

LS2 Staff Training Handout

Version 1.6.1



Table of Contents

Launching the Software / Log On	1
Borrower Services	3
Load a Borrower	3
Check Out	8
Change Due Date.....	10
Stats Only	10
Renew Selected	11
Mark Selected.....	12
Blocks	15
Requests	15
Place Requests	16
Current Requests	17
Cancel Request	18
Charges	18
Unpaid Charges.....	18
Payment History	21
Borrower Info.....	21
Basic Info.....	21
Extra Info	21
Settings.....	22
Loan History	23
Delete Borrower.....	23
Change Photo.....	24
Remove Photo.....	25
New Borrower	26
Copy Borrower Info.....	26
Responsible Party	27
Check In	29
Normal	30
Change Check In Date	31
In-House Use.....	31
Special Status.....	32
Staff Services	34
Titles & Items.....	34
Search Titles and Items.....	34
Add New OTF	35
Requests Queue.....	36
Edit Title.....	36
Delete Title	36
Add/Remove Subjects	36
Add New Item	37
Edit Item	37
Delete Item	37
Messages	38
Group by Collection	38
Mark Missing	38
Export All	39
Print All	39
Delete Messages.....	39
Requests Shelf	39
Cancel Request	40
Print	40

Item Transfers	40
Transfer Type	40
Item Transfers	43
File Uploads.....	43
Upload & Merge	43
Merge Summary	43
Retrieve Records.....	43
Lists & Actions	45
Lists & Searches	45
Search for a List or Saved Search	45
Browse Lists and Searches	46
Results.....	47
Actions.....	47
Delete	48
Items.....	48
Search Options.....	48
Results.....	49
Actions.....	49
Save Search	50

Section 1

Launching the Software / Log On

Learning Objectives

After completing this section, you will be able to:

- Access and login **LS2 Staff**

Getting Started

Click your desktop shortcut, browser bookmark, or type the Internet address in the browser. The **Library Log On** form displays. A *Privacy* link displays on the lower left of the form if your library has opted-in to Google Analytics. The version number of the application currently in use displays on the lower right. Type your **User ID** and **Password**, as configured in **Config > Users** by the System Administrator.

The **Location** and **Workstation Name** pre-populates based on your log on credentials. Click **Log On**. If the information is not populated, select your **Location** and **Workstation Name** from the drop-down list. If you do not see your location, see your System Administrator.

The **LS2 Staff** application opens to the **Borrower Services** tab. **Check In** is the only option enabled until a borrower is loaded.

Note: Some **LS2 Staff** functions open a pop-up window. In order for **LS2 Staff** to work properly, set your browser to allow pop-ups.



Section 2

Borrower Services

Learning Objectives

After completing this section, you will be able to:

- Load a borrower
- Check out items to borrowers
- Renew items and mark items lost
- View, place, and cancel requests
- View, pay, and waive borrowers' unpaid charges
- Add a charge fee
- Add, edit, or delete borrowers
- Add, change, or remove a borrower's photo
- Check in items, including Special Status or In-House Use

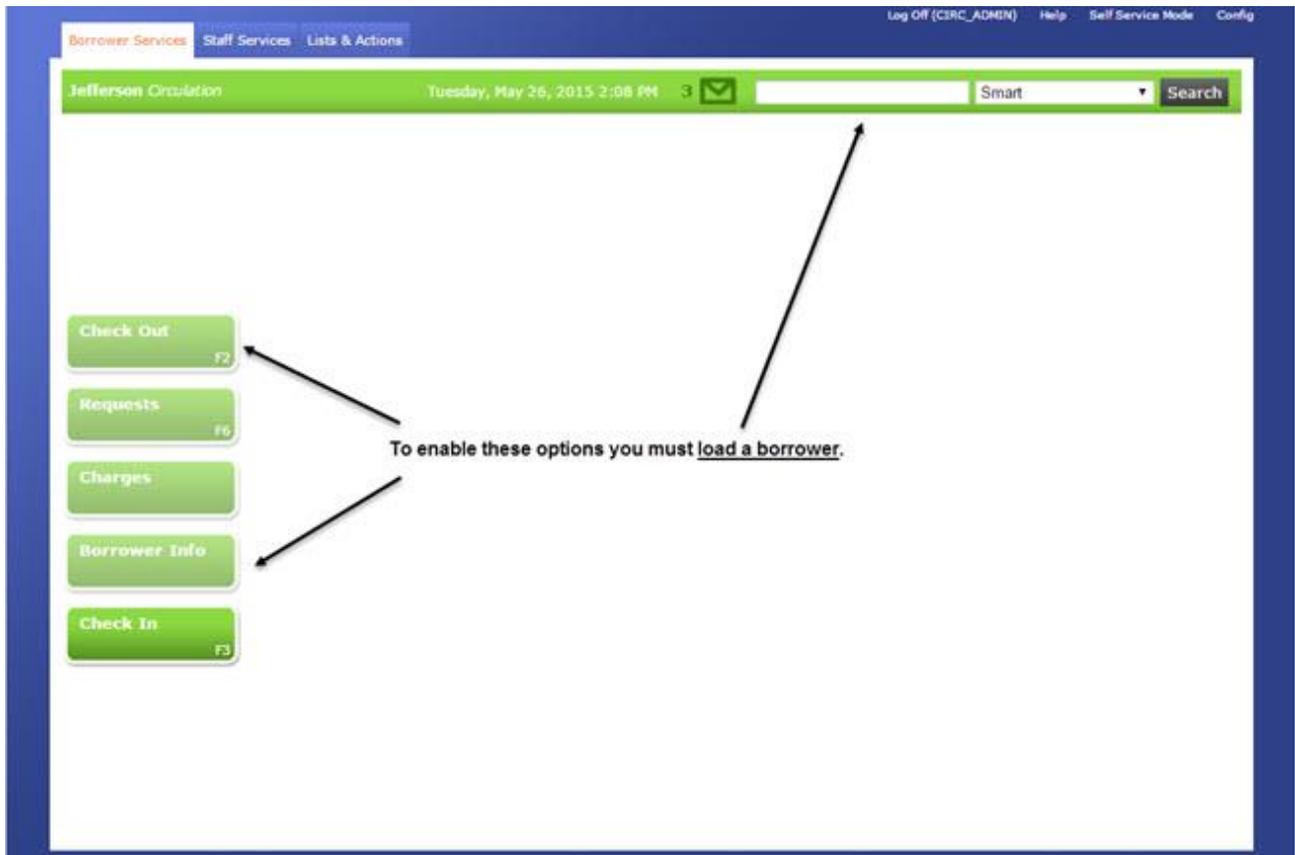
Getting Started

The **Borrower Services** tab displays after logging into **LS2 Staff**. You can check items in, and after loading a borrower, check items out and access the borrower's information, requests, and charges.

Load a Borrower

The **Smart Search** box, in the upper right corner, is available on each of the **Borrower Services** options: **Check Out**, **Requests**, **Charges**, **Borrower Info**, and **Check In**.

To load a borrower scan the borrower's ID. You can also type the borrower's name, borrower's ID, or alternate ID. By default, the **Smart** option searches using these three settings.



You can use other **Search** types such as **Phone**, **Email**, **Zip Code**, **Address**, or **D.O.B.** (Date of Birth - mm/dd/yyyy) by typing a search term in the **Search** box and using the **Smart** drop-down list to highlight the appropriate option.



Wildcards: For wildcard searches use the percent (%) character followed (or preceded) by the text string you want to match.

First, Middle, Last name searches:

- **Exact Match:** Searching for a borrower's full name (Last, First, Middle) will return an exact match.
- **Exact Matches Only:** Searching for "**Smith**" will return borrowers with **Smith** as their last name, as well as those whose last name begins with "Smith." No other name match criteria (first, middle) will be taken in to account. .
- **Begins With:** Searching for **Smith%** will return all borrowers with the matching name, or a name that begins with the search characters. For example, searching for **Smith%** will return matches to "Smith," as well as borrowers with names such as Smithers, Smithson, etc.
- **Ends With:** Searching for **%Smith**, will return all borrowers with the matching name, or a name that ends with the search characters. For example, Hammersmith, Winsmith, etc.

You can also use an asterisk * for wildcard searches. If you are searching for barcodes, use the * in front of the search string to search for borrower ID only. Otherwise, the asterisk can be used for name searching in the same manner as the percent sign %.

Review the list to locate the appropriate borrower. You can expand or refine the search results by selecting the **Home Location Only**, **My Login Locations** or **All Locations** check box.

Borrower Search

smith% Smart Search

Home Location Only My Logon Locations All Locations

To refine your search, select the appropriate check box.

