entries

1. **To renew**, select line items from the Current Session Item list or the Items Currently Checked Out list. You can also click the Select All button for either or both lists.

2. Click .

OLE will update due dates/times.

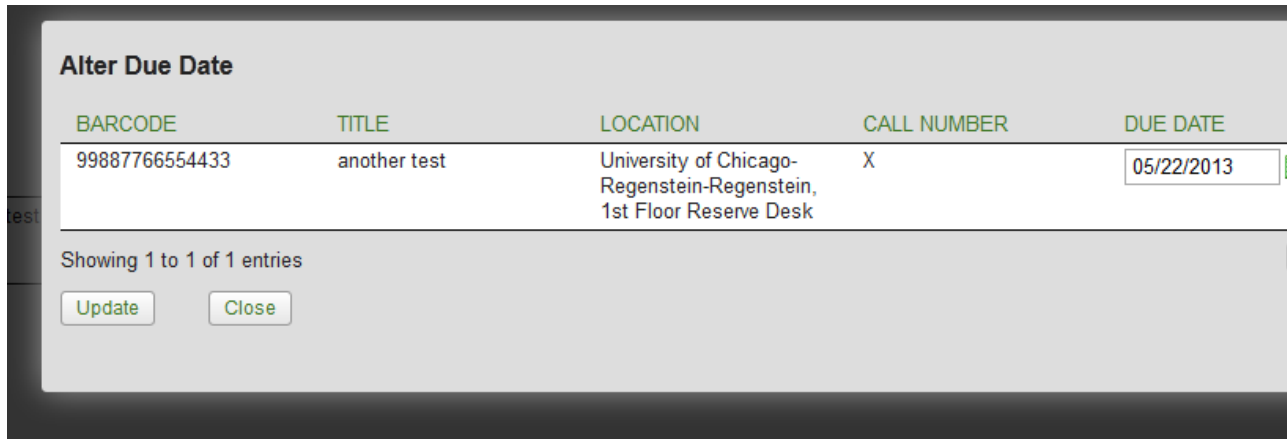
Tip

Alternatively, enter the item barcode in the item field as though loaning the item and press Enter. The item will be renewed for the patron.


1. **To modify or alter a due date/time**, select line items from the Current Session Item list or the Items Currently Checked Out list. You can also click the Select All button for either or both lists.

2. Click .

The **Alter Due Date** window will appear.




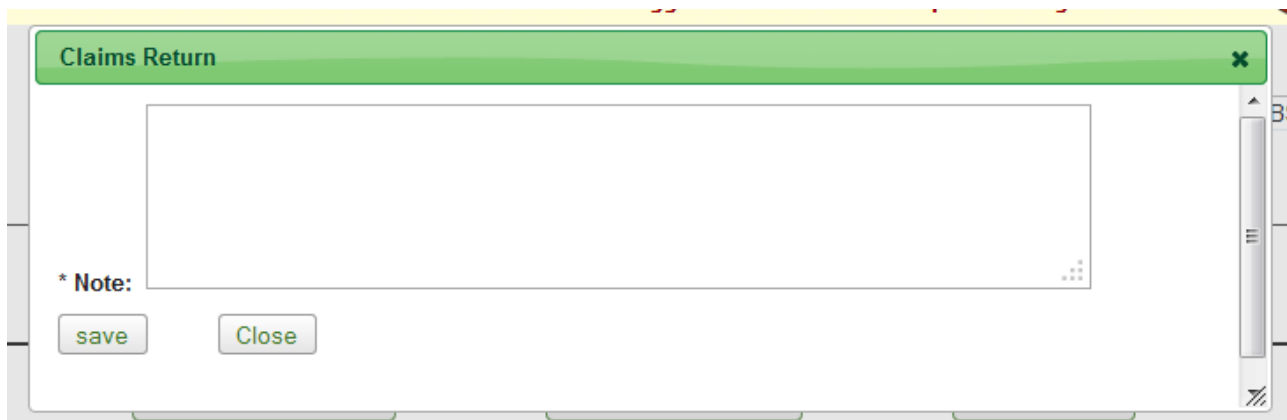
3. Enter in a new **Due Date** or use the calendar icon . Note that you can also adjust the due time if your loan periods are hourly.

4. Click .

Claims Return

Patrons sometimes notify library staff that they have returned items for which they may have received overdue notices or replacement fee bills. In such circumstances a library staff operator with proper permission needs to manually turn on a “claims returned” flag in the item and have the system automatically record the date of the event.

1. To perform the claims return, select the line item associated with the title.
2. Click .
3. Type any notes to record specific circumstances in the pop up window:



4. Click .

The claims return note and date will appear with the item.

Business Rules

Circulation policies are based on three factors: item location, item type and borrower type. Each specific combination determines the loan period, applicable maximum limits, and other policies pertaining to renewals, requests, etc. These can be defined locally.

Staff must log in and select a circulation desk before loaning, or checking-in items.

Return



A return consists of removing the temporary link between the item and the patron that exists in the loan transaction record. A return session begins with the identification of the item being returned and ends when all the items to be checked in have been processed. Returns utilize item barcode numbers as the primary identifier to begin processing a check-in transaction.

Getting Started

OLE 1.0 breaks down circulation permissions into several roles. Unit Manager and operator have permissions to return items within OLE.

To loan and return items, please sign into OLE as:

Role	Login
Unit Manager	dev2
Operator	edna, eric

Warning

You will receive errors if not logged in with one of the above sample users. Login before selecting Return.

Each staff operator can be authorized to work at one or more circulation desks; one must be set as the default. If they have more than one circulation desk, they will be able to change from one circulation desk to another to indicate where they are. When an operator changes a circulation desk during a session, the change will persist for the rest of the session. The next time the operator logs in OLE will return them to their default location.

Note

For more information about Circulation Desk maintenance and mapping, see [Circulation Desk](#) and [Circulation Desk Mapping](#).

Impersonating User: edna

Circulation Desk: ▼


Process Overview

The system automatically assumes today's date/time as the default date/time of any check-in. An operator can change the date/time as needed (e.g., items returned overnight while the library is closed may be checked-in as if returned yesterday).

Tip

Clicking on the green **Loan** button will take you to the Loan menu, allowing you to check-out materials.

To check-in items, staff will find the **Return** e-document under **Deliver** on the **Rice 2** menu.

1. Enter the item barcode or search for it from the lookup .
2. Press **Enter**.

Loan

Damaged CheckIn

* Check-in Date:  Time:

Item: 

End Session

3. Items returned appear in the **Item(s) Returned** tab with the most current at the top of the list.

 action list  doc search

Loan

Damaged CheckIn

* Check-in Date:  Time:

Item: 

Item(s) Returned

BARCODE	TITLE	AUTHOR	LOCATION	CALL NUMBER	CHECK-IN DATE	ITEM STATUS
77665544332211	testing yet another times	John Doe	University of Chicago-Regenstein-Regenstein, 1st Floor Reserve Desk	X	05/22/2013 10:43 AM	Recently Returned

Showing 1 to 1 of 1 entries

End Session

A sound will notify staff of successful check-outs or alert them of issues to address (provided the sound parameter AUDIO_OPTION is turned on the computer has speakers). A visual alert may appear to notify staff of any item related problems based on local configurations settings. These may include recalls, fines, and outstanding holds, item condition notices, and number of pieces an item contains, missing record information, and others. OLE provides a pop up screen to assist staff to correct these errors.

If necessary, OLE will calculate any fines or penalties based upon the locally configured fine rates and create an overdue fine bill and send it automatically to the patron.

Note

For more information about the Patron Bill, see [below](#).

Damaged Item Return

If the **Damaged Check-in** box is checked, the item's status becomes Returned-Damaged and a routing slip is printed so that the item can be handled later.

Loan

Damaged CheckIn

* Check-in Date: Time:

Item:

Item(s) Returned

BARCODE	TITLE	AUTHOR	LOCATION	CALL NUMBER	CHECK-IN DATE	ITEM STATUS
00998877665544	test test test test	jane doe	University of Chicago-Regenstein-Regenstein, 1st Floor Reserve Desk	X	05/22/2013 11:01 AM	RETURNED-DAMAGED

Showing 1 to 1 of 1 entries

First

End Session

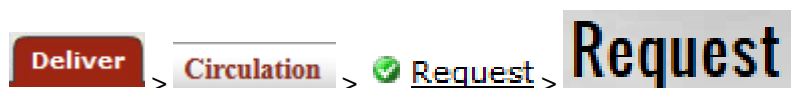
Example of the routing slip:

Returned Damaged	
Route To	: UC_JRLMAIN
Circulation Location	: Regenstein, Books
Item Barcode	: 00998877665544
Title	: test test test test
Call Number	: X
Copy Number	:
Check-in Date	: 2013-05-22 11:01:
Patron Barcode	: 601057000297896

Business Rules

- During a check-in transaction, the system compares the due date/time in the loan transaction record to today's date/time (as set on the Return screen). If today's date time is AFTER the due date/time, the system verifies if an overdue fine is to be imposed and if so, the rate at which the fine is calculated. The overdue fine bill is then created automatically as part of the return process.
- For check-in, if an operator's circulation desk is not the same as the item's "home" location, OLE sets the item status to "in transit" and prints a routing slip so the item can be sent to its "home" location. When the item is checked in again at the "home" circulation desk, the item status returns to "Available" (or "Recently Returned"—an option to allow for the time gap between check-in and reshelving. A batch program changes "Recently Returned" to "Available" once that time gap has expired).
- Check-in of a borrowed item increments the item's circulation counter by "1". If an item with no loan transaction is checked-in, the system increments the in-house uses counter by "1".
- At check-in, the system also displays notices of special conditions to the operator. E.g., check-in of an item with a pending request shows a message indicating that the item needs to be placed on hold for the requestor and an on-hold slip is printed. Other conditions result in other messages/directions for the operator.

