4. BASIC CIRCULATION

4.1 CHECKOUT

From the Circulation module Common Tasks wizard group, click on the CheckOut wizard.

Scan the patron’s barcode (or type it then click the Get User Information button). Alternatively, you can use the User Search helper to find the user record.

Scan the item’s barcode in the Item ID field, or type the Item ID and select the Check Out Item to User button.

Note that items that are checked out will appear in the “List of Checkouts” section, while Checkouts from the same patron’s previous sessions appear under “Current user checkouts.”

The checkout is done.

Note also that some fields on the screen are underlined, such as the Date Due field in the List of Checkouts. That underlining indicates that there is something called a “glossary” in Symphony. Glossaries can offer additional information screens OR a list of shortcuts to other wizards without having to use the WorkFlows standard navigation graphical layout to open additional wizards, helpers, or function keys.
One use of a glossary at Checkout is to see the setting used by Symphony to calculate a due date. Symphony calculates due dates by referring to a table (unseen by staff) called the Circulation Map that considers the checkout library of the item, the item type of the item, and the user profile of the patron. It combines all three of those variables into one circulation rule. You can see which circulation rule was invoked by looking at the information that comes up with a left mouse click on the date due glossary:

In the example above the circ rule code is 07D05C0E-N. “07D” stands for 7 day loan period. “05C” stands for $.05 daily fine. “0” stands for 0 renewals allowed. “E” stands a max fine of $10, and “-N” stands for no limit on materials of the number of Items using this rule allowed out at the same time.
4.2 SPECIAL DUE DATE

If the due date calculated by the Circulation Map is incorrect or needs an exception, it can be changed. If you want to change a due date BEFORE you checkout an item(s), in the Checkout wizard, look for the Special Due Date helper:

This will bring up a Special Due Date window:

Enter in a date in the MM/DD/YYYY format (or use the calendar gadget) to select the desired Due Date. Then indicate whether this special due date will be in effect for this entire Checkout session (every patron); or for this patron only during this session; or for the one item you will checkout next (default value).

If you need to change a due date AFTER the item has already been checked out, your next operation depends on whether you need to change just that one item, or whether you need to all or multiple items the same patron has already checked out. If you just need to change one item, you would right-click the mouse on the Due Date glossary and select Modify Due Date from the resulting list:
That will take you to a list of that one checkout. On that screen, check the box for “Apply Same Due Date” and then define the date you want in the MM/DD/YYYY format.

Finally, as a last step click on Modify User Due Dates button.

If you need to adjust the Due Date of several items checked out to the same patron, you need to invoke the Modify Due Dates wizard from the Special wizard group navigation bar; or, from within Checkout, by using the ALT-SHIFT-F4 function key. After identifying and retrieving the user record, Modify Due Dates brings up the same dialog as above, but contains a list of all the patron’s current checkouts:
NOTE: Do NOT use Modify Due Date as a workaround to avoid renewal limits. A renewal will count as a separate circulation (as it should), but modified due dates will not credit the library with the added checkout statistic.
4.3 RENEWING ITEMS

Symphony offers several ways to renew items, depending on where you may already be within Symphony or with the information presented to you by a patron. If you are already in the Checkout wizard, just identify the user desiring the renewal and use the Glossary (underlined Due Date) to Renew each individual item (as Seen or Unseen).

The Seen vs. Unseen choice makes no difference (according to the way ANSER has been set up; other sites have renewal rules that differ that allow fewer renewals for unseen items as opposed to seen).

If you do NOT already have Checkout open, you can renew items for a given user with the Renew User wizard; or from a given item ID (barcode) using the Renew Item wizard.

The Renew User wizard is straightforward: identify the user, then select items from their list of checkouts and hit the Renew Selected items button:
Note that items are renewed from today's date—Symphony does not tack on an entire new loan period from the original due date. Also, note that renewal periods in Symphony are calculated to be the same length as initial loan periods, i.e. the system cannot define a renewal period to be shorter than the initial checkout loan period.