251 Borrowers Found

Name	Borr. ID	Home	Phone	Type	Address	Birth Date
Shepherd II, Randy Smith	2221000016174	Roosevelt	555-555-2368	Adult	510 Glenview	
Sisk-Smith, Benjamin H.	22210003309993	Lincoln	555-555-2368	Adult	1407 Graymalkin Lane	05/19/1995
Smith II, John C.	22210000024784	Truman	555-555-2368	Adult	510 Glenview	
Smith II, Richard F.	22210002001118	Truman	555-555-2368	Adult	623 East 68th Street	07/18/1982
Smith III, Stan J.	22210001004277	Taylor	555-555-2368	Adult	698 Sycamore Road	09/25/1988
Smith III, William B.	22210000016790	Lincoln	555-555-2368	Adult	1407 Graymalkin Lane	02/01/1972
Smith Jr., Albert Wayne	22210002003846	Truman	555-555-2368	Adult	510 Glenview	12/23/1963
Smith Jr., Charles J.	22210003359261	Roosevelt	555-555-2368	Adult	698 Sycamore Road	08/26/1951
Smith Jr., Jarret Grant	22210002006218	Taylor	555-555-2368	Adult	1882 Gerard Street	01/25/1993
Smith Jr., John Eugene	22210003659090	Lincoln	555-555-2368	Adult	1882 Gerard Street	01/12/1948
Smith Jr., Michael Gregory	22210001005827	Truman	555-555-2368	Adult	1407 Graymalkin Lane	09/11/1982
Smith Jr., Richard F.	22210000000551	Washington	555-555-2368	Adult	4222 Clinton Way	05/07/1964
Smith Jr., Steven James	22210003038345	Truman	555-555-2368	Adult	623 East 68th Street	11/02/1993
Smith Sr., Raymond Alan	22210001006879	Truman	555-555-2368	Adult	698 Sycamore Road	07/04/1955

Select Borrower New Borrower

Click any column header to sort the list by ascending or descending order. After locating the borrower, click the borrower's name.

If the name selected is a responsible party, the **Responsible Party** dialog displays with names/photos (if available) of any responsible party the borrower is responsible for.

Responsible Party



Leilani Hale
is responsible for:



Sophia Alana

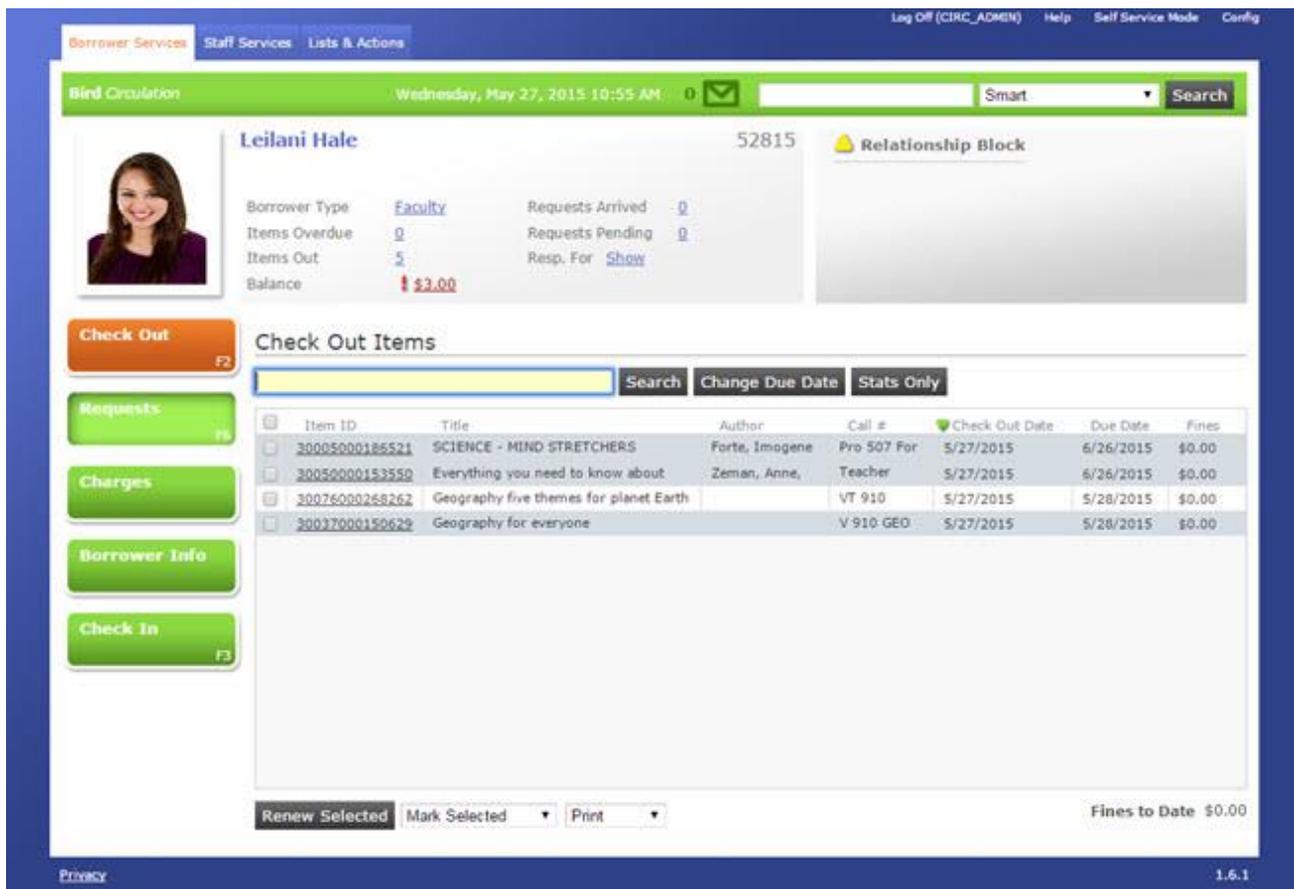


Kekoa Iona



Mason Johns

Click the appropriate borrower and the **Check Out** page displays a summary of the borrower's account information and a photo of the borrower, if available. You can immediately start checking items out, or click other **Borrower Services** options.



Borrower Services | Staff Services | Lists & Actions

Bird Circulation | Wednesday, May 27, 2015 10:55 AM | 0 | Smart | Search



Leilani Hale 52815

Relationship Block

Borrower Type: [Faculty](#) | Requests Arrived: 0
 Items Overdue: 0 | Requests Pending: 0
 Items Out: 5 | Resp. For: [Show](#)
 Balance: \$3.00

Check Out

Requests

Charges

Borrower Info

Check In

Check Out Items

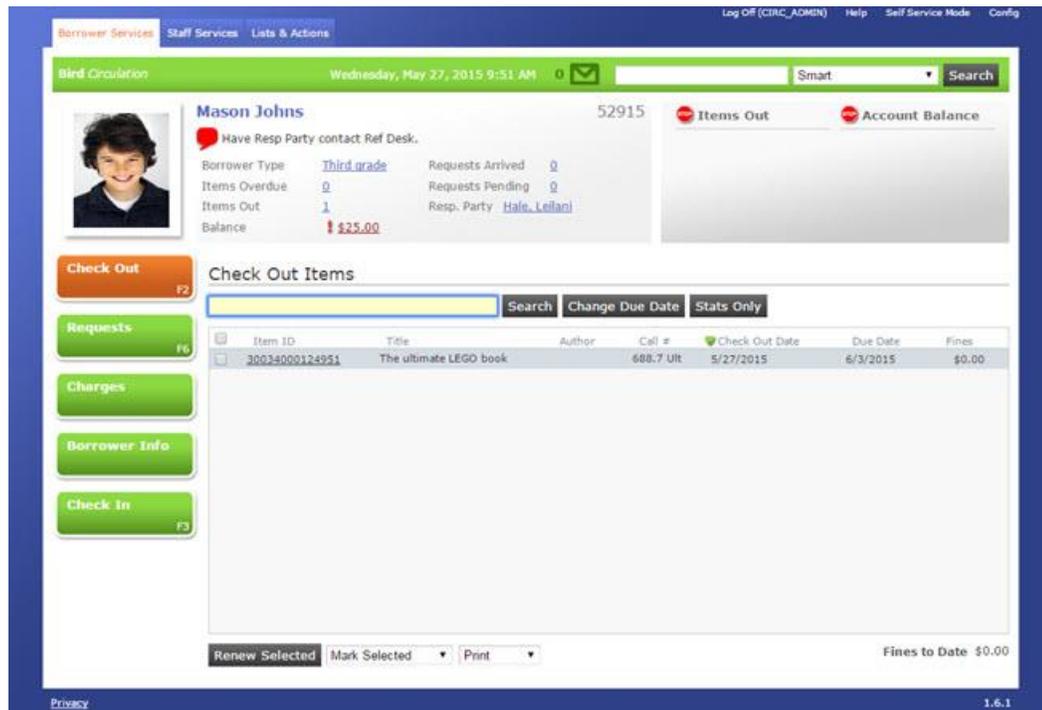
[Search] [Change Due Date] [Stats Only]

