

ELOQUENT SYSTEMS INC

Eloquent Librarian™ Planning Guide

Volume 3 – Circulation, Booking, Inventory & Fines



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This manual is designed to guide you in planning the implementation of the Eloquent Librarian software as well as for when you are ready to start using additional features. This volume prepares you for performing major functions in circulation, booking, fines, and library inventory.

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Introduction to the Guide

Who should read this guide?

The Planning Guide is for anyone preparing to use the Eloquent Librarian software. It provides a good overview of the system. With that knowledge you know what menu items to use for any function. You can then rely on the online HELP for each item on your menu and for every entry prompt on all the web forms.

When should it be read?

The entire volume should be read prior to implementing the software or getting any training from Eloquent. Your request for training can be more specific. You understand the options available and can plan for custom tailoring to better fit the workflow in your organization.

You should read specific sections again after a few months of operation – when you are ready to start implementing features that were not essential at the start. Any new employee should read the relevant volumes and sections prior to being trained.

Where else can I get help?

You also can take advantage of the following support provided by Eloquent Systems:

- [Tutorials](#) available on the Eloquent Website,
- You may log in as a [Read-only User](#) to access all the same menu items, but with the safety of not having the ability to add/modify any data.
- Just-in-time [remote training](#) for coaching on each new component as soon as you are ready to use it, and
- [Hotline support](#) after the system is installed and in operation.
- A few hours of [Professional Services](#) are free for the implementation and training for each new application or module. Additional hours may be purchased for data migration or for extensive custom tailoring.

Which volumes are specific to the Eloquent Librarian application?

1. Volume EL1 - Public Access
2. Volume EL2 - Cataloging and Digital Content
3. Volume EL3 - Circulation, Booking, Inventory & Fines
4. Volume EL4 - Serials Management, Issues & Article Cataloging
5. Volume EL5 - Acquisitions & Budgeting

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Which volumes apply to all WebSuite applications?

1. Volume WS1 - Administrator Functions
2. Volume WS2 - Managing Authority Files
3. Volume WS3 - Structuring Data for Output
4. Volume WS4 - Pointers, Hierarchies & Hyperlinks

What is this volume about?

This volume describes all the functions related to managing physical items such as copies of books, CD's, journal issues, and even equipment and facilities such as conference rooms and projects.

System Overview

What additional menu items do I get with these modules for managing the physical items?

The following table contains all the extra menu items that become available with the

Copies

[Search/create new copy records](#)

[Enter/edit copies \(batch\)](#)

[Add/edit a copy of a title](#)

[Search/print/export copies](#)

Circdesk menu

Requests

[Request a title](#)

[Request titles \(batch mode\)](#)

Check-out

[Check-out copies \(change due date\)](#)

[Check-out copies \(autosave\)](#)

[Check-out copies \(batch\)](#)

[Check-out copies \(batch autosave\)](#)

[Check-out non barcoded items](#)

Renew

[Renew a loan](#)

[Renew a loan \(batch, individual dates\)](#)

[Renew a loan \(batch, common date\)](#)

Check-in

[Check-in copies \(transaction mode\)](#)

[Check-in copies \(batch mode\)](#)

[Check-in non barcoded items](#)

[Check-in for another date](#)

[Check-in received issues](#)

[Pay fines in full](#)

[Pay partial fines](#)

Circulation, Fines, and Booking by Day modules. Some of them will be missing if you do not have all the modules.

Others will be removed during implementation because you realize they are not appropriate for the way you run your operation.

In addition you could create User Groups that contain only the specific menu items required for certain functions, such as a busy check-out desk.

Go to the next page for more.