The Renew Item wizard is even simpler: just scan or type in the barcode of the item and hit the Renew Item button.
4.4 ADD BRIEF TITLE (FOR ILL ITEMS FROM OUTSIDE ANSER)

If you attempt to checkout an item and the item barcode is not in the system, you will receive the following message:

Hopefully you would never get this message on an item that the patron found on the shelf, but you may get it if you have obtained an ILL item from outside of ANSER for a patron. In Symphony, you could create a temporary record for this item using the Add Brief Title helper in Checkout.

That helper brings up an Enter Brief Item Info form:

This form includes defaulted values for the Item Type, Home Location, Item Category 1 and Item Category 2 that assume you are adding a record for an ILL item. If you are not, you would need to change these defaults. The Item ID (barcode) and Title fields are blank, but need to be filled in. The ISBN field is also blank, but we only recommend filling that in if you are entering one of your own uncataloged items, not an ILL item. Use all caps in the TITLE field; enter the main title and “by (AUTHOR NAME)” in the Title field. You do not need to adjust the two smaller boxes that appear before the Title.
field—they are for filing indicators, which we don’t need for these temporary records.

NOTE: The lack of a call number field on this form is an oversight on the part of the software. Inserting a title is helpful if the material is not returned; an overdue notice would be generated with the title that was input on this form.

NOTE: These Add Brief Title records do not automatically get deleted when the items are returned and discharged. Instead, ANSER administrators run a report once a week that deletes ILLOAN location items that are not currently checked out.
4.5 DISCHARGING (CHECKIN)

To check in items returned by patrons or accepted from deliveries, select the Discharging wizard from the Circulation module Common Tasks wizard group.

Enter Item IDs (barcodes) of the items being checked in. As the checkouts are processed, they will appear in the List of Discharges.

If the item being checked in needs to be put in Transit to another library, a message will pop-up indicating where it needs to be directed. (If a receipt printer is attached, the workstation will also print a Transit slip.)

If the item can fill a hold that had your library as the pickup location, a popup message will indicate that the item is now an “Available Hold.” In Symphony terminology, “Available Hold” means it is now on the Hold Shelf, while an “Unavailable Hold” is a hold that is still waiting to be filled.
If a receipt printer was attached, a Hold slip would be printed.

Items appearing in the List of discharges will include a glossary (underline) on the Route/Transit To field. A left click on that glossary field will bring up detail including the item call number, where and when it was discharged, and where it should be directed to.

A right click on the glossary brings up a menu that would allow you to perform tasks often done at discharge: bill a user for damage; display user information (of user who just returned the item); or edit item note.
4.6 DISCHARGING BOOKDROP

When checking in items left in the library bookdrop, you want to give the patron the benefit of the doubt that they could have returned these items immediately after the last time the book drop was cleared. In Symphony, you must manually set the date to the day the bookdrop was last cleared—as a default it puts in the current day’s date, which in most cases you would NOT want. Set the date by typing it in using the format MM/DD/YYYY or use the Date Gadget.

![Discharge date set in Symphony](image)

After the date has been set, scan the Item IDs of the items from the bookdrop. Process Transits and Holds as in standard Discharging.
4.7 BILLING A USER

Most bills are generated automatically by Symphony as overdue items are checked in or set to Lost. However, on occasion the library may need to manually assess a fine or fee against a user. This is done with the Billing a User wizard found in the Circulation module Common Tasks wizard group.

Identify the user by User ID (or by doing a User Search). Then select a “Reason for bill” you are going to assess from the drop-down menu. Several of the listed reasons are normally invoked automatically by Symphony, but some were meant to only be applied manually, like the NEWCARD fee. Enter the amount that you are charging for this service.

Most manually-assessed bill reasons are not related to a specific item, so as you select a specific reason, you may see the Item ID field grayed out.

The Payment type field would only be used if you are assessing a fee and then immediately accepting payment for it in one step (i.e. you would use the Pay Now button at the bottom of the screen rather than Bill User.)
4.8 BILL HISTORY

ANSER Policy: Retain the information for Paid Bills for a period of six months.

Paid bills can be found in the Display User wizard. Once a user is displayed, the Bills tab initially shows their unpaid bills. However, if you scroll down to the bottom of the Unpaid bills, you’ll note a drop-down box labeled “Bills:" has been defaulted to Unpaid Bills. Change that setting to ALL or Paid and you will then see their paid bills.

