ALEPH/McGill Circulation Module
Part One: Basic Circulation

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1. Training schedule and online calendar

The training schedule is available on the Web as an electronic calendar.

1. Go to the library homepage at http://www.library.mcgill.ca/
   Click on Electronic Classroom (left hand column).

2. Go to the bottom of the page.
   Click on Select beside the word “Calendars” at the bottom right of the page.

3. Click on alephtrn.

4. To find out which workshops you are registered for:
   Go to the bottom of the page.
   Click on Search beside the words “Calendars select” at the bottom right of the page.

5. Enter your PC network login in the search box that pops up.
   Only change the dates if you do not want to see all your scheduled sessions.
   Click on the Search button.

6. A list of all the occurrences of your registration will appear in a new browser window.

7. To change your schedule to a calendar-like, or grid, view:
   Go to the bottom of the page.
   Click on block.

8. To print your calendar schedule:
   Go to File…Print Preview from the browser main menu to verify that your printout will look the way you want it to, then select Print.
   Go to File…Print, to print without previewing.
2. Introduction

Welcome to the circulation module of Aleph! Over the course of the next two months (from now until mid-March) you will learn all about circulation within the Aleph system, everything from basic loans and returns to patrons to course reserves.

Just as you were told at the staff mode introduction sessions, Aleph is still undergoing development, so what you see in your handouts may not be exactly what you will see on the screen, but the principles will remain the same.

a) Structure of the course

Circulation will be covered in six parts: Basic circulation, Borrowers, Cash management, Holds/recalls, Course reserves, and Notices and reports. Each part will be offered for several sessions over the course of one week, and we have tried to schedule your training so that you will have several days to practice between sessions. Most of you will attend the first four or five sessions; the last part, Notices and reports, will be just for supervisors.

At each session, you will be given a handout on the topic being covered in the session, as well as a set of practice exercises to take back and work with in your home library. At the first session, you will also be given a package of dummy users and items. Keep them! They will be used in all the training sessions, and are to be used for your practicing as well.

Each session will be one and a half hours long; for the first 30 to 45 minutes, your trainer will go step by step through all aspects of the course, while you watch on the screen; then you will have the rest of the session to practice the exercises included in the handout. We have arranged to have one person per computer, so you will be able to have plenty of “hands on” practice.

Each session will have a trainer and two helpers. Don’t be shy about asking questions!
b) Terminology

Aleph terminology is somewhat different from NOTIS. Some of the main differences are listed below:

<table>
<thead>
<tr>
<th>Aleph term</th>
<th>NOTIS term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan</td>
<td>Charge/checkout</td>
</tr>
<tr>
<td>Return</td>
<td>Discharge/checkin</td>
</tr>
<tr>
<td>Borrower/user</td>
<td>Patron</td>
</tr>
<tr>
<td>Cash management</td>
<td>Bills/fines</td>
</tr>
<tr>
<td>Courtesy return</td>
<td>Courtesy discharge</td>
</tr>
<tr>
<td>Transfer slip</td>
<td>Routing slip</td>
</tr>
<tr>
<td>Waive cash transaction</td>
<td>Forgive fine</td>
</tr>
<tr>
<td>Log in</td>
<td>Sign on</td>
</tr>
<tr>
<td>Borrower status</td>
<td>Patron category</td>
</tr>
</tbody>
</table>


c) Shortcuts

As you already know from the staff mode training, because Aleph is a windows environment, there is always more than one way to do a task. We will be showing you just one, or possibly two, ways. As you are practicing back in your own libraries, if you come across a faster or easier way of doing something, please let us know (there is a list of contacts at the back of this handout). We’ll make sure your tips get added to the web tips page.

d) Help

All Aleph windows have Help buttons, which are context-sensitive. However, they do not contain the library policies or staff security information, so you may not be able to perform all the transactions they discuss. During our training sessions, we may not use the Help buttons much, but they will be included in your practice exercises.

e) Feedback (how you can help us)

As I mentioned earlier, Aleph is constantly undergoing development. In your practice sessions, you may notice that some transactions do not work the way they are supposed to, or you may discover something good (or bad) about Aleph that was not covered at your training session. Please, let us know! We will investigate and let Ex Libris know if they need to fix something.
The same applies to any questions that might arise in your practice sessions. We will post the most frequently asked questions and their answers on the web page.