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Usage

[Basic usage search](#)

[Basic usage search \(with full browse\)](#)

[Advanced usage search](#)

[Cancel bookings, reserves, on holds](#)

[Search/print overdue reports](#)

Booking by day

[Book a copy \(by day\)](#)

[Book a copy \(by fixed date\)](#)

[Check-out bookings](#)

Year end functions

[Change group/dept code \(batch\)](#)

[Change patrons expiry date](#)

[Change patrons expiry date \(by loan code\)](#)

[Import patrons records - custom](#)

[Search/change patrons status code to Inactive](#)

[Change YTD usage counter to zero for copies](#)

[Change YTD usage counter to zero for patrons](#)

Copy inventory

[Prepare for inventory](#)

[Take inventory/update](#)

[Import/update copy status](#)

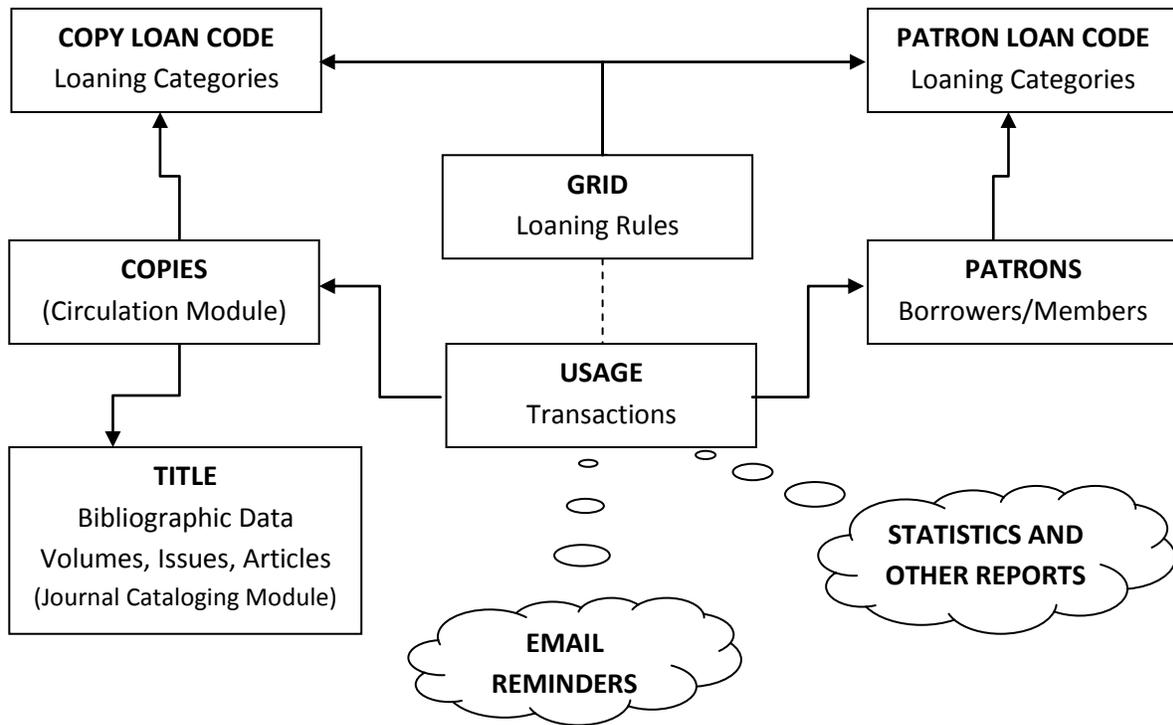
[Search/print missing item report](#)

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What files/folders are used for these modules?

The following diagram illustrates the files involved with the modules described in this volume of the Planning Guide.



Preparing the Copies

Is there a quick way to create all my copy records?

Go to **Copies -> Search/create new copy records**. The most common approach is to search by System creation date. By default, the system will create one copy per title; if you have titles with more than one copy, you can specify that number in the *Number of new copies to create* field on the cataloging screen.

What is the “copy loan code”?

The copy loan code is used in combination with the patron loan code to calculate various loan rules. For example, reference materials usually have different loaning restrictions than the rest of the books. Loan periods and other related parameters can be modified using *Enter/edit loan grid (batch)* and *Enter/edit loan grid details*. See also the description on the Loan Grid in another section.

How do I print spine and barcode labels?

