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* on the 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
- Patron provides access to patron records and patron bills.
- Circulation Admin includes the maintenance documents (documents that control database tables) associated with circulation.
- 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 OLE Basic Functionality and Key Concepts.

This guide as well as guides to other OLE modules are available 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

Admin > Batch Processes > Batch/Scheduled Jobs

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.

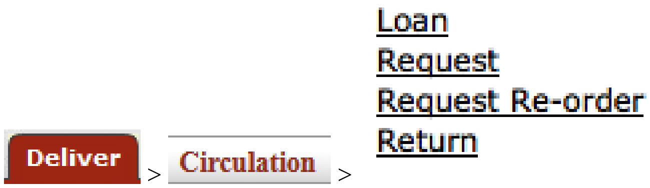
Each job may be scheduled by a library to run at any time. From the **Admin** menu, click **Batch/Scheduled Jobs** to enter the lookup. Click**Search**. Click **Edit** to change the schedule for any job. (As of now, the jobs are set to run at 2 AM Eastern time. A more user-friendly scheduling method 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 > System 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 ***n*** *days/hours after the due date/time;* subsequent overdue notices (how many determined locally) are then generated **n** days/hours after the last notice. Also generates replacement fee bills for items that have received **n** 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.
updateStatusIntoAvailableAfterReSchelvingJob	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". **Note** See additional information about the shelving lag time in the Circulation Desk documentation.
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 breaks down circulation permissions into several roles. Unit Manager have all loan privileges including override permissions. Operator have only “create loan” permissions.

Note

You will receive errors if not logged in as a user mapped to a circulation desk. Login before selecting Loan from the **Deliver** Menu.

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.

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.

   ### Note

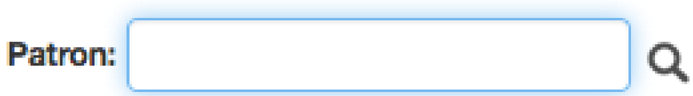
   The preferred addresses on a patron's record must be verified otherwise the warning "Patron's street address has not been verified" will appear.

   ### Tip

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

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.

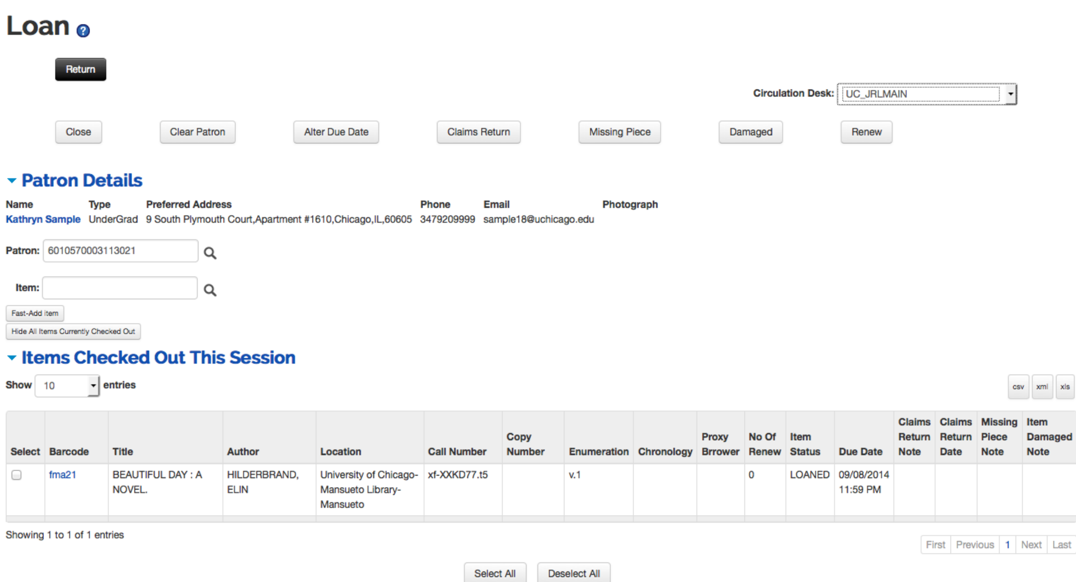
Note

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**



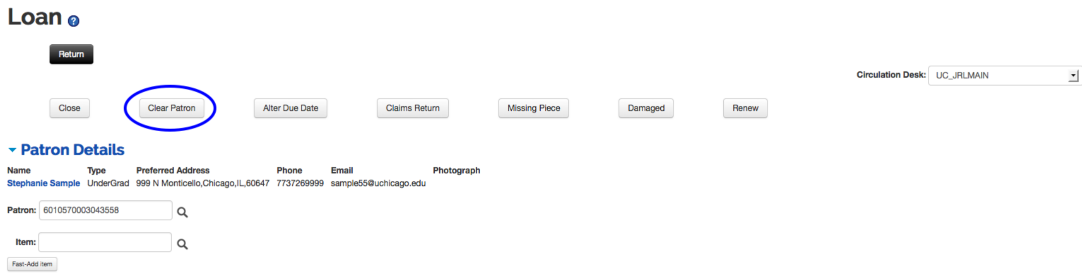
OLE will calculate the due date and time and update the item status to "Loaned". This information displays in the **Items Checked Out This Session** section of the screen. A sound will notify staff of successful check-outs or alert them of issues to address (provided the sound parameter AUDIO_OPTION 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 **Items Checked Out This Session** list.

   To view all items a patron has checked out, click the Show All Items Currently Checked Out button.

6. Clear the patron information to prepare for the next patron.

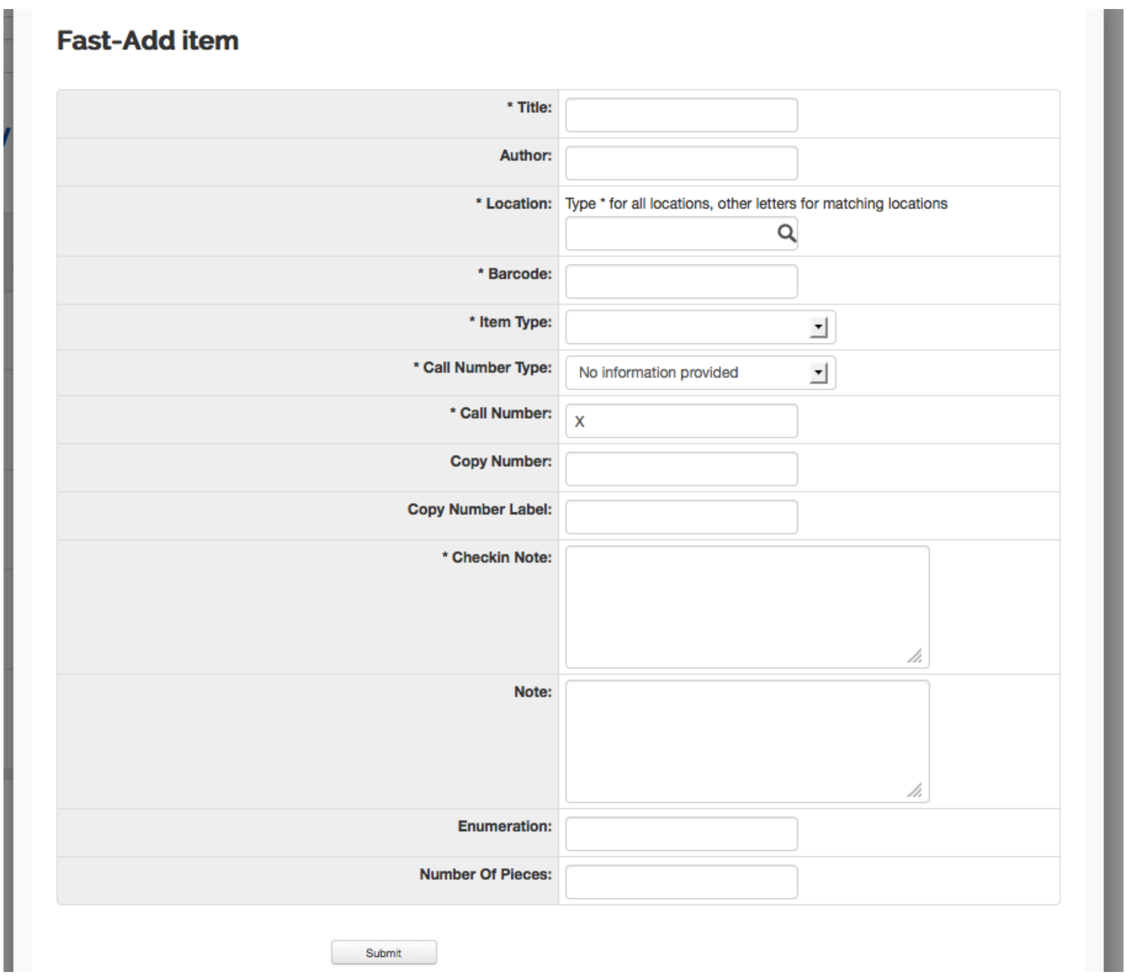


Tip

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 simple record editor on top of the **Loan** window:



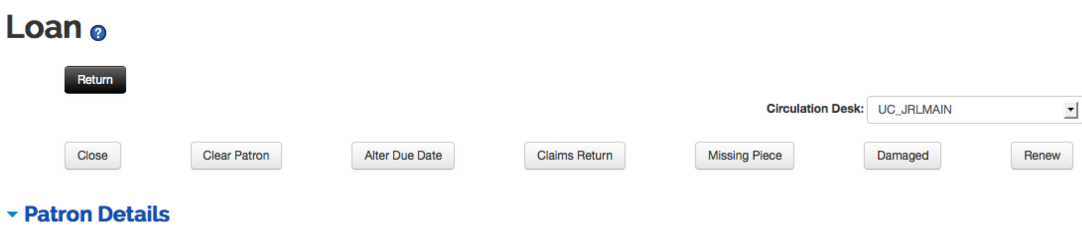
1. You must enter all fields that have asterisks (*) before their labels, these are required.
2. Click **Submit**.

   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** on your keyboard.

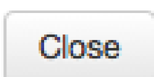
The Loan now proceeds.

Options available from the Loan Screen

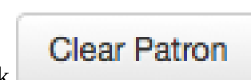
You will notice that there are a row of buttons available at the top of the Loan Screen. These are explained below



Close and Clear Patron

If you change circulation desks for a loan and then want to switch back to your default location, click 

. You will not exit the Loan screen but default settings will be restored.

If you need to clear a patron to loan items to a new patron, click 

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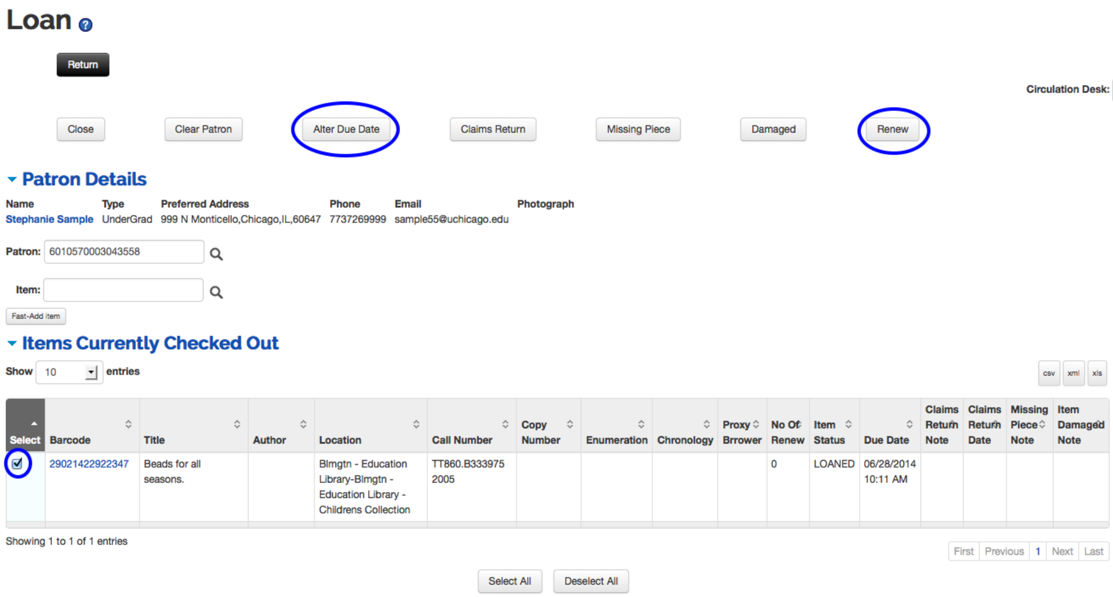
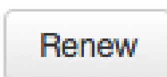
Renew and Modify Due Dates/Times

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



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.

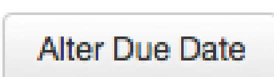
2. Click .

   OLE will update due dates/times.

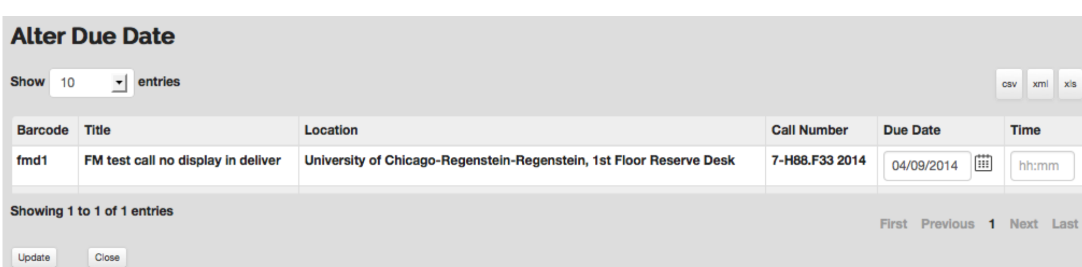
Tip

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, if you do not specify a time, OLE will assume 23:59:59. This assumed time can be changed from the parameter DEF_CLOSE_TIME.

4. Click Update.

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 from the loan screen, select the line item associated with the title.

2. Click Claims Return from the top row of buttons available.

3. Type any notes to record specific circumstances in the pop up window:

4. Click Save.

   The claims return note and date will appear in the item record and if the item is requested to circulate again.

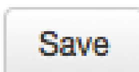
Missing Piece

If the operator observes that the item presented for checkout is missing a piece, then they can report the missing piece within OLE. Missing pieces are noted on the item record and will remind staff with each circulation transaction if the item remains in circulation.

1. To mark an item as missing a piece from the loan screen, select the line item associated with the title.

2. Click Missing Piece from the top row of buttons available.

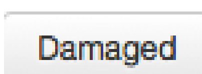
3. Type how many pieces are missing from the item and add a notes to record specific circumstances in the pop up window:

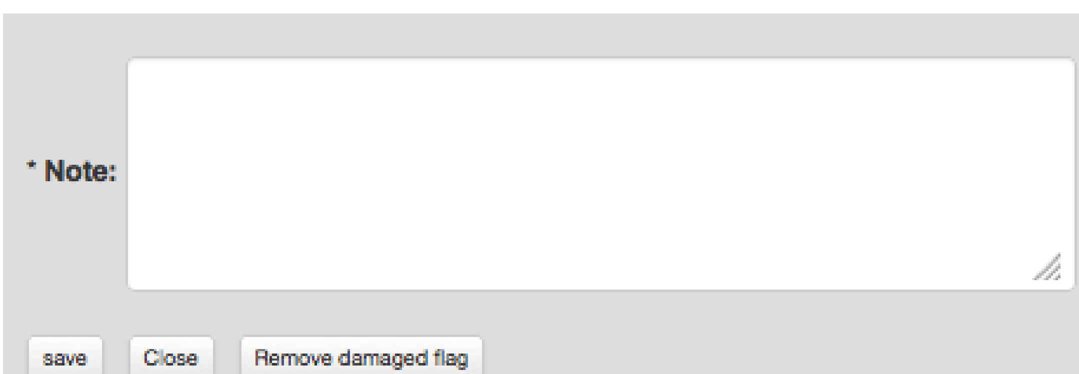
4. Click .

   The missing piece count, note, and date will appear in the item record and when the item is requested to circulate again.

Damaged

If the operator observes that the item presented for checkout is damaged, then they can report the damage within OLE. Damages are noted on the item record and a notice will pop up with each circulation transaction if the item remains in circulation.

1. To mark an item as damaged from the loan screen, select the line item associated with the title.
2. Click  from the top row of buttons available.
3. Type a notes to record specific circumstances in the pop up window:



4. Click 

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   The note and date will appear in the item record and when the item is requested to circulate again.

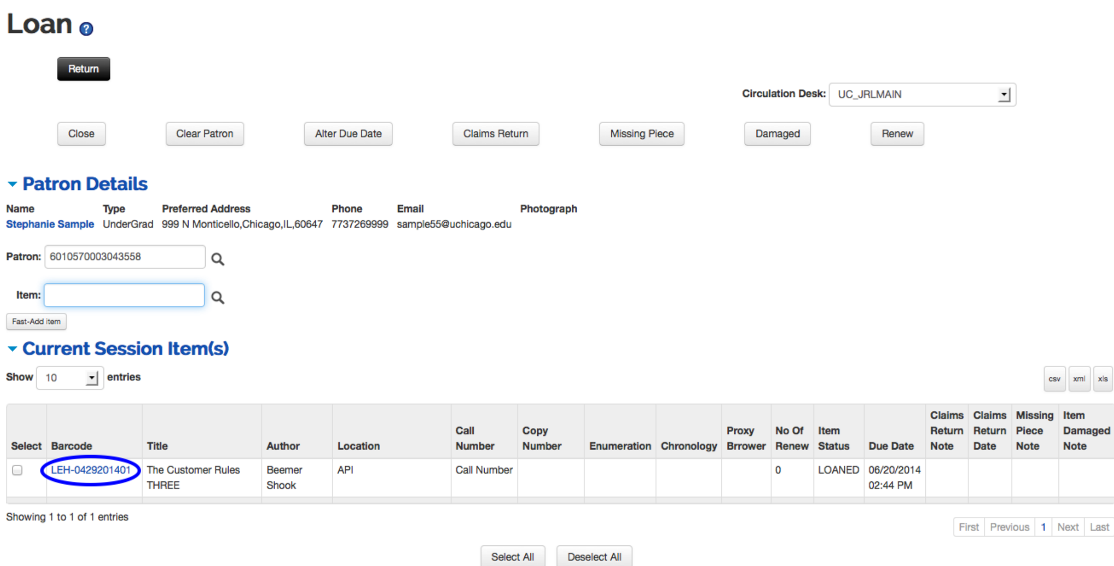
5. Click 

to remove the damage flag.

Printing Call Slips

You may print call slips from the item record.

Click the barcode number to access the item record.



Note

To learn more about printing call slips, see the relevant section of the item record in the *Guide to the OLE Describe and Manage Module*.

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.

Request

Deliver > Circulation > Request >

Request Lookup >

Request

** Helpful notes:

- At this time the back button simply sends you back to the Deliver homescreen (not back to the last page you were on). It does the same thing as Cancel
- If you select the wrong request type, you will receive an error. The system will allow you to select a new request type without having to start over. The same applies with patron, simply delete patron name and barcode and select the magnifying glass lookup to search for another patron.