Request



The Request Document allows staff operators to place patron requests for library items.

Request types include:

Recall (for hold or delivery) Hold (for hold or delivery) Page (for hold or delivery) Copy

In-transit

A recall request applies when an item is checked out to one patron and another patron wants to borrow that item. A "for hold" request means that the patron (i.e., the requestor) will come to a pick-up location to retrieve the item when available. A "for delivery" request means that the item will be automatically checked out and delivered to the patron's preferred street address when it becomes available. . Each patron's delivery privileges (either "yes" or "no") are stored in the patron record and the system will automatically select the request method based on this value. However, if a patron's delivery privileges=yes, the system still provides for selection of a pick-up location. If one is selected, the request is recall/hold, not recall/delivery. Delivery privileges can be automatically enabled for any patron of a designated borrower type , e.g., you might set up OLE so that any patron belonging to borrower type "faculty" gets delivery privileges. However, delivery privileges can be assigned on an individual basis as well, e.g., you may enable delivery for any student with a physical disability.

Most copy requests are now typically filled by scanning the required item and a file is then emailed to the patron, meaning that copy requests are "delivered" via email. If a paper copy is made, the staff operator will manually address an envelope using the preferred street address from the patron record.

Patrons can place their own requests via a library's user interface which will need to be customized to interact with the OLE request logic appropriately.

Process Overview



To request items, staff will find **Request** e-document under **Deliver** on the **Rice 2** menu.

1. Click **Create New** in the upper right side of the interface.

Request

	Patron Id: <input style="width: 80%;" type="text" value=""/>
	Patron Barcode: <input style="width: 80%;" type="text"/>
	Patron First Name: <input style="width: 80%;" type="text"/>
	Patron Last Name: <input style="width: 80%;" type="text"/>
	Item Barcode: <input style="width: 80%;" type="text"/>
	Item Title: <input style="width: 80%;" type="text"/>

The **Select Request** window will appear.

2. Select the **User Type** from the dropdown menu.
3. Enter the **Item Barcode** or search for it from the lookup .
4. Select the **Request Type** from the dropdown.
5. Enter the **Patron Id** or search for it from the lookup . This can also be the Proxy Patron Id.

Asterisks indicate a required field.

Request

Document Number
Initiator Network

▼ Select Request

User Type:	Patron <input style="width: 80%;" type="text"/>
* Item Barcode:	<input style="width: 80%;" type="text" value=""/>
Item Title:	<input style="width: 80%;" type="text"/>
* Request Type:	<input style="width: 80%;" type="text"/>
* Patron Id:	<input style="width: 80%;" type="text"/>
Patron Barcode:	<input style="width: 80%;" type="text"/>
Patron Name:	<input style="width: 80%;" type="text"/>

Different Request Types call for different information. Once selected, the interface will change depending on what you select. Below is an example of a Recall/Hold Request:

Request	Document Number: 3979
	Initiator Network Id: admin C

▼ Select Request	
User Type:	Patron
* Item Barcode:	54321
Item Title:	ole-4262 test
* Request Type:	Recall/Hold Request
* Patron Id:	00285722W
Patron Barcode:	
Patron Name:	

▼ Recall Request	
Patron Queue Position:	
Pickup Location:	
Recall Notice Sent Date:	
Create Date:	08/12/2013
Request Expiry Date:	

[submit](#) [save](#) [blanket approve](#) [close](#) [Cancel](#)

Copy Requests include an **Item Details** tab to include author and/or call number information:

Request	Document Number: 3979	D
	Initiator Network Id: admin	Creat

▼ **Select Request**

User Type:	Patron
* Item Barcode:	54321
Item Title:	ole-4262 test
* Request Type:	Copy Request
* Patron Id:	
Patron Barcode:	
Patron Name:	

▼ **Copy Request**

Patron Queue Position:	
Pickup Location:	
Create Date:	08/12/2013
Request Expiry Date:	

▼ **Item Details**

Author:	Keith Welch
Shelving Location:	
Call Number:	X
Copy Number:	
Copy Format:	
Content Description:	

▶ **Route Log**

[submit](#) [save](#) [blanket approve](#) [close](#) [Cancel](#)

In-Transit Requests contain an **In-Transit Request** tab. This is to allow for the situation when an item needs to be sent to another Circulation Location (only library staff my place In-Transit Requests):

Request		Document Number:	3979
		Initiator Network Id:	admin Cr
▼ Select Request			
User Type:	Patron <input type="text"/>		
* Item Barcode:	54321 <input type="text"/>		
Item Title:	ole-4262 test		
* Request Type:	In Transit Request <input type="text"/>		
* Patron Id:	<input type="text"/>		
Patron Barcode:	<input type="text"/>		
Patron Name:	<input type="text"/>		
▼ In-Transit Request			
Patron Queue Position:	<input type="text"/>		
* Circulation Location:	<input type="text"/>		
* Create Date:	08/12/2013 <input type="text"/>		
Request Expiry Date:	<input type="text"/>		
Check-In Note:	<input type="text"/>		
► Route Log			
<input type="button" value="submit"/> <input type="button" value="save"/> <input type="button" value="blanket approve"/> <input type="button" value="close"/> <input type="button" value="Cancel"/>			

- Click .

Modifying or Cancelling Requests

An authorized library staff operator can change a pickup location or an expiration date for a request.

- Enter any search criteria in the **Request** screen and click .

Note

To learn more about searching, see [Searching OLE](#) on the *OLE E-doc fundamentals* wiki page.

- Click **edit** to modify the request or **cancel** to remove the request from OLE.

Request

Patron Id:	<input type="text"/>
Patron Barcode:	<input type="text"/>
Patron First Name:	<input type="text"/>
Patron Last Name:	<input type="text"/>
Item Barcode:	<input type="text"/>
Item Title:	<input type="text"/>

Actions	Patron Queue Position	Request Type Code	Patron First Name	Patron Last Name	Patron Barcode	Item Barcode	Item Type	Title	Author
edit cancel	1	Recall/Delivery Request	Brian	Wample	6010570003027627	clm8041	BOOK	Request display	Malmborg, Cheryl
edit cancel	1	Page/Hold Request	Mary	Mample	6010570001520755	clm8052	BOOK	Huh	Malmborg, Cheryl

Showing 1 to 2 of 2 entries

Tip

One additional way to cancel a request is through the “My Account” portal.

To learn more about My Account, see [below](#).

- If you click edit, you will be able to change only the **Pickup Location** and the **Request Expiry Date**.

Request Document ID
Initiator Net

▼ Select Request		
	Old	New
User Type:	Operator	Operator
Item Barcode:	clm8041	clm8041
Item Title:	Request display	Request display
Request Type:	Recall/Delivery Request	Recall/Delivery Request
Patron Id:	91858467H	91858467H
Patron Barcode:	6010570003027627	6010570003027627
Patron Name:	Brian Wampl	Brian Wampl

▼ Select Request		
	Old	New
User Type:	Operator	Operator
Item Barcode:	clm8041	clm8041
Item Title:	Request display	Request display
Request Type:	Recall/Delivery Request	Recall/Delivery Request
Operator Id:	dev2	dev2
Operator Name:		
Patron Id:	91858467H	91858467H
Patron Barcode:	6010570003027627	6010570003027627
Patron Name:	Brian Wampl	Brian Wampl

▼ Recall Request		
	Old	New
Patron Queue Position:	1	1
Pickup Location:		
Recall Notice Sent Date:		
Create Date:	08/05/2013	08/05/2013
Request Expiry Date:	08/15/2013	08/15/2013

▼ Modified Details		
	Old	New
Modified Date:	08/13/2013	08/13/2013
Modifying Operator :	admin	admin

4. Alternatively, if you click cancel from the search screen, a confirmation screen will appear.



Request	Document Number: 4
	Initiator Network Id: 8

Select Request	
User Type:	Operator
Item Barcode:	clm8041
Item Title:	Request display
* Request Type:	Recall/Delivery Request
* Operator Id:	dev2
Operator Name:	
* Patron Id:	91858467H
Patron Barcode:	6010570003027627
Patron Name:	Brian Wample

Recall Request	
Patron Queue Position:	1
Pickup Location:	
Recall Notice Sent Date:	
Create Date:	08/05/2013
Request Expiry Date:	08/15/2013

cancel

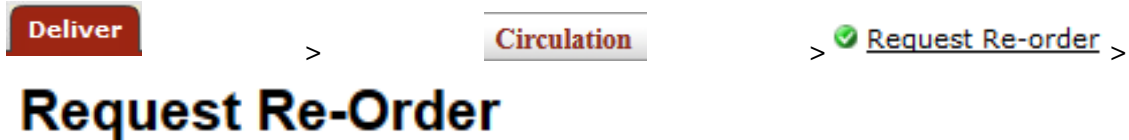
submit save blanket approve close Cancel

The request is cancelled and you return to the **Rice Main Menu**.

Business Rules

- When a request for a patron is completed (i.e., the item is checked out to the patron), the request information is removed from active requests and archived.
- Requests can only be placed at the item level. Title-level requests will be a future OLE enhancement.
- Not all requests are allowed for any item at any time. E.g., you cannot place a page request for an item currently loaned. In that situation, the operator would place a recall or hold request depending on the requestor's preference.