And if you notice important changes in terminology between NOTIS and Aleph, we’ll be glad to add them to our glossary!

Just send us an email (the list of contacts is at the back of this handout).
3. Getting started

Getting into the circ module:

After logging in to Aleph, click on **Circ** on the application toolbar.

The Aleph circulation module will appear.

The circulation menu bar (at the top of your screen) contains several icons; for now, we will be concerned with just three of them:

- **Login** as another user: you will use this at the circulation desk when you change shifts, so you do not have to close out of Aleph completely.

- **Loan**: this is one way to call up a Loan window. You can also use **F5**, just as you do now in NOTIS.

- **Return**: this is one way to call up a Return window. You can also use **F6**, just as you do now in NOTIS.
NB: Notice that the application toolbar stays on the screen. If you are bothered by it you can either close it by clicking on the x or move it to another part of the screen by clicking on the top of the bar and dragging it where you want it.

Logging in as another user:

Click the icon. The following window will appear:

Type your user name and password in the appropriate boxes and click OK (or press Enter). (Make sure the Save password box is not clicked, or anyone who has access to your workstation will be able to log on to Aleph as you).

IMPORTANT: Notice that after you have logged in, your User name (login name) appears at the top of the screen. Whenever you replace another staff member at the circulation desk, always remember to log in and check the menu bar to ensure that your own name appears.
4. Loans

Click on the icon (or press F5).

Note that the Loan window appears on the left side of your screen.

Now click the icon (or press F6).

Note that the Return window appears on the right side of the screen to the right of the Loan window.

These are the default positions, set up to allow you to have both Loan and Return windows active at the same time. You can change their position on the screen, just as you learned in the staff mode searching session, but it is important to be consistent at the circ desks so that the settings will be the same for everyone who works there. Left for Loan and Right for Return seems a logical choice.

Notice also that there are two minimized windows in the lower left corner of your screen, a Loan history window and a Return history window. We will go into them in more detail later.
Using the Loans window:

Enter the user’s barcode in the **User ID/barcode** field (you can scan or type it).

(If the user’s ID card won’t scan, you can click on the **arrow** at the end of the field to call up a user list, then double-click on the name you want; the barcode will be pasted into the field automatically.)

The user’s mailing information and borrower status (e.g., 01, undergrad) will appear in the **upper** box of the window.

If the borrower has items on the hold shelf waiting to be picked up, a pop-up message will appear. You can click **OK** to get rid of it.

If there is a problem with the borrower (e.g., overdue loans), a message will appear in the **lower** box of the window and the box for entering the item barcode will turn gray, forcing you to **Override** or **Cancel** the transaction (see **Overrides** below).

After you have entered the user’s barcode scan the **item barcode** (or type it in). If there are any notes in the item record a pop-up message will appear. Click **OK** to get rid of it.
The author/title, due date and due time of the item will appear in the **lower** box. (Note that the **due time** is the **closing** time of the library, as set up in the calendar table. It does not affect fines for stack loans.)

![Library Management System Screenshot]

**Important:** If the book the borrower wants to take out is already on loan to another user, the following message will pop up:

![Item Loan Warning Message]

Click on **OK** to get rid of the box, then either return the item and loan it to the user at the desk or set it aside for further action.
Keep scanning item barcodes until you have completed all loans for the borrower.

Press F7 (or click the **Print session** button) to print the date due slip for the items you have just loaned. (We have set up Aleph to print one receipt at the end of the session, listing all loans, rather than one slip per item.)