As bills are displayed, note that the bill amount has a glossary. A left click on the glossary of a paid bill reveals detailed information about the dates, number of payments, and payment locations of a paid bill.
4.9 PAYING BILLS

Users may approach staff to pay their bills at service desks at the time they are returning items, taking items out, or just seeking to clear their record. There are options to pay bills at Discharge, at Checkout, or as a separate wizard. This last option is the Paying Bills wizard, available in the Circulation module’s Common Tasks wizard group.

The Paying Bills screen (whether invoked as a helper within Checkout or Discharging, or using the Paying Bills wizard) looks very similar to the Billing a User wizard:

The first step is identifying the user (by User ID or User Search). Next, if you want to pay against the Total bills owed by the patron, enter that amount in the “Total bills and payments”: Payment box and select Payment Type. Then click the Pay Bills button at the bottom of the screen.

You can also pay individual bills or accept different forms of payment for different bills by skipping the “Total bills and payments” section and going to the “Individual Bills and Payments” section. In that section, adjust the
Payment Type and Payment fields for each row representing an individual bill.

<table>
<thead>
<tr>
<th>Title</th>
<th>Item ID</th>
<th>Reason</th>
<th>Owes</th>
<th>Payment Type</th>
<th>Payment</th>
<th>Change</th>
<th>Billed</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PRINT</td>
<td></td>
<td></td>
<td>$2.00</td>
<td>CASH</td>
<td></td>
<td></td>
<td>$3.00</td>
<td>10/17/2013</td>
</tr>
</tbody>
</table>

Total bills and payments:
- Total owed: $5.00
- Payment type: CASH
- Change: $3.00
- Credit balance now: $5.00
4.10 DAMAGED ITEMS

The procedure for handling items returned to the library in a damaged condition depends on whether the item belongs to library where it was returned; and whether the item is still in condition to circulate, despite damage.

*If the item belongs to your library:*

Decide whether or not to charge the person who had the item checked out last. All the information you need to proceed is either the Item Search and Display wizard or the Discharging wizard (using glossaries). In Item Search and Display, enter the item barcode; then once at the Detailed Display for that item, the last User ID can be found either in the Previous user ID (if you have already Discharged the damaged item) or under the Checkouts tab (if you had not yet discharged the item). You can also find the replacement cost of the item under the Item Information tab.

OR

At Discharging, use the discharged item list glossary to: 1) Display the user information; 2) Display the item information with replacement cost; and 3) Bill User for item to assess a damaged fee.
Next, using the Billing a User wizard, assess the user either the full or a partial cost of the item, using the Reason for Bill value of DAMAGE. Enter the Item ID when creating the bill.

If a decision needs to be made over whether the item needs to be mended before it circulates again, check out the item to the User ID: xxxDAMAGED (where xxx is your library code). This will block it from being available to fill holds, and also changes its current Location to DAMAGED so that users see that in the public catalog.

Note: Items should remain in the DAMAGED location only as long as it takes to decide whether they will be discarded (discharge and delete item record or checkout to xxxDISCARD), repaired (checkout to xxxREPAIR), or put back on the shelf as is (discharge).

If the item belongs to a different library:

1) Do not immediately discharge the item. Use a RED Damaged Slip. A customizable form can be found under the Services tab in the ANSER Manual Appendix 16 on the RCLS Website - www.rcls.org.
   - If item is returned by patron or in book drop, inspect the damage and if the patron is present, let them know that a charge may be incurred on their account when the owning library receives the item (or, if possible, consult with the owning library over the phone). Fill out Red Damaged Slip.
   - If item is received in delivery for your patron and the damage is minor enough that you feel the patron may still borrow the item before returning it to owning library, fill out the Red Damaged Slip and tuck in item. Explain to patron that slip must be kept and returned inside the item. When item is returned, continue with Step 2.

2) Place a copy-level hold on the item for the owning library’s ILLRCLS user account referenced in the list below*
   
   Change the Pickup Location to the owning library.
Add a note in the *Comments* field with a short description of the damage and complete with your initials, your library, and date of return.

3) Now Discharge the item and you will be directed to send the item in-transit to the owning library. Tuck the Red Damaged Slip inside the item along with the transit slip.

* The accounts are identifiable by an asterisk in their description in the user database. Holds placed for these accounts take precedence over all other holds, ensuring that the item will go to the owning library for repair or replacement before it circulates again.