Request Re-order



When more than one patron has requested the same item, an authorized library staff operator can display the request record that enumerates the patrons. The queue can be reordered appropriately.

Process Overview

To reorder multiple requests for the same item, locate the **Request Re-Order** interface under **Circulation** on the **Deliver** menu.

1. Enter the **Item** or search for it from the lookup .
 2. To reorder the request queue, change the numeration within the the **Queue Position**
- Click **Save**.

[Home](#) » [Request Re-Order](#) »

Request Re-Order

Item: 

Request Id	Request Type	Queue Position	Item Barcode	Title	Author	Item Type	Call Number	Copy Number
5	Recall/Hold Request	<input type="text" value="1"/>	clm8052	Huh	Malmborg, Cheryl	BOOK	KG1.M1	1
4	Page/Hold Request	<input type="text" value="2"/>	clm8052	Huh	Malmborg, Cheryl	BOOK	KG1.M1	1

Business Rules

- When multiple requests are made for the same item, recall requests are always given precedence over other request types. Hold requests have second priority followed by paging and copy requests. If there are multiple requests of the same type from multiple patrons, the system places them in the order in which they were made .

View Item Bill

[Deliver](#) > [Circulation](#) > [View Item Bill](#)

Each site is able to have bills queued and available for review before transmission or opt to have bills sent immediately. (In the case of printed bills, “immediately” means printed out; actual delivery of course requires manual handling.)


You may also view bills by patron via the patron record.

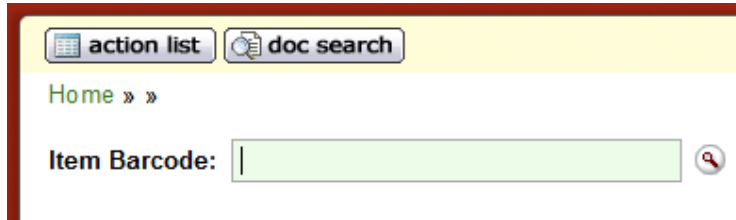
Note

For more information about Patron Documents, see [below](#)

Process Overview

To view an item bill, locate the **View Item Bill** interface under **Circulation** on the **Deliver** menu.

1. Enter the **Item** or search for it from the lookup .



2. The bill will appear below the search screen.

Item Barcode: 

Item Details

Item Title	Item Author	Item Call Number	Item Copy Number	Item Enumeration	Item Chronology	Own Location
Supplements to Vetus Testamentum.		BS410.V601	c.1	v.124		

Item Bill in Detail

	ITEM BARCODE	BILL NO	BILL DATE	FEE TYPE	FEE AMOUNT	PAYMENT STATUS	OUTSTANDING
	089112177	1	05/30/2013 12:17 PM	Service Fee	50	Outstanding	50
	089112177	1	05/30/2013 12:19 PM	Service Fee	100	Outstanding	100

Showing 1 to 2 of 2 entries

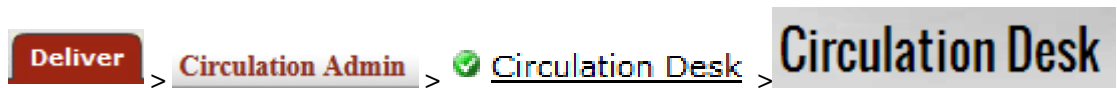
[First](#) [Previous](#)

Chapter 3. Circulation Admin



On the Deliver menu, Circulation Admin provides access to a number of circulation functions that allow users to view and maintain a variety of standard Circulation E-Docs.

Circulation Desk



Circulation desks are the basic work locations where operators circulate items to patrons, check-in items, hold items to give to patrons, and help patrons by creating requests. Circulation Desks can also function as pick-up locations where patrons can claim their requested items.

Document Layout

Circulation Desk
Document Number:

Initiator Network Id:

▼ Document Overview

* Description: <input style="border: 2px solid red;" type="text"/>		Explanation: <input style="width: 95%;" type="text"/>
Organization Document Number: <input type="text"/>		

▼ Add/Edit Circulation Desk

	Old	New
Circulation Desk Code:	BL_EDUC	<input type="text" value="BL_EDUC"/>
Circulation Desk Public Name:	BL Education	<input type="text" value="BL Education"/>
Circulation Desk Staff Name:	BL Education	<input type="text" value="BL Education"/>
On-Hold Days:	1	<input type="text" value="1"/>
Shelving Lag Time(minutes):	15	<input type="text" value="15"/>
Pick Up Location:	true	<input type="text" value="true"/>
Print Slip:	true	<input type="text" value="true"/>
Active Indicator:	true	<input type="text" value="true"/>

▼ Location

*** Location**

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

▶ Route Log

The Circulation Desk document includes the **Add/Edit Circulation Desk** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.




Add/Edit Circulation Desk Tab Definitions

Title	Description
Circulation Desk Code	Required. The circulation desk code associated with this circulation desk.
Circulation Desk Public Name	Required. The familiar title of the circulation desk's public view.
Circulation Desk Staff Name	Required. The familiar title of the circulation desk's staff view; may be the same as the public name.
On-Hold Days	The number of days an item will remain on hold at this circulation desk.
Shelving Lag Time (minutes)	The amount of time, in minutes, between check-in and reshelving.

Pick Up Location	Indicates whether this circulation desk can be used as a pick up location for holds.
Print Slip	Indicates whether this circulation desk can print receipts for patrons.
Active Indicator	Indicates whether this circulation desk is active or inactive. Remove the check mark to deactivate.

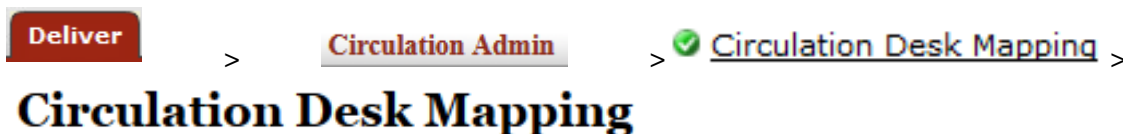
Locations

A circulation desk can have multiple shelving locations but each shelving location can have only a single circulation desk. On the **Location** tab, you may add and/or delete shelving locations to circulation desks.

1. Enter a location or search for it from the lookup .
2. Click .
3. To remove an existing location, click .



Circulation Desk Mapping




Circulation Desk Mapping allows users with the role OLE-PTRN Deliver Admin to map circulation desks to OLE operators.

Each operator will have a default circulation desk but they can have one or more circulation desks where they can work. If they have more than one circulation desk, they will be able to change from one circulation desk to another to indicate where they are when circulating library materials.

Process Overview

To map circulation desks, staff will find the **Circulation Desk Mapping** interface under **Circulation Admin** on the **Deliver** menu.

1. Enter the **Operator** or search for the person from the lookup .
2. Press **Enter**.

[Home](#) » [Circulation Desk Mapping](#) »

Circulation Desk Mapping

* Operator: 

Default	Allowed	Desk Code	Desk Name
<input checked="" type="checkbox"/>	<input type="checkbox"/>	UC_JRLMAIN	UC Regenstein Library, 1st Floor
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BL_BS_SPEA	BL Business SPEA
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BL_EDUC	BL Education
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BL_HPER	BL HPER
<input type="checkbox"/>	<input checked="" type="checkbox"/>	UC_DLAU	UC D Angelo Law Library
<input type="checkbox"/>	<input checked="" type="checkbox"/>	UC_CRERAR	UC Crerar Library
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DU_PERKN	DU Perkins
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DU_LILLY	DU Lilly
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DU_FORD	DU Ford

Showing 1 to 9 of 9 entries

First Pre

3. You may change the default circulation desk by checking one of the boxes in the **default** column. Every time an operator logs into OLE to circulate materials, they will be at this location.
4. You may select or deselect allowed circulation desks by checking or unchecking the boxes in the **allowed** column. These will appear in the **Circulation Desk** dropdown on the **Loan/Return** interface.

A list of circulation desks will appear below the search.

5. .
Click

Fixed Due Date

[Deliver](#) > [Circulation Admin](#) > [Fixed Due Date](#) >

Fixed Due Date Lookup

The Fixed Due Date document...

Document Layout

Request Type		Document Number: 4023	Document Sta
		Initiator Network Id: admin	Creation Timesta

▼ Document Overview

* Description:

Explanation:

Organization Document Number:

▼ Add/Edit RequestType

	Old	New
Request Type Code:	Recall/Delivery Request	<input type="text" value="Recall/Delivery Request"/>
Request Type Name:	Recall/Delivery Request	<input type="text" value="Recall/Delivery Request"/>
Request Type Description:	Recall Request	<input type="text" value="Recall Request"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

▶ Route Log

The Fixed Due Date document includes the **Add/Edit Fixed Due Date** tab and the **Time Span** tab. Staff may choose a circulation policy set from the drop down **Circulation Policy Set...**

Request Type



The Request Type document defines the type of request available on the Request edocument and allows the system to apply logic unique to each type. For example, a request, which could include recalls, holds or pages, could be hold or delivery. Hold means that the patron will come to a pick-up location to retrieve the item when it becomes available. Deliver means that the item will be delivered to the patron when it becomes available. Request types could also include Copy or In Transit Requests.

Requests are managed via check-in or check-out transactions and those operations have business logic to follow when an item has a pending request(s) of any kind. Because of that, creating a new request type without adding business logic to the code will be pointless. The Request Type is used by an operator when creating a request for a patron. The Request Type determines the business logic to be followed.