When you press F7, the system will also erase all information for the current user, so that you are ready for the next user.

Clicking on Print session does not erase the information; you must then click the **Clear** button.
Overrides:

If the lower box of the Loan window shows blocks on the user, the Item barcode box will be gray and you must either cancel the transaction by clicking on the Cancel user button or override the block by clicking on the Override button.

If you click on Override the information disappears from the lower box and the barcode box turns white, allowing you to continue normally.

If you do not have override security the Override button will be grayed out, but you can ask your supervisor to temporarily override the session so that you can proceed with the loan (see next page).
Temporary overrides:

Click on **Cancel user** to clear the current loan session.

Go to the **Options** pulldown menu and choose **Temporary password override**.

A small form will pop up. The supervisor must enter his/her user name and password, then click on **OK** or press Enter (then click on the box and drag it out of the way). (Note that the profile name on the menu bar changes from **User** to **OVERRIDE User** when you do a temporary override.)

This will enable the **Override** button on the Loan window; rescan the user’s barcode, then click on Override and proceed with the loan. Once all items for the user have been scanned, press **F7** to clear the session and print a receipt, then close the Temporary password override box. (**Important:** You must close the form by clicking on the **Close** button; clicking on **x** will not clear the override.)

Note that you continue to have access to the higher level of security until you actually close the form. Check the **Profile** name after closing the form to make sure it has reverted to the circ desk staffer’s login name.
Additional buttons and information available on the Loan window:

**User**
Click on User to see the User Record. You will be able to see information such as the borrower's loans, holds, photocopy requests, cash transactions and privileges. (This will be covered in detail in the Borrowers training session.)

**Item**
Click on Item to see all copies available for a particular bibliographic record. You will be able to see information such as the sub-library that owns each copy, and the status of each copy (how long the copy may be checked out).

**Change Date**
Click Change Date to change the due date for the current loan. A small window will pop up enabling you to enter a new due date and time.

**Note**
Click on Note to get a form that allows you to add up to two notes to any item you loan (e.g., Missing pages 25 to 37).
New Cash
You may register a cash transaction on an ad hoc basis by clicking the New Cash button. A form will be displayed, enabling you to define the transaction as a debit or credit, write a descriptive note about the transaction, and link the transaction to a particular target, sub-library, or item record. (We probably will not use this function.)

Pay Cash
The Owe field shows the total unpaid fines owed by the user. If the user wants to pay some or all of the money he owes, you can enter the amount in the Pay field and click the Pay Cash button. (This will be covered in detail in the Cash management training session.)

View Cash Transactions
To view the actual Cash Transactions (bills) of the user, click the arrow next to the Pay field. (This will be covered in detail in the Cash management training session.)
Loan history window:

This window automatically opens (minimized) when you open the Loan window. You can maximize it by clicking on Restore or by pressing Shift+F5.

The window provides a running list of all loan transactions performed since you logged onto the system.

It shows the borrower's ID number and name, as well as the barcode of each item borrowed.

You can click on the Print button to print a receipt for any or all of the items borrowed by one or several users, even after the session with the user is finished. Just highlight the user name(s) you want. (If the items have been returned in the meantime, the receipt will show only the date and user ID.)

You can click on Item to see all copies available for a particular bibliographic record. You will be able to see information such as the sub-library that owns each copy, and the status of each copy (how long the copy may be checked out).

You can click on User to see the User Record, which contains information such as the borrower's loans, holds, photocopy requests, cash transactions and privileges. (This will be covered in detail in the Borrowers training session.)

You can clear the Loan history window by clicking on Clear, but the transactions will still be recorded in the database.

You cannot close the window while the Loan window is open; if you click on Close the window will minimize, not close.
5. Returns

If you do not already have your **Return** window active, open it by clicking on the icon or pressing **F6**.

**Using the Returns window:**

Returning items is very simple: scan the barcode in the **Item barcode** field (or type it in).

The returning borrower information is displayed in the upper part of the Return window.