Go to **Copies -> Search/print/export copies**. Select the size/type of barcode and/or label you want.

Can I use RFID?

Yes, as long as your library has the appropriate RFID hardware to translate the code into a copy number.

What label stock do you recommend?

Eloquent Librarian provides a multitude of options for label stock. From **Copies -> Search/print/export copies**, you can search for an item, and choose from a dropdown menu of options.

Any label format can be supported. However, there is a cost to configure ones that are not already available in the dropdown menu.

Can I loan journal issues if they are not bar-coded?

Yes. Go to **Check-out -> Check-out non bar-coded items**. You will first need to have “generic copy records” prepared using the *Number of new copies to create* field and **Search/create new copy records**. There is a special copy loan code for non bar-coded. You create the number of generic copies to support the number of that category that may be expected to be out at any one time. It should be no more than what would be convenient to scan manually when finding a returned item. The generic copies may relate to a single journal such as National Geographic, or

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to All Journals, or All Videos. Or, it could be for Old Journals, because you will be bar-coding all new ones.

How do I process additional copies of existing titles?

Go to **Copies** -> **Enter/edit copies (batch)**, search for the existing Title, and enter appropriate information in the table. This method is appropriate for processing one title at a time. For multiple copies, update the *Number of new copies to create* field on the bibliographic record and use **Search/create new copy records**. It will process multiple copies for multiple titles.

Preparing the Clients/Patrons file

Can I import client data from another source?

Yes. Go to **Year end functions** -> **Import patron records**. You may have to work together with Eloquent to configure the import for your file format. In some cases, it might be easier to simply have Eloquent take care of the entire import process, but if you are importing on a regular basis, it can be setup so that you can do the import yourself.

Do patrons require barcodes?

The system automatically assigns every patron a sequential number, which can be used as a barcode, but you are not required to use it. The system can also accommodate existing barcodes if necessary. There are three options for identifying the patron borrowing a book: 1) scan a barcode, 2) enter the number, or 3) search by the patron by name.

What is a “patron loan code”?

A patron loan code identifies the patron types; and each patron type may have different kinds of borrowing privileges. For example, in a school environment, teachers usually have more privileges than students. This code is used only for loaning rules. Keep it to a minimum.

Why would I assign patrons to groups?

The system uses the groups for budgeting purposes in the acquisitions module. You can allocate specific amounts to each group (department) and see how much each group has spent.

When would I link patrons to a “parent” record?

The patron may optionally point to an ‘Organization’ or ‘Department’ parent record. Some of the demographic data will be inherited from the organization record if unique data is not entered for the patron. You may not require it. Discuss your objective with Eloquent prior to using it.

Preparing the Loan Grid

Does the loan grid have to be complex?

No it does not. You can specify and maintain only the information you feel is necessary for your library. You should only have a separate entry in the loan grid if it represents a separate loaning category. For example, you may have separate material types for audio and video, but they can have the same copy loan code if their loaning rules are the same.

Patron\Copy	Default	CLC2	CLC3
Default	Loan Rules	Loan Rules	Loan Rules
PLC2	Loan Rules	Loan Rules	Loan Rules

In the above example 3 different Copy Loan codes and 2 separate Patron Loan Codes result in 6 sets of rules to be maintained. The rules for the Default categories should be complete and should represent the most frequently encountered situation. The Default is the fall-back rule if there is no match for either code or if the rule is missing. You could function with only the Default loan rules – one set rather than six.

What is controlled by the loan grid?

Various factors are controlled by the loan grid. For each patron loan code and copy loan code, you can specify the number of loan days, reserve loan days, max loan items, fines per day, or fixed fines, etc. For the full grid information, log in Administrator, and go to **Circulation -> Enter/edit loan grid details**.

How do I account for holidays and other closed days?

Those dates and days can be specified on the loan grid. Go to **Circulation -> Enter/edit loan grid details**. You do not need to enter this for rule record in the loan grid. If you enter this information on the combination of copy loan code 'default' and patron loan code 'default', all other entries will share this information. Note: If you are normally closed on the weekend, then the special dates you enter should not fall on the weekend. Enter the Monday or Friday if it is a holiday.