Document Layout

Request Type
Document Number
Initiator Network

▼ Document Overview

* Description: <input style="width: 90%;" type="text"/>	Explanation: <input style="width: 98%;" type="text"/>
Organization Document Number: <input style="width: 80%;" type="text"/>	

▼ Add/Edit RequestType

	Old	New
Request Type Code:	Recall/Delivery Request	<input style="width: 98%;" type="text" value="Recall/Delivery Request"/>
Request Type Name:	Recall/Delivery Request	<input style="width: 98%;" type="text" value="Recall/Delivery Request"/>
Request Type Description:	Recall Request	<input style="width: 98%;" type="text" value="Recall Request"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

▶ Route Log

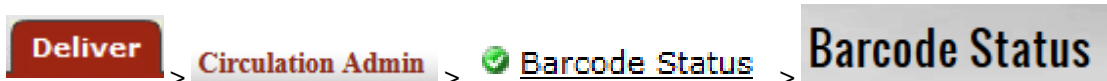
submit
save
blanket approve
close
Cancel

The Request Type document includes the **Add/Edit Request Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Request Type Tab Definitions

Title	Description
Request Type Code	Required. The request type code associated with this request type
Request Type Name	Required. The familiar title of the request type.
Request Type Description	The familiar description of the request type.
Active Indicator	Indicates whether this Request Type is active or inactive. Remove the check mark to deactivate

Barcode Status



The Barcode Status lookup is used to review available statuses for a barcode. Barcode statuses are used in the **Patron** document to indicate active, lost or stolen. You cannot create or edit barcode statuses.

Document Layout

Barcode Status

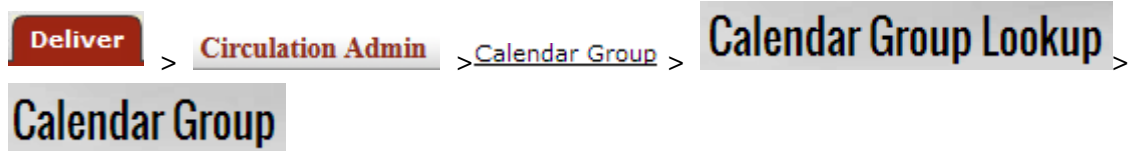
Barcode Status Code:	<input type="text"/>
Barcode Status Name:	<input type="text"/>
Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both
Delete Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both

Barcode Status Id	Barcode Status Code	Barcode Status Name	Active
1	Active	Active	true
2	Lost	Lost	true
3	Stolen	Stolen	true

Showing 1 to 3 of 3 entries

As a function of OLE, you may search for barcode statuses. Execute a blank search to review the three barcode status types.

Calendar Group



The Calendar Group document...

Document Layout

Calendar Group		Document Number: 5963	Docu
		Initiator Network Id: ole-khuntley	Creation

Document Overview	
* Description: <input type="text"/>	Explanation: <input type="text"/>
Organization Document Number: <input type="text"/>	

Add/Edit Calendar Group		
	Old	New
Calendar Group Code:	Group 2	<input type="text" value="Group 2"/>
Calendar Group Name:	Restricted Hours	<input type="text" value="Restricted Hours"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

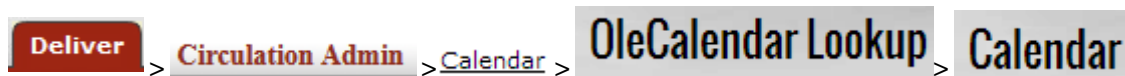
Notes and Attachments (0)
Ad Hoc Recipients
Route Log

The Calendar Group document includes the **Add/Edit Calendar Group** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Calendar Group Tab Definitions

Title	Description
Calendar Group Code	Required.
Calendar Group Name	Required.
Active Indicator	Indicates whether this Calendar Group is active or inactive. Remove the check mark to deactivate

Calendar



The Calendar document...

Document Layout

Calendar
Document Num
Initiator Networ

Begin Date: 09/16/2013 12:00 AM **End Date:** * **Group Name:** * **Description:**

General

Each day of week: <input type="text" value="Sunday"/> <input type="text" value="Sunday"/>	Open Time: <input type="text" value="hh:mm"/> <input type="text" value="AM"/>
	Close Time: <input type="text" value="hh:mm"/> <input type="text" value="AM"/>
Each day of week: <input type="text" value="Monday"/> <input type="text" value="Friday"/>	Open Time: <input type="text" value="01:00"/> <input type="text" value="PM"/>
	Close Time: <input type="text" value="04:00"/> <input type="text" value="PM"/>

Exception Day

Date: <input type="text"/>	Exception Type: <input type="text"/>	Open Time: <input type="text" value="hh:mm"/> <input type="text" value="AM"/>	Close Time: <input type="text" value="hh:mm"/>
-----------------------------------	---	--	---

Exception Period

Begin Date: <input type="text"/>	End Date: <input type="text"/>	Description: <input type="text"/>
---	---------------------------------------	--

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

The Calendar document includes three unique tabs - **General**, **Exception Day**, and **Exception Period**. Above these three tabs, enter the **Begin Date**, a **Group Name**, and a **Description**.

Definitions

Title	Description
Begin Date	Required. Autopopulates today's date. Enter another date or use the calendar icon
End Date	The end date for this calendar.
Group Name	Required. Select the group name from the dropdown menu.
Description	Required. The familiar description, or name, of the calendar. Used for ease of identification.

General Tab

Click .

General			
Each day of week:	Sunday <input type="button" value="v"/>	Sunday <input type="button" value="v"/>	Open Time: <input type="text" value="hh:mm"/> <input type="button" value="AM"/> <input type="button" value="v"/>
			Close Time: <input type="text" value="hh:mm"/> <input type="button" value="AM"/> <input type="button" value="v"/>
Each day of week:	Monday <input type="button" value="v"/>	Friday <input type="button" value="v"/>	Open Time: <input type="text" value="01:00"/> <input type="button" value="PM"/> <input type="button" value="v"/>
			Close Time: <input type="text" value="04:00"/> <input type="button" value="PM"/> <input type="button" value="v"/>

General Tab Definitions

Title	Description
Each day of week	
Open Time/ Closed Time	
Actions	Click Add to add the general calendar times.

Exception Day Tab

Click to add an exception day.

Exception Day			
Date: <input type="text"/> <input type="button" value="calendar icon"/>	Exception Type: <input type="button" value="v"/>	Open Time: <input type="text" value="hh:mm"/> <input type="button" value="AM"/> <input type="button" value="v"/>	Close Time: <input type="text" value="hh:mm"/> <input type="button" value="AM"/> <input type="button" value="v"/>

Exception Day Tab Definitions

Title	Description
Date	The date of the calendar exception. Enter the date or use the calendar icon <input type="button" value="calendar icon"/> .
Exception Type	
Open Time/Closed Time	
Actions	Click Add to add the general calendar times.

Exception Period Tab



Click to add an exception day.

Exception Period			
Begin Date: <input type="text"/> <input type="button" value="calendar icon"/>	End Date: <input type="text"/> <input type="button" value="calendar icon"/>	Description: <input type="text"/>	

Exception Period Tab Definitions

Title	Description

Circulation Admin

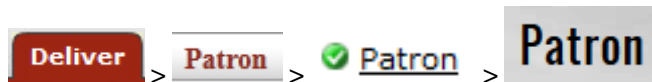
Begin Date	The beginning date of the calendar exception period. Enter the date or use the calendar icon  .
End Date	The end date of the calendar exception period. Enter the date or use the calendar icon  .
Description	
Actions	Click Add to add the general calendar times.

Chapter 4. Patron



On the Deliver menu, Patron provides access to users to view and maintain standard Patron E-Docs.

Patron



The Patron document is used to create and maintain the contact information of patrons within OLE

Getting Started

Permissions to create and maintain Patron records are given to several roles. Patron Manager has all privileges to modify Patrons and the maintenance documents. Full Circulation Attendant has permission to edit patron records

To modify patrons, please sign into OLE as:

Role	Login
Patron Manager	admin
Full Circulation Attendant	dev1, dev2

Patron Bills

From the Patron search screen, staff may view bills and accept payments from the **Patron Bill** link or create a bill from the **Create Bill** link.

Note

For more information about creating patron bills, see [Patron Bill Payment](#)

Patron Create

Patron Id:

Barcode:

First Name:

Last Name:

Borrower Type:

Email Address:

Active Indicator:

Actions	Patron Id	Name Prefix	First Name	Last Name	Name Suffix	Barcode	Borrower Type	View Bill	Create Bill
edit copy delete	00001497Q		Salinda	Lample		6010570002006861	UnderGrad		Create Bill
edit copy delete	00100055U		Stephanie	Sample		6010570003043558	UnderGrad	Patron Bill	Create Bill
edit copy delete	00126150D		Jamal	Jample		6010570002086988	UnderGrad		Create Bill
edit copy delete	00155937C		Madhur	Tample		6010570002965975	Faculty		Create Bill
edit copy delete	00207422T		Lee	Mample		6010570001340972	Guest		Create Bill
edit copy delete	00267058Y		Yong	Wample		6010570003168413	Researcher		Create Bill
edit copy delete	00285722W		Phoebe	Rample		6010570002205588	Faculty		Create Bill
edit copy delete	00377755J		Michael	Kample		6010570002978960	UnderGrad		Create Bill
edit copy delete	00389218X		Kathryn	Sample		6010570003113021	UnderGrad		Create Bill
edit copy delete	00399410S		Joann	Tample		6010570002465109	UnderGrad		Create Bill

Showing 1 to 10 of 51 entries First Previous 1 2 3 4 5 Next

1. Click **Patron Bill** to view and accept payments for a patron.

Patron Details

Patron Id	Barcode	First Name	Last Name	Borrower Type	Grand Total
00100055U	6010570003043558	Stephanie	Sample	UnderGrad	120

Patron Bill

Select Bill	Bill No	Bill Date	Total Fee Amount	Total Paid Amount
<input type="checkbox"/>	1	08/02/2013	20	0
<input type="checkbox"/>	2	08/05/2013	100	0

Showing 1 to 2 of 2 entries

Patron Bill in Detail




Select Item	Bill No	Bill Date	Item Barcode	Item Title	Item Author	Item Call Number	Item Copy Number	Item Enumeration	Item Chronology Own Location	Fee Type	Fee Amount	Paid Amount	OutS Amo
<input type="checkbox"/>	1	08/02/2013 03:49 PM								Service Fee	20	0	20
<input type="checkbox"/>	2	08/05/2013 09:37 AM								Service Fee	100	0	100

Showing 1 to 2 of 2 entries

* Payment Mode:

* Pay Amount:

2. Check the line item the patron would like to pay, either on the total amount (above) or for a single fee on a bill (below).
3. Select the **Payment Mode** from the dropdown list if you plan to accept a payment.
4. Enter the **Pay Amount**.