Brief bibliographic information and other item information, including circ notes and loan notes, for the **item** being returned is displayed in the lower part of the Return window.
If you return an item belonging to another library and you have **courtesy return** (courtesy discharge) set up with them, the system will automatically print a **transfer slip** for the item.

If there are hold requests for the item, the **List of hold requests** will be displayed in a separate window. (This will be covered in detail in the **Holds/recalls** training session.)

If you return an item that had not been loaned, a pop-up message will appear. Click **OK** to get rid of it.

If you return an item that has a special processing status attached to it (e.g., BP - Binding preparation), a pop-up message will appear to warn you. Click **OK** to get rid of it and take the appropriate action with the item.

Keep scanning barcodes until you have completed all returns, then click the **Clear** button to clear the session.

**Overriding the return date:**

There may be times when you wish to change the actual return date to an earlier one (e.g., when items are returned to a box over the weekend and the actual return is not done until Monday morning). If you have the security, you will be able to click on **Override date**, then change the return date. (**IMPORTANT: THIS OPTION IS NOT YET WORKING; WHEN IT IS, WE WILL SEND OUT INSTRUCTIONS FOR USING IT.**)
Additional buttons and information available on the Return window:

**User**
Click on User to see the **User Record**. You will be able to see information such as the borrower’s loans, holds, photocopy requests, cash transactions and privileges. (This will be covered in detail in the **Borrowers** training session.)

**Item**
Click on Item to see all copies available for a particular bibliographic record. You will be able to see information such as the sub-library that owns each copy, and the status of each copy (how long the copy may be checked out).

**New Cash**
You may register a cash transaction on an ad hoc basis by clicking the New Cash button. A form will be displayed, enabling you to define the transaction as a debit or credit, write a descriptive note about the transaction, and link the transaction to a particular target, sub-library, or item record. (We probably will not use this function.)

**Pay Cash**
The **Owe** field shows the total unpaid fines owed by the user. If the user wants to pay some or all of the money he owes, you can enter the amount in the **Pay** field and click the Pay Cash button. (This will be covered in detail in the **Cash management** training session.)
View Cash Transactions
To view the actual Cash Transactions (bills) of the user, click the arrow next to the Pay field. (This will be covered in detail in the Cash management training session.)
Return history window:

This window automatically opens (minimized) when you open the Return window. You can maximize it by clicking on Restore or by pressing Shift+F5.

The window provides a running list of all return transactions performed since you logged onto the system.

It shows the borrower’s ID number and name, as well as the barcode of each item borrowed.

It also shows the Return date and time and the Due date and time for each item.

You can click on the Print button to print a return receipt for a single highlighted item, or highlight a user name and click Print user to print a return receipt for everything returned by a single borrower. (This will be very useful for borrowers who want a receipt as proof that they have returned their books.)

You can click on Item to see all copies available for a particular bibliographic record. You will be able to see information such as the sub-library that owns each copy, and the status of each copy (how long the copy may be checked out).

You can click on User to see the User Record, which contains information such as the borrower's loans, holds, photocopy requests, cash transactions and privileges. (This will be covered in detail in the Borrowers training session.)

You can clear the Loan history window by clicking on Clear, but the transactions will still be recorded in the database.

You cannot close the window while the Loan window is open; if you click on Close the window will minimize, not close.
6. Renewals

There are three ways for circulation staff to renew a loan: **Direct** (by barcode), **Item** and **User** (borrower). Users will also be able to renew their own loans through the OPAC, provided they are not blocked.

1. **User (borrower) renewal** (this is probably the method we will use most often):

From the circulation menu bar, click on the icon or press **F8**.

The **User ID** window will appear. Scan (or type) the user’s barcode in the box.

(If the user’s ID card won’t scan, you can click on the **arrow** at the end of the field to call up a user list, then double-click on the name you want; the barcode will be pasted into the field automatically.)