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
30005000185521	SCIENCE - MIND STRETCHERS	Forte, Imogene	Pro 507 For	5/27/2015	6/26/2015	\$0.00
30050000153550	Everything you need to know about	Zeman, Anne,	Teacher	5/27/2015	6/26/2015	\$0.00
30076000268262	Geography five themes for planet Earth		VT 910	5/27/2015	5/28/2015	\$0.00
30037000150629	Geography for everyone		V 910 GEO	5/27/2015	5/28/2015	\$0.00

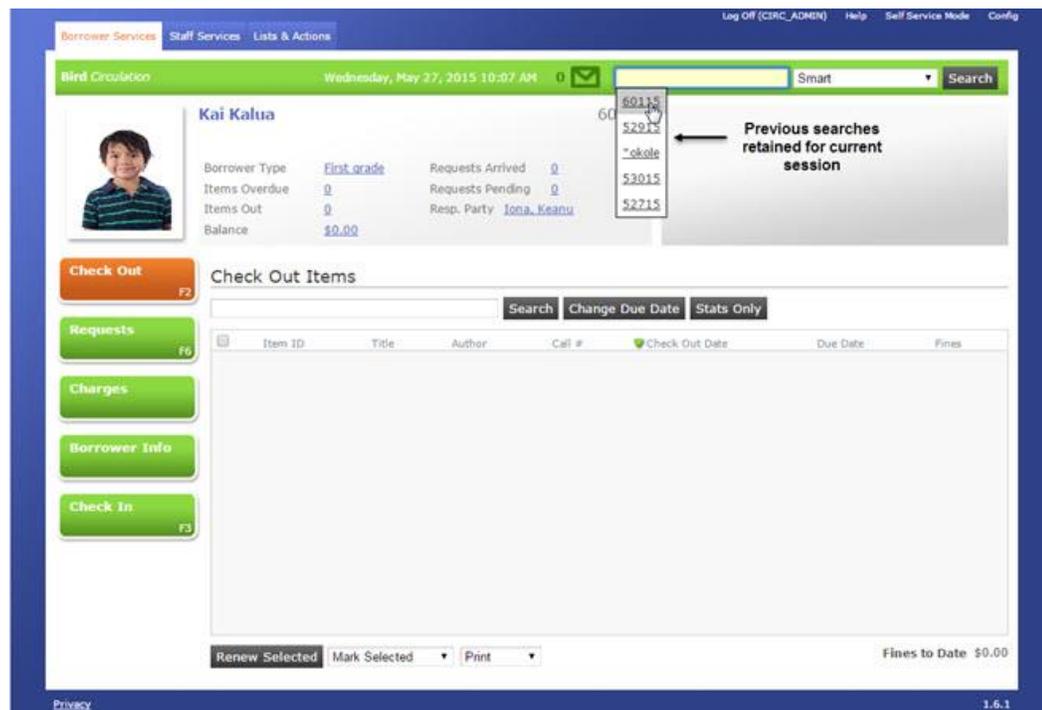
Fines to Date \$0.00

If a photo is not available, then a placeholder displays. You can add and remove a photo using the **Change Photo** button.

Clicking any of the links in the summary area brings you directly to the associated page. If a comment only shows a portion, hover over the comment icon to display the entire thing. Any blocks on the borrower's account display on the right.



When you search for a borrower, the **Search** box retains the searches for the current session only. Selecting an entry from the list will reload the associated information.



Check Out

Check Out on the **Borrower Services** tab allows you to check out items to a borrower. You can also view any blocks on the borrower's account, override the due date, print a receipt, renew items, mark items lost, perform a stats only check out, and view individual fines for each item currently overdue.

To check out to a borrower, search for the borrower in the database and go to the **Check Out** option on the **Borrower Services** tab, or press **F2** if the borrower is already loaded. The **Check Out Items** area lists all of the items currently checked out to the borrower. Overdue items will display with a red background.

The screenshot shows the 'Borrower Services' interface for a borrower named Kai Kalua. The borrower's account details are as follows:

Borrower Type	First grade	Requests Arrived	0
Items Overdue	1	Requests Pending	0
Items Out	2	Resp. Party	Iona Keanu
Balance	\$0.00		

The 'Check Out Items' section displays a table of items checked out to the borrower:

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
30013000184082	The picture world of space voyages	Barrett, Norman	629.45	5/27/2015	5/27/2015	\$0.00
30036000208791	Planets & the solar system		V 523.4	5/27/2015	5/13/2015	\$0.00

At the bottom of the interface, there are buttons for 'Renew Selected', 'Mark Selected', and 'Print'. The 'Fines to Date' is shown as \$0.00.

If there are any fines associated with the checked out items, the **Fines** column lists the amount due. The **Total Fines to Date** shows the amount due for all overdue items shown in the list.

To **Check Out** an item, scan or type the barcode in the **Search** box. You can also type the title of the item in the **Search**.

The screenshot shows the library system interface for a borrower named Sophia Alana. The interface includes a navigation menu at the top with options like 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The borrower's account details are displayed, including their name, ID (53015), and various statistics like 'Items Out' (3) and 'Balance' (\$0.00). A 'Check Out Items' section is visible, featuring a search bar with the instruction 'Scan or type the barcode, or type the title'. Below the search bar is a table of items with columns for Item ID, Title, Author, Call #, Check Out Date, Due Date, and Fines. The table lists three items related to horses. At the bottom of the interface, there are buttons for 'Renew Selected', 'Mark Selected', and 'Print', along with a 'Fines to Date \$0.00' indicator.

After typing your title related search results display. You can expand or refine your results by selecting/clearing the **Home Location Only** check box.

The screenshot shows the 'Title Search' results page. The search term is 'Horses' and the results are displayed in a table. The 'Home Location Only' checkbox is checked, and 113 titles are found. The table lists various titles related to horses, including 'Horses, horses, horses : a collection of stories', 'Horses, horses, horses : palominos & pintos, polo ponies & plow', and 'The joy of horses : a beginner's guide to safe and responsible'. The table columns include the title, author, book type, year, and a unique identifier. A 'Select' button is visible at the bottom right of the table.

Clearing the **Home Location Only** check box will include results from all locations. Highlight and click the title you want from the list of results.

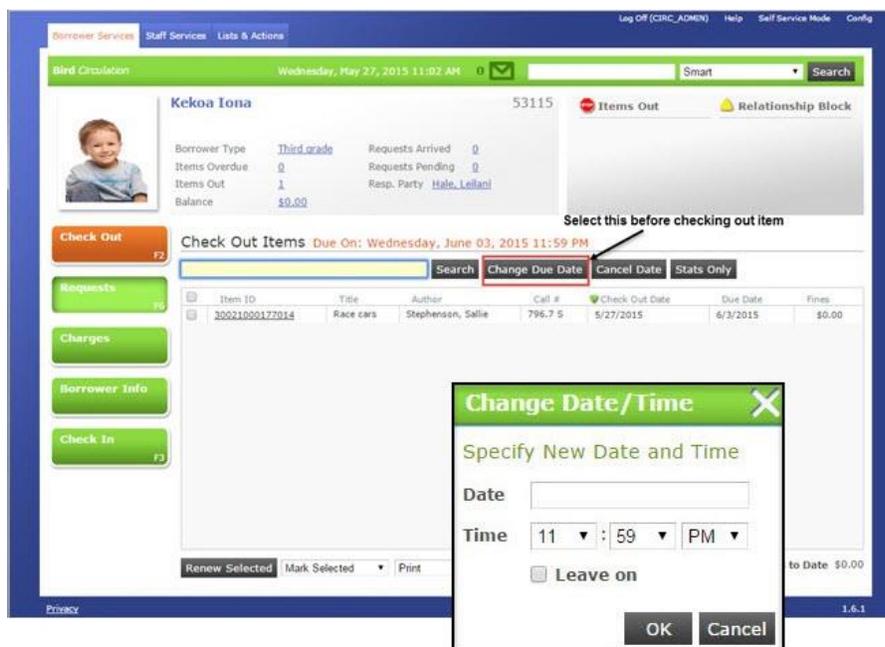
Blocks on the account: If there is a hard block on the borrower's account, the block needs removed before proceeding with the checkout. For more information, refer to the [Blocks](#) topic.

Popups on selected item: If the item checked out is on request for another borrower, a pop-up dialog displays the option to check out and cancel the request, or to check out and leave the request on hold. If there is a rental charge and/or rental renewal charge configured for the item's

associated holding code, a pop-up dialog displays the option to **Charge** or **Waive** the charges. Selecting **Waive** requires an **Override Password**.

Change Due Date

If you want to change the due date, you must select **Change Due Date** before performing the check out. Clicking the **Change Due Date** button opens the **Change Date/Time** dialog.