5. Click  to receive a payment.
6. Click  to forgive an amount.
7. Click  when the charge was made in error.

Document Layout

Document Overview

* Description: New Patron Document	Explanation:
Organization Document Number:	

Overview

Patron Id:	Barcode: *	Borrower Type: *	Source:
Statistical Category:	Activation Date:	Expiration Date:	Active: <input checked="" type="checkbox"/>

Contacts

Name

Name Type: Preferred **Title:** *** First Name:** **Middle Name:** *** Last Name:** **Suffix:**

Address

	Address Type	* Address Source	Valid From	Valid To	Address Verified	Preferred Address
Details	Home	Registrar Load	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Showing 0 to 0 of 0 entries

Phone

Phone Type	Phone Number	Extension Number	Country	Preferred Number
Home	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Showing 0 to 0 of 0 entries

Email

Email Type	Email	Preferred Email	Active
Home	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 0 to 0 of 0 entries

- Affiliation
- Library Policies
- Loaned Records
- Requested Records
- Temporary Circulation History records
- Note
- Proxy Patron
- Proxy For
- Local Identification
- Ad Hoc Recipients
- Route Log

The Patron document includes the **Overview**, **Contacts**, **Affiliations**, **Library Policies**, **Loaned Records**, **Requested Records**, **Temporary Circulation History Records**, **Proxy Patron**, **Proxy For** and **Local Identification** tabs in addition to the standard tabs that display at the bottom of OLE documents.

Note

For more information about the standard tabs, see [Standard Tabs](#) on the *OLE E-doc fundamentals* wiki page.


Overview Tab

The **Overview** Tab of the Patron Document is different from the standard **Document Overview** tab found on OLE e-documents and contains basic information about the patron record.

The screenshot shows the 'Overview' tab of a Patron record. It features several input fields and controls:

- Patron ID:** A text input field.
- Barcode:** A text input field with an asterisk indicating it is required.
- Borrower Type:** A dropdown menu with an asterisk indicating it is required.
- Source:** A dropdown menu.
- Statistical Category:** A dropdown menu.
- Activation Date:** A date picker field.
- Expiration Date:** A date picker field.
- Active:** A checked checkbox.

Patron Overview Tab Definitions

Title	Description
Patron ID	System-assigned unique ID
Barcode	Required. A unique sequence of numeric or alphanumeric characters printed on a label (also including an optical, machine-readable version of the number) attached to a patron ID card; used to identify the patron in the system for check-out or request transactions; can also serve as a patron login to "my account" functions from the library's public user interface.
Borrower Type	Required. Indicates a group of library patrons sharing the same service privileges; one of the primary determinants of loan periods, maximum limits, fine rates, etc.
Source	Identifies origin of the patron data
Statistical Category	An identifier as locally defined to fulfill reporting requirements
Activation Date	Date on which patron's privileges became active.
Expiration Date	Date on which a patron's privileges expire. The expiration date in a patron record can be null.
Active	Indicates whether this patron is active or inactive. Remove the check mark to deactivate.
Upload Image	Visual ID of the patron. Browse to find the image on your local machine. Click  .

Contacts Tab

The **Contacts** tab contains the patron name and contact information. When you modify contact information to an existing patron record, the old tabs will display above the new. When adding lines to the **Address**, **Phone** or **Email** sub-tabs, enter information and then select the **add** button.

▼ Contacts

▼ Name
 Name Type: Preferred Title: * First Name: Middle Name: * Last Name: Suffix:

▼ Address

	Address Type	* Address Source	Valid From	Valid To	Address Verified	Preferred Address	Active	Actions
Details	Home	Registrar Load	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	add

Showing 0 to 0 of 0 entries First Previous 1 Next Last

▼ Phone

Phone Type	Phone Number	Extension Number	Country	Preferred Number	Active	Actions
Home	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	add

Showing 0 to 0 of 0 entries First Previous 1 Next Last

▼ Email

Email Type	Email	Preferred Email	Active	Actions
Home	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	add

Showing 0 to 0 of 0 entries First Previous 1 Next Last

Note

Click **Details** to view and edit the address.

▼ Address

	Address Type	* Address Source	Valid From	Valid To	Address Verified	Preferred Address
Details	Home	Registrar Load	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Line 1: <input type="text"/>		Line 2: <input type="text"/>	Line 3: <input type="text"/>	City: <input type="text"/>	State: <input type="text"/>	Postal Code: <input type="text"/>
						Country: <input type="text"/>

Showing 0 to 0 of 0 entries First

Patron Contacts Tab Definitions

Title	Description
<i>Name Sub-Tab</i>	
Name Type	Defaults to Preferred.
Title	Form of address preceding a name, used in notices and messages addressed to patron
First Name	Required. Enter the patron's first name
Middle Name	Optional. Enter the patron's middle name
Last Name	Required. Enter the patron's last name
Suffix	A descriptor following a name and providing additional information about a person; used in notices and messages addressed to patron
<i>Address Sub-Tab</i>	
Address Type	A descriptor identifying characteristics of an address; an address type must be assigned to any address
Address Source	A value that identifies the origin of a patron's address.
Valid From	The date at which an address becomes the preferred address for sending notices and patron bills
Valid To	The date at which an address is no longer the preferred address for sending notices and patron bills
Address Verified	Indicates whether or not the address is verified; when checking out an item to a patron with an unverified address, the operator receives a prompt to verify the address

Patron

Preferred Address	Indicates which address is used when sending notices and patron bills. Only one address can be the preferred address.
Active	Indicates whether this address is active or inactive. Remove the check mark to deactivate.
Line 1-3	A building name, street number, room number, "attn. of: [nnn]", etc. Three fields are available.
City	Enter the name of the city for this address
State	Select the state from the State list.
Postal Code	Enter the postal code for this address
Country	Select the country from the Country list
<i>Phone Sub-Tab</i>	
Phone Type	A descriptor identifying the type of phone number. Each Phone number must have a type but you cannot use a type more than once.
Phone Number	Enter the phone number here (only numeric characters)
Extension Number	Optional. Enter the phone number's Extension
Country	Select the country from the Country list
Preferred Number	Indicates which phone number is preferred for contact. Only one phone number can be the preferred number.
Active	Indicates whether this phone number is active or inactive. Remove the check mark to deactivate.
<i>Email Sub-Tab</i>	
Email Type	A descriptor identifying the general use/purpose of the email
Email	Enter the email address here
Preferred Email	Indicates which email address is preferred for contact. Only one email address can be preferred.
Active	Indicates whether this email is active or inactive. Remove the check mark to deactivate.

Affiliation Tab

The **Affiliation** tab contains information on how a patron is affiliated and to which campus. When adding lines to the **Affiliation** tab, enter information and then select the **add** button.

▼ Affiliation

Affiliation Type <input style="width: 95%; height: 20px;" type="text"/>	Campus Code <input style="width: 95%; height: 20px;" type="text"/>	Actions <input style="width: 20px; height: 15px; border: 1px solid red;" type="button" value="add"/>
---	--	--

Patron Affiliation Tab Definitions

Title	Description
Affiliation Type	Select the type of affiliation from the Affiliation Type list
Campus Code	Select the campus from the Campus List


Library Policies Tab

The **Library Policies** tab contains information about a patron's privileges.

▼ Library Policies

General Block:
 General Block Notes:
 Delivery Privilege:
 Paging Privilege:
 Courtesy Notice:

Patron Library Policies Tab Definitions

Title	Description
General Block	Flag to indicate if the patron is blocked for a reason not otherwise defined in the system; if flag is on, patron cannot checkout or request items.
General Block Note	A field allowing staff to explain why a general block has been placed on the patron record. Click the  to expand the note field.
Delivery Privilege	Enables automatic physical delivery of requested items versus being required to pick up requested items from a pick-up location (i.e., a circulation desk).
Paging Privilege	Allows a patron to place a paging request.
Courtesy Notice	Allows the system to send courtesy notices (expired holds and pending due dates) only to those who request them. Note Courtesy notices can be sent systematically any number of times from the interval setting parameter COURTESY_NOTICE_INTER

Loaned Records, Requested Records and Temporary Circulation History Tabs

The **Loaned Records**, **Requested Records**, and the **Temporary Circulation History** tabs allow you to review items linked to the patron. Each tab includes basic information about a title loaned to the patron as well as the due date. Click **View all records** to see the patron's loaned or requested items, or the patron's temporary Circulation History Record

Note

The Temporary Circulation History Records feature allows users to look up items they have checked out in the past. If privacy concerns trump the desire to offer this feature, a library can opt NOT to create a temporary circulation history.