Checking Items Out

Which check-out process works best for me?

It depends what you are checking out, how many items, and for what dates. If you do not need to use all of the check-out options, then Eloquent can remove the unused menu items for you.

Here is some general information about each process:

- **Check-out copies (change due date)** – With this process, you must first use the calculate button to obtain the due date from the loan grid. You then have the option to change the due date before saving.
- **Check-out copies (batch)** – This is the same as the above but is ideal for checking-out multiple copies for one patron.
- **Check-out copies (auto-save)** – With this process, the system automatically saves after you calculate. This will help you save time when you do not need to change the due date.
- **Check-out copies (batch auto-save)** – This is the same as the above but is ideal for checking-out multiple copies for one patron.
- **Check-out non bar-coded items** – This process allows you to check-out journal issues and other types of material that do not have a barcode. Unlike other check-out processes, you do no search for the copy; you search for a generic title such as the journal title. You have a field for unique copy information so that you know which issue is out.

If a magazine is not bar-coded how will I know which copy the patron has out?

When you prepare the magazine, you created generic copy records for each issue. These generic copy records do not have unique information but when you use the **Check-out non bar-coded items** option, there is a '*Unique copy information*' field. This is the unique information that is printed on the issue, such as the date. When the item is returned you can select the appropriate item from a list of all copies currently out.

Can a patron check out his/her own material?

It is possible to have a workstation open to one of the check-out screens so that patrons can do their own check-out. Use one of the 'auto-save' options. You will probably require help from Eloquent in setting it up for smooth operation.

How do I control the number of items a patron has out at one time?

Go to **Circulation** -> **Enter/edit loan grid details** to fill in the field with those details. After you identify a patron for check-out, the system will tell you the number of items he has out and his maximum limit beside his name. However, the system will not automatically prevent the patron from going over the limit. It is up to the check-out clerk to maintain the limit.

Checking Items In

Which check-in process works best for me?

As with Check-out, the Check-in process depends on your particular situation. Eloquent can remove unused menu items during implementation if you wish. Go to **Circsuper menu** -> **Circdesk menu** -> **Check-in** for a list of options. Here is some general information about each process:

- **Check-in copies (transaction mode)** – This process allows you to check-in one item at a time. You can scan the barcode. For certain items, you will receive messages such as overdue warnings.
- **Check-in copies (batch mode)** – This process allows you to quickly scan multiple barcodes and then check in all the items at once. You will not receive messages or warnings.
- **Check-in non barcoded items** – This process allows you to check in items that do not have a barcode. To find the item, you search on the generic title for a browse displaying all copies currently out. You select the appropriate item by the unique copy information that you entered at check-out.
- **Check-in for another date** – This process allows you to change the return date to a day in the past. This is important if your library charges fines. For example, if a patron returns an item on the night of the due date, you can check it in the next morning with charging a fine to him.
- **Check-in received issues** – This is for the serials module.

How will I know that the item is on reserve and should not be shelved?

When you check-in the item, the system will automatically put it on hold and notify you that the copy should go to the hold location.

What usage statistics do I get?

You can collect statistics by searching on any of the 3 files involved: people, copies, or usage transactions.

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There are two counts automatically tracked by the system for every patron and every copy: the YTD usage and the Lifetime usage. The YTD usage keeps track of how many loans occur during a year. It is reset to '0' at the end of each year. The Lifetime usage keeps track of the total loans. You can search on these four fields for people/copies in certain ranges. For example, all items or all people that are at '0' for the year.

The usage table has an entry for every transaction except the ones that may have been purged by you after a certain length of time. With creative search combinations a wealth of statistics may be obtained. Go to **Circsuper menu -> Circdesk menu -> Usage -> Advanced usage search** to search. For example you could find all usage records for a specific patron or title within a date range.