You can select your date from the pop-up calendar, or type the date in the **Date** box using mm/dd/yyyy format. Set a time by using the drop-down lists for hour, minute, and AM/PM. To the right of the checked out items, the new **Due Date** and **Time** displays in red and a **Cancel Date** option displays. If you select the **Leave on** check box, the selected due date remains displayed until you clear the option by clicking the **Cancel Date** option.

Stats Only

To check out multiple items from a special collection (non-cataloged or non-barcoded), perform a **Stats Only** check out. These transactions are included in the Circulation statistics, but no Circulation 'rules' apply, such as fines, overdues, or tracking of individual items by borrower.

The screenshot shows the library system interface for borrower Kai Kalua (ID: 60115). The interface includes a navigation menu, a search bar, and a list of checked-out items. The 'Stats Only' button is highlighted with a red box, and an arrow points to it from the text: "Click here to check out multiple items from a non-cataloged collection".

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
2002600208751	Planets & the solar system		V 523.4	5/27/2015	5/13/2015	\$0.00
20012000184082	The picture world of space voyages	Barrett, Norman	629.45	5/27/2015	5/27/2015	\$0.00

Click the **Stats Only** button and the **Statistics Only Check Out** dialog displays.

The dialog box titled "Statistics Only Check Out" contains the following fields:

- Choose category and amount.
- Category: MAG - Magazines (dropdown menu)
- Quantity: (empty text input field)
- Buttons: OK, Cancel

Select a **Category** from the drop-down list. Type the number of items in the **Quantity** box, and then click **OK**.

Renew Selected

To renew an item, highlight the item from the borrower's list of checked out items, or renew all items from the list by selecting the check box in the column header. Click the **Renew Selected** button. The date in the **Due Date** column changes. If you renew an overdue item, a notice advises upon renewal a fine is charged.

The screenshot shows the library system interface for a borrower named Leilani Hale. The interface includes a navigation bar with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The borrower's profile shows a balance of \$3.00 and a relationship block. A table of checked-out items is displayed, with the first item selected. Below the table, the 'Renew Selected' button is highlighted with a red box, and an arrow points to it from the text 'Select the item, then click Renew Selected'.

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
<input checked="" type="checkbox"/> 30027000123593	Quick-but-great science fair projects	Levine, Shar,	507.8 LEV	5/27/2015	6/3/2015	\$0.00
<input type="checkbox"/> 30004000124947	Science at the extreme : scientists on the	Taylor, Peter	509.2 Tay	5/27/2015	6/26/2015	\$0.00
<input type="checkbox"/> 30037000150629	Geography for everyone [videorecording]		V 910 GEO	5/27/2015	6/26/2015	\$0.00
<input type="checkbox"/> 30076000268262	Geography five themes for planet Earth		VT 910	5/27/2015	6/26/2015	\$0.00
<input type="checkbox"/> 30050000153550	Everything you need to know about	Zeman, Anne,	Teacher	5/27/2015	6/26/2015	\$0.00
<input type="checkbox"/> 30004000126462	Best of physics from Science teacher's		530 Sci	5/27/2015	6/26/2015	\$0.00

Renew Selected Mark Selected Print Fines to Date \$0.00

You can also renew items from the **Item Details** area under **Titles & Items**.

Mark Selected

The **Mark Selected** option provides a way to mark a checked out item as **Lost**, **Claims Returned**, or **Claims Never Out**. Highlight the item on the borrower checked out items list, and using the drop-down list for **Mark Selected**, select the appropriate option.

The screenshot shows the library system interface for borrower Sophia Alana. The top navigation bar includes 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The main header displays 'Bird Circulation', the date 'Wednesday, May 27, 2015 11:55 AM', and a search bar. The borrower's profile shows a photo, name 'Sophia Alana', ID '53015', and various statistics: Borrower Type 'Third grade', Items Overdue '0', Items Out '3', Balance '\$0.00', Requests Arrived '0', Requests Pending '0', and Resp. Party 'Hale, Lellani'. A 'Check Out' button is visible. Below, the 'Check Out Items' table lists three items, with the third item 'My pony book' selected. A dropdown menu is open under 'Mark Selected', showing options: 'Mark Selected', 'Lost', 'Claims Returned', and 'Claims Never Out'. An arrow points to the 'Lost' option. A text box below the table reads 'Select an item and then click the appropriate option from Mark Selected'. The bottom right corner shows 'Fines to Date \$0.00' and version '1.6.1'.

- **Lost**

Select **Lost** and a **Mark Item as Lost** dialog displays with a fine amount. The amount pulls from the price subfield defined in the holding field (typically subfield p of the 949), as well as any lost fee charges, if applicable. If the amount is not available in the price subfield, then the system checks the default settings established at the District level. You can accept the displayed amount, or type a new amount and write a Comment, explaining the adjustment you made.

The 'Mark Item as Lost' dialog box is shown with a green title bar and a close button. The text inside reads 'Determine fine for the item 30039000121121'. There are two input fields: 'Amount' with the value '\$15.95' and 'Comment' which is empty. At the bottom right, there are 'OK' and 'Cancel' buttons.

The amount, along with the title and related information and any comments, displays with the borrower's unpaid charges on the **Charges** page. An **Account Balance** block displays to the right of the borrower's summary account information area. Any items marked as 'Lost' are not expected to be returned.

- **Claims Returned / Claims Never Out**

Selecting **Claims Returned** or **Claims Never Out** removes the item from the checked out items list and marks it as lost in the database. No fees are charged, and under the borrower's **Extra Info** tab, *Excused Losses* records the action. Items are marked as 'Claims Returned' or 'Claims Never Out' based on the borrower's explanations.

- **Print/Email**

The **Print/Email** option allows you to print and/or email a list of all **Items Out** to the currently displayed borrower, or to print and/or email a **Due Slip** displaying the borrower's current fine balance. The information displayed only reflects the items and balance due for the logged on location. Under the **Print/Email** drop-down list, click **Due Slip** or **Items Out**. A dialog displays the choices: **Email**, **Print**, or **Email & Print**. If you did not configure email in your system, a print dialog displays the check out slip.

The screenshot shows the 'Borrower Services' interface for a borrower named Leilani Hale. The borrower's profile includes a photo, name, ID (52815), and statistics: Borrower Type (Adult), Requests Arrived (0), Items Overdue (0), Requests Pending (0), Items Out (1), and Balance (\$0.00). A 'Soft Block' area is visible with an 'Email Receipts' icon. Below the profile is a 'Check Out Items' table with columns for Item ID, Title, Author, Call #, Check Out Date, Due Date, and Fines. Three items are listed:

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
32200003003389	Science & technology firsts	Bruno, Leonard	609	5/27/2015	5/27/2015	\$0.00
32200600049546	Time for kids science almanac		3 500 T	5/27/2015	6/17/2015	\$0.00
32200000967065	Science crafts for kids 50 fantastic things	Diehn, Gwen,	3 507.8 D	5/27/2015	6/17/2015	\$0.00

At the bottom of the interface, a 'Print/Email' dropdown menu is open, showing options: 'Print/Email', 'Due Slip', and 'Items Out'. An arrow points to the 'Print/Email' option. The interface also includes navigation buttons like 'Check Out', 'Requests', 'Charges', 'Borrower Info', and 'Check In'.

If you configured email in your system, a soft block will display in the blocked message area of the Borrower Summary, as shown above. Click on the block to confirm this borrower wants to receive check out slips via email. A **Configure Receipts** dialog displays.

Configure Receipts X

Does the borrower want to receive receipts via email?

Yes No

Clicking **No** clears the block for 6 months. Clicking **Yes** displays another message depending whether an email address is on file. If an email address is on file, the address displays. If no email address exists, type the borrower's email address. This automatically adds the email address to the borrower's account under the **Basic Info** tab.

Configure Receipts X

Verify borrower's email address

lhale@gmail.com

OK Cancel

If an email address already exists on file, verify and edit the email address, if necessary.

Blocks

Various blocks display on a borrower's account in the upper-right on any of the **Borrower Services** pages. There are two different types of blocks: **hard** and **soft**. **Soft blocks**  are informational messages. Examples might include email receipts, arrived request, address change, library card almost expired, relationship block, or borrower maximum fine limit. **Hard blocks**  are warnings that must be cleared or overridden before items are checked out. Examples might include collection agency block, block status, account balance, library card expired, items overdue, items out, long overdue, check out limit, relationship block, or registered online but has not yet provided identification.

Requests

The **Requests** option on the **Borrower Services** tab displays two sub-tabs: **Place Requests** and **Current Requests**. The **Place Requests** sub-tab opens by default.

Place Requests

From the **Borrower Services** tab, search for the borrower requesting the item in the **Search** box. After loading the borrower, click **Requests** or press **F6**. Search for the title, select the title from the search results list, and click **Select**. The title displays under the Search entry box.

Select one of the **Request Type** options: **First Available**, **Location Specific**, **Item Specific**, or **Multiple Copies**.