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

Request types include:

- Recall (for hold or delivery) - The ability for a patron to ask that an item currently on loan to another patron be returned.
- Hold (for hold or delivery) - The ability for a patron to ask that an item currently on loan to another patron be made available when it is returned.
- Page (for hold or delivery) - The ability for a patron to ask that an item not on loan be retrieved and either placed on hold or be delivered.
- Copy - The ability for a patron to ask for a photocopy or PDF of a part of an item.
- In-Transit - The ability for a patron to ask for an item that is currently in route between circulation desks
- ASR - The ability for a patron to ask for an item that is located in the Automated Storage and Retrieval System

A “for hold” request means that the patron (i.e., the requester) 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.

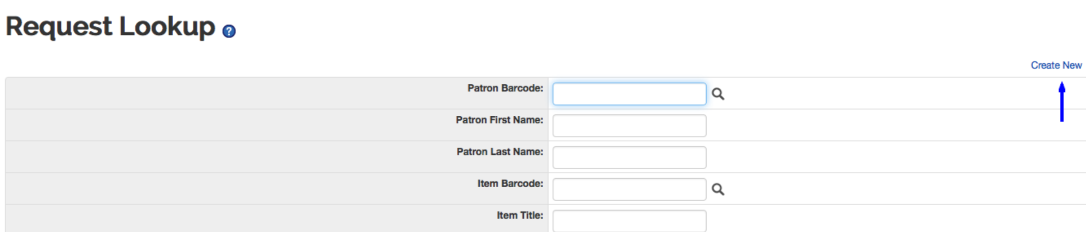
Most copy requests are now typically filled by scanning the required item and a file is then emailed to the patron, meaning that copy requests are "delivered" via email. If a paper copy is made, the staff operator will manually address an envelope using the preferred street address from the patron record.

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 new items, staff will find **Create New** to the very right in the **Request** Lookup.

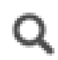
1. Click **Create New** in the upper right side of the interface.



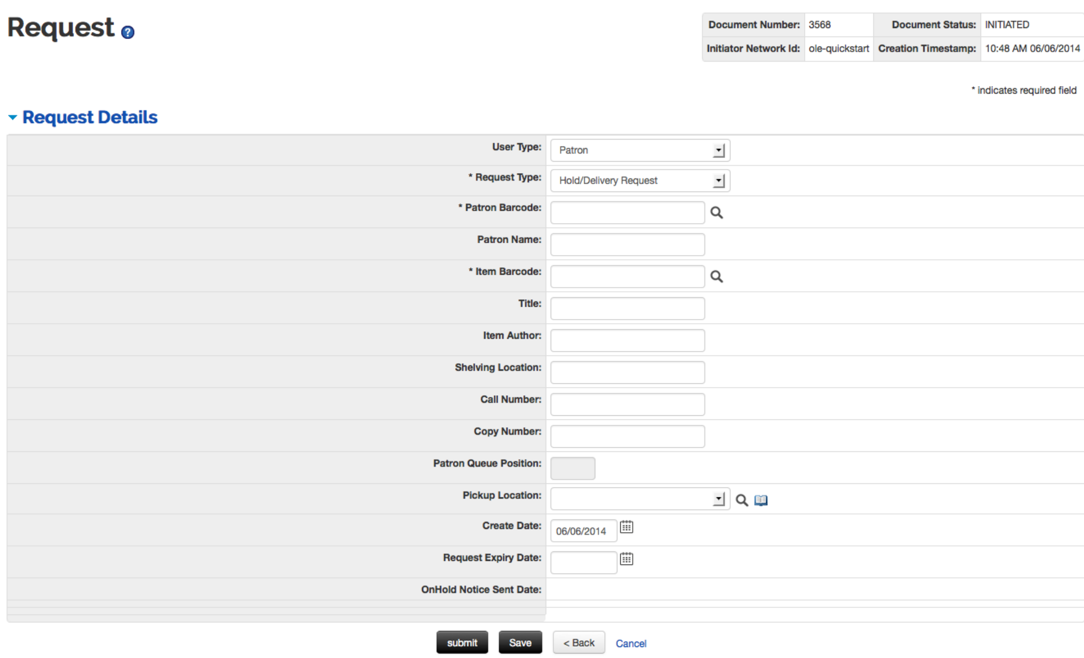
   The **Request** window will appear.

2. Select the **User Type** from the drop down menu.

3. Select the **Request Type** from the drop down.

4. Enter the **Patron Id** or search for it from the lookup  . This can also be the Proxy Patron Id.

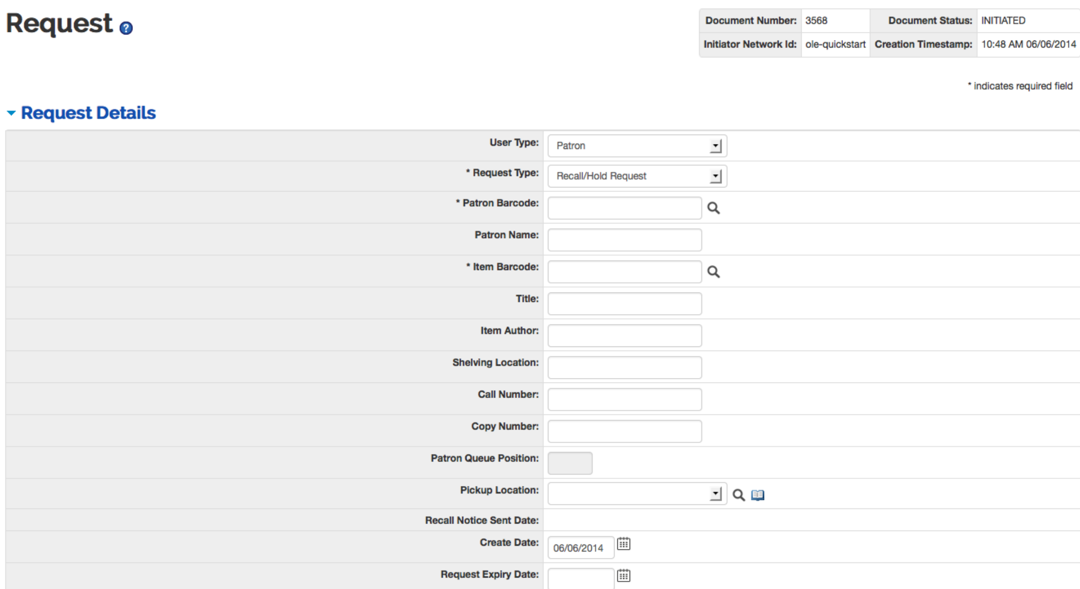
   Asterisks indicate a required field.



5. Once you have entered the patron information, enter the Item Barcode or search for it from the lookup .

   Different Request Types call for different information. Once selected, the interface will change slightly depending on what you select.

   Below is an example of a Recall/Hold Request:

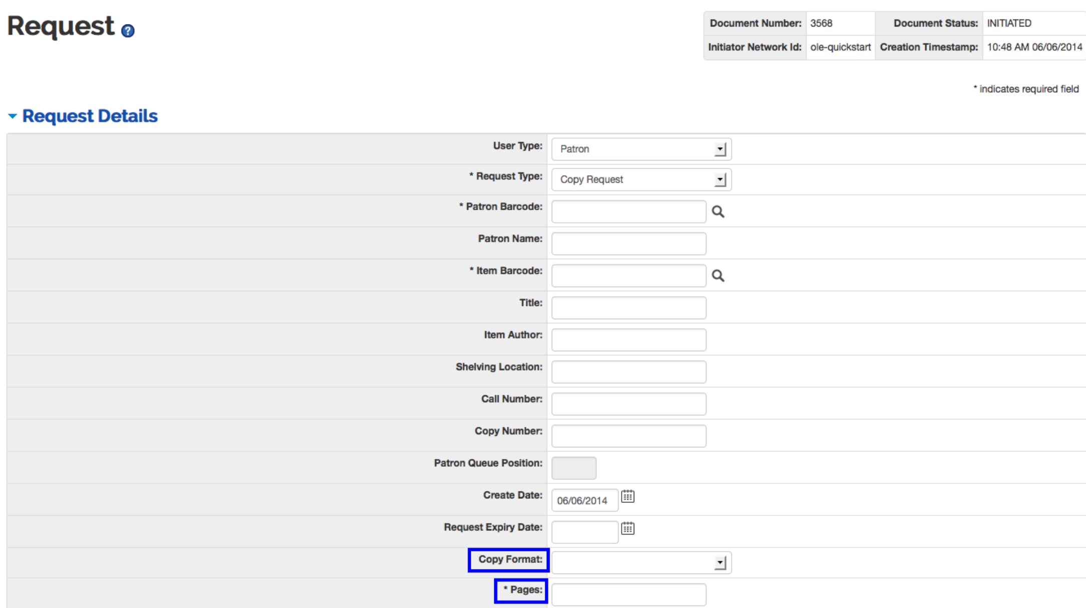


Request Detail Tab Definitions

Title	Description
User Type	The type of patron making the request. Select the Type from the dropdown list.
Request Type	Required. The type of request being made. Select the Type from the dropdown list.
Patron Barcode	The barcode of the patron. Search from the lookup and OLE will automatically fill all Patron infotmation.
Patron Name	The name of the patron making the request.
Item Barcode	Required. The barcode of the item. Search from the lookup and OLE will automatically fill all Item information.
Title	The title of the requested item. This will be filled automatically when you lookup the item barcode.
Item Author	The author of the requested item. This will be filled automatically when you lookup the item barcode.
Shelving Location	The shelving location of the requested item. This will be filled automatically when you lookup the item barcode.
Call Number	The call number of the requested item. This will be filled automatically when you lookup the item barcode.
Copy Number	The copy number of the requested item. This will be filled automatically when you lookup the item barcode.

Patron Queue Position	The numeric position of the patron in the patron queue. Once a request is linked to an item, any subsequent borrower requests for the same item are added to the request record and assigned a position in a queue. Patron Queues can be updated by authorized staff from Request Re-Order
Pickup Location	The circulation desk at which the patron will pick up their hold.
Recall Notice Sent Date	The system-generated date at which OLE sent the recall notice.
Create Date	The date that the patron makes the request. Defaults to today's date but may be edited.
Request Expiry Date	The date that the patron no longer needs the requested item. Enter a date or select it from the calendar icon .

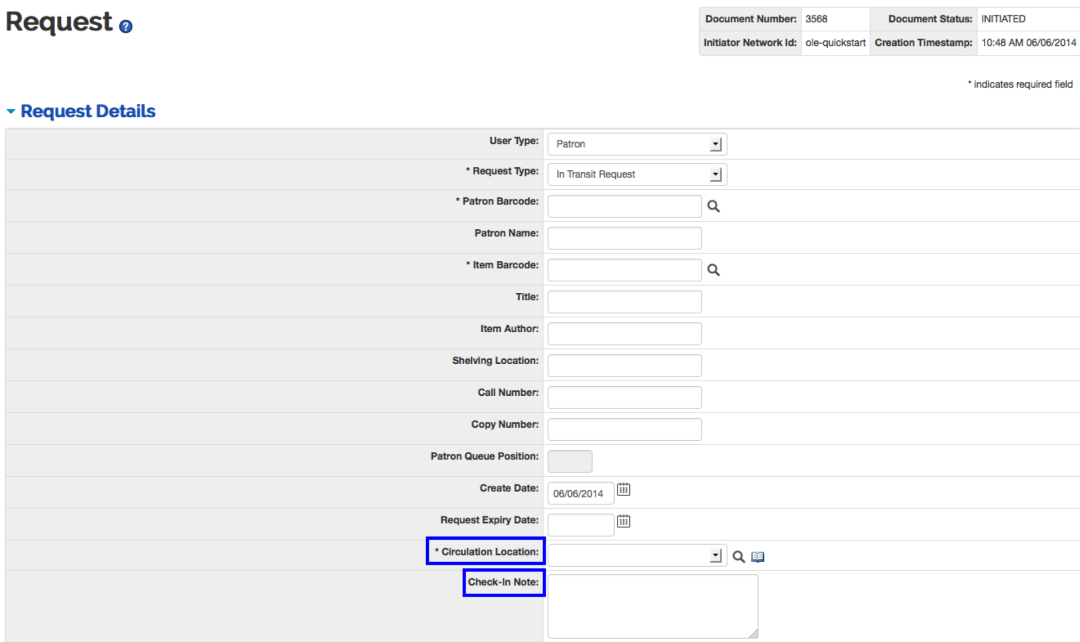
Copy Requests include fields for format and page information:



Request Detail Tab Definitions for Copy Requests

Title	Description
Copy Format	The format in which the patron would like to receive the copy, such as photocopy or PDF.
Pages	The pages or content that the patron would like to have copied.

In-Transit Requests contains a **Circulation Location** and a **Check-in Note** field. This is to allow for the situation when an item needs to be sent to another Circulation Location (only library staff may place In-Transit Requests):



Request Detail Tab Definitions for In-Transit Requests

Title	Description
Circulation Location	The circulation desk at which the item should be routed to.
Check-In Note	An additional note to be displayed at the time the item is checked-in.

6. Click 

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Modifying or Canceling Requests

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

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

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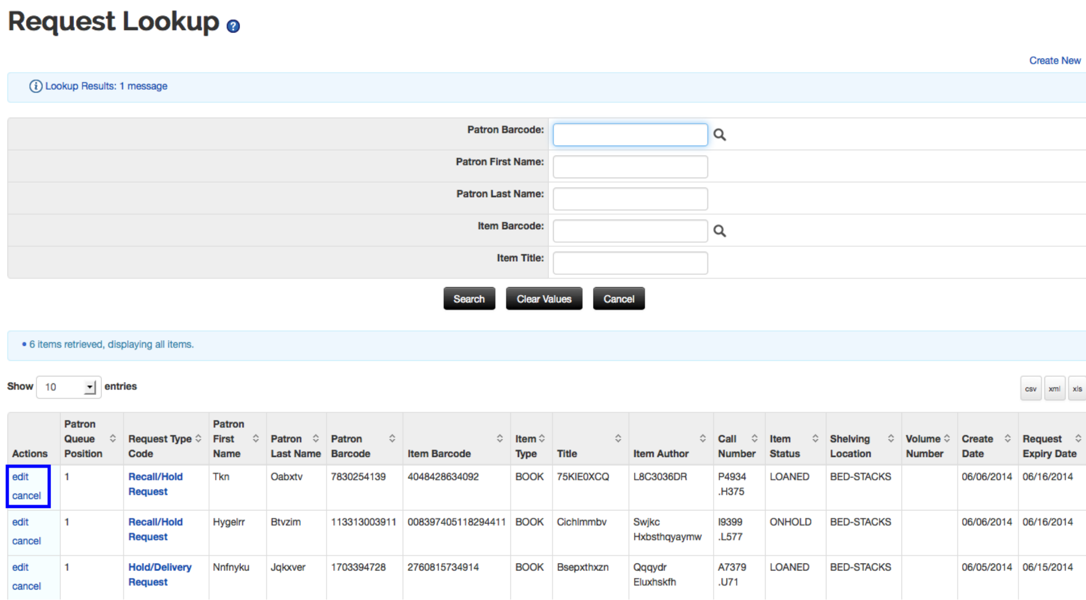
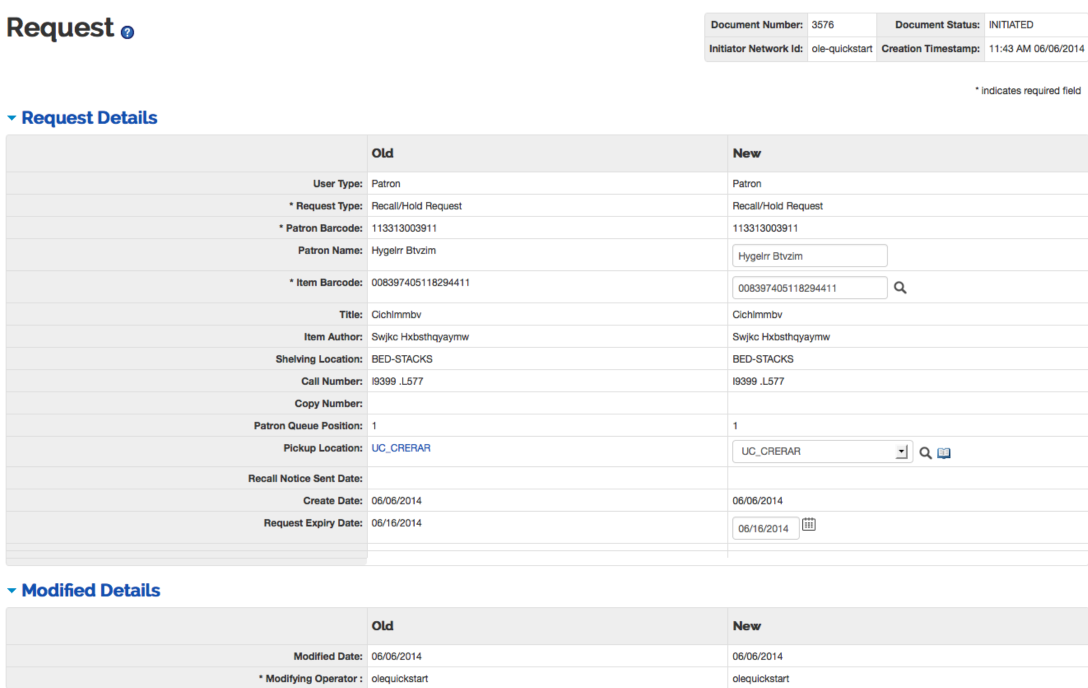
   ## Note

   To learn more about searching, see Searching OLE on the *Guide to OLE Basic Functionality and Key Concepts*.

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

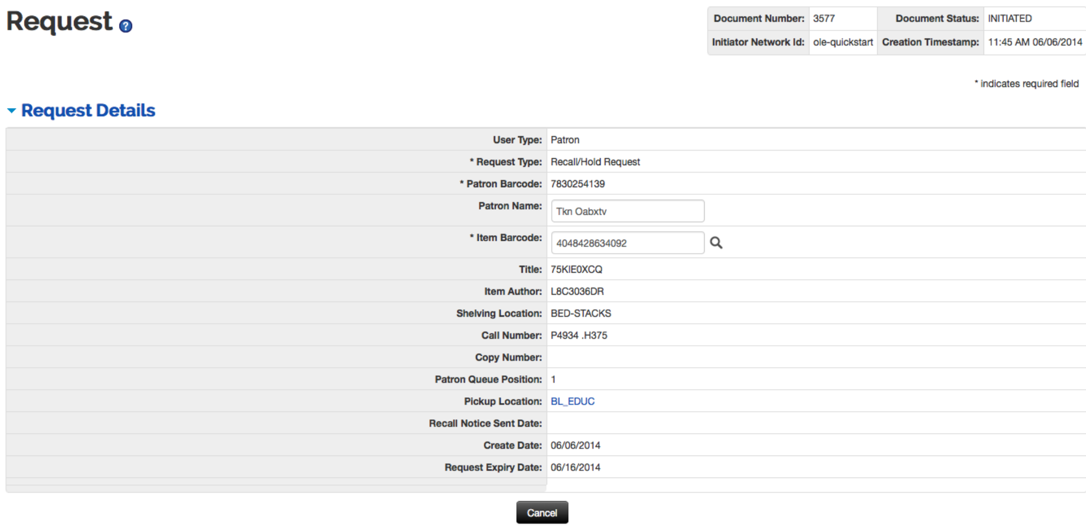


3. If you click edit, you will be able to change **Pickup Location**, the **Request Expiry Date**, the **Patron** and the **Item**.