▼ Loaned Records

Loaned Items

[view all records](#)

▼ Requested Records

Requested Items

Lookup/Add Multiple Lines 

[view all records](#)

▼ Temporary Circulation History records

Temporary Circulation History Records

[view all records](#)

Proxy Patron and Proxy For Tabs


The **Proxy Patron** tab allows you to identify another patron as a proxy for this patron as well as set activation and expiration dates for the proxy. When adding a proxy to the **Proxy Patron** tab, enter the patron and then select the **add** button.

The **Proxy For** tab will display the details of the proxied patron. This tab is not editable.

Proxy Patron						
* Patron Id	First Name	Last Name	Barcode	Activation Date	Expiration Date	Actions
<input type="text"/>				<input type="text"/>	<input type="text"/>	

Showing 0 to 0 of 0 entries

Patron Proxy Patron Tab Definitions

Title	Description
Proxy ID	System Assigned Unique ID. Enter the Patron who will act as the proxy or use the Patron Lookup  .
First Name	Display only. Once the patron ID has been entered, this field will auto-populate.
Last Name	Display only. Once the patron ID has been entered, this field will auto-populate.
Barcode	Display only. Once the patron ID has been entered, this field will auto-populate.
Activation Date	Date on which the proxy patron becomes active.
Expiration Date	Date on which the proxy patron becomes inactive.

Local Identification Tab

The **Local Identification** tab allows you to further distinguish a patron’s connection to the library. When adding a local id to the **Local Identification** tab, enter the identification and then select the **add** button.

Local Identification	
Local Id	Actions
<input type="text"/>	<input type="button" value="add"/>

Showing 0 to 0 of 0 entries

Patron Local Identification Tab Definitions

Title	Description
Local ID	Any identifier as locally defined to further identify the patron, e.g., any other alphanumeric ID used in the institution

Lost/Invalid Barcode Info Tab

A patron’s lost/invalid barcode number is tracked to prevent fraudulent use of lost or stolen ID cards. Users may update a patron’s barcode on the **Overview** tab. When this has been done, any expired barcodes will appear on the **Expired/Updated Barcode** tab with an **Effective date**.

Lost/Invalid Barcode Info	
Lost/Invalid Barcode	Effective date
6010570002006861	08/09/2013

Showing 1 to 1 of 1 entries

To update a barcode:

1. Choose **Update barcode** at the bottom of the Patron record.
2. Enter a new barcode in the **Overview** tab.
3. Select **Submit**.

Process Overview

Business Rules

- At a minimum, a patron **MUST** have the following data elements: last name, first name, borrower type, delivery privileges, paging privileges, affiliation, department, barcode, address, delivery preference, address verified, address (can be either a mail address, email or text; if a mail address), address source (required for each address of any type), courtesy notice preference
- Any attempt to create a patron record without a required field will refresh the display with a message indicating the missing data element.
- Expiration dates in a patron's record can be set to null.
- If courtesy notices are not used by a library, these will be set to "No". If switched to Yes, these will only be produced when a special batch process is run.

Patron Bill



Patron bills for overdue fines and replacement fees are generated automatically by the system through check-in and renewal transactions using information from loan transaction records, calculated based on information from the Circulation Policy Set governing the loan, and sent to patrons using their preferred delivery method. Patron bill information is stored in the system; the formatted bill as delivered to the patron is not. Operators can also manually create patron bills.

Note

Fine rates and replacement fees will be configured locally. By setting fine rates and replacement fees to null or zero, libraries can opt to NOT automatically create these patron bills.

Note

To view the current Circulation Policy (in xml format), see [OLE Data Import Templates](#).

You may alternatively access Patron Bills via the **Patron** search screen.

Patron bills for replacement and other fees can also be created manually by duly authorized operators using locally-defined fee types, e.g., rentals, copying, etc. and then be delivered to patrons. To do so, click **Create Bill** on the **Patron** search screen.

Document Layout

Patron Bill

▼ Document Overview

* Description:	<input type="text"/>	Expla
Organization Document Number:	<input type="text"/>	

Patron Section

First Name:	Stephanie
--------------------	-----------

Patron Bill Section

* Date:	08/05/2013	
----------------	------------	--

FeeType Section

FeeType Section

* Fee Type ▲	* Fee Amount ◆	Item Barcode ◆	Item Title
Overdue Fine ▼	<input type="text"/>	<input type="text"/>	
Service Fee	100		

Showing 1 to 1 of 1 entries

Total Amount

Total Amount: 100

- ▶ Notes and Attachments (0)
- ▶ Ad Hoc Recipients
- ▶ Route Log

The Patron Bill Payment document includes the **Patron Section**, **Patron Bill Section**, **Fee Type Section** and **Total Amount** tabs in addition to the standard tabs that display at the bottom of OLE documents.

Note

For more information about the standard tabs, see [Standard Tabs](#) on the *OLE E-doc fundamentals* wiki page.


Patron Section Tab

The **Patron** tab is used to identify the patron who has accumulated an overdue fine. It is automatically populated with the name(s) of the individual.

Patron Section	
First Name:	Stephanie

Patron Bill Section Tab

The **Patron Bill Section**

Patron Bill Section	
* Date:	08/05/2013 

Patron Bill Section Tabs Definitions

Title	Description
Date	Required. Date/time a payment was recorded
Text Note	Free text field to enter information regarding the payment transaction

Fee Type Section Tab

The **Fee Type Section** tab contains the fee information pertaining to the bill. When adding lines to Fee Type Section, enter information and then select the **add** button.

FeeType Section

FeeType Section

* Fee Type ▲	* Fee Amount ◆	Item Barcode ◆	Item
Overdue Fine ▼	<input type="text"/>	<input type="text"/> 🔍	<input type="text"/>
Service Fee	100		

Showing 1 to 1 of 1 entries

Total Amount

Total Amount: 100

Fee Type Section Tabs Definitions

Title	Description
Fee Type	Required. Choose the fee type from the dropdown list. Examples include Overdue, Replacement and Service but these may be locally configured.
Fee Amount	Required. Enter the monetary amount for any individual fee.
Item Barcode	Enter the item barcode for the loaned item liable for an overdue fine or replacement fee or search for it from the Item lookup 🔍.
Item Title	Title of the item associated with the fine or fee
Item Type	Used in conjunction with location and borrower type, determines the circulation policy applied
Payment Status	Choose the status of the payment from the dropdown list.

Total Amount Tab

If you create multiple fees on a patron's bill, the system calculates the total amount.

Total Amount

Total Amount: 100

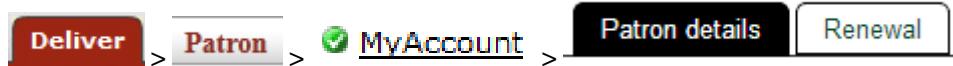
Process Overview

Business Rules

- An operator can create a bill manually online by charging any fee.
- If an item in a check-in transaction is found to be overdue, the system creates an overdue fine patron bill at check-in, using the applicable values in the appropriate Circulation Policy Set. This bill is then

delivered automatically to the patron provided the total amount meets the locally-determined threshold amount. Replacement fee bills are generated by a batch program for those items that are overdue and have received a maximum number of overdue notices.

My Account



My Account contains two separate tabs, **Patron Details** and **Renewal**. To access either, you must first input a Patron Id in the **Patron** field and press **Enter**.

Patron Details

Patron details contain the same elements as the Patron Record. Some are not editable from **My Account**.

Note

For more information about individual patron elements, see [Patron](#).


Patron Details Screen

Library Patrons will be able to add and delete addresses, phone numbers, and emails from the My Account tabs. If there are any proxy patrons listed, users may modify the proxies' effective dates. By clicking **Request Records**, users may also cancel any requests on their account.

Patron details Renewal

Patron details

Patron Overview

Patron Id: 00001497Q Barcode: 6010570002009999 Borrower Type: UnderGrad Activation Date:  Courtesy Notice:

Name

Title: First Name: Salinda Middle Name: Last Name: Lample Suffix:

Address

ADDRESS TYPE	LINE 1	LINE 2	LINE 3	CITY	STATE
Home <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Home <input type="text"/>	P.O. Box 9	<input type="text"/>	<input type="text"/>	Gambier	OHIO
Campus <input type="text"/>	P.O. BOX 9	<input type="text"/>	<input type="text"/>	GAMBIER	OHIO

Showing 1 to 2 of 2 entries



Phone

[show inactive](#)

PHONE TYPE	PHONE NUMBER	EXTENSION NUMBER	COUNTRY	PREFERRED NUMBER	ACTIVE
Home <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Campus <input type="text"/>	9176489999	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home <input type="text"/>	9176489999	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1 to 2 of 2 entries



Email

[show inactive](#)

EMAIL TYPE	EMAIL	PREFERRED EMAIL	ACTIVE
Home <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Home <input type="text"/>	lample97@uchicago.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Showing 1 to 1 of 1 entries



Proxy Patron

Request Records

Renewals

Patrons will be able to review the materials they have checked out on the renewals tab. By selecting titles and clicking **Renew**, they may also renew their library materials.