For **Location Specific** and **Item Specific** requests, *Can Use* and *Allowed* columns display.

- *Allowed* is based on whether requests are allowed for this **Borrower Type** and **Holding code** combination as established under **Rules Profiles** and **Borrower Types** in **L•S Preferences**.
- *Can Use* is based on the **Holds Routing** settings under **Types and Codes** in **L•S Preferences**.

If either *Can Use* or *Allowed* displays 'No', **LS2 Staff** may allow you to place a request, but a message may display indicating there is a problem filling the request.

The screenshot shows the 'Place Requests' dialog for a borrower named Malia Kama. The dialog is for a request titled 'A gardening book, indoors and outdoors'. The 'Request Type' is 'Location Specific'. The 'Pickup Location' is 'Bird' and the 'Priority' is '5'. The 'Exp Date' is '8/25/2015'. A table shows the availability of the book at various locations: Bird, Bon Air, Community H.S., Midlothian High, and Hopkins. The 'Can Use' and 'Allowed' columns are highlighted in red, showing 'Yes' for all locations.

Location	Copies	On Shelf	Can Use	Allowed
Bird	0	0	Yes	No
Bon Air	0	0	Yes	No
Community H.S.	0	0	Yes	No
Midlothian High	0	0	Yes	No
Hopkins	0	0	Yes	No

For **Multiple Copies**, the dialog expands, displaying the number of copies available, and a drop-down to select the number of copies needed.

Place Requests **Current Requests**

Smart Search

Title: Harry Potter and the goblet of fire

Request Type

First Available Location Specific Item Specific **Multiple Copies**

Pickup Location: Bird

Priority: 5

Exp Date: 8/25/2015

Number of copies you can request: 7

Number of copies requested: 1

Place Request

Selecting Multiple Copies expands the dialog for the # of copies

You can also change the **Pickup Location**, **Priority**, and/or **Exp. Date**. The **Priority** settings are 1 through 10, with 1 being the highest priority. When you are finished, click **Place Request**. A notice advises the request was placed successfully. The request, along with any other previous requests, display under the **Current Requests** sub-tab.

Current Requests

On the **Current Requests** sub-tab, you can view all of the pending requests, as well as cancel a request. Click any column header to sort the list by ascending or descending order. Click a **Title** to view the **Request Queue** for that title. Click an **Item ID** to display the item details for that title. An **Item ID** will only display for **Arrived** or **In Transit** requests.

The screenshot shows the 'Borrower Services' interface for Malia Kama (ID: 60215). The borrower's profile includes a photo, name, and statistics: Borrower Type (Adult), Requests Arrived (0), Items Overdue (0), Requests Pending (4), Items Out (2), and Balance (\$0.00). On the left, there are buttons for 'Check Out', 'Requests', 'Charges', 'Borrower Info', and 'Check In'. The main area displays 'Current Requests' in a table:

Title	Author	Status	Item ID
Crafts	Spritzzen, Alice.	InTransit	00001000108379
A gardening book, indoors and outdoors	Walsh, Anne Batterberry,	Pending	
Gardening hints and tips	Greenwood, Pippa	Pending	
Look at flowers / words by Rena K. Kirkpatrick ; pictures by Annabel Milne and Peter Stebbing	Kirkpatrick, Rena K.	InTransit	00049000113978

A red box highlights the 'Status' column, with an arrow pointing to it and the text 'Displays Status' below it. The interface also includes a 'Cancel Request' button at the bottom.

For statuses of **Arrived**, click the link to print the **Arrived Request Slip**. Proceed accordingly with the **Print** dialog associated with your browser

Cancel Request

To cancel a request, highlight the one you want to cancel, and then click **Cancel Request**. If required, type the appropriate **Override Password**, and then click **OK**. A notice advises the request was cancelled successfully. Please note if email notifications are configured for the borrower, a message displays advising that a cancelled request notice has been sent to the borrower's email account. Another message advises the necessary handling of the item, and if a notice has been sent regarding another borrower's request for the item.

Charges

The **Charges** option on the **Borrower Services** tab displays two sub-tabs: **Unpaid Charges** and **Payment History**. The **Unpaid Charges** sub-tab opens by default. This option only tracks how charges are tendered and should not be considered a cash drawer.

Unpaid Charges

The **Unpaid Charges** sub-tab displays the active borrower's **Balances**, unpaid **Charges**, and **Payment** options. This sub-tab allows you to accept full or partial payments, add a fee or credit to the account balance, refund credit balance, or waive all, or part of the unpaid charges. You can add or edit a comment on any of the unpaid charges. Click the link or the blank area under the

Comment column to add/edit a comment. The **Print/Email Charges** button allows you to print, email or print and email a list of current charges for the displayed borrower. Click any column header to sort the list by ascending or descending order.

Note: For multiple charges/fees the system pays off in a chronological order from oldest to newest unless specific charges have been selected.

The screenshot displays the LS2 Staff interface for a borrower named Leilani Hale. The interface includes a navigation bar at the top with options like 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The main content area shows the borrower's profile, including a photo, name, and ID (52815). Key statistics are listed: Borrower Type (Faculty), Requests Arrived (0), Items Overdue (0), Items Out (6), Requests Pending (0), and Balance (\$18.95). A 'Relationship Block' warning is also present. Below this, there are buttons for 'Check Out', 'Requests', 'Charges', 'Borrower Info', and 'Check In'. The 'Unpaid Charges' section shows a 'Balances' summary: Total Owed: \$18.95, Owed Here: \$18.95, and Total Credit: \$0.00. A 'Make Payment' section offers options: 'Pay With' (Cash selected), 'Credit Balance', and 'Waive'. The 'Selected Total' is \$0.00, and an 'Amount' input field is provided. A 'Charges' table lists items with columns for Type, Title, Due Date, Comment, Location, Post Date, and Amount Owed. The table shows three charges: COPY (\$3.00), ARNPU (\$1.00), and L (\$14.95), with a 'Total Owed' of \$18.95. Buttons for 'Add Fee' and 'Print Charges' are at the bottom.

Type	Title	Due Date	Comment	Location	Post Date	Amount Owed
<input type="checkbox"/>	COPY			Bird	5/27/2015	\$3.00
<input type="checkbox"/>	ARNPU			Bird	5/27/2015	\$1.00
<input type="checkbox"/>	L			Bird	5/27/2015	\$14.95
Total Owed						\$18.95

- Pay**

There are four payment methods used to process fines/fees: **Cash, Check, Credit Card, and Debit Card**. **Cash** is the default option. Credit and debit payments are for statistical purposes only; the actual credit and debit transactions are handled outside of **LS2 Staff**. You also have the option to use the **Credit Balance** or **Waive** the charges. By default, all of the charges are selected. Clear the check box for each item you are not paying or waiving. The amount of the selected charges displays in the **Selected Total** field.
- Pay With**

If you select a payment method from the **Pay With** drop-down list, type the dollar amount including the decimal into the **Amount** box, and then click **Pay**.

On the **Print Receipt** notice, click **Print** or **No Thanks**. If the setting is configured to print automatically, you will not be prompted with this notice. This setting can be found in **Config > Print Options**. Select the **Automatically print fine payment slip** check box.

- **Credit Balance**

If you select the **Credit Balance** payment, type the dollar amount including the decimal in the **Amount** box. Be sure the amount does not exceed the **Total Credit** field. Click **Pay**. Type or scan the **Authorized Borrower ID**, if required.

- **Waive**

If you select the **Waive** payment, type the dollar amount including the decimal in the **Amount** box, and then click **Waive**. Type the **Override Password**, if required, and then click **OK**.

- **Add Credit**

To add a credit, click **Add Credit**. Type the amount including the decimal in the **Credit Amount** box, and add a **Comment**, if desired. Click **OK**. If the setting is configured to print automatically, you will not be prompted with this notice.

Note: This setting can be found in **Config > Print Options**. Select the **Automatically print fine payment slip** check box. Modifications to the credit slip can be made in **L•S Preferences** under **Location Setup > Slips Setup > Borrower Payment Receipt**.

- **Refund Credit**

To refund a credit from the displayed borrower's **Total Credit** balance, click **Refund Credit**. Type the **Refund Amount** to be paid to the borrower including the decimal, and then click **OK**. Type or scan the **Authorized Borrower ID**, and click **OK**. If the setting is configured to print automatically, you will not be prompted with this notice.

Note: This setting can be found in **Config > Print Options**. Select the **Automatically print fine payment slip** check box.

- **Add Fee**

To add a fee, click **Add Fee**. Select the appropriate **Fee Type** from the drop-down list. Type the **Fee Amount** including the decimal. Type a **Comment** regarding the reason for the fee, and then click **OK**.

- **Print/Email Charges**

To print and/or email a list of the current charges for the displayed borrower, click the **Print/Email Charges** button.

A dialog displays the choices: **Email**, **Print**, or **Email & Print**. If you did not configure email in your system, a print dialog displays the payment slip. If you plan to print, select your printer.