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

Double check that this is the request you would like to cancel and click .



The request is canceled and you return to the **Deliver Menu**.

Printing Call Slips

You may print call slips from the item record.

To access the item record, search for an item from the **Search Workbench**.

Note

To learn more about printing call slips, see the relevant section of the item record in the *Guide to the OLE Describe and Manage Module*.

For more information about the Search Workbench, see Search Workbench in the *Guide to OLE Basic Functionality and Key Concepts*.

Business Rules

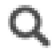
- When a request for a patron is completed (i.e., the item is checked out to the patron), the request information is removed from active requests and archived.
- Requests can only be placed at the item level. Title-level requests will be a future OLE enhancement.
- Not all requests are allowed for any 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 requester'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.

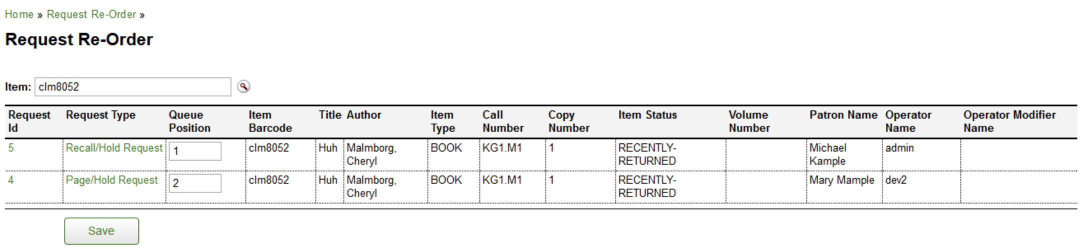
Process Overview

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 **Queue Position**

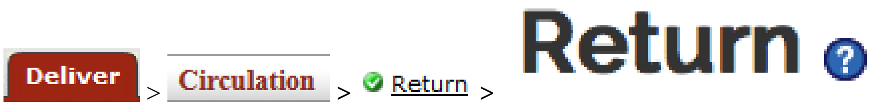
   Click **Save**.



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 .

Return



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

Note

You will receive errors if not logged in as a user mapped to a circulation desk. Login before selecting Loan from the **Deliver** Menu.

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.

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).

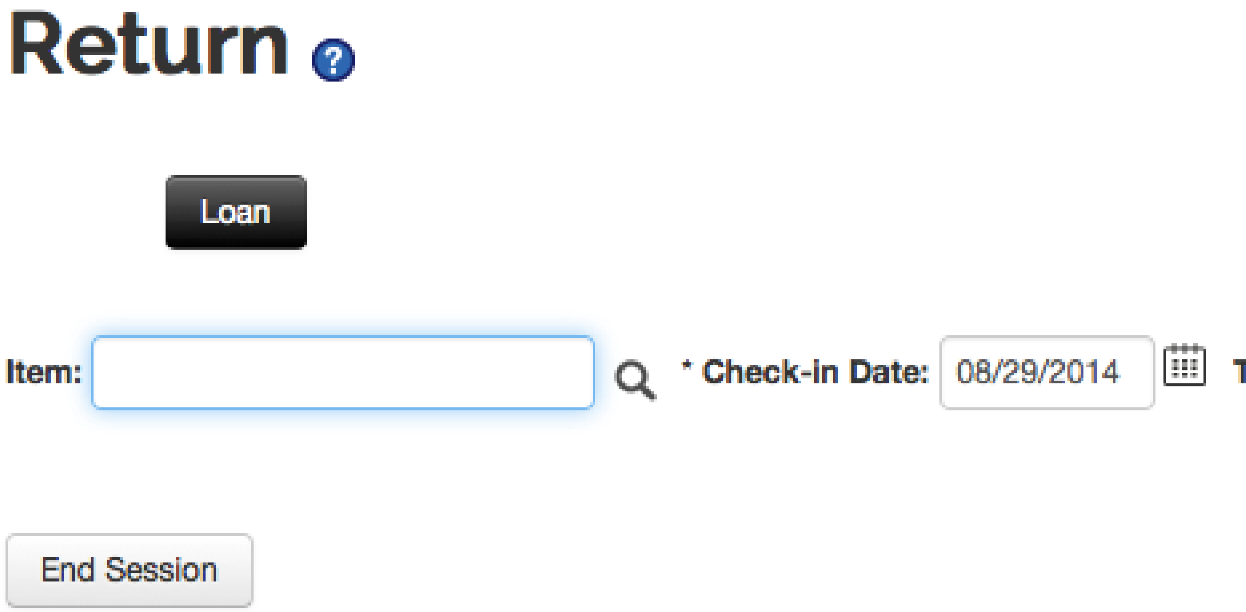
Tip

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

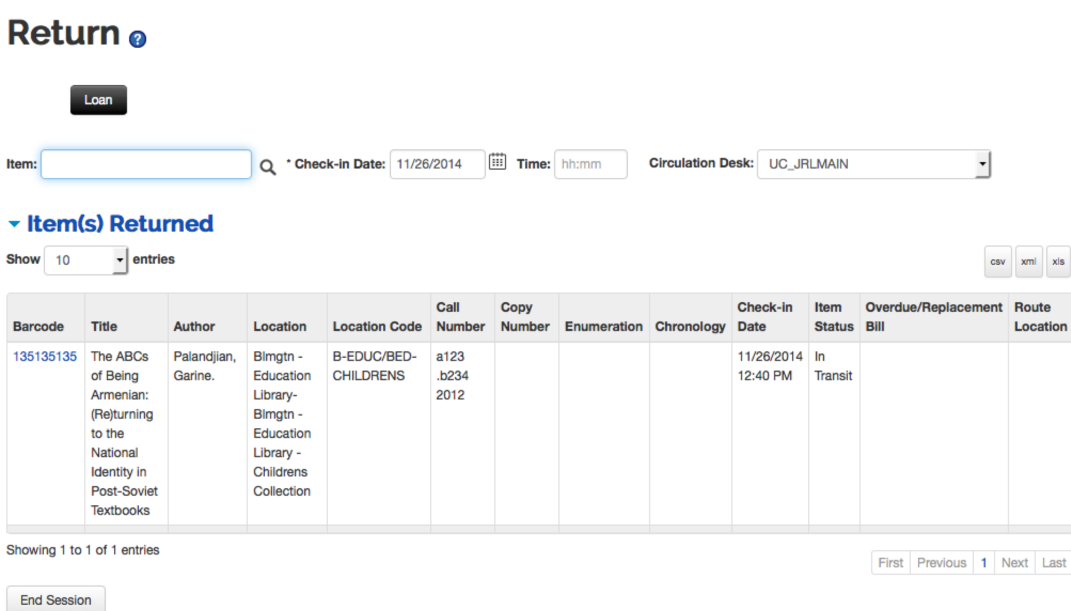
To check-in items, staff will find the **Return** e-document under **Circulation** on the **Deliver** menu.

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

2. Press **Enter.**



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



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 Patron Bill.

To mark an item as Claims Return, Item Damaged, or Missing Piece

If the patron requests a Claim Return, returns the item damaged, or returns the item while missing pieces, you may make note of these situations from the **Circulation Information** tab of the **Item** record.

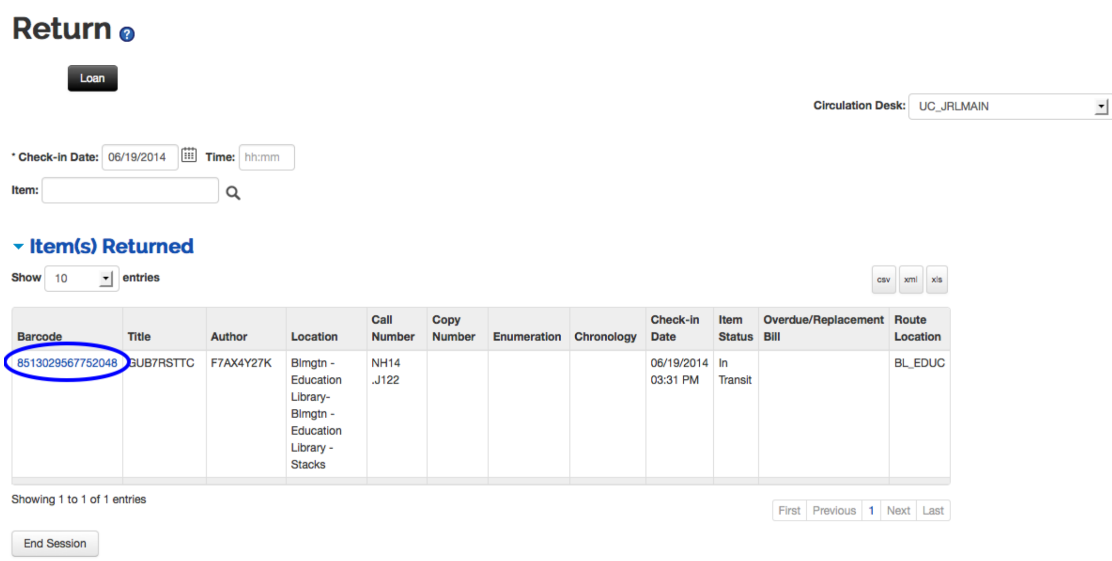
Click on the item barcode to open the Item Record.

Note

To learn more about the Circulation Information tab of the **Item** record, see the relevant section of the *Guide to the OLE Describe and Manage Module*

Tip

From the item record, you can also print call slips. For more information, see printing call slips.



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 requester and an on-hold slip is printed. Other conditions result in other messages/directions for the operator.

Chapter 3. Patron

Deliver > Patron > Deliver Notices
Patron
Patron Bill

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

Deliver Notices

Deliver > Patron > Deliver Notices >

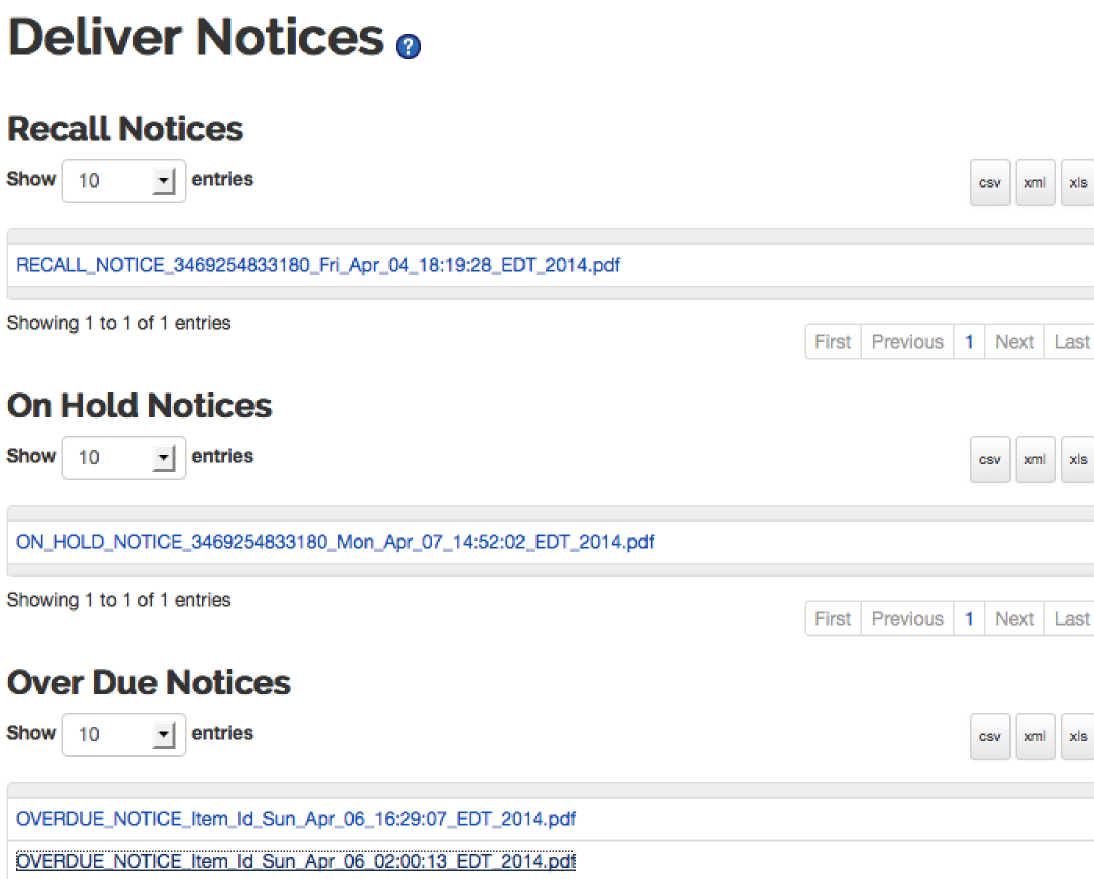
Deliver Notices

The Deliver Notices allow users to download pdf versions of Recall, On hold, or Overdue notices. The notices will include Patron information and Title/Item information. Pdfs may be printed and sent or emailed to patrons.

Deliver Notices are stored in a locally configurable location. This location is set by the parameter PDF_LOCATION (OLE-DLVR is the Namespace Code; Parameters can be found on the Admin tab).

On the bottom of some of the notice types, Recalls for one, a link to "My Account" will display. This should be modified to your institution's "My Account" patron service. This link location is set by the parameter MY_ACCOUNT_URL. (OLE-DLVR is the Namespace Code).

Deliver Notices can also be accessed from the **Admin** tab, below the **Batch Processes** sub menu, under the link **Deliver Batch Job**.



Patron

Deliver > Patron > Patron > Patron Lookup > Patron

Note

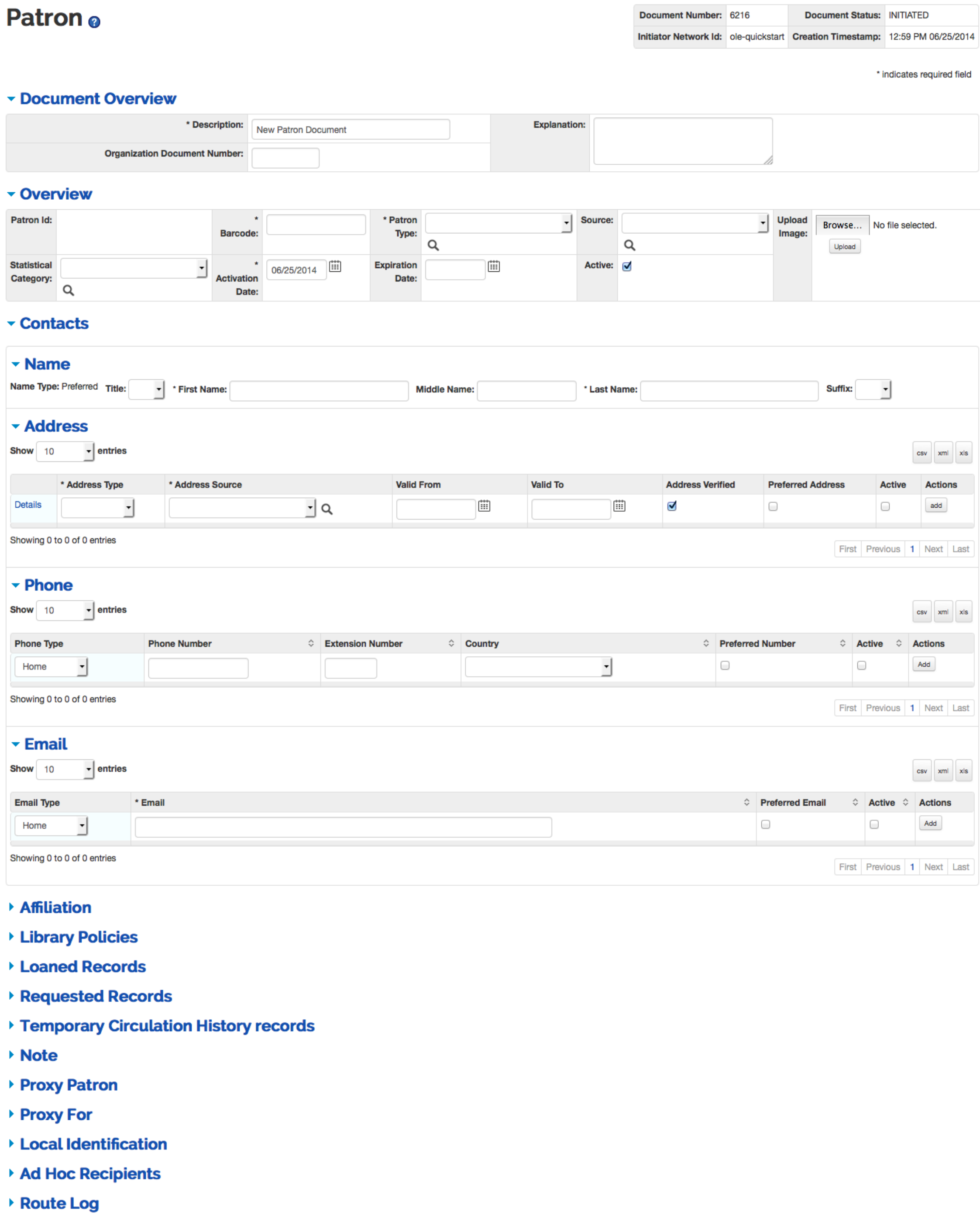
Please click here for technical documentation.

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

Document Layout



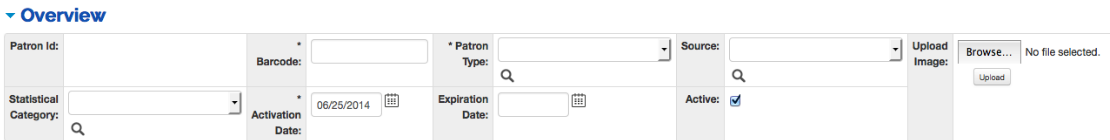
The Patron document includes the **Overview**, **Contacts**, **Affiliations**, **Library Policies**, **Loaned Records**, **Requested Records**, **Temporary Circulation History Records**, **Proxy Patron**, **Proxy For** and **Local Identification** tabs in addition to the standard tabs that display at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

Note

For more information about the standard tabs, see Standard Tabs on the *Guide to OLE Basic Functionality and Key Concepts*.

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.