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Library Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>22802000000094</td>
<td>BLAUVELT FREE LIBRARY*</td>
</tr>
<tr>
<td>22804000000017</td>
<td>CALLICOON – WESTERN SULLIVAN PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22805000069472</td>
<td>CENTRAL VALLEY – WOODBURY PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22806000000012</td>
<td>CHESTER PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22807000000093</td>
<td>CORNWALL PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22808000000091</td>
<td>CRAGSMOOR FREE LIBRARY*</td>
</tr>
<tr>
<td>22809000000016</td>
<td>ELDRED – SUNSHINE HALL FREE LIBRARY*</td>
</tr>
<tr>
<td>22810000098935</td>
<td>ELLENVILLE PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22861000000017</td>
<td>FALLSBURG LIBRARY*</td>
</tr>
<tr>
<td>22811000000012</td>
<td>FLORIDA PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22853999460158</td>
<td>GARDINER LIBRARY*</td>
</tr>
<tr>
<td>22812000000010</td>
<td>GOSHEN PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22814000000016</td>
<td>GREENWOOD LAKE PUBLIC LIBRARY*</td>
</tr>
<tr>
<td>22813000000018</td>
<td>GRAHAMSVILLE – DANIEL PIERCE LIBRARY*</td>
</tr>
<tr>
<td>228350000445687</td>
<td>HAVERSTRAW KING’S DAUGHTERS MAIN*</td>
</tr>
</tbody>
</table>
22815000000096 HAVERSTRAW KING’S DAUGHTERS VILLAGE*
22816000000011 HIGHLAND FALLS LIBRARY*
22817999999999 HIGHLAND MILLS – WOODBURY PUBLIC LIBRARY*
22857000000015 JEFFERSONVILLE – WESTERN SULLIVAN LIBRARY*
22818000000041 LIBERTY PUBLIC LIBRARY*
22819000000015 LIVINGSTON MANOR FREE LIBRARY*
228030000040627 MAMAKATING LIBRARY DISTRICT*
22820000000013 MIDDLETOWN THRALL LIBRARY*
22821000000037 MONROE FREE LIBRARY*
22822000000019 MONTGOMERY FREE LIBRARY*
22823000000090 MONTICELLO – E B CRAWFORD PUBLIC LIBRARY*
22824999999995 NANUET PUBLIC LIBRARY*
22859000000011 NARROWSBURG – WESTERN SULLIVAN LIBRARY*
22826001087198 NEWBURGH FREE LIBRARY MAIN*
22826999999999 NEWBURGH FREE LIBRARY TOWN*
22825999999999 NEW CITY LIBRARY*
22827000000018 NYACK LIBRARY*
22828000079747 ORANGEBURG LIBRARY*
22829000000014 PALISADES FREE LIBRARY*
22830000000012 PEARL RIVER PUBLIC LIBRARY*
22831000000028 PIERMONT PUBLIC LIBRARY*
22832000082065 PINE BUSH AREA PUBLIC LIBRARY*
22833000000016 PORT JERVIS FREE LIBRARY*
22801999999999 RCLSHQ*
22834000000014 ROSCOE FREE LIBRARY*
22849000000004 SLOATSBURG PUBLIC LIBRARY*
22191000352121 SPRING VALLEY – FINKELSTEIN MEMORIAL LIBRARY*
22836000000019 STONY POINT – ROSE MEMORIAL LIBRARY*
22837000000017 SUFFERN FREE LIBRARY*
22838000069614 TAPPAN LIBRARY*
22839000000013 TOMKINS COVE PUBLIC LIBRARY*
22840000000011 TUXEDO PARK LIBRARY*
22841000099417 VALLEY COTTAGE LIBRARY*
22842000000017 WALDEN – JOSEPHINE-LOUISE LIBRARY*
22843000000015 WALLKILL PUBLIC LIBRARY*
22844000342365 WARWICK – ALBERT WISNER LIBRARY*
22845000000010 WASHINGTONVILLE – MOFFAT LIBRARY*
22846000001446 WEST NYACK FREE LIBRARY*

When the item arrives at the owning library, they will Discharge it and see the comment as a popup:

![Image of Item Discharged popup]