If you did configure email, a soft block will display in the blocked message area of the Borrower Summary. Click on the block to confirm this borrower wants to receive check out slips via email. Selecting **No** clears the block for 6 months. Selecting **Yes** displays another message depending whether an email address is on file. If no email address exists, type the borrower's email address. This will automatically add the email address to the borrower's account under the **Basic Info** tab. If an email address already exists on file, verify and edit the email address, if necessary.

Payment History

The **Payment History** sub-tab allows you to view a detailed list of payments the borrower has paid, whether by cash, credit, or withdrawal. Waived charges are included.

Note: The **Yes** option needs to be selected under **Record Payment History** found under **Borrower Info > Settings** sub-tab.

Borrower Info

The **Borrower Info** option on the **Borrower Services** tab displays four sub-tabs: **Basic Info**, **Extra Info**, **Notifications**, and **Loan History**. The **Basic Info** sub-tab opens by default. On each of the four sub-tabs, the options to **Delete Borrower**, **Change Photo**, **New Borrower**, and **Copy Borrower Info** are available.

Basic Info

The **Basic Info** sub-tab allows you to edit the current borrower's general information. Asterisk fields are required: **Name**, **Home** (location), **Type**, **Expiration Date**, and **ID**.

The screenshot shows the 'Basic Info' sub-tab for a borrower named Leilani Hale. The interface includes a navigation bar at the top with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. Below the navigation bar, there is a header for 'Bird Circulation' with the date 'Friday, May 29, 2015 9:46 AM' and a search bar. The borrower's profile is displayed, including a photo, name 'Leilani Hale', ID '52815', and a 'Relationship Block' warning. A summary of borrower statistics is shown: Borrower Type (Faculty), Requests Arrived (0), Items Overdue (0), Requests Pending (0), Items Out (4), Resp. For (Show), and Balance (\$30.96). A sidebar on the left contains buttons for 'Check Out', 'Requests', 'Charges', 'Borrower Info', and 'Check In'. The main content area is divided into 'Basic Info' and 'Contact Info' sections. The 'Basic Info' section contains fields for Name (Last, First, Middle, Suffix, Title), Home (Bird), Type (Faculty), Exp. Date (05/20/2016), ID (52815), Alt ID, PIN, Status (Good), Gender (Female), D.O.B. (06/14/1988), Resp. for (Sophia Alana, Kekoa Iona, and Mason Johns), and a Comment field. The 'Contact Info' section includes Address 1 (123 Main St), Address 2, City (Honolulu), State (HI), Zip Code (96817), Primary Phone, Secondary Phone, Address Correction Request, Email (lhale@gmail.com), and Mobile (Verizon, (808) 521-6789). At the bottom, there are buttons for 'Save Changes', 'Cancel Changes', 'Delete Borrower', 'Change Photo', 'New Borrower', and 'Copy Borrower Info'.

Extra Info

The **Extra Info** sub-tab allows you to add information into the assigned **Custom Borrower Fields** and view the **Borrower's Maintenance Info**. Some **Custom Borrower Fields** examples might

include the borrower's schedule, a signed internet use agreement, etc.

The fields under **Borrower Maintenance Info** are system-generated and cannot be edited. You can click the **Items Lost** and **Excused Losses** link to view the related information.

The screenshot displays the LS2 Staff interface for a borrower profile. At the top, there is a navigation bar with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. A search bar is located on the right. The main content area is titled 'Leilani Hale' with ID '52815'. A 'Relationship Block' warning is visible. The borrower's details include: Borrower Type: Faculty; Requests Arrived: 0; Items Overdue: 0; Requests Pending: 0; Items Out: 4; Balance: \$30.96. The 'Extra Info' tab is selected, showing 'Custom Borrower Fields' with a 'Driver's license information' field containing 'C625188 WV' and several empty fields labeled 'Field 1' through 'Field 14'. The 'Borrower Maintenance Info' section shows: Account Created: 5/26/2015 4:03:20 PM; Last Active: 5/27/2015 3:32:57 PM; Last Active Location: Bird; Last Staff Edited: 5/27/2015 12:14:47 PM; Last Updated: 5/26/2015 4:03:20 PM; Previous ID: ; Date ID Changed: 5/26/2015 4:03:21 PM; Items Lost: 1; Excused Losses: 1; Total Check Outs: 7. At the bottom, there are buttons for 'Save Changes', 'Cancel Changes', 'Delete Borrower', 'Change Photo', 'New Borrower', and 'Copy Borrower Info'. A 'Privacy' link is in the bottom left, and the version '1.6.1' is in the bottom right.

Settings

The **Settings** sub-tab allows you to setup how you want to notify the displayed borrower regarding friendly warnings, overdue notices, final overdue notices, arrived requests notices, and cancelled requests notices by selecting **Paper**, **Email**, **Telephone**, or **Text Message**. Only one option can be selected for each notice type. Notices are automatically generated.

- **Paper** - requires your library to generate a paper report using **LS2 Reports** to produce printable notices.
- **Email** - requires your library to have an email delivery capability. The system will automatically send notices via email using the email address listed in the borrower's account. Friendly warnings can only be sent via email and have been configured to send three days prior to the item due date for all borrowers.
- **Telephone** - requires your library to have an automated telephone notification system installed, such as **Talking Tech**. The telephone notification system calls borrowers to notify them of the appropriate information. The system will automatically generate a message on the due date.

- **Text Message** - requires the borrower to provide a mobile number and associated SMS carrier. The mobile number and selected carrier are entered in the **Contact Info** area of the **Borrower Info** tab. Once configured the system will automatically send a text message via SMS using the mobile number and carrier entered in the borrower's account.

The screenshot shows the 'Borrower Info' tab for a borrower named Leilani Hale. The interface includes a navigation menu at the top with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. A search bar is located at the top right. The borrower's name 'Leilani Hale' and ID '52815' are displayed. A 'Relationship Block' warning is visible. The 'Settings' tab is active, showing a table for communication preferences.

	Paper	Email	Telephone	Text Message
Friendly Warning	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overdue Notices	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Final Overdue Notices	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arrived Request Notices	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cancelled Request Notices	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

	Paper	Email
Payment and Check Out Slips	<input type="radio"/>	<input checked="" type="radio"/>

	Yes	No
Record Payment History	<input checked="" type="radio"/>	<input type="radio"/>
Record Loan History	<input type="radio"/>	<input checked="" type="radio"/>

At the bottom of the settings section, there are buttons for 'Save Changes', 'Cancel Changes', 'Delete Borrower', and 'Change Photo'. On the right side, there are buttons for 'New Borrower' and 'Copy Borrower Info'.

You also have the option to select **Paper** or **Email** for **Payment and Check Out Slips**. **Record Payment History** or **Record Loan History** require **Yes** or **No** to display. The **Payment and Loan History** tabs displays if the history gathering features are enabled in the database. Selecting **Yes** records the payment history under the **Payment History** tab found under **Charges** and records the loan history under the **Loan History** tab found under **Borrower Info**.

Loan History

The **Loan History** sub-tab allows you to view the loan activity for the currently loaded borrower. The tab displays the **Item ID**, **Title**, and **Date Out**. Click any column header to sort the list by ascending or descending order. Click the underlined **Item ID** number to view the **Title Info** page with the **Item Details** information.

Delete Borrower

You can delete a borrower from any of the sub-tabs previously discussed. Verify you have the correct borrower displayed and check to make sure they do not have any items checked out, owe any fines, or have items on request. You cannot delete the borrower under any of those conditions. Once verified click **Delete Borrower**. A message asks if you want to delete the borrower. Click **OK**.

Change Photo

You can change the borrower's photo from any of the sub-tabs previously discussed. Verify you have the correct borrower displayed, and then click **Change Photo**.

Note: Batch loading photos can be imported into the **LS2 Staff** database using **Library•Solution > Circulation Utilities > Photo Importer**.

The screenshot shows the LS2 Staff interface for a borrower named Sophia Alana. The interface includes a navigation bar at the top with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The main content area displays the borrower's profile, including a photo, name, ID (53015), and various statistics like 'Items Out' (2) and 'Balance' (\$0.00). Below the profile is a 'Basic Info' tab with fields for Name (Last, First, Middle, Suffix, Title), Home (Bird), Type (Third grade), ID (53015), PIN, Status (Good), Gender (Female), D.O.B., Resp. Party (Leilani Hale), and Comment. There are also 'Remove' and 'Add' buttons for the comment. To the right of the 'Basic Info' tab is a 'Contact Info' section with fields for Address 1, Address 2, Address, City, State, Zip Code, Primary Phone, Secondary Phone, and Mobile. At the bottom of the form, there are buttons for 'Save Changes', 'Cancel Changes', 'Delete Borrower', and 'Change Photo'. The 'Change Photo' button is highlighted with a red box, and an arrow points to it from the text 'Click here to open the Change Borrower Photo dialog'.