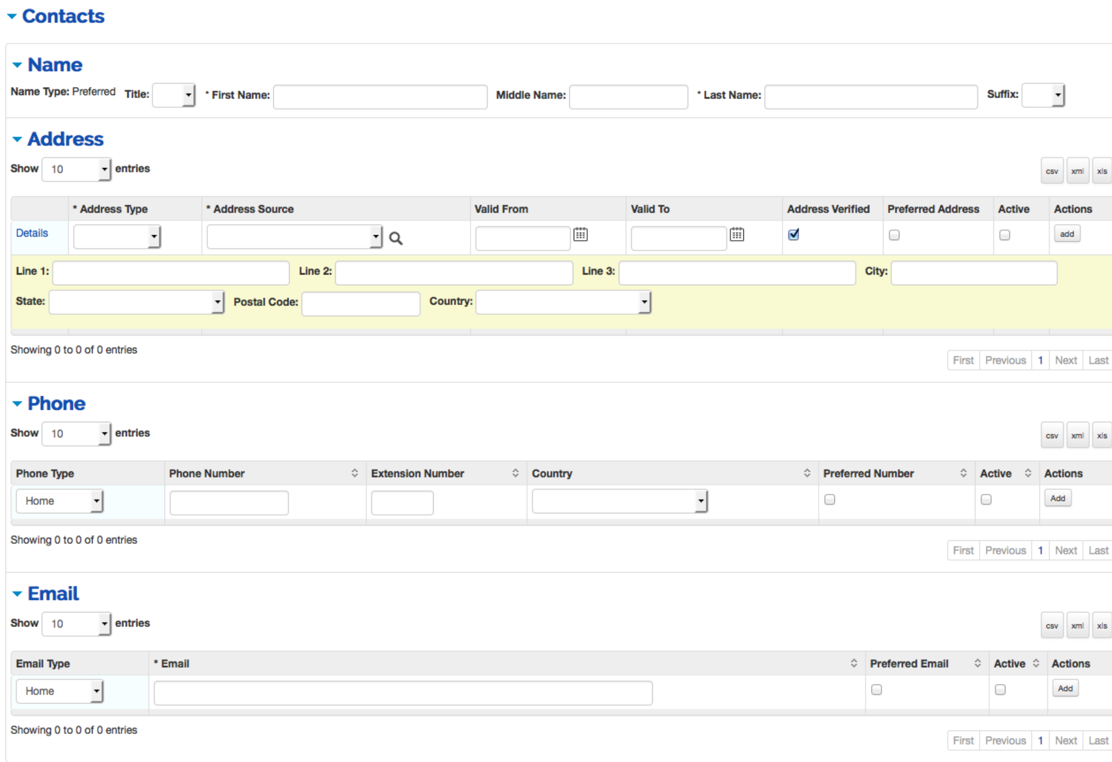


Patron Overview Tab Definitions

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.
Patron 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  .

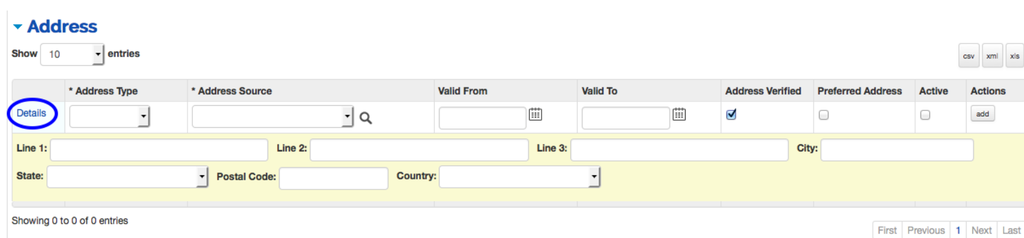
Contacts Tab

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.



Note

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



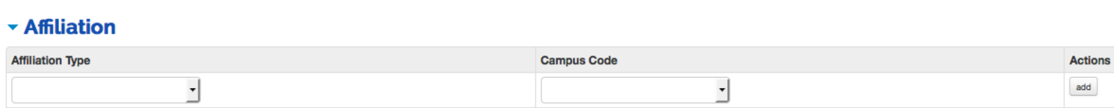
Patron Contacts Tab Definitions

Title	Description
Name Sub-Tab	
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
Address Sub-Tab	
Address Type	Required. A descriptor identifying characteristics of an address; an address type must be assigned to any address.
Address Source	Required. 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 will receive a prompt if no addresses have been verified.
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. Enter the address for the patron.
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
Phone Sub-Tab	
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 a phone number for the patron (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.
Email Sub-Tab	
Email Type	A descriptor identifying the general use/purpose of the email
Email	Required. Enter an email address for the patron.
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.



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.

Patron Library Policies Tab Definitions

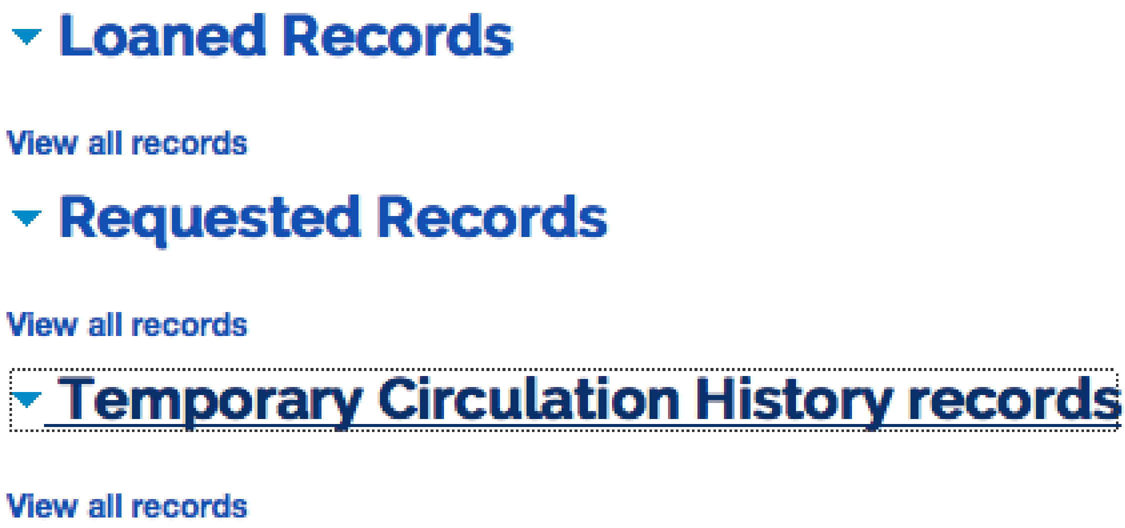
Title	Description
General Block	Flag to indicate if the patron is blocked for a reason not otherwise defined in the system; if flag is on, patron cannot checkout or request items.
General Block Note	A field allowing staff to explain why a general block has been placed on the patron record. Click the  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

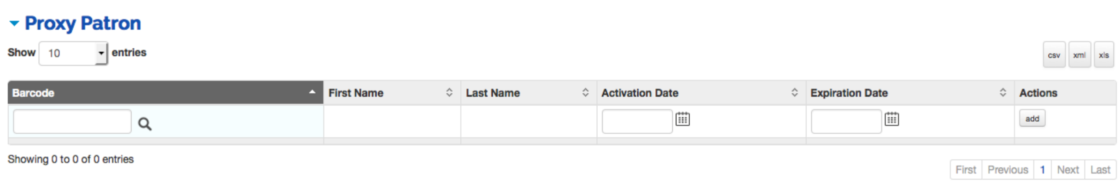
The Temporary Circulation History Records feature allows users to look up items they have checked out in the past. If privacy concerns trump the desire to offer this feature, a library can opt NOT to create a temporary circulation history.



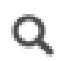
Proxy Patron and Proxy For Tabs

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.



Patron Proxy Patron Tab Definitions

Title	Description
Barcode	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

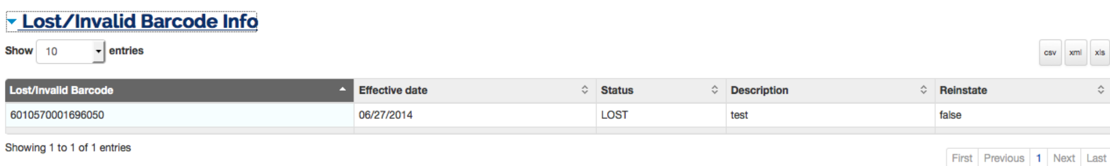
The **Local Identification** tab allows you to further distinguish a patron’s connection to the library. When adding a local id to the **Local Identification** tab, enter the identification and then select the **add** button.

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

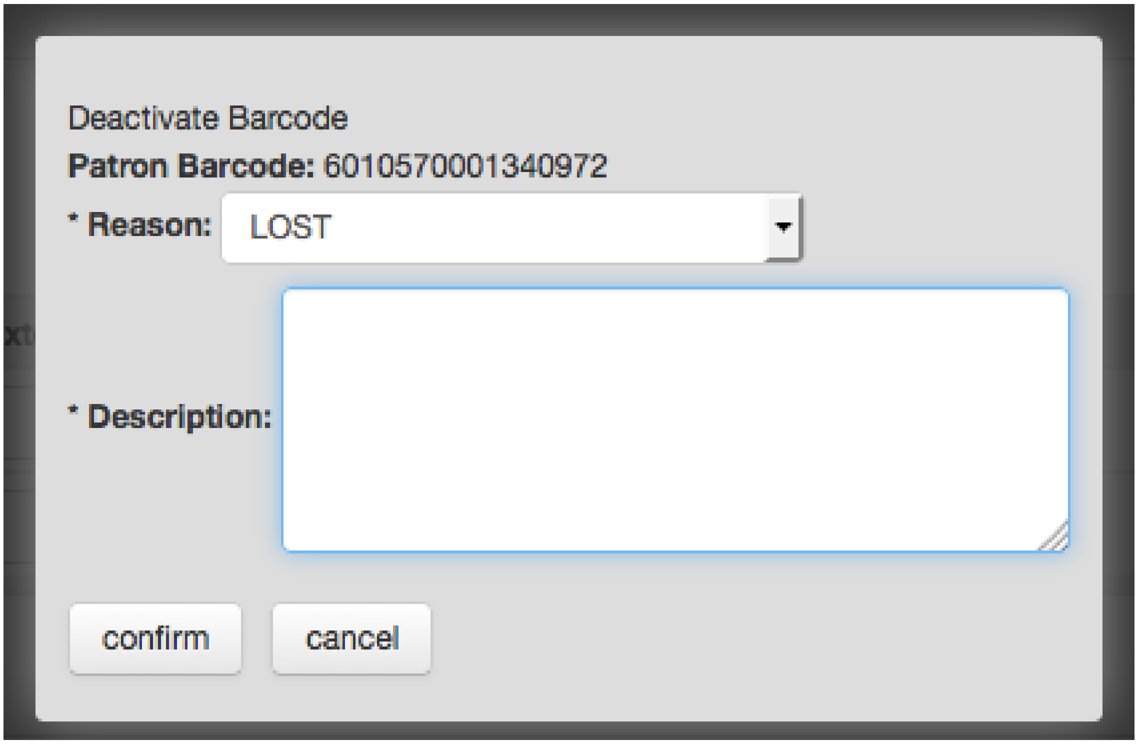
A patron's lost/invalid barcode number is tracked to prevent fraudulent use of lost or stolen ID cards. Users may update a patron's barcode on the **Overview** tab. When this has been done, any expired barcodes will appear on the **Expired/Updated Barcode** tab with an **Effective date**.



To update a barcode:

1. Choose **Update barcode** at the bottom of the Patron record.

2. In the pop-up window, select a **Reason** from the dropdown list and add a **Description**.



3. Click **Confirm** to update the Patron record.

4. On the Patron record, enter a new barcode in the **Overview** tab.

5. Select **Submit**.

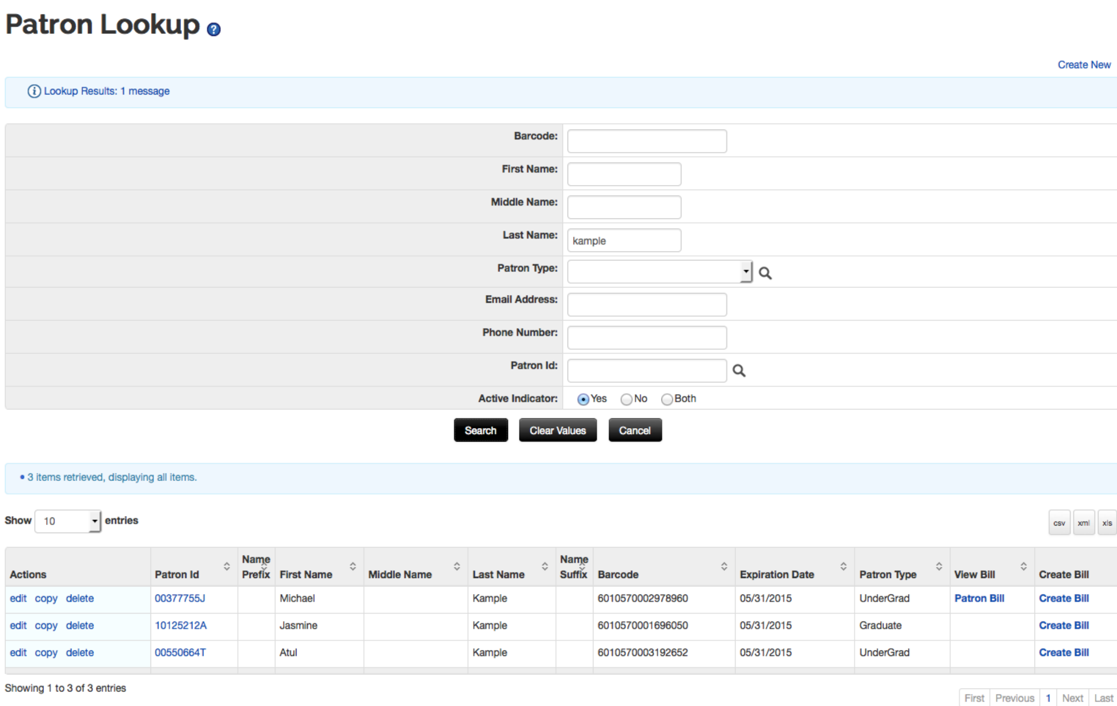
Process Overview

Patron Bills

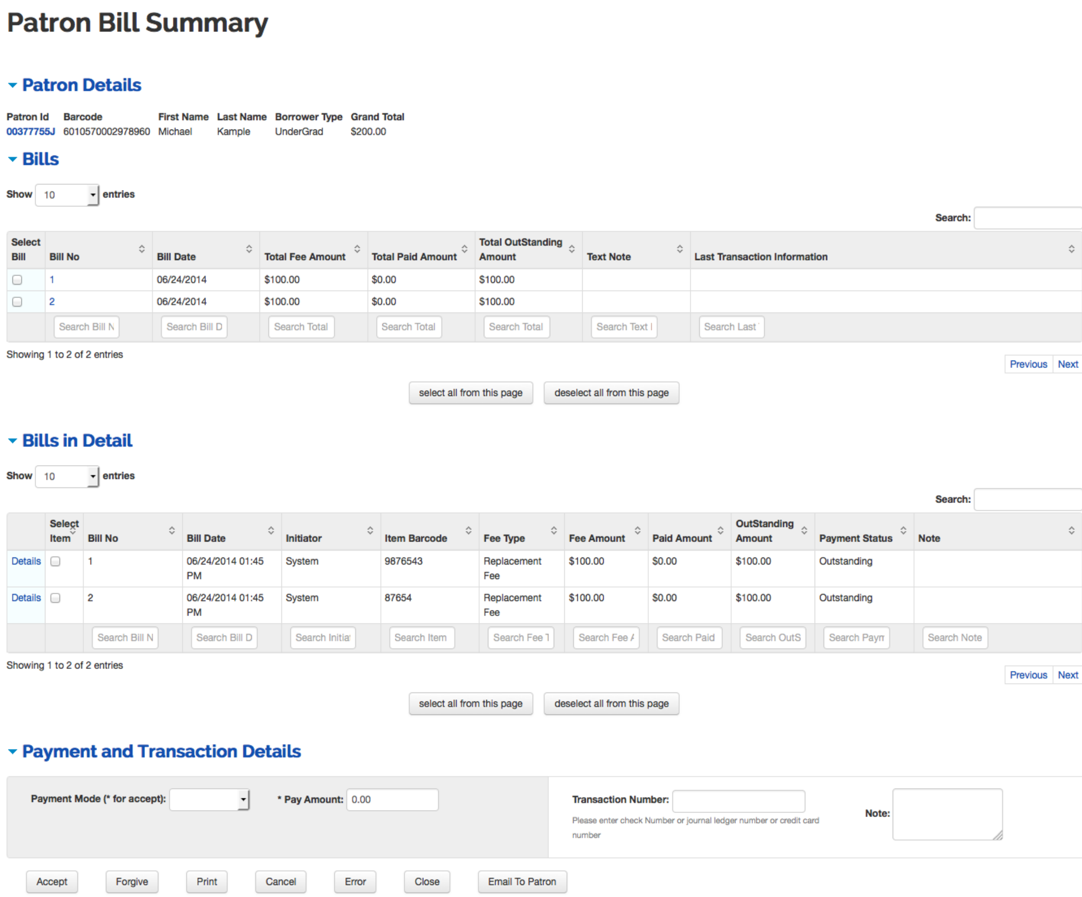
From the Patron search screen, staff may view bills and accept payments from the **Patron Bill** link or create a bill from the **Create Bill** link.

Note

For more information about creating patron bills, see Patron Bill Payment



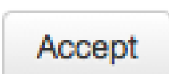
1. Click **Patron Bill** to view and accept payments for a patron.



2. Check the bill from the **Bills** tab or the line item from the **Bills in Detail** tab that the patron would like to pay.

3. Select the **Payment Mode** from the drop down list if you plan to accept a payment.

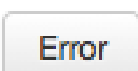
4. Enter the **Pay Amount**.

5. Click 

to receive a payment.

6. Click 

to forgive an amount.

7. Click 

when the charge was made in error.

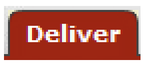
When selecting cancel, error. or forgive, you must enter a note in the pop-up box and click **ok**. This note has a limit of 500 characters.

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



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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

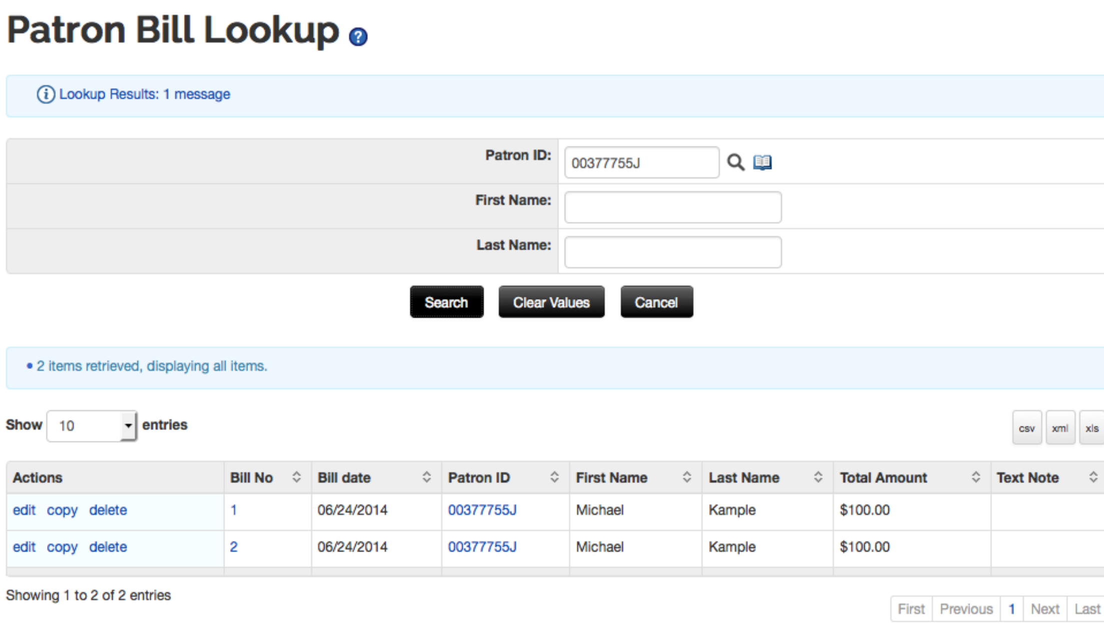
Fine rates and replacement fees will be configured locally. By setting fine rates and replacement fees to null or zero, libraries can opt to NOT automatically create these patron bills.