The **User information** window will be displayed. (There is a lot of information in this window, but for this session we will only look at **Loans**.)

Click on the **Loans** tab of the window.
A list of all items out to the user will appear. The list shows bibliographic information, due date and due hour, barcode, call number, item status, sub-library and collection.

![User Information - 1/29000512483/Textpatron, Jane J](image)

To renew one item at a time, **highlight** the item you wish to renew and click the **Renew** button.

You will get a **Renew Loan** box showing the normal renewal due date and time, as per the library’s policies.

![Renew Loan](image)

Unless you need to change it, simply press **Enter** or click on **OK**. The display will change to show the new due date and time.
If you do not want to highlight individual items, click the **Renew All** button. The same Renew Loan box will appear, but the **Due date** and **Due hour** fields will be blank. Just click **OK** or press **Enter** and the system will automatically renew all loans according to your library’s policies. (If you want to make every loan in the Loan window fall due on the same day you can type in a date and time, but we would probably do this only in very special circumstances.)

![Renew Loan dialog box](image)

After you click **OK**, the loans in the window will flash as the date in the **Due date** column changes, and a **Log window** will open up at the bottom of the Loans tab, displaying the relevant error message or success message for each and every renew transaction. For successful renewals a check mark will appear, and for unsuccessful (failed) renewals an exclamation mark will appear.

If you highlight the first icon in the Log window, the associated loan will also be highlighted. Use the arrow keys on your keyboard to scroll through the renewals and check the dates. (Don’t forget that if a user has loans from another library, those renewals will be unsuccessful; we can only renew loans from our own library.)
2. Direct by barcode renewal:

Go to the Circulation pulldown menu and choose Renew loan by barcode.

An Item barcode window will appear. Scan (or type) the barcode in the white space.

A Renew loan by barcode two-part form will be displayed, with the normal renewal due date and time entered for you.

If you need to change the date, type it in; otherwise, just click OK or press Enter. (Note that the rest of the information displayed in this window is for reference only.)

A new Item barcode form will appear for you to scan the next barcode.

IMPORTANT: You do not get any confirmation of the due date once the form has been closed. If there is a problem with the renewal, an error message will pop up. Click OK to get rid of it.
3. Item renewal:

Find the item you wish to renew by clicking the icon or the icon.

On the Item list that appears, highlight the item you wish to renew and click on the Borrower button.

A two-tab Item borrower window will pop up. Click the Renew button.
A Renew loan window will appear with the normal due date and time displaying. If you do not need to make any changes, just press Enter or click OK.

The Renew loan window will disappear.

Close the Item borrower window.

The Item list will reappear, with the new due date showing.
7. Other useful circulation information

Quick catalogue (for items without a record):

Go to the **Items** pulldown menu and choose **Catalogue item**.

A two-tab **Catalogue record** form will appear.

![Catalogue Record Form]

Fill in the author and title on the **Document information** tab.
Fill in as much information as you can on the Item information tab (you must fill in the required fields).

Barcode: required (scan or type from the item).

Sub-library: click on the arrow and choose from the list.

Collection: click on the arrow and choose from the list.

Call number type: click on the arrow and choose from the list.

Call number: copy from the item.

Description: if there is volume information, fill in here.

Material type (required): click on the arrow and choose from the list.

Item status (required): click on the arrow and choose from the list.

Once you have finished, press Enter or click OK.
A **Barcode and record number** window will appear.

You have the option of cancelling at this point. If the record appears to be okay, press **Enter** or click on **OK**.

You can then loan the item as usual.

**Note:** The item will automatically be placed on hold for the Cataloging department.
8. Exercises

Loans & Renewals

1)

Returns

1)

Using Help

1)
9. Helpful Web Sites

General information about the ALEPH/McGill conversion:
http://www.library.mcgill.ca/aleph/

ALEPH/McGill Staff Mode Training site:
http://www.library.mcgill.ca/aleph/training/

10. Contacts

Circulation Module Workgroup

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