After clicking **Change Photo**, the **Change Borrower Photo** dialog opens. **LS2 Staff** automatically detects whether a webcam is available. If a webcam is not available, you can still upload a photo.

The 'Change Borrower Photo' dialog box is shown. It has a title bar with a close button (X). On the left side, there is a preview of the current photo of Sophia Alana. On the right side, there are two options: 'Select photo from your device' with a 'Choose File' button and 'No file chosen' text, and 'Take photo using your webcam!' with an 'Open Webcam' button. At the bottom of the dialog, there are three buttons: 'Upload and Save', 'Remove', and 'Cancel'.

Navigate to the image file for the borrower and click **Open**. Once the photo displays on the left, click **Upload and Save**.

Note: The maximum image file size is 2 MB and only jpeg file extensions are acceptable; all other file extensions, such as .gif or .png, and/or over the limit file sizes, result in an error.

Webcam Detected

If a webcam is detected, click **Open Webcam**. Select the **Allow** option under **Adobe Flash Player Settings**. If you do not want the **Privacy** setting to display each time, select the **Remember** check box.



Position the borrower in front of the camera and then click the camera  icon. Then click **Upload and Save**. The borrower’s photo displays and opens on the **Borrower Info** option.

If you are using an iPad, users must have IOS 6.0 installed. Select **Change Photo** and then **Choose File**. You have the option to take a photo or choose an existing photo. If you take a photo, the image displays on the left side. Click **Upload and Save**. The Borrower Info tab opens with the borrower’s photo.

Remove Photo

Load the borrower whose photo you want to remove and click **Change Photo** from the **Borrower Info** option. From the **Change Borrower Photo** dialog, click **Remove**. A pop-up asks, *Are you sure you want to delete this borrower’s photo?* Click Ok to remove the photo from the borrower’s account. ‘No Image’ shows as the photo.



New Borrower

To set up a new borrower, first search for the borrower's name to be sure it is not already in your system. If you do not find the borrower in your search, click **New Borrower** from the **Borrower Search** results page, or from the **Basic Info** sub-tab under **Borrower Info**.

Borrower Search

kealoha Smart Search

Home Location Only My Logon Locations All Locations

2 Borrowers Found

Name	Borr. ID	Home	Phone	Type	Address	Birth Date
Kealoha, Alina	60413	Bird		Fifth grade		
Kealoha, Kai	60315	Bird		Sixth grade		

If name is not found, click New Borrower to open Borrower Info option

Select Borrower New Borrower

Required fields w/asterisk: **Name**, **Home** (location), **Type**, **Expiration Date**, and **ID**. Other optional fields: **Alternate ID**, **PIN**, **Status**, **Gender**, **Date of Birth**, **Responsible Party**, **Comment**, **Address**, **Phone numbers**, **Email** and **Carrier**.

Click **Save** after entering your information.

Copy Borrower Info

Copy Borrower Info offers a quick way to copy borrower information to a new borrower. Load the borrower whose information you want to copy. On the **Borrower Info** option, click **Copy Borrower Info**. The **Copy Borrower Info from [selected borrower]** opens with pre-populated and pre-selected fields.

The screenshot shows a web interface for copying borrower information. The main form is titled "Copy Borrower Info from Leilani Hale" and includes the following fields and options:

- Name:** First, Middle, Last * (with a dropdown showing "Hale").
- Primary ID ***: Text input field.
- Pin:** Text input field.
- Issuing Location *:** Dropdown menu with "Bird" selected.
- Borrower Type *:** Dropdown menu with "Select" selected.
- Expiration Date *:** Date picker showing "05/23/2016".
- Email:** Text input field with "lhale@gmail.com" selected.
- Mobile:** Text input field with "Verizon" selected and "(808) 521-6789" entered.
- D.O.B.:** Date picker.
- Gender:** Dropdown menu with "Select" selected.

Below the form, there are several checkboxes and a notification settings table:

- Leilani Hale is responsible for this borrower
- This borrower lives at 123 Main St
- Notifications will use Leilani Hale's settings

The notification settings table is as follows:

Friendly Warning	Email
Overdue Notices	Email
Final Overdue Notices	Email
Arrived Request Notices	Email
Cancelled Request Notices	Email
Looking for other fields?	other

At the bottom of the form, there are buttons for "Save and Add Another" and "Save and Close".

Keep the pre-selected check boxes for the fields you want to copy; otherwise, clear the check boxes and edit the fields. Hovering over the underlined areas displays a pop-up of related information. Clear the check boxes for responsible party and/or address if you do not want to use the same information. If the *[name] is responsible for this borrower* check box is cleared, the notifications revert to the default settings for the *Issuing Location*. You need to manually modify the notification settings under the **Borrower Info > Settings** tab, if necessary.

Click **Save and Add Another** to open a new **Copy Borrower Info from [selected borrower]**. An area on the right slides out to display the newly added borrower(s) and the form is ready to copy the information for a new borrower.

Click **Save and Close** if you are finished copying the borrower's information. The form closes and opens to the selected borrowers **Borrower Info** option.

Responsible Party

To add a responsible party to the displayed borrower's account, click **Choose**.

The screenshot displays the library system interface for managing borrower information. The borrower's name is Alika Kealoha, ID 60413. The interface includes a navigation menu, a borrower summary area, and a detailed form for managing borrower information. A red box highlights the 'Choose' button in the 'Resp. Party' section, with an arrow pointing to it and the text 'Click Choose to add Resp Party for this borrower'.

Borrower Summary:

- Borrower Name: Alika Kealoha (ID: 60413)
- Borrower Type: [Fifth grade](#)
- Requests Arrived: 0
- Items Overdue: 0
- Requests Pending: 0
- Items Out: 0
- Balance: \$0.00

Form Fields:

- Name:** Last * (Kealoha), First (Alika), Middle, Suffix, Title
- Home *:** Bird
- Type *:** Fifth grade
- Exp. Date *:** 05/23/2016
- ID *:** 60413
- Alt ID:**
- PIN:**
- Status:** Good
- Gender:** Male
- D.O.B.:**
- Resp. Party:** Choose (highlighted), Add
- Comment:**

Contact Info:

- Address 1, Address 2, Address
- City, State, Zip Code
- Primary Phone, Secondary Phone
- Address Correction Request (checkbox)
- Email, Mobile (Select Carrier)

Buttons: Check Out (F2), Requests (F6), Changes, Borrower Info, Check In (F3), Save Changes, Cancel Changes, Delete Borrower, Change Photo, New Borrower, Copy Borrower Info.

Search for the borrower who will act as the responsible party and click the borrower's name. The **Choose** button changes to **Remove**, and the responsible party name displays to the left. The responsible party also displays in the borrower summary area at the top. Click **Remove** from the **Borrower Info** screen to delete the Resp. Party.

On the responsible party account, a **Show** link displays. Click **Show** to display the names/photos of any responsible party the borrower is responsible for.

The screenshot displays the 'Borrower Services' tab for a user named Leilani Hale. The interface includes a navigation bar with 'Borrower Services', 'Staff Services', and 'Lists & Actions'. The borrower's profile shows a photo, name, ID (52815), and a 'Relationship Block' warning. Statistics include Borrower Type (Faculty), Items Overdue (0), Items Out (4), and Balance (\$30.96). A 'Check Out Items' table lists items with columns for Item ID, Title, Author, Call #, Check Out Date, Due Date, and Fines. A 'Responsible Party' pop-up window shows four photos of individuals: Leilani Hale, Sophia Alana, Kekoa Iona, and Mason Johns, with the text 'Leilani Hale is responsible for:'.

Item ID	Title	Author	Call #	Check Out Date	Due Date	Fines
30027000123593	Quick-but-great science fair projects	Levine, Shar,	507.8 LEV	5/27/2015	6/3/2015	\$0.00
30076000269262	Geography five themes for planet Earth	VT 910		5/27/2015	6/26/2015	\$0.00
30050000153550	Everything you need to know about	Zeman, Anne,	Teacher	5/27/2015	6/26/2015	\$0.00
30004000126462	Best of physics from Science teacher's	530 Sci		5/27/2015	6/26/2015	\$0.00

Check In

The **Check In** option on the **Borrower Services** tab (F3) allows you to check in items returned by a borrower. The current date is used as the check in date, but if you want to alter the date, the **Change Check In Date** feature is available. The **Check In** option does not require a borrower's account to be loaded before performing a check in.

The screenshot shows the 'Check In' interface of a library system. The interface includes a navigation menu on the left with buttons for 'Check Out', 'Requests', 'Charges', 'Borrower Info', and 'Check In'. The main area is titled 'Check In' and has radio buttons for 'Normal', 'In-House Use', and 'Special Status'. Below these is a search box and a 'Change Check In Date' button. A table displays a list of items with columns for Item ID, Title, Borrower, Call #, Holdings, Due Date, Check In Date, and Action. The table contains three rows of data for Star Wars items. At the bottom, there is a 'Clear Check In List' button.