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

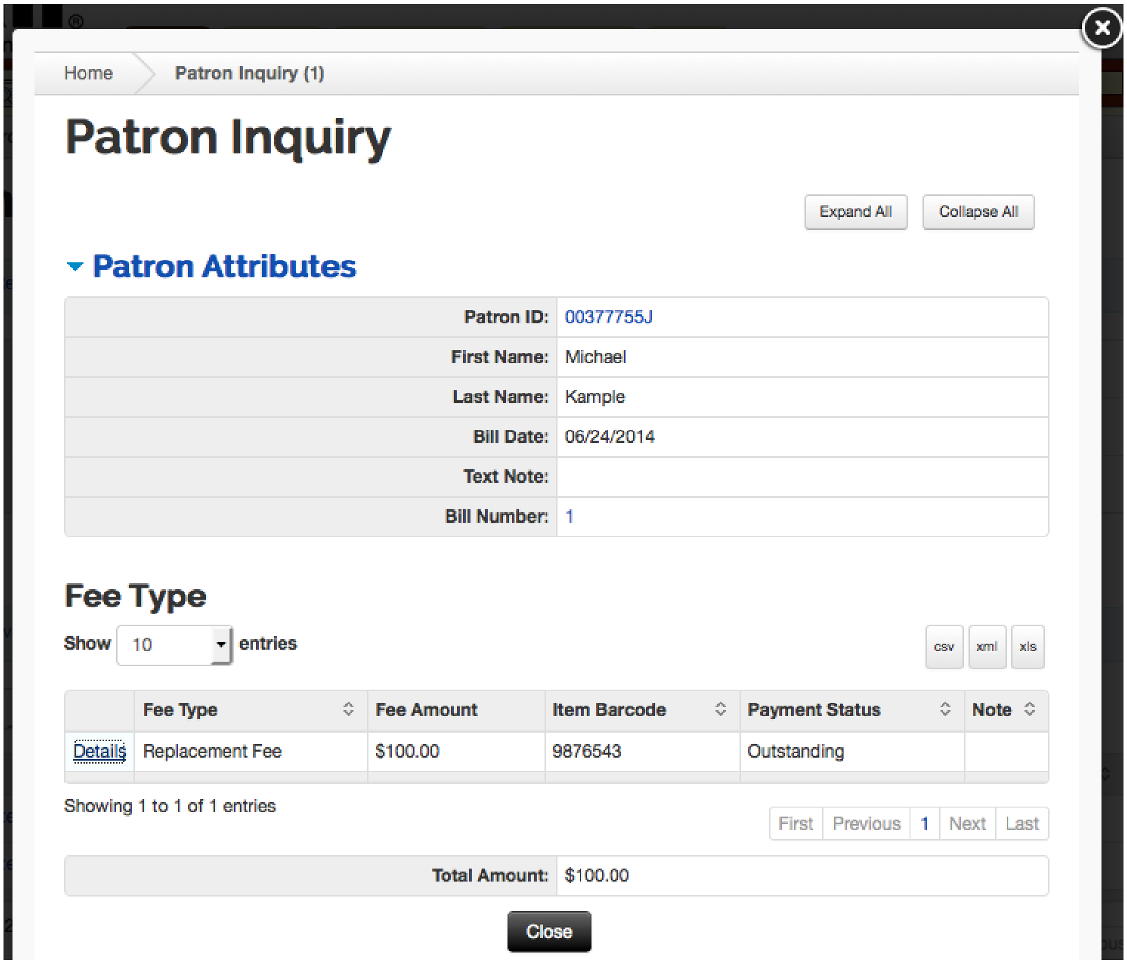
Search for a Patron Bill

From the **Deliver** tab, under the **Patron** submenu, click **Patron Bill** to enter the lookup screen.

Enter the Patron's ID or search for the patron by name.



Click the bill number of the bill you wish to view. A popup box will appear with some information about the bill. Click **details** to view more information including item and transaction information and notes.

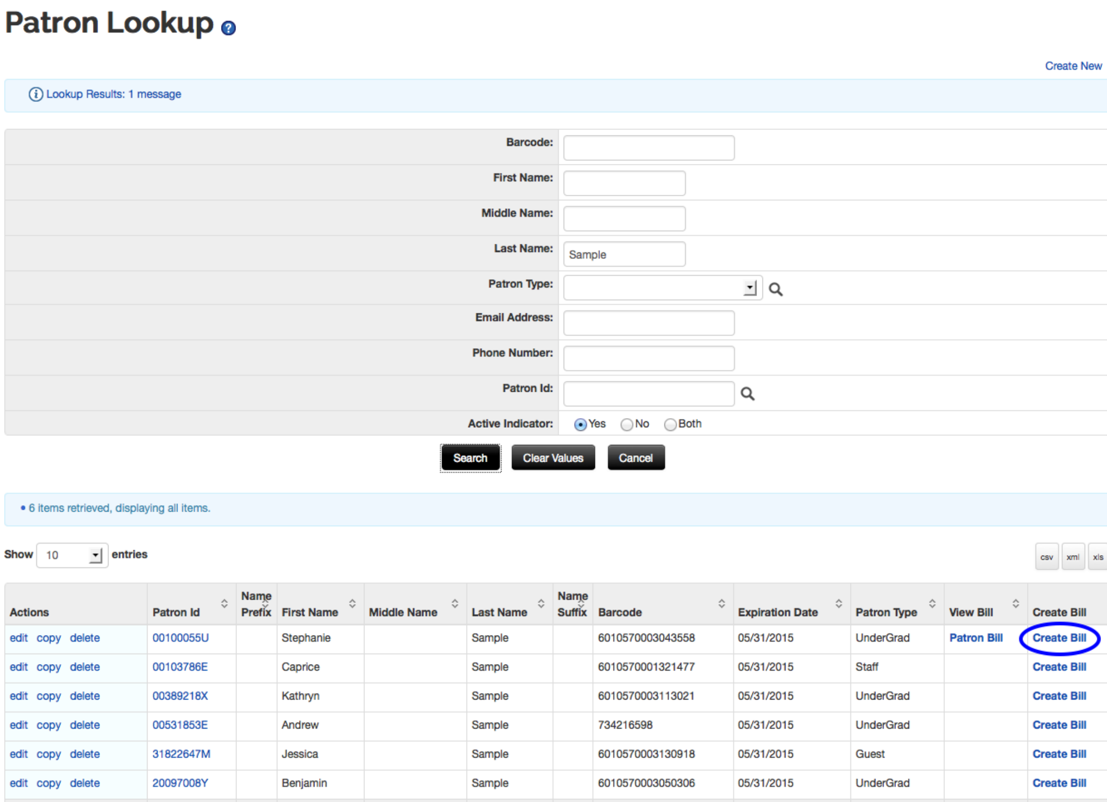


Create a Patron Bill Manually

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.

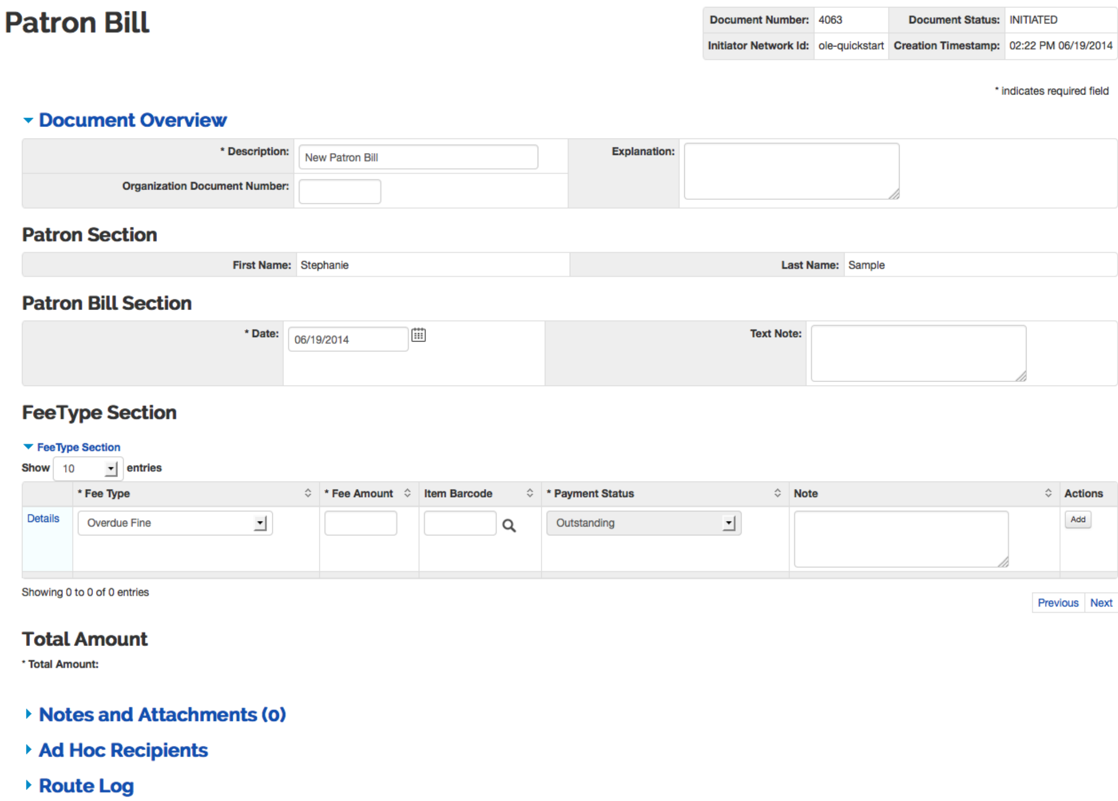
Note

To pay a patron bill, you must click **Patron Bill** from the Patron Lookup Screen. For information about paying the bill, see Patron Bill.



Actions	Patron Id	Name Prefix	First Name	Middle Name	Last Name	Name Suffix	Barcode	Expiration Date	Patron Type	View Bill	Create Bill
edit copy delete	00100055U		Stephanie		Sample		6010570003043558	05/31/2015	UnderGrad	Patron Bill	Create Bill
edit copy delete	00103786E		Caprice		Sample		6010570001321477	05/31/2015	Staff		Create Bill
edit copy delete	00389218X		Kathryn		Sample		6010570003113021	05/31/2015	UnderGrad		Create Bill
edit copy delete	00531853E		Andrew		Sample		734216598	05/31/2015	UnderGrad		Create Bill
edit copy delete	31822647M		Jessica		Sample		6010570003130918	05/31/2015	Guest		Create Bill
edit copy delete	20097008Y		Benjamin		Sample		6010570003050306	05/31/2015	UnderGrad		Create Bill

Document Layout



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

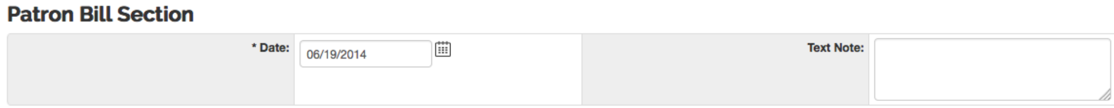
For more information about the standard tabs, see Standard Tabs on the *Guide to OLE Basic Functionality and Key Concepts*.

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 Bill Section Tab

The **Patron Bill Section**

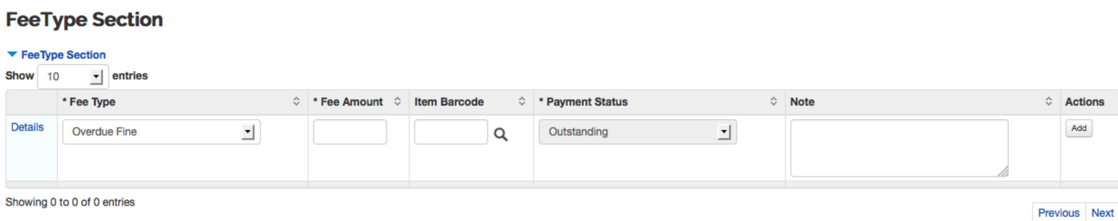


Patron Bill Section Tabs Definitions

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

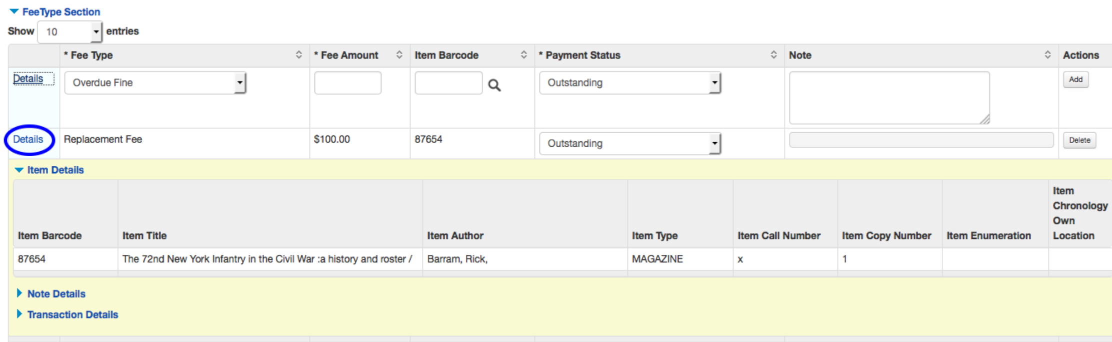
The **Fee Type Section** tab contains the fee information pertaining to the bill. When adding lines to Fee Type Section, enter information and then select the **add** button.



Fee Type Section Tabs Definitions

Title	Description
Fee Type	Required. Choose the fee type from the drop down 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 .
Payment Status	Choose the status of the payment from the drop down list.
Note	Optional. Enter a note about the fee. **Note** There is a 500 character limit on this note field.
Action	Click **add** to add the fee to the patron bill.

Once the fee has been added, the **Details** can be expanded to see the title, author, and other pertinent information about the item.



Total Amount Tab

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

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.

Chapter 4. Circulation Admin

Maintenance > Circulation Admin >

Barcode Status
Calendar
Calendar Exception Type
Calendar Group
Circulation Desk
Circulation Desk Mapping
Copy Format
Fixed Due Date
Flagged Items Search
Location
Location Level
Request Type

On the Maintenance 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.

Barcode Status

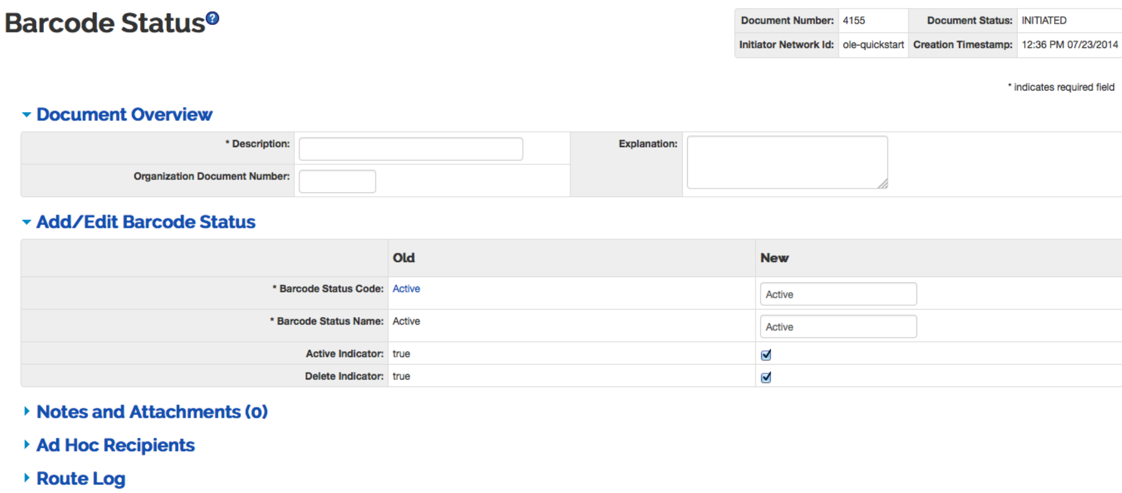
Maintenance > Circulation Admin > Barcode Status > Barcode Status LookUp > Barcode Status

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 patron barcodes.

Note

Users cannot add or edit the barcode statuses without making changes to the underlying code. This maintenance document is to be removed in 2.0. See OLE-6788.

Document Layout



Calendar

Maintenance > Circulation Admin > Calendar > Calendar Lookup > Calendar

A Calendar defines a library's open and closed days/hours for a definite or indefinite chronological period.

Each Calendar is assigned to a Calendar Group (even if the library uses only one Calendar). A Calendar Group can have one Calendar with no End Date and be used indefinitely OR a Calendar Group can have a chronological sequence of Calendars, one becoming active automatically as soon as the previous one expires.

Each Circulation Desk defines the Calendar Group it uses; if a library has multiple Circulation Desks that share the same hours, all of those Circulation Desks can use the same Calendar Group. Any Circulation Desk with its own hours will need its own Calendar Group.