The owning library then needs to either delete the request from their ILLRCLS User Profile record (or checkout the item to that record to clear
the hold); and then immediately check it out again to nnnDAMAGED. The owning library can also opt to assess the DAMAGED bill to the patron.
4.11 MARK ITEM LOST

When an item is marked as Lost, Symphony does the following:

- Shadows the item from display in the public catalog so that other users will not inquire about the item
- Prevents holds from being placed on the lost item
- Prevents that item from being used to satisfy a hold
- Keeps the item on the patron’s record as a checkout until the lost item is returned to the library (after 2 years the items will be deleted)
- Maintains the current location of LOST-CLAIM until the item returns to circulation

Note that LOST-CLAIM location means that someone has manually set an item to Lost. It does not have any relation to Claims Returned items. A different location, LOST-ASSUM, is assigned to items automatically by Symphony if they are overdue 90 days (and, at some fine-free libraries, 50 days).

To mark an item lost, remember that you can click on the glossary of the user’s checkouts in the Checkout wizard or use the Mark Items Lost wizard from the Items menu in Circulation module.
Click the Mark Item Lost wizard. Enter the Item ID or use one of the helpers to search for the item or search a user’s list of checkouts. Select All items or select individual item(s) from the resulting list and click Mark Item Lost.

A popup will appear with Billing options:

If desired, modify the billing information, and select one of the options: Bill User to bill the patron for the lost item (and processing fee, if your library has one); or Pay Now to pay the lost item bill immediately; or Cancel Lost Item Bill (the item will still be marked as lost and appear on the user’s list of checkouts, but the user will not be billed and no Paid Bill record would exist.)

Repeat these steps for each item until all lost items are marked.
If Lost materials are returned that had not yet been paid for, the Lost bill will automatically be removed, but overdue fines would remain.

ANSER libraries have opted to NOT have Symphony set so that Lost items returned after they had been paid for would generate a credit refund for a patron. Having credit accounts within a consortia like ANSER creates accounting problems, because credits given by any library for items owned by any library could be used to offset fines imposed by any library.
4.12 MARK ITEM CLAIMS RETURNED

If a user receives an overdue notice, but claims to have returned the materials earlier, use the User Claims Returned wizard to mark materials with a claims returned date (also available in the glossary of Current Checkouts in the Checkout wizard).

When you mark an item with a claims returned date, the Claims Returned value in the User record is increased by one. The Claims Returned field contains the number of times a user has claimed to have returned items. This field is automatically updated when you date a user's charge in the Claims Returned field. The value shows the number of times a patron has claimed to have returned materials during the history of the patron's use of your library.

![User Claims Returned](image)

Because this number is a historical counter, the value does not decrease if the items are later found and checked in, or marked as MISSING or LOST-CLAIM. This historical counter can be useful in determining if a patron is habitually abusing his or her library privileges.

To mark an item as Claims Returned, in the Special wizard group in Circulation, click the User Claims Returned wizard; or use the Claims Returned option in the glossary of a user’s checked out item list in Checkout. If using the Claims Returned wizard, input the User ID or do a User Search and select the user. The title and date due for all items checked out to the specified user display in their List of Checkouts.
In the Claimed Returned field of the title you want to mark as Claims Returned, click the Calendar gadget, select the date that the user claims to have returned the item, and click OK. **NOTE: Symphony will charge overdue fines if the Claims Returned date is later than the Date Due.** So if you want to give patrons the benefit of the doubt (recommended), set the Claims Returned date to be equal to the Date Due. Then Click the Mark Items Claimed Returned button.

Note: Once the item is marked Claims Returned, the item continues to appear on the patron’s current checkout list with a checkout status of Claims Returned. Note that the item’s Current Location is still CHECKEDOUT. There is no Current Location of Claims Returned. Because Claims Returned items are listed as Checkouts, they count towards any circulation rules that have been established that would limit users to having a certain number of Item Type items out at one time.

Because of the above issues, some libraries have opted not to use Claims Returned at all. Our recommendation is that you go ahead and mark items Claims Returned in order to increment the patron’s Claims Returned counter; but then (after checking the shelves) immediately check out the item to your nnnMISSING user. This gets the item off the patron’s list of Checkouts, but still records the number of times they have indicated a missing item was returned.