Contact Eloquent if you are not sure how to compose the search you require or if you want custom statistical reports.

Member services *(additional module)*

What is the difference between a user, a patron, a researcher and a member?

A **researcher** is someone that searches your database online. A **patron** is a researcher registered with the library and can borrow material. A **member** is a patron that can log in with an email address and password to gain extra privileges. Researchers and patrons do not have the ability to write to the database. A member may be given write capability. A **user** is usually someone working for the library. They log into the system with a username and password.

What extra privileges do members get?

Members can log into their account to see what items they have out, renew items, change their personal information, place requests for library items, and any other functions you may wish to give them. Contact Eloquent regarding any special functions you would like to give members. They may be custom enhancements.

Can someone self-register and use privileges without my approval?

When someone self-registers, they will receive an email with login information. The librarian at any time can view all recent new registered members by searching the patrons file by system creation date and deny privileges by changing the member's password or deleting the member entirely. Also, you could inhibit the automatic response to the registration. They get their password only after you approve them.

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Can I simply make every patron a member?

Any patron with an email address automatically becomes a Member, but they cannot login without their password. You could send a batch email to all members advising them of their member status and telling them to request their password online. The email sending the password will advise them to change the password immediately.

Will members create more work for me?

There may be some cases of members that cause trouble, but generally members will save the librarian's time because they will be able to do more on their own, such as changing their demographics or seeing what items they currently have out. The overall result is improved client service and greater utilization of your resources.

Requests, reserves, holds, renewals

How does a patron know that his/her request has become a reserve or a hold?

If a copy is available when a request is made, the item is put on hold. If all copies of a title are out, the request is placed as a reserve against the title. The librarian gets a report showing all the new reserves and hold transactions created. They can be notified by email. When a reserved copy is returned, there is a message indicating that the patron on top of the reserve list has it placed on hold and that you should place the item in the hold location rather than shelve it.

If you use the "*batch mode*" for quickly checking in a large batch of items you will get an on-screen report showing all the transactions, including any holds. You can process them immediately, or print a report for later use.

Does the patron pick up the item or do I send it to him/her?

You can do either. Simply perform a normal check-out at pick up or delivery time.

How do I extend the loan (renew it)?

Go to **Circsuper menu** -> **Circdesk menu** -> **Renew** and choose from the options. You will be able to change the due date to a later date.

Chasing Overdue Loans

How easy is it to follow up on overdue items?

Go to **Circsuper** menu -> **Circdesk** menu -> **Usage** -> **Search/print overdue reports**. You can send email reminders from this window.

What if the patron does not have an email address?

If you prefer to phone your patrons about overdue books you can print the **Columnar detail with notes** report from the same menu. It contains the phone number.

Collecting Fines *(additional module)*

How do I keep track of fines due?

Go to **Circsuper** menu -> **Circdesk** menu -> **Usage** -> **Basic usage search**. Choose **PAY** for Usage type to get all fines. You could further restrict your search with other access points such as the patron or the date.

What determines the amount of a fine?

The amounts are set by you in the loan grid. Fines can change depending on the loan codes, or you can specify the fines only for the default loan codes. Another factor in determining a fine is the fixed fine and the daily fine. If you specify both a fixed fine and a daily fine, the daily fine will accumulate and append to the fixed fine.

Can I accept partial payment?

Yes. Go to **Circsuper** menu -> **Circdesk** menu -> **Check-in** -> **Pay partial fines**.

Can someone borrow more items if fines are unpaid?

Yes, the system does not prevent it, but it does provide a notice when doing the check-out. You can restrict the number of items out as a guideline and adjust fine rates on the loan grid.

Can I audit the fines collected?

Yes, the system is able to produce meaningful daily reports. (There are some problems if you permit partial payments.) Contact Eloquent and describe your requirements.

Booking by Day *(additional module)*

What is the difference between booking by day and normal circulation?

Booking by day allows for an item to be booked for some date in the future rather than to get it as soon as it is available.

How far ahead can I book?