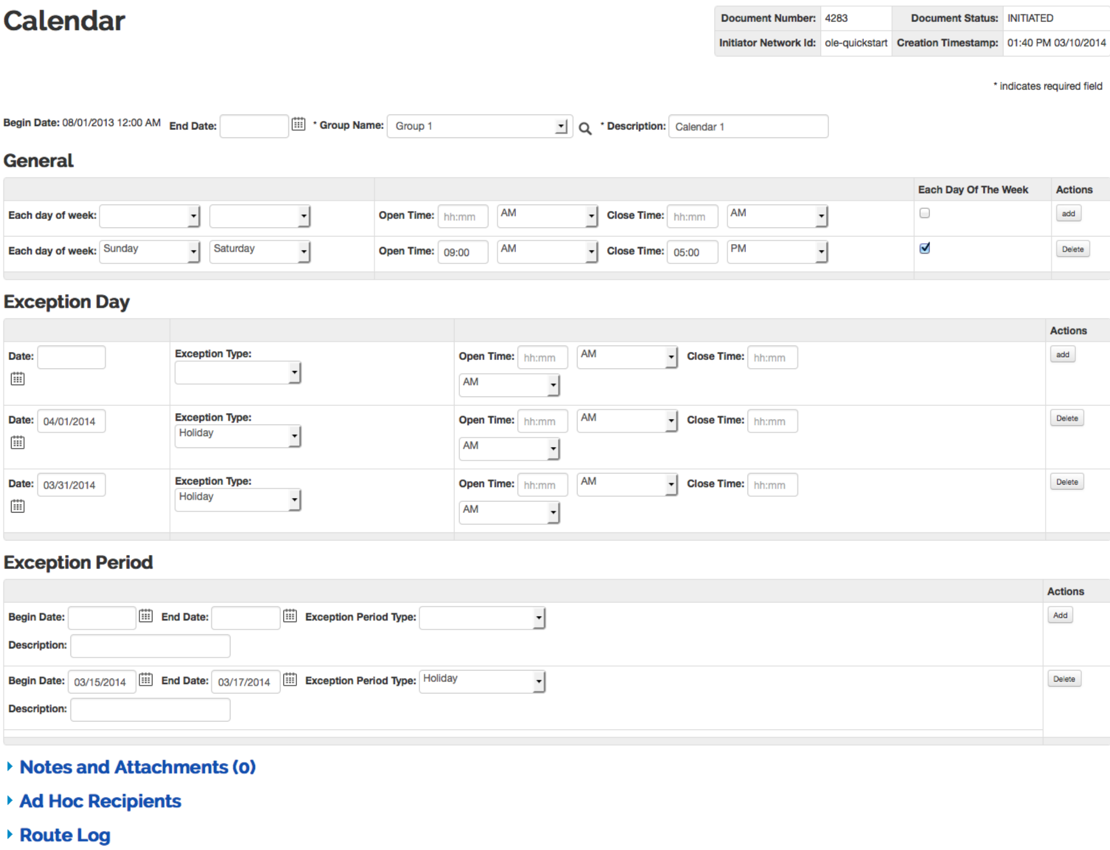
A Calendar can define individual hours for each day of the week or define the days that share the same hours. Exceptions can be defined by specific dates or by periods of time.

Note

Day(s) on which a library is always closed are simply not defined when creating a Calendar and therefore do NOT display on any Calendar.

Each library must have at least one Calendar with a Calendar Group.

Document Layout



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	If the calendar is part of a chronological sequence within the Calendar Group, an End Date may be required, depending on the position within the sequence. If the Calendar is the only one in the Calendar Group, the End Date is optional.
Group Name	Required. Select the Calendar Group name to which the Calendar belongs from the drop down menu.
Description	Required. The familiar description, or name, of the calendar. The data entered here appears in a column on the search results when searching for a Calendar. If you will have a sequence of Calendars within a Calendar Group, the Description could be a sequence,, e.g., “Calendar 1”, “Calendar 2”, etc. However, this is free text so you may describe any Calendar as desired.

General Tab

Click 

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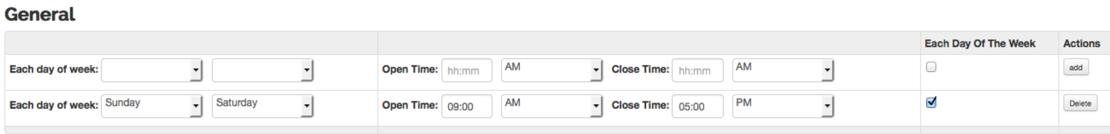
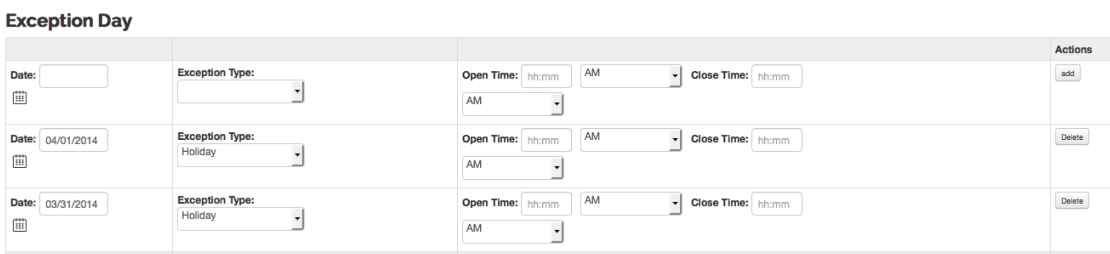


General Tab Definitions

Title	Description
Each day of week	If the library is open 7 days a week and has the same open/close times every day, select Monday for the first day and Sunday for the next day (or whatever span of days your week covers, e.g., Monday and Saturday), enter the open/close times, and then check the “Each Day of the Week” box. If the library has different open/close times for different days, select the same day for the first and second days and then enter the open/close times. Repeat for the other days. NOTE: if you are always closed on a particular day(s) of the week, do NOT enter that day(s). The system does not accept a day entry with blank open/close times.
Open Time/ Closed Time	Enter the open and close time for the library and choose "AM" or "PM" from the drop down list.
Actions	Click **Add** to add the general calendar times.

Exception Day Tab

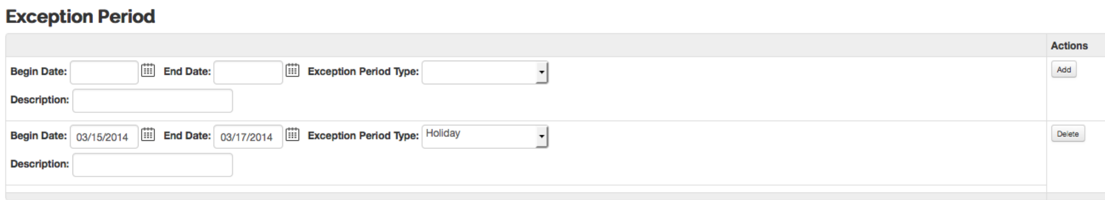


Exception Day Tab Definitions

Title	Description
Date	The date of the calendar exception. Use this to define any day when the library is closed or when a day has open/closed hours that differ from the normal hours as defined in the general tab. Enter the date or use the calendar icon .
Exception Type	Required if exception date is entered; select from the drop down menu
Open Time/Closed Time	Blank means closed all day; enter and select "AM" or "PM" to define specific times.
Actions	Click **Add** to add the exception day.

Exception Period Tab

If an Exception Period is added, specify days of the week as above. Exception Periods are most likely to be defined when the Calendar has Begin and End Dates. If your Calendar has no End Date, you typically will use Exceptions Days instead of Exception Periods.



Exception Period Tab Definitions

Title	Description
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	A descriptive title of the exception period.
Actions	Click **Add** to add the exception period.

Process Overview

Business Rules

- Operators without create permission will NOT be able to create a new Calendar.
- For “Each day of week”, you can either enter each day separately (if open/close times vary by day) or enter a span of days (if open/close times are the same for each day).
- Each day of the week check box must be checked for a span of days.
- A day’s closed time may be after midnight, e.g., open time=8 AM and close time=1AM.
- If a closing time for **any** day of the week is after midnight, you must enter each day separately with its own open/close times.
- If the library is always closed on a day(s) of the week, simply omit that day(s) from your Calendar. The system automatically assumes the library is always closed on that day(s). Do NOT define a regularly-closed day as an Exception Day or Exception Type.
- If a library has hours associated with an academic term, interrupted by interim periods with different hours, the library may wish to define a chronological sequence of Calendars within a Calendar Group; in such a scenario, the system expects the Begin Date of the second Calendar in the sequence to be the day after the End Date of the first Calendar in the sequence; and so forth. New Calendars are simply added to the chronological sequence. The final Calendar in the sequence may or may not have an End Date. Alternatively, the library COULD define one Calendar with no End Date, continue to add Exception Days and define its academic interims as Exception Types.
- Validation rules have been set up to make it as difficult as possible to define a Calendar or sequence of Calendars with overlapping Begin/End Dates.
- It is possible to define an End Date for a Calendar without a chronological successor Calendar.

- Exception Days can be added after the fact to record a closed day or a day with abbreviated hours caused by unexpected circumstances or emergencies, e.g., weather, natural disasters, problems with a building's mechanicals, etc. While this will not automatically adjust certain situations (e.g., this does NOT automatically extend a loan period for items due on that day), it will serve as a reference point for staff asked, e.g., to forgive overdue fines or make other adjustments related to the unanticipated closing.

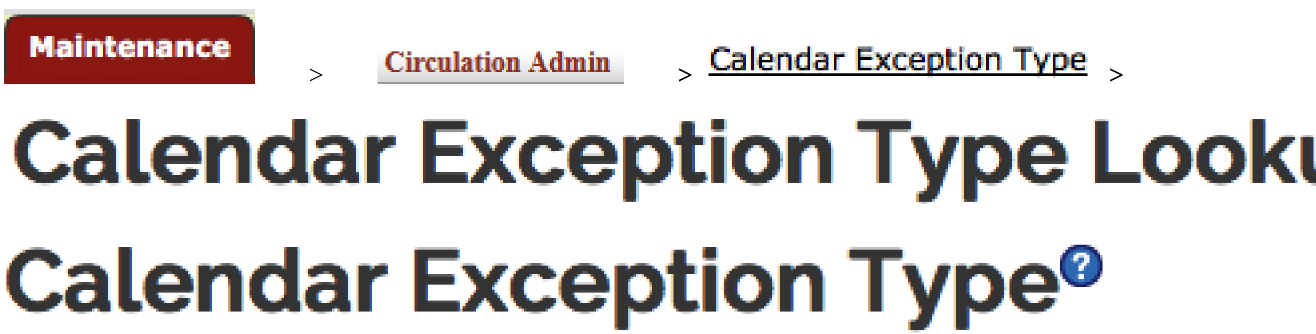
Creating Calendars

1. Open the Calendar Document from the **Maintenance** tab.
2. Enter the appropriate data. Click Add to add a General calendar, exception day or exception period.
3. Click **Submit**.

Maintaining Calendars

Libraries must establish internal procedures for ensuring that Calendars are created prior to the dates that they need to become effective. There is no automatic alert system in place to notify staff that a Calendar is nearing its End Date.

Calendar Exception Type



Before setting up an OLE Calendar (used by each Circulation Desk), you must first define Exception Types. Exception Types define the most common reasons that a library is closed on a day(s) that it would otherwise normally be open. Typical Exception Types might include, but are not limited to:

Holiday

Building Evacuation

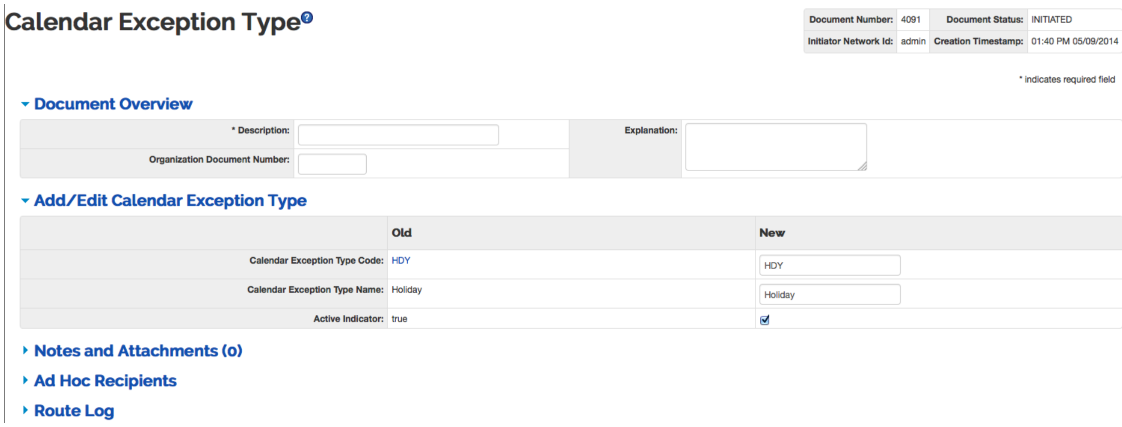
Weather Event

Snow Day

Spring Break

As soon as you create a Calendar Exception Type, the name appears in a drop-down menu on a Calendar for use when defining Exception Days and/or Exception Periods.

Document Layout



The Exception Type document includes the **Add/Edit Calendar Exception 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 Calendar Exception Type Tab Definitions

Title	Description
Calendar Exception Type Code	Required. A unique code that identifies the Calendar Exception Type
Calendar Exception Type Name	Required. A descriptive title for the exception type. This displays in a drop-down menu on the Calendar for Exception Day and Exception Period
Active Indicator	Indicates whether this Calendar Exception Type is active or inactive. Remove the check mark to deactivate.

Calendar Group

Maintenance > Circulation Admin > Calendar Group > Calendar Group Lookup > Calendar Group

A Calendar defines a library's open and closed days/hours for a definite or indefinite chronological period.

Each Calendar is assigned to a Calendar Group (even if the library uses only one Calendar). A Calendar Group can have one Calendar with no End Date and be used indefinitely OR a Calendar Group can have a chronological sequence of Calendars, one becoming active automatically as soon as the previous one expires.

Each Circulation Desk defines the Calendar Group it uses; if a library has multiple Circulation Desks that share the same hours, all of those Circulation Desks can use the same Calendar Group. Any Circulation Desk with its own hours will need its own Calendar Group.

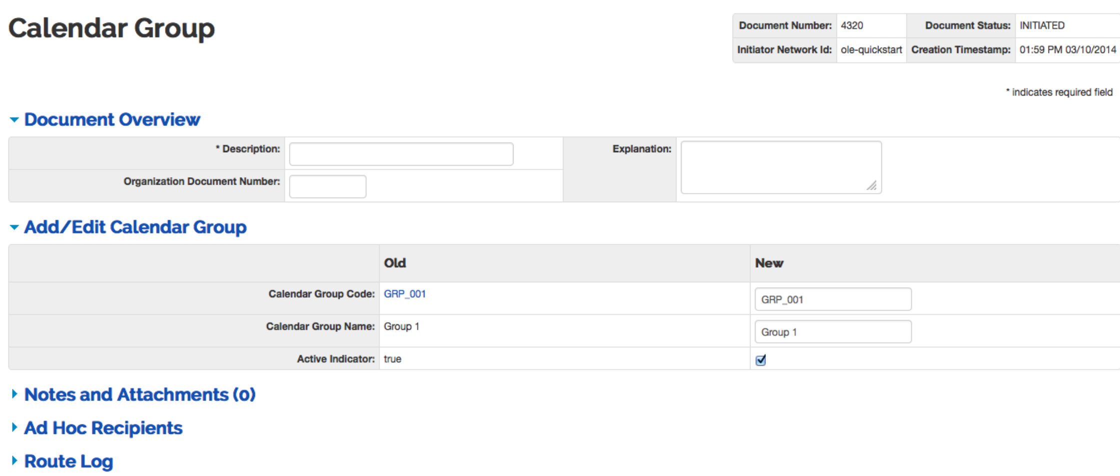
A Calendar can define individual hours for each day of the week or define the days that share the same hours. Exceptions can be defined by specific dates or by periods of time.

Note

Day(s) on which a library is always closed are simply not defined when creating a Calendar and therefore do NOT display on any Calendar.

Each library must have at least one Calendar Group.

Document Layout



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. A unique code to identify the calendar group.
Calendar Group Name	Required. A descriptive name of the calendar group.
Active Indicator	Indicates whether this Calendar Group is active or inactive. Remove the check mark to deactivate

Process Overview

Business Rules

- Operators without create permission will NOT be able to create a new Calendar Group.
- Each Circulation Desk is associated with a Calendar Group which contains a Calendar(s)—see Calendar. If all Circulation Desks have identical hours, they can all share the same Calendar Group. Any Circulation Desk with its own hours will need to have its own Calendar Group.
- Define as many Calendar Groups as you have Circulation Desks with their own hours.

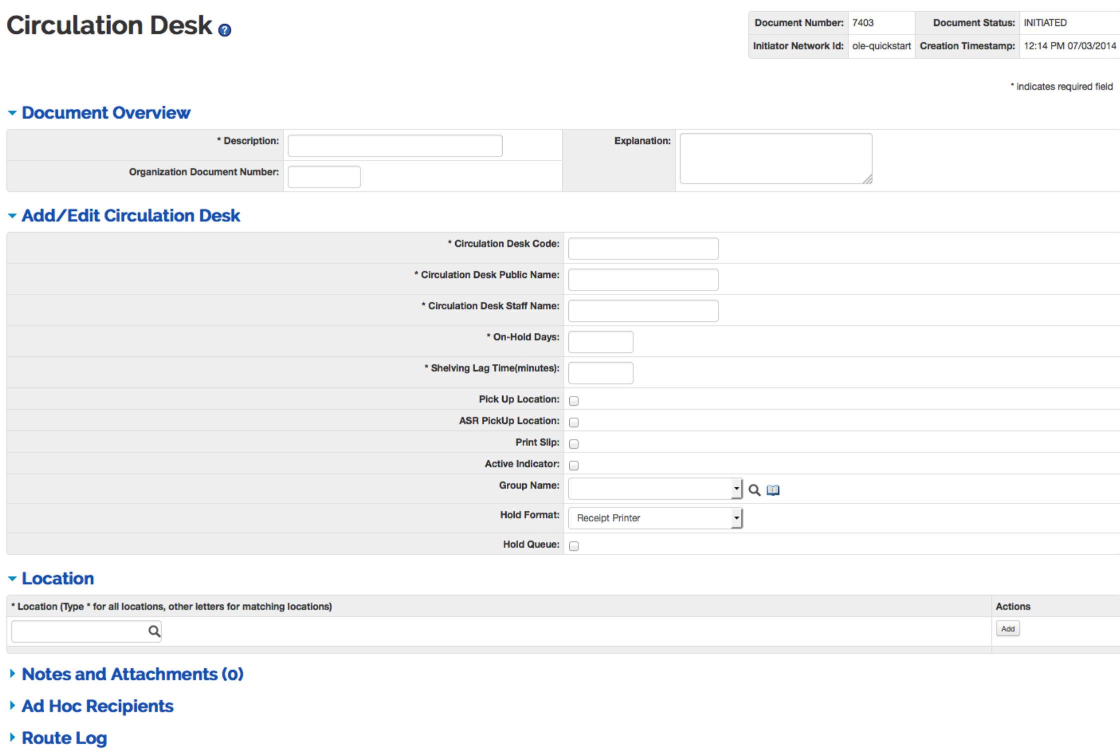
- Calendar Groups no longer needed or used should be marked “inactive”.

Circulation Desk

Maintenance > Circulation Admin > Circulation Desk > Circulation Desk Lookup

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.

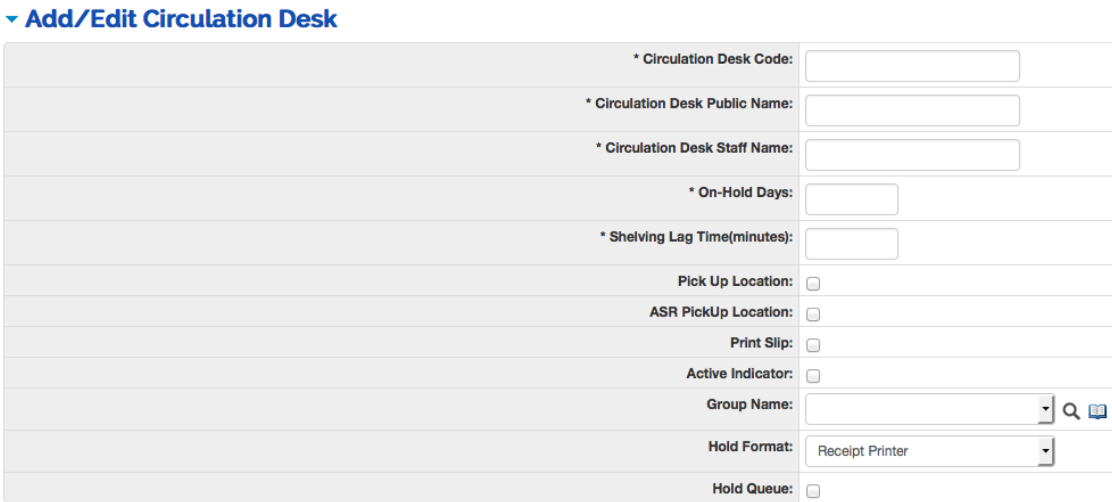
Document Layout



The Circulation Desk document includes the **Add/Edit Circulation Desk** tab and the **Location** tab.