Patron details **Renewal**

Renewal


Item:

▼ **Items Currently Checked Out**

Select All	Barcode	Title	Author	Location
<input type="checkbox"/>	54321	ole-4262 test	Keith Welch	Blmgtn - Education Libran Library - Teaching Materia

Showing 1 to 1 of 1 entries

Patron Bill Review

Deliver > **Patron** >  Patron Bill Review > **Patron Bill Review**

We are removing this function.

Chapter 5. Patron Admin



On the Deliver menu, Patron Admin provides access to a number of patron maintenance documents.

Patron Load Reports



The Patron Load Report stores uploaded files and allows users to review the xml files uploaded to OLE. It will also give basic information as to record creation, deletion and modification.

Note

To learn about importing patrons to OLE, see the [Batch Framework](#) chapter of the *OLE Guide to System Administration*

Process Overview

From the lookup screen, click  to perform a blank search:

The screenshot shows the 'Patron Load Report Lookup' interface. It includes search filters for File Name, Principal Name, and Date Created. Below the filters are 'search', 'clear values', and 'cancel' buttons. A table displays the results of the search.

Patron Load ID	Principal Name	File Name	No. of Total Record	No. of Created Record	No. of Rejected Record
2		DefaultPatrons.xml	51	51	0
3	ole-khuntley	sample50v3(1).xml	51	0	0

Showing 1 to 2 of 2 entries

The patron load report search results will present users with the **Patron Load ID, File Name, No of Total Records, No. of Created Records, No of Updated Records, No. of Failed Records.**

View the patron records from **Patron** on the **Describe** tab.

Patron Merge



Patron Merge is used to merge two or more patron records online. Patron Merge allows a duly-authorized operator to display all records to be merged. Any records of any kind linked to a duplicate record(s) will be relinked to the survivor record.

Process Overview

[Home](#) » [Patron Merge](#) »

Patron Merge

First Name :

Last Name :

Patron Type :

1. From the **Patron Merge** screen, search for the patron by **first name, last name** and/or **patron type**

2. Click

A list of persons will appear below the search.

Home » Patron Merge »

Patron Merge

First Name :

Last Name :

Patron Type :

List of Patrons

Survivor	Duplicate Patron	Barcode	First Name	Last Name
<input type="checkbox"/>	<input type="checkbox"/>	6010570003043558	Stephanie	Sample
<input type="checkbox"/>	<input type="checkbox"/>	6010570001321477	Caprice	Sample
<input type="checkbox"/>	<input type="checkbox"/>	6010570003113021	Kathryn	Sample
<input type="checkbox"/>	<input type="checkbox"/>	6010570002473400	Andrew	Sample
<input type="checkbox"/>	<input type="checkbox"/>	6010570003130918	Jessica	Sample
<input type="checkbox"/>	<input type="checkbox"/>	6010570003050306	Benjamin	Sample

Showing 1 to 6 of 6 entries

3. Select the **Survivor**, the record that will remain.
4. Select the **Duplicate Patron(s)** that will be added to the survivor record.
5. Click .

Patron Type



Borrower types allow for distinct groups to be granted permissions such as the ability to borrow items, the default circulation loan period, ability to renew and/or request, eligibility for physical delivery, etc. Borrower type is one of the three primary characteristics controlling circulation policy sets (the other two being item type and shelving location). Each patron record in OLE must have a borrower type.

Document Layout

Borrower Type		Document Number
		Initiator Network Id
Document Overview		
* Description:	<input type="text"/>	Explanation: <input type="text"/>
Organization Document Number:	<input type="text"/>	
Add/Edit Borrower Type		
	Old	New
Borrower Type Code:	FAC	<input type="text" value="FAC"/>
Borrower Type Description:	Use for current Faculty	<input type="text" value="Use for current Faculty"/>
Borrower Type Name:	Faculty	<input type="text" value="Faculty"/>
Active Indicator:	true	<input checked="" type="checkbox"/>
Notes and Attachments (0)		
Ad Hoc Recipients		
Route Log		

The Borrower Type document includes the **Add/Edit Borrower Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Borrower Type Tab Definitions

Title	Description
Borrower Type Code	Required. The borrower type code associated with this borrower type
Borrower Type Description	Required. A description of the borrower type.
Borrower Type Name	Required. The familiar title of the borrower type.
Active	Indicates whether this borrower type is active or inactive. Remove the check mark to deactivate.

Patron Source



The Source document is used to define where the information on the Patron document has been obtained.

Document Layout

Ole Source

Doc
Initia

▼ Document Overview

* Description: <input style="width: 90%;" type="text"/>	Explanation: <input style="width: 95%;" type="text"/>
Organization Document Number: <input style="width: 80%;" type="text"/>	

▼ Add/Edit Source

	Old	
Ole Source Code:	REG	<input style="width: 95%;" type="text"/>
Ole Source Name:	Registrar	<input style="width: 95%;" type="text"/>
Ole Source Description:	Registrar	<input style="width: 95%;" type="text"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

▶ Route Log

The OLE Source document includes the **Add/Edit Source** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Source Tab Definitions

Title	Description
OLE Source Code	Required. A unique code to identify an OLE source.
OLE Source Name	Required. The familiar title of the source.
OLE Source Description	Required. A description of the source.
Active Indicator	Indicates whether this carrier code is active or inactive. Remove the check mark to deactivate the code.

Statistical Category



The Statistical Category document is used to identify statistical categories associated with an OLE patron.

Document Layout

Patron Statistical Category

- Required

Document Overview

* Description: <input style="border: 2px solid red;" type="text"/>	Explanation:
Organization Document Number: <input type="text"/>	

Add/Edit Statistical Category

	Old
Statistical Category Code:	SAMPLE
Statistical Category Name:	Sample
Statistical Category Description:	Sample
Active Indicator:	true

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

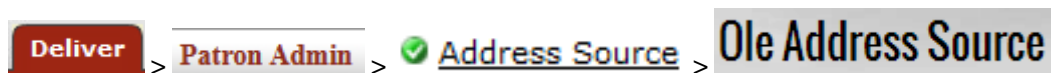
submit
save
blanket approve
close

The Statistical Category document includes the **Add/Edit Statistical Category** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Statistical Category Tab Definitions

Title	Description
Statistical Category Code	Required. A unique code to identify a statistical category.
Statistical Category Name	Required. The familiar title of the statistical category.
Statistical Category Description	Required. A description of the source statistical category.
Active Indicator	Indicates whether the statistical category is active or inactive. Remove the check mark to deactivate the code.

Address Source



The Address Source document is used to define where the address came from on a **Patron** document. For example, loaded from the registrar, input by an operator or patron, etc. Some or even all of your Address Sources could be identical to your Sources. The Address Source has been defined specifically for situations

where you wish to preserve information from a particular Address source when overlaying existing patron data during an import. For example, data from a Source “Registrar” would typically have its address data identified as Address Source “Registrar” but you may wish to preserve any existing address whose Address Source is “Patron Supplied”. You would set your import options appropriately.

Document Layout

Ole Address Source
Document Number
Initiator Network

Document Overview

* Description: <input style="width: 90%;" type="text"/>	Explanation: <input style="width: 90%;" type="text"/>
Organization Document Number: <input style="width: 80%;" type="text"/>	

Add/Edit Address Source

	Old	New
Ole Address Source Code:	REGL	<input style="width: 90%;" type="text" value="REGL"/>
Ole Address Source Name:	Registrar Load	<input style="width: 90%;" type="text" value="Registrar Lo"/>
Ole Address Source Description:	Registrar Load	<input style="width: 90%;" type="text" value="Registrar Lo"/>
Active Indicator:	true	<input checked="" type="checkbox"/>

Notes and Attachments (0)

Ad Hoc Recipients

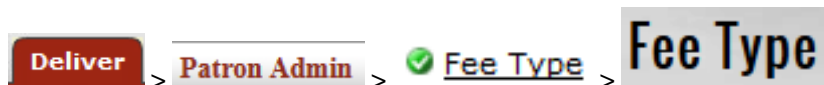
Route Log

The Address Source document includes the **Add/Edit Address Source** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Address Source Tab Definitions

Title	Description
OLE Address Source Code	Required. A unique code to identify an address source.
OLE Address Source Name	Required. The familiar title of the address source.
OLE Address Source Description	Required. A description of the source address source.
Active Indicator	Indicates whether the address source is active or inactive. Remove the check mark to deactivate the code.

Fee Type



The Fee Type document is used to define the type of fee created on the **Patron Bill Payment** document.

Document Layout

Fee Type

Document
Initiator Ne

▼ Document Overview

*** Description:**

Organization Document Number:

Explanation:

▼ Add/Edit Fee Type

	Old	New
Fee Type Code:	OVR_DUE	OVR_DUE
Fee Type Name:	Overdue Fine	Overdue F

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

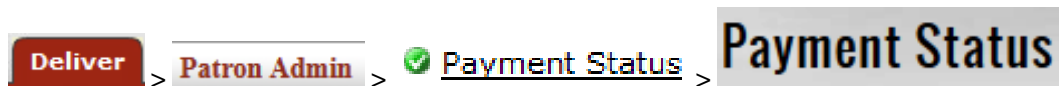
▶ Route Log

The Fee Type document includes the **Add/Edit Fee Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Fee Type Tab Definitions

Title	Description
Fee Type Code	Required. A unique code to identify a fee type.
Fee Type Name	Required. The familiar title of the fee type.

Payment Status



The Payment Status document is used to define the status of payment on the **Patron Bill Payment**.