You are able to choose any month and future year from the calendar window. If you want to follow the loan grid, make sure your closed dates are entered for that far in the future.

What type of items can I book?

You can book many items, including books, reference (even if they cannot leave the library, you can book them for one day on-site use). The circulation due-date takes into consideration future bookings. In addition to resource material that is normally loaned you can book supplies and facilities such as rooms and projectors.

If a title has multiple copies does it matter which item I book?

You make your booking request by title. The software will place the booking on the first copy it finds to satisfy your timeframe. The copy is booked.

Can I see all the bookings for an item?

Yes. Go to **Circsuper menu -> Circdesk menu -> Usage -> Basic usage search**. Choose Booked by day (BBD) for Usage type and enter the item in the Title word(s) prompt. That report may help you find an available timeslot if the automatic request is not appropriate.

Can I see all the bookings for a patron?

Yes. Go to **Circsuper menu -> Circdesk menu -> Usage -> Basic usage search**. Choose Booked by day (BBD) for Usage type and enter patron's name in Patron/Org code. This becomes a good planning guide for your client such as an educator lining up resources and facilities.

What do I do if time slots are filling up?

You have the option of booking by fixed dates to bypass the loan grid, or the system can automatically shorten the loan period so that the patron still gets his required day.

How am I reminded that the time has arrived to deliver the item?

You can get a listing each morning of the items that need to be picked off the shelf and prepared for borrowers. Go to **Circsuper menu -> Circdesk menu -> Usage -> Basic usage search**. Choose Booked by day (BBD) for Usage type and enter the current date in *Current usage date*.

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Does the system allow for shipping time?

Yes. Use the prep fields in *Enter/edit loan grid details*. That will give you the reminders with enough lead time.

Annual Inventory

Do I close the library in order to do inventory?

You can close your library *or* continue to check-out and check-in materials to patrons.

What are the steps in a physical inventory?

You will find a comprehensive document in the menu help for ***Copy inventory***.

Here is just an overview of the main steps:

1. Create your list of items you want to run inventory on by saving a search in **Search/print/export copies**. This gives you the option to take one manageable section of your holdings at a time rather than everything.
2. Run a process that changes the status of everything in the list to 'Missing (inv)'.
3. Take inventory by scanning the barcodes of everything present in that section. This will return the code to 'Shelves'.
4. Print reports for what is still 'Missing (inv)' and take the appropriate action.

What happens to items that are currently out on loan?

Anything that is out on loan will have its status changed from 'Missing (inv)' to 'Shelves' when it is returned and checked in.

Can more items be loaned while I am doing inventory?

Yes, as you can continue to check in and checkout materials during inventory. They will end up with the appropriate code in the end.

What if a "missing" book shows up as a check-in?

The system will check the item in give you a message telling you that it is missing and automatically set the book back to 'Shelves'.

Annual Housekeeping

Do you suggest taking year end statistical reports?

The YTD code is going to be set to '0' for all copies and patrons. So, any annual statistics based on this YTD must be taken prior to the re-set. Reports from the usage transactions can be taken any time prior to the transactions being purged.

How do I reset the year-to-date statistics on patrons?

Go to **Circsuper** menu ->Year end functions -> **Change YTD usage counter to zero for patrons** with *Change all items* set to 'yes'. This should be done before the first check-out of the next year so that the transaction is allocated to the correct year. You may want to first run any report for the previous year.

How do I reset the year-to-date statistics on items?

Go to **Circsuper** menu ->Year end functions -> **Change YTD usage counter to zero for copies** with *Change all items* set to 'yes'. This should be done before the first check-out of the next year so that the transaction is allocated to the correct year. You may want to first run any report for the previous year.

Do I have to enter all the closed days and dates for the upcoming year?

'Closed days' refers to the days of the week that are closed. For example, you do not want a loaned item due on a Saturday or Sunday if you are closed on those two days. Those two days will probably remain the same for many years. However, other dates such as Thanksgiving and Christmas have a year associated with them, so must be entered for every year into the future.