Add/Edit Circulation Desk Tab

The system automatically enters data into both the **Old** and **New** sections in the **Add/Edit Circulation Desk** 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	Required. The number of days an item will remain on hold at this circulation desk.
Shelving Lag Time (minutes)	Required. The amount of time, in minutes, between check-in and reshelving. **Note** This time is dependant on the batch job updateStatusIntoAvailableAfterReShelvingJob. Statuses will not be updated to "available" until this job has run. If the Shelving Lag Time is set to "15", but the job is set to run only at midnight, then this is when statuses will be updated. However if the job is set to run every 5 minutes, the job will run three times before statuses are updated.
Pick Up Location	Indicates whether this circulation desk can be used as a pick up location for holds.
ASR Pick Up Location	Indicates whether this circulation desk can be used as a pick up location for items on hold from an Automated Storage Retrieval System (ASR).
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.
Group Name	Indicates the Calendar Group assigned to the circulation desk. Select a calendar group from the dropdown list or search for one from the lookup 
Hold Format	Indicates the format of the printed on-hold slips for a circulation desk. Receipt Printer will format the page to print on 3.5" x 6" paper. Normal Printer will format the page to print on standard 8.5" x 11" paper.
Hold Queue	Indicates whether all on-hold slips print together after a circulation attendant clicks "end session" or individually, after each circulation transaction occurs. Check the box to print the slips all together.

Location tab

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 Add.

3. To remove an existing location, click Delete.

Circulation Desk Mapping

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

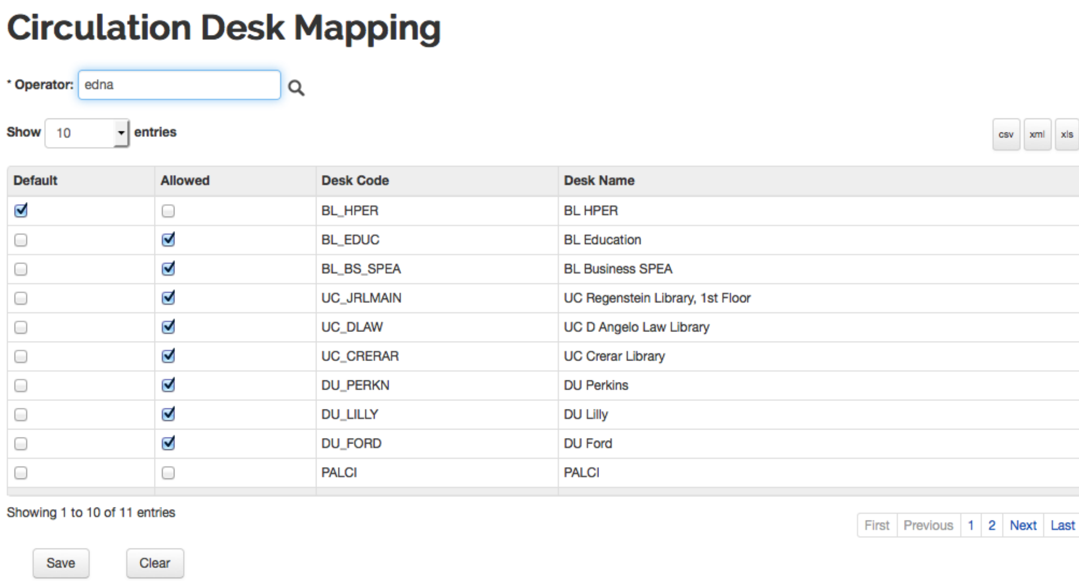
Each operator will have a default circulation desk but they can have one or more circulation desks where they can work. If they have more than one circulation desk, they will be able to change from one circulation desk to another to indicate where they are when circulating library materials.

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**.



Circulation Desk Mapping

* Operator: edna

Show 10 entries

csv xml xls

Default	Allowed	Desk Code	Desk Name
☑	☐	BL_HPER	BL HPER
☐	☑	BL_EDUC	BL Education
☐	☑	BL_BS_SPEA	BL Business SPEA
☐	☑	UC_JRLMAIN	UC Regenstein Library, 1st Floor
☐	☑	UC_DLAW	UC D Angelo Law Library
☐	☑	UC_CRERAR	UC Crerar Library
☐	☑	DU_PERKN	DU Perkins
☐	☑	DU_LILLY	DU Lilly
☐	☑	DU_FORD	DU Ford
☐	☐	PALCI	PALCI

Showing 1 to 10 of 11 entries

First Previous 1 2 Next Last

Save Clear

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** drop down on the **Loan/Return** interface.

   A list of circulation desks will appear below the search.

5. Click Save.

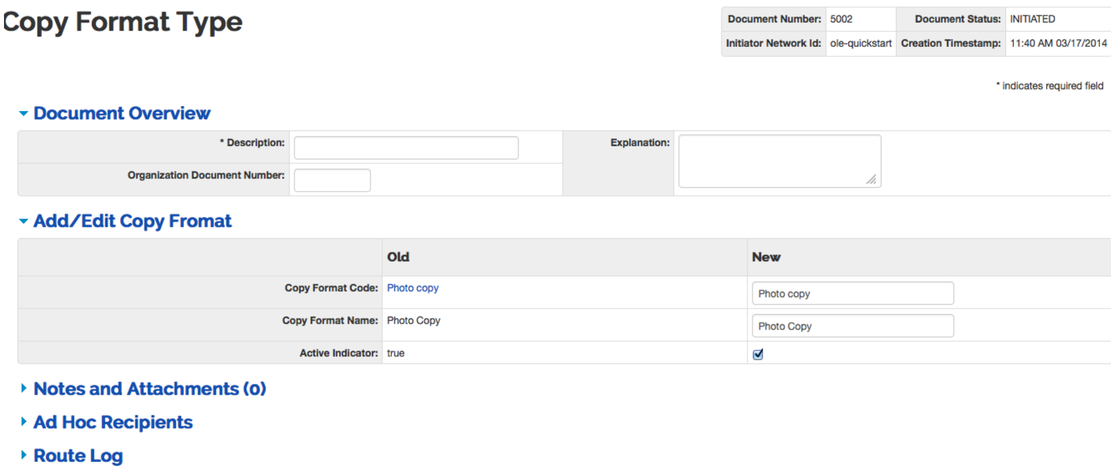
Copy Format

Maintenance > Circulation Admin > Copy Format >

Copy Format Type

The Copy Format document defines the format of a copy request. Though locally configurable, some examples of copy format include "photocopy" and "PDF".

Document Layout



The Copy Format document includes the **Add/Edit Copy Format** 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 Copy Format Tab Definitions

Title	Description
Copy Format Code	Required. The code to identify the copy format.
Copy Format Name	Required. A descriptive name of the copy format.
Active Indicator	Indicates whether this Copy Format is active or inactive. Remove the check mark to deactivate

Fixed Due Date

Maintenance > **Circulation Admin** > **Fixed Due Date** >

Fixed Due Date Lookup >

Fixed Due Date

A **Fixed Due Date** schedule allows a library to determine that materials loaned during specific periods all come due at the same time. This maintenance document makes it possible to set up a system wherein everything loaned during an academic term comes due at the end of the term, and everything loaned during the summer break comes due at the end of the summer.

Staff can create multiple fixed due date schedules.

Note

The from and to dates of multiple entries in a fixed due date schedule must not intersect.

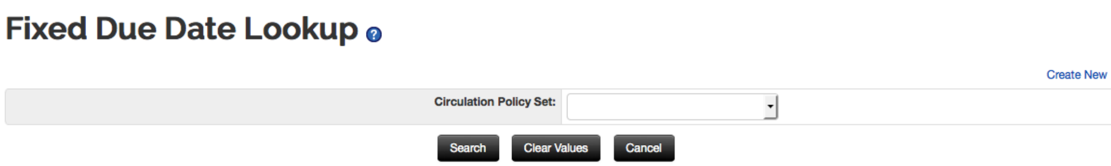
Getting Started

Fixed due dates are tied into circulation policies. If a fixed due date is in effect for the circulation policy, then any loan that takes place between the start and end dates of the fixed due date schedule will use the fixed due date.

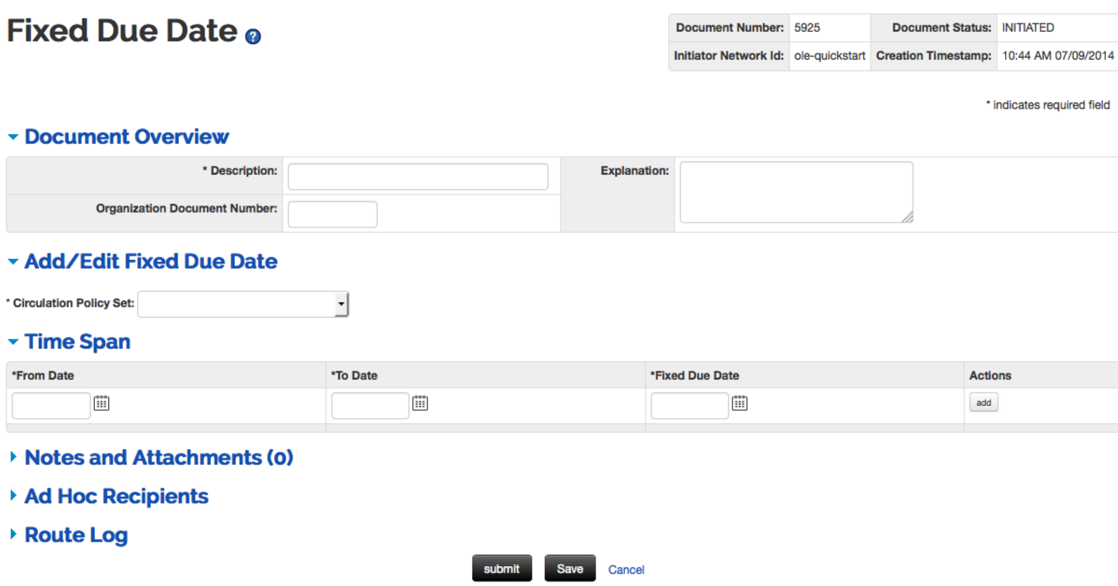
Tip

You need to be familiar with the circulation policy KRMS rules built into your local implementation to assign fixed due dates.

Because fixed due dates are tied into circulation policies, the **Fixed Due Date Lookup** only allows uses to search by the policy set.



Document Layout



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 *Guide to OLE Basic Functionality and Key Concepts*.

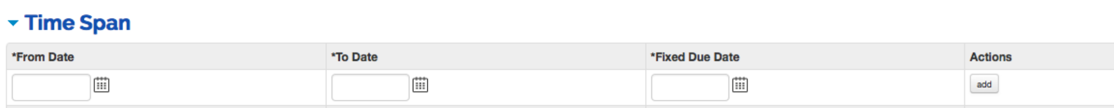
Add/Edit Fixed Due Date Tab

The **Add/Edit Fixed Due Date** tab allows staff to assign the fixed due date to a circulation policy set. A fixed due date must be tied to a policy set. Select the **Circulation Policy Set** from the dropdown list.

Circulation Policy Sets are created from the KRMS rules written in xml and loaded into OLE by an administrator. While all KRMS rules display in the dropdown, not all of them can have fixed due dates applied. You will need to select a Circulation Policy Set that is applicable to checkouts/loans, see an administrator familiar with your institution's circulation policy xml to determine which circulation policy set to select.

Time Span Tab

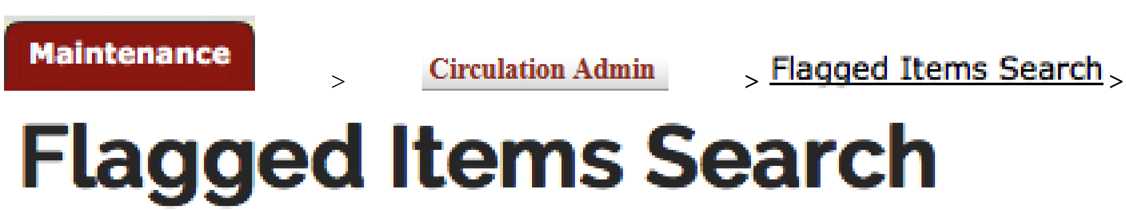
The **Time Span** tab allows staff set the time frame for the fixed due date schedule as well as the assign the due date for a circulation policy.



Time Span Tab Definitions

Title	Description
From Date	The starting date for the fixed due date schedule. Anything loaned from this date on and apply to the circulation policy noted above will be assigned the fixed due date.
To Date	The ending date for the fixed due date schedule. Anything loaned before and on this date and apply to the circulation policy noted above will be assigned the fixed due date.
Fixed Due Date	The date every item loaned within the circulation policy noted above will be due. Fixed Due Dates are scheduled to be due on the date entered, at 23:59:59. This time can be changed from the parameter DEF_CLOSE_TIME.
Action	Click **add** to add the time span.

Flagged Item Search

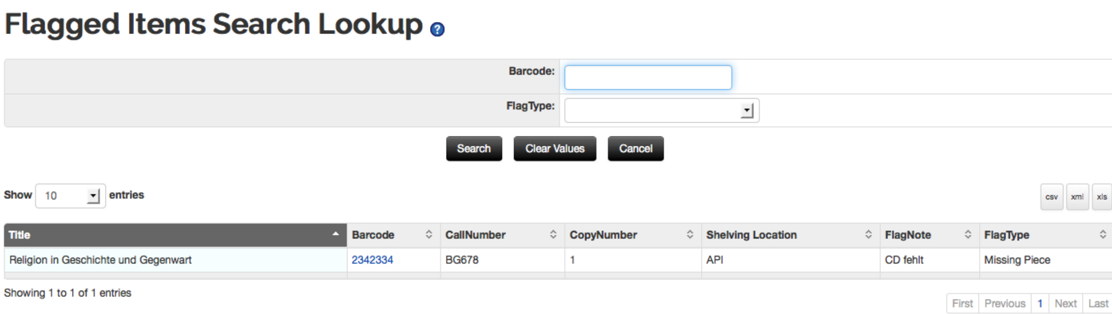


The Flagged Item Search allows users to look up items that have been flagged as damaged, missing pieces, or lost during circulation. Users may click the hyperlinked barcode to open the Item record.

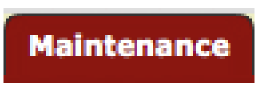
Note

For information on the item record, see OLE Items in the *Guide to OLE Describe and Manage Module*.

Document Layout



Location



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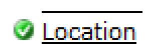

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Note

Please click here for technical documentation.

The goals of the location system are to:

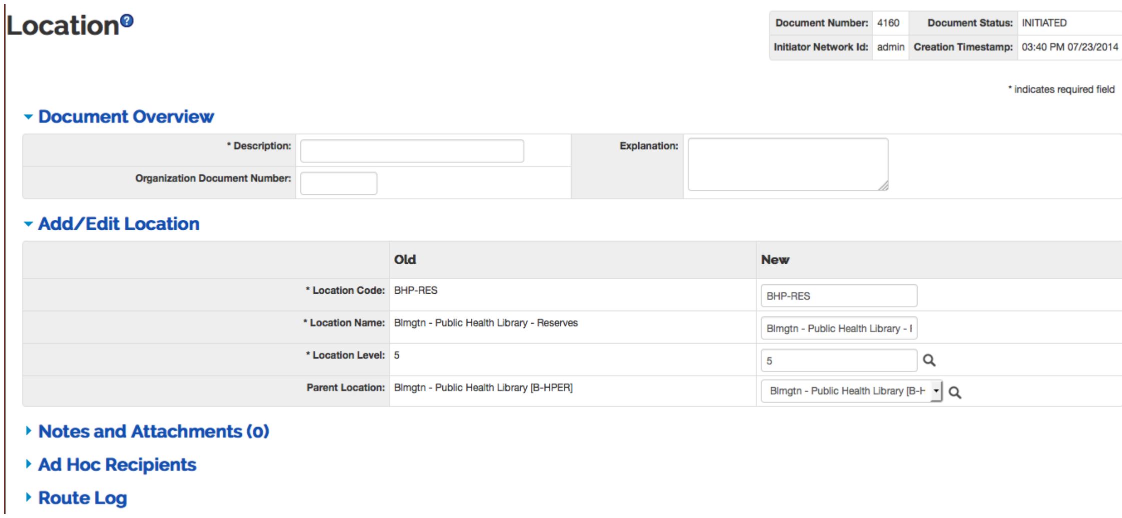
1. Model the organization’s structure clearly and accurately.
2. Support storing configuration information at the appropriate level of the organizational structure.
3. Allow libraries to establish policies for a location that apply to the organization’s components. This makes administration easier.
4. Support modeling relationships between parts of the organization.
5. Support consortial models.

The general idea is that a location’s setting or policy will automatically apply to the location’s children, unless the children override the setting.

Note

Only users with an OLE-PTRN Shelving Location Administrator or OLE-PTRN Location Administrator role may create and manage Locations.

Document Layout



The OLE Location document includes the **Add/Edit Location** 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 Location tab definition

Title	Description
Location Code	The code to identify the location of the Instance Record. Each location must have a unique code with a maximum length of 40 characters.
Location Name	Required. The familiar title of the location. Maximum length is 100 characters.
Location Level	Required. The numerical representation of the location hierarchy. Locally configured, valid values are 1-5.
Parent Location	If the location level is NOT 1, chose a parent location by clicking on the magnifying glass icon. A valid parent location must be at a higher level than the new location being created.

Implementation Information

Each Location must have a Location Code, a Location Name, and a Location Level (Location Level Id). Each Location may have a Parent Location (displayed as the Location Name and, in brackets, the Location Code) of a location with a higher location level than its own level. Note the Parent Location does not have to be one defined at the next higher location level – it can be a location with any level higher than its own level. Its parent cannot be at the same level as itself or at a level below its own.

There is one other restriction when building an institution’s Locations. The lowest level of Locations must be defined using the Location Level 5 Id. Additionally, the Location Codes for Level 5 must be completely unique from any other Location Codes.

If your institution does not want to use Institution or Collection Levels, just Campuses, Libraries, and Shelving levels, you can leave the Location Level definitions alone. You construct your Locations and have the highest level be a 2, Libraries (level 3's) with Level 2 parents, and Shelvings (Level 5's) with level 2 or level 3 parents.