Document Layout

Payment Status

Document
Initiator N

▼ Document Overview

* Description: <input style="width: 90%;" type="text"/>	Explanation: <input style="width: 90%;" type="text"/>
Organization Document Number: <input style="width: 80%;" type="text"/>	

▼ Add/Edit Payment Status

	Old	New
Payment Status Code:	PAY_OUTSTN	<input style="width: 90%;" type="text" value="PAY_OUTSTN"/>
Payment Status Name:	Outstanding	<input style="width: 90%;" type="text" value="Outstanding"/>

▶ Notes and Attachments (0)

▶ Ad Hoc Recipients

▶ Route Log

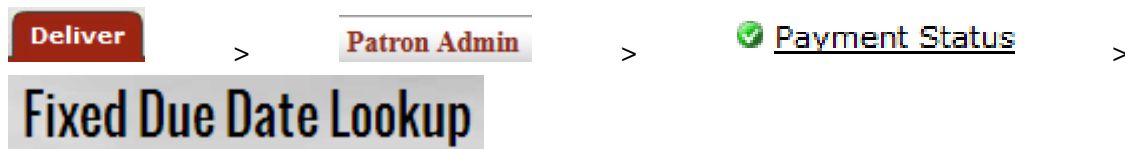
submit
save
blanket approve
close
Cancel

The Payment Status document includes the *Add/Edit Payment Status* tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

Add/Edit Payment Status Tab Definitions

Title	Description
Payment Status Code	Required. A unique code to identify a payment status.
Payment Status Name	Required. The familiar title of the payment status.

Fixed Due Date



Getting Started

Fixed Due Date Lookup

Circulation Policy Set:

Document Layout

Fixed Due Date

Document Number:	5473	Doc
Initiator Network Id:	ole-khuntley	Creatio

▼ **Document Overview**

* **Description:** Required

Explanation:

Organization Document Number:

▼ **Add/Edit Fixed Due Date**

* **Circulation Policy Set:**

▼ **Time Span**

* From Date	* To Date	* Fixed Due Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

▶ **Notes and Attachments (0)**

▶ **Ad Hoc Recipients**

▶ **Route Log**

This screen includes unique **Add/Edit Fixed Due Date** and **Time Span** tabs in addition to the standard tabs that display at the bottom of OLE documents.

Note

For more information about the standard tabs, see [Standard Tabs](#) on the *OLE E-Docs fundamentals* wiki page.

Add/Edit Fixed Due Date Tab

Time Span Tab

▼ Time Span

* From Date	* To Date	* Fixed Due Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Time Span Tab Definitions

Title	Description
From Date	
To Date	
Fixed Due Date	
Action	

Chapter 6. APPENDIX

Deliver Terms and Definitions

Term	Definition
Patron	<p>An individual who has some level of library privileges. A person with access to a library (virtual or physical) and identified as belonging to a specific group, e.g., faculty, undergraduate, unaffiliated, etc. Each group may have different levels of service privileges, e.g., faculty have indefinite loan periods when borrowing items, undergraduates can borrow for 90 days, etc.</p> <p>Synonyms: borrower, patron, library user</p>
Borrower Type	<p>A group of library users (e.g., “undergraduate”, “graduate”, “faculty”, “alumni”, “affiliate”, etc.) who share a primary characteristic(s) and have the same service privileges (e.g., loan period, fine rate, access (or not) to interlibrary loan, etc.). Borrower type is one component in determining whether or not a user can borrow a library item and if so, under what policies.</p>
Check digit	<p>A check digit is a form of redundancy check used for error detection, the decimal equivalent of a binary checksum. It consists of a single digit computed from the other digits in the message. With a check digit, one can detect simple errors in the input of a series of digits, such as a single mistyped digit or some permutations of two successive digits. In libraries, e.g., check digit routines can be used to validate ISBNs, ISSN, and item and patron barcode numbers.</p>
Circulation	<p>The functions, policies and processes by which a library loans materials to its users, tracks such transactions and charges fines and fees for policy violations, e.g., overdue fines for late returns, lost item replacement fees, etc. Departments in charge of circulation may also issue patron ID cards, rent lockers, collect copying fees, manage the interlibrary loan function, etc.</p>
Circulation Desk	<p>The place that is considered an item's "home" when it is presented for circulation transactions, i.e., it can be checked out without override AND, when checked-in, does not need to be routed as it is already "home".</p>
Shelving Location	<p>The place where a library's item is housed, either permanently or temporarily. Identified in a holdings and/or item-level record, shelving location is used as one attribute in determining whether items housed there are eligible for borrowing and if so, the applicable policy. See also Location.</p>
Item status	<p>A descriptor describing an item's state for circulation purposes, e.g., "not checked out", "on hold", "checked out", "on shelf", etc. If an item is still in the order process, item status typically is the same as the order status, e.g., "on order", "received", "in processing", etc.</p>
Item Type	<p>An identifier assigned to each item in a library that, in circulation, is one component to determine whether or not such an item can be borrowed and, if so, the conditions of the loan. Item types are generally defined by each library and can be either a specific format (e.g., “DVD”, “CD”, “Map”, “Dissertation”, etc.) or an indicator of borrowing eligibility (e.g., “Circulating”, “Non-Circulating”).</p>
Loan	<p>The process by which the system: (1) validates whether or not a library user can borrow a library item based on defined attributes (e.g., the circulation desk location, the shelving location of the item, item type, borrower type, etc.); and (2) if a loan is permitted, links the item with the patron and applies certain conditions (e.g., length of loan period) based on policies defined in configuration files.</p> <p>Synonyms: Check-out, charge, charge out</p>
Loan Period	<p>The period of time for which a user has been allowed to borrow a library item. The loan period is usually dependent on the item type, the item's location and the borrower type. A loan period can be expressed in days, hours, as a fixed date, or as “indefinite”.</p>
Location	<p>An element in a library's system configuration that describes a conceptual entity (e.g., “The University of X Library”) or a building</p>

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	(“John Doe Memorial Library”) or an area (“Doe Library, Bookstacks”; “Doe Library, Circulation Desk”). All library items are assigned to a shelving area location and this becomes an attribute in identifying an item’s eligibility for borrowing and if eligible, the applicable loan policy. Locations may also refer to library staff work areas at which certain functions (e.g., acquisitions, cataloging or circulation) are performed on or with items housed at shelving locations; work areas (e.g., a circulation location) are identified at operator login.
Request	The ability of a library user/patron to ask for services relating to the retrieval, loan or copying of an item in the library’s collections. Such requests are now typically submitted online through a public interface that must interact with the library’s “back office” system. See also Hold Request and Recall Request.
Return	The process by which the system: removes the temporary linkage between an item loaned by the library to a patron; calculates any overdue fines or penalties to be charged to the patron; and resets the item status to indicate its next state (e.g., “not checked out”, “in transit”, “on hold”, etc.). Synonyms: Check-in, discharge
Overdue Fine	The amount charged to a patron when a loaned library item is returned late. Overdue fines are calculated at check-in, based on an amount per day/hour, and may vary depending upon the borrower type, the item’s location and the item type.
Overdue Recall Fine	The amount charged to a patron when a loaned library item that has been recalled is returned late. Recall overdue fines are calculated at check-in, based on an amount per day/hour, and may vary depending upon the borrower type, the item’s location and the item type.
Replacement Fee	The amount charged to a patron for an unreturned item. Lost item replacement fees may be a specific amount (as defined in the item-level record) or a standard amount based on borrower type, the item’s location and the item type.

For additional OLE terms and definitions, see the [OLE glossary](#) wiki page.

Deliver Roles

Below are some of the roles that will be authorized to use Loan/Return, Request, Patron, My Account, and related maintenance documents. Please see individual e-docs for specific requirements in each workflow.

Note

Sample users are provided for ease of testing and can be replaced with local library users.

Role Name	Sample User	Functions/ Permissions
Patron Manager	admin	System user who has all permissions for patrons and for borrower types
Full Circulation Attendant	dev1	System user who can edit patrons and maintenance documents pertaining to patrons with the exception of borrower types
Limited Circulation Attendant	testuser1, testuser2	System user who can view but not edit patron records and has no access to patron type.
Circ Desk Attendant I	testuser1	System user who can view patrons and edit their address, can loan and return items, update/backdate due dates and create fast adds.
Circ Desk Attendant II	eric, edna	System user who can loan and return items, update/backdate due dates, create fast adds, create and edit requests, post and forgive payments.
Circulation Supervisor	dev1, dev2	System user who can loan and return items, update/backdate due dates, create fast adds,

		create and edit requests, post and forgive payments, create and update bills, update request queue, manage patron addresses and proxy accounts.
Super Circulation Supervisor	admin; admin1	System user who can loan and return items, update/backdate due dates, create fast adds, create and edit requests, post and forgive payments, create and update bills, update request queue, manage patron addresses and proxy accounts, and manage circulation desks.
Shelving Location Administrator	dev1, dev2	System user who can create and edit permissions for shelving locations. Can view the location, location level and create, edit a maintenance document only where the location level is a shelving level
Location Administrator	admin, admin1	System user who can add and edit institutions, campuses, libraries and collections. Can view, create, edit location maintenance documents and can view, edit the name of the location level maintenance document.
Deliver Admin	admin, admin1	System user who can initiate and map circulation desks
Operator	edna, eric, dev2	System user who can loan materials
Unit Manager	dev2	System user who can loan and override loan
<any user-Action List>	<any Kuali user>	

Linked Resources

- [OLE Basic Functionality and Key Concepts](#).: E-Docs, action buttons- basic overview of elements
- [OLE Documentation Portal](#)
- [OLE Release Documentation](#) on the wiki
- [OLE Roadmap](#)