If your institution wants a different 3 level structure like Campus, Library, and Collection, you can do that as well although it may not look as clean as the previous example. Your Collections locations must use a Level 5 definition (lowest level must be Level 5). This is going to look a bit messy if the Location Level Code for Level ID 5 cannot be changed (must be left as "SHELVING"). Your institution could at least change the Level Name of the Level ID 5 record to read "Collection". Then proceed building the Locations using Level Id's 2, 3, and 5.

Location Level

>


>


>


>


Locations are structured so that a location can be part of another location. The various levels that make up a location are named and structured in this maintenance document.

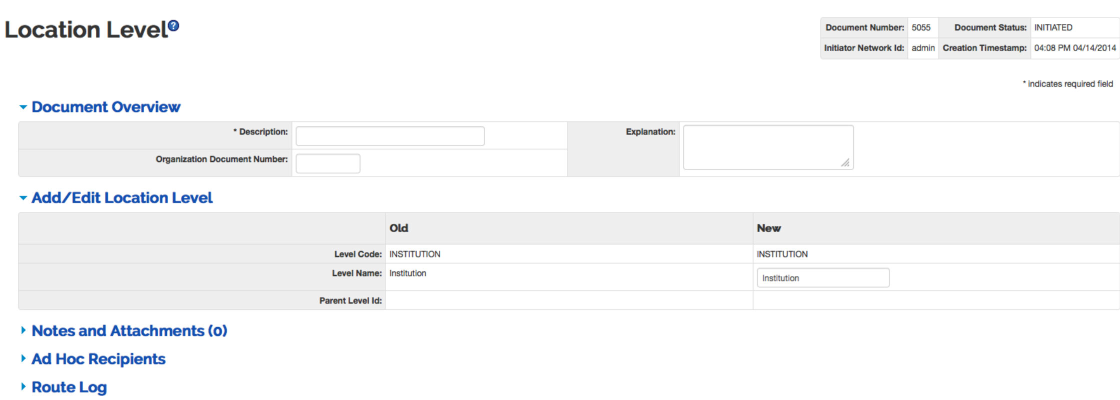
There are always 5 location levels. They are identified by the Location ID number 1 through 5. The Location Level ID cannot be changed.

Each Location Level must have a Level Code and a Level Name. Each Location level may have a Parent Level ID of one of the other levels. In practice only the top level location will be without a Parent Location. No Parent Level ID should be used in more than one other Location Level definition.

Note

Only users with an OLE-PTRN Location Administrator role may create and manage Location Levels.

Document Layout



The OLE Location Level document includes the **Add/Edit Location Level** 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 Location Level tab definition

Title	Description
Level Code	The code to identify location level
Level Name	Required. The familiar title of this location level
Parent Level ID	The level in the hierarchy above this location level

Implementation Information

The out of the box values for Level Code and Level Names are:

Level ID	Level Code	Level Name	Parent Level ID
1	INSTITUTION	Institution	
2	CAMPUS	Campus	1
3	LIBRARY	Library	2
4	COLLECTION	Collection	3
5	SHELVING	Shelving	4

Each installing partner can provide their own Level Code and Level Name values with the possible exception of Level ID 5. It may be that its code must be SHELVING but it could have any Name value. We are looking into that to see if and where code is referencing the level code value rather than the Level ID.

The Location Level structure is used to build the actual Locations at a particular institution. See additional Implementation Information under Location .

Request Type

Maintenance > Circulation Admin > Request Type >

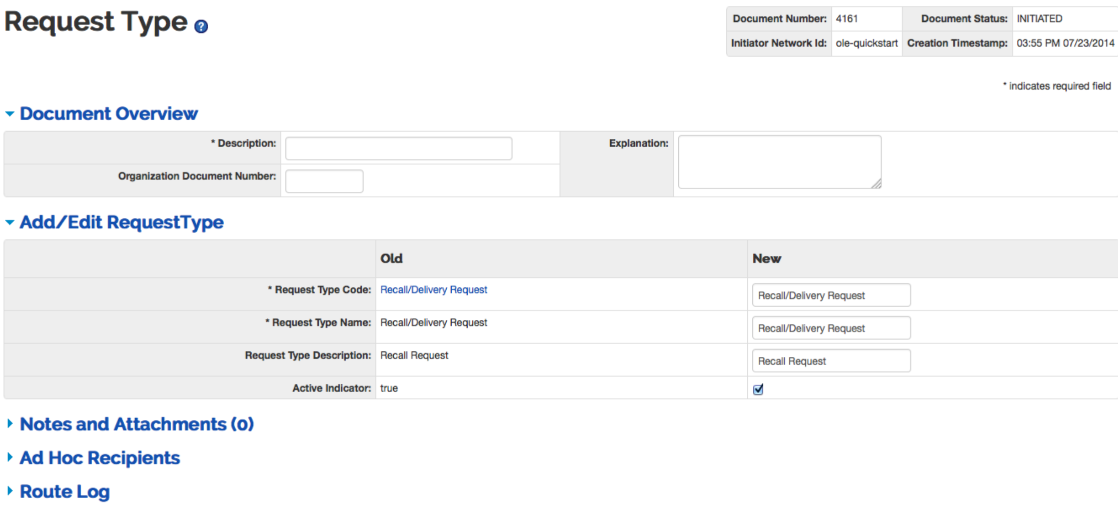
Request Type Lookup >

Request Type

The Request Type document defines the type of request available on the Request e-document 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

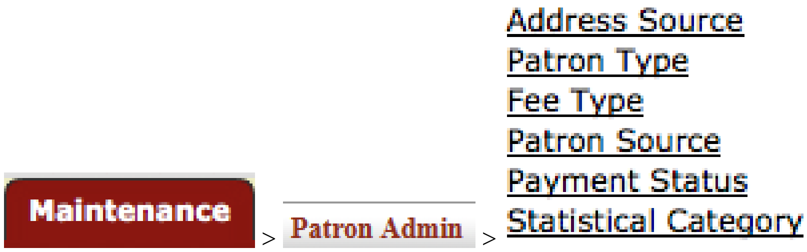


The Request Type document includes the **Add/Edit Request Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

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

Chapter 5. Patron Admin

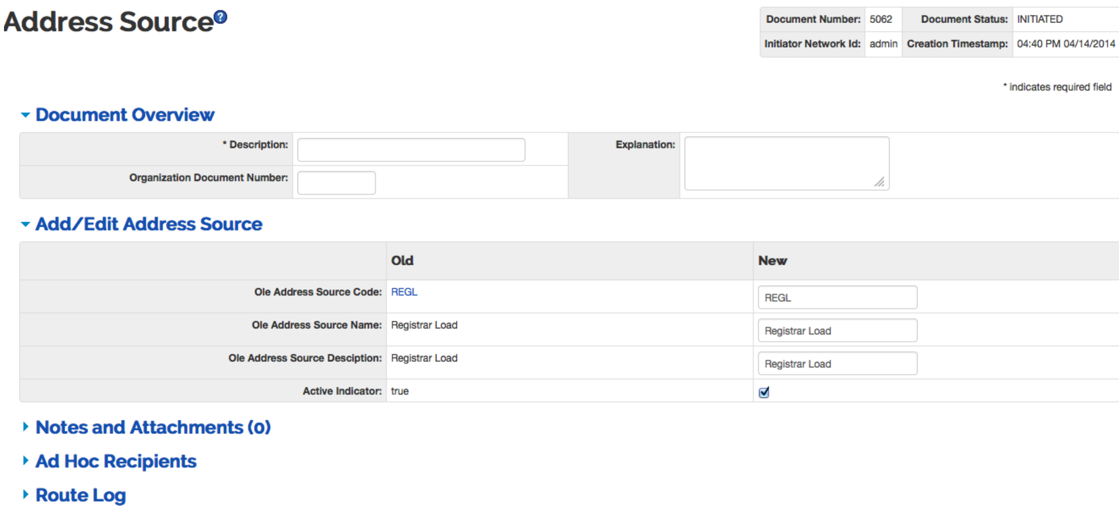


On the Maintenance menu, Patron Admin provides access to a number of patron maintenance documents.

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 Load” would typically have its address data identified as Address Source “Registrar Load” but you may wish to preserve any existing address whose Address Source is “Patron Supplied”. You would set your import options appropriately.

Document Layout



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

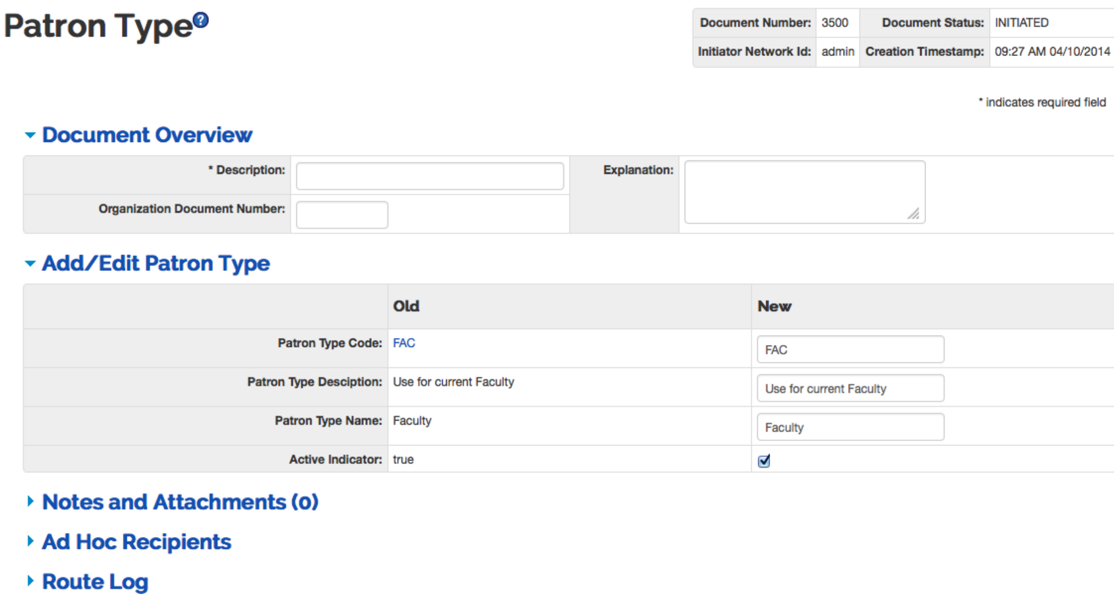
Title	Description
OLE Address Source Code	Required. A unique code to identify an address source.
OLE Address Source Name	Required. The familiar title of the address source.
OLE Address Source Description	Required. A description of the source address source.
Active Indicator	Indicates whether the address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

Patron Type

Maintenance > Patron Admin > Patron Type > Patron Type Lookup > 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



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

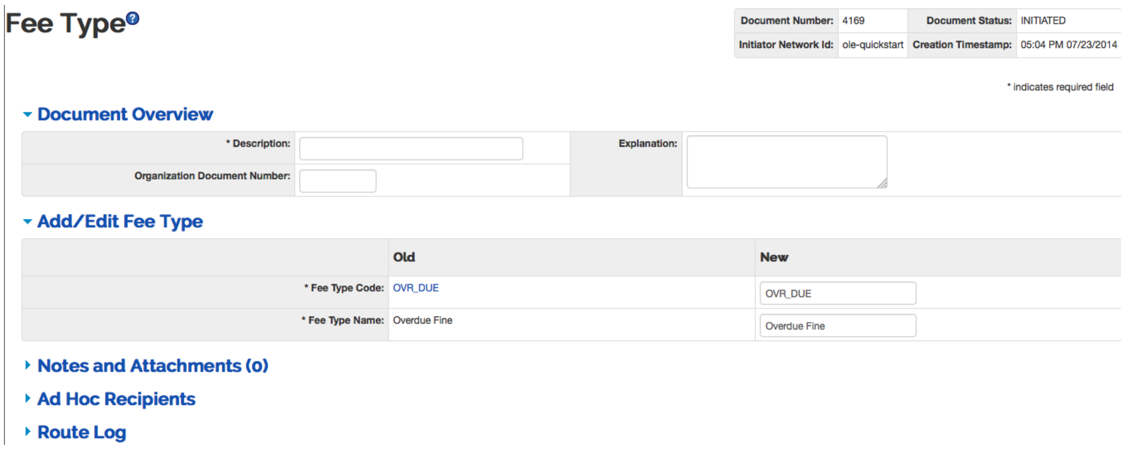
Title	Description
Borrower Type Code	Required. The borrower type code associated with this borrower type
Borrower Type Description	Required. A description of the borrower type.
Borrower Type Name	Required. The familiar title of the borrower type.
Active	Indicates whether this borrower type is active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

Fee Type

Maintenance > Patron Admin > Fee Type > Fee Type Lookup > Fee Type

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

Document Layout

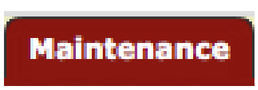


The Fee Type document includes the **Add/Edit Fee Type** tab. The system automatically enters data into both the **Old** and **New** sections in this tab. Selected data fields are available for editing.

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.

Patron Source



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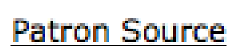

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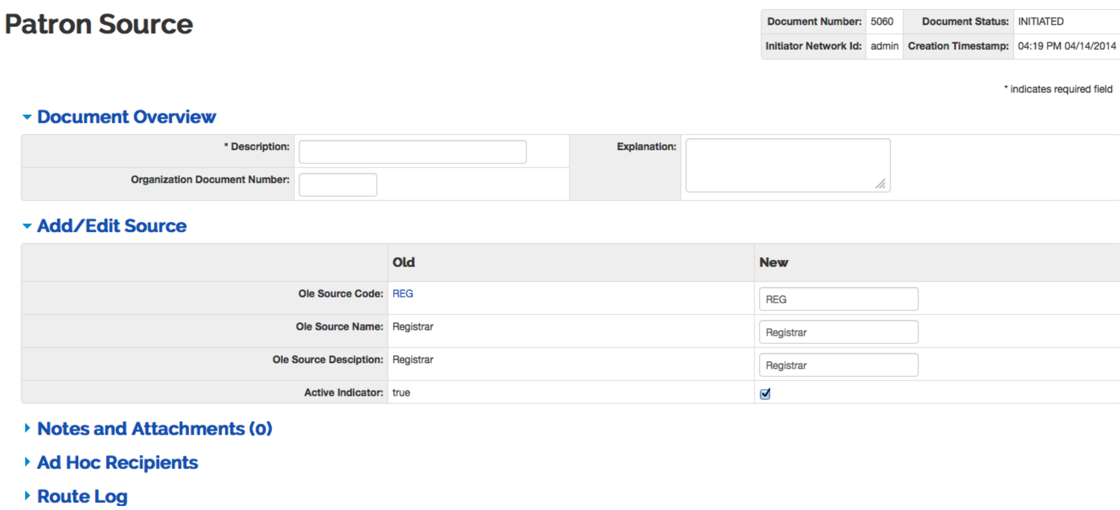
The Source document is used to define where the information on the Patron document has been obtained.

Document Layout



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.

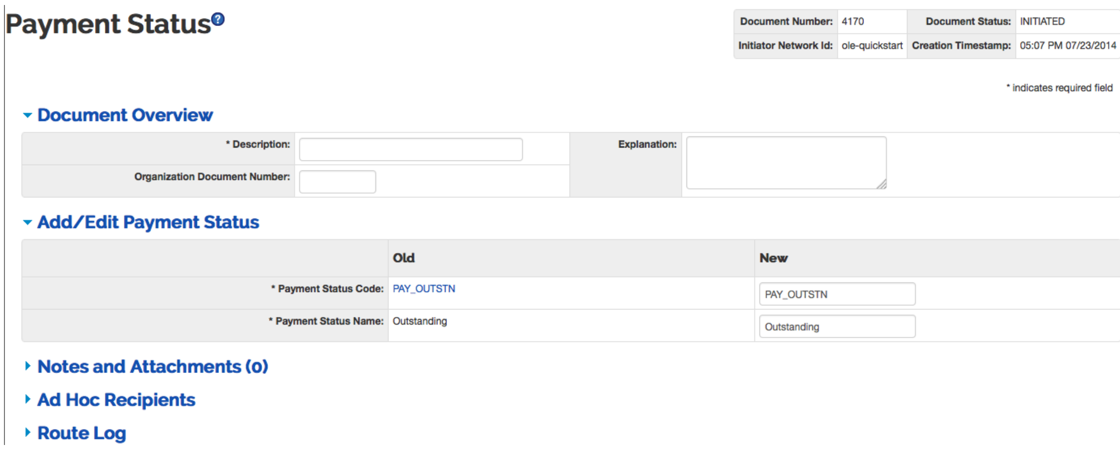
Add/Edit Source Tab Definitions

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.

Payment Status

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

Document Layout



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.

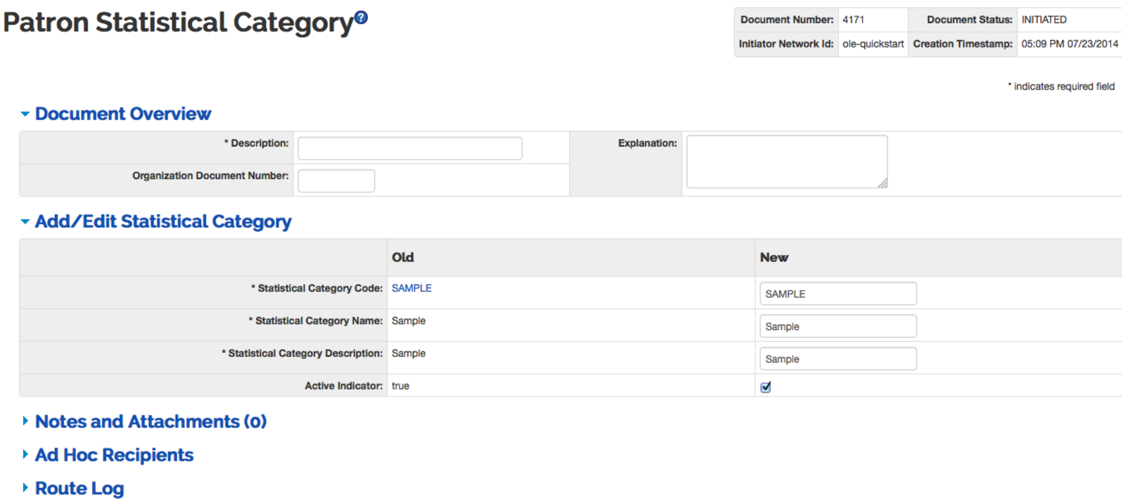
Add/Edit Payment Status Tab Definitions

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.

Statistical Category

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

Document Layout



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.

Chapter 6. APPENDIX

Deliver Terms and Definitions

Term	Definition
Patron	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. Synonyms: borrower, patron, library user
Borrower Type	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.
Check digit	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.
Circulation	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.
Circulation Desk	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".
Shelving Location	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.
Item status	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.
Item Type	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”).
Loan	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. Synonyms: Check-out, charge, charge out
Loan Period	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”.
Location	An element in a library’s system configuration that describes a conceptual entity (e.g., “The University of X Library") or a building (“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.

Deliver Roles

Below are some of the roles that will be authorized to use Loan/Return, Request, Patron, My Account, and related maintenance documents in the OLE test drive. 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 Published User Documentation on the wiki
- OLE Roadmap