Item ID	Title	Borrower	Call #	Holdings	Due Date	Check In Date	Action
30077000139149	Star wars return of	Iona Keay	791.43	0077NF	5/28/2015	6/2/2015 7:50:44 AM	🚫
30065000132693	Star Wars - The	Iona Keay	F Wat	0065FIC	5/28/2015	6/2/2015 7:50:16 AM	🚫
30034000124951	The ultimate LEGO	Johns, Mason	688.7 Ult	0034NF	6/3/2015	6/2/2015 7:49:51 AM	🚫
30050000153550	Everything you	Hale, Leilani	Teacher	0050PRO	6/26/2015	6/2/2015 7:49:18 AM	🚫

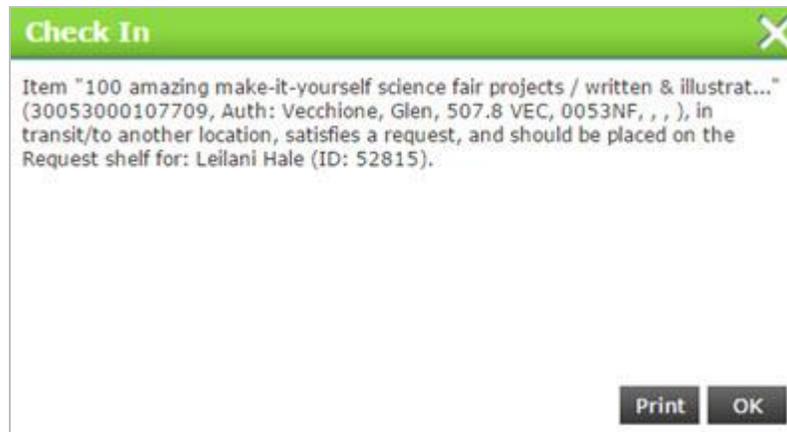
Check In also provides an option to perform an **In-House Use** check in. This option allows you to record a borrower's use of items in the library, or "in house". These items were not checked out. Statistics will be recorded in the database for items checked in using this option.

You can also check in an item and assign a **Special Status**. The standard options are: **Lost: Staff Action, Lost, Missing: Staff Action, Missing, and Damaged**.

Normal

The **Normal** option is the default. Scan or type the barcode of the item you want to check in. If enabled, you can also search for the title by typing the title or a portion of the title in the **Search** box.

If there is a check in / out note for the item, or if the checked in item requires special handling, a pop-up notice displays. When a checked in item satisfies a request, a notice displays along with a **Print** button.



The **Check In** list displays the most recently checked in items for the current day on each workstation. When the list exceeds the page space, as new items are added, the oldest entry is removed.

Click any column header to sort the list by ascending or descending order. Click the underlined **Item ID** number to view the **Title Info** page with the **Item Details** information. Click the underlined **Borrower Name** to display the borrower's account information on the **Check Out** page.

Symbols related to notices such as fines or relocation of the item, may display in the **Action** column. To view a note, click the **Alert**  symbol and the original notice that appeared during the check in displays. Clicking the **Dollar sign**  symbol opens the **Charges** page for that borrower.

If for any reason you want to clear the list of checked in items, click the **Clear Check In List** button. A message advises you are about to clear the check in list. Click **OK**.

Change Check In Date

If you want to change the check in date, you must click **Change Check In Date** prior to checking in any items. A calendar pop-up displays. Select the date you want to use. The date appears in red. Select the *Leave On* check box if you are checking in multiple items. Click **Cancel Date** to return to the current date.

Item ID	Title	Borrower	Call #	Holdings	Due Date	Check In Date	Action
30001000196826	Tennessee		812 Wil	0001NF		6/10/2015 1:59:03 PM	
30001000112021	Summer snow		F Lev	0001FIC		6/10/2015 1:58:23 PM	
30035000175505	Gardening ...		635 Fen	0001REF		6/9/2015 11:59:00 PM	

In-House Use

Select the **In-House Use** option if you want to record a borrower's use of items not physically checked out in the library. Statistics recorded in the database for items checked in with this option are retained by running the **Items with In-House Usage** in **LS2 Reports**. **In-House Use Check In**

displays in red to the right of the **Search** button. This option will remain on until you select **Normal**. Scan or type the barcode of the items you want to be in-house usage.

Special Status

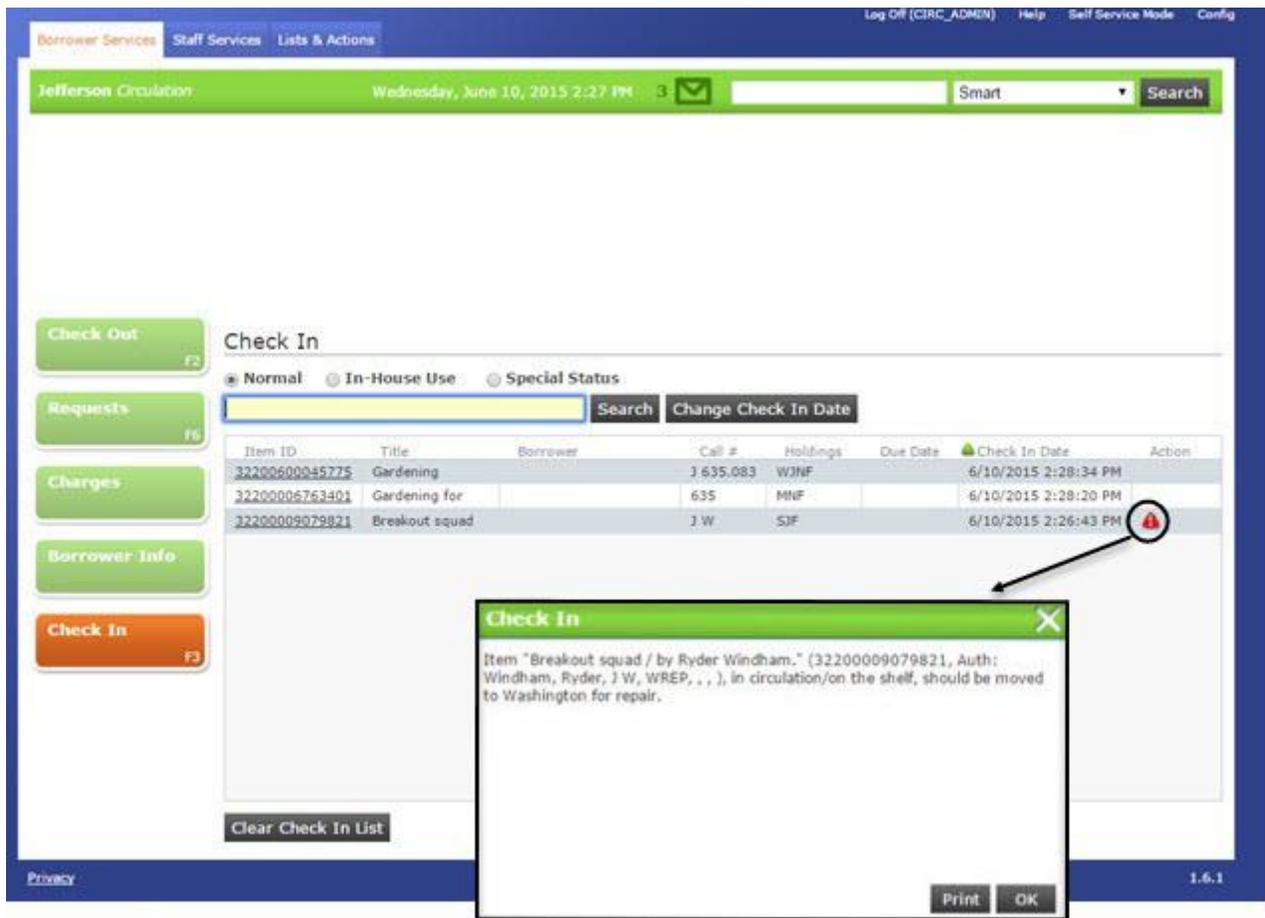
Select **Special Status** if you need to check in an item that has been lost, missing or damaged. Select the check box and then scan or type the barcode of the item you are checking in. If you are checking in multiple items with a **Special Status**, then select the **Leave On** check box. After scanning the item or typing the title the Select Special Status dialog displays.

Select the reason for the special status from the drop-down list and click **OK**. Your selections present different dialogs to be completed. For Lost items change the **Charge Amount** and add a

Charge Comment, if necessary.

If you select the **Missing** option and the item is needed to fill a request, a **Request Replacement** dialog displays. Choosing the **User selects item to fill request** option requires you to type a specific barcode into the field.

Selecting the **Damaged** option allows you to edit the item's condition and send to the repair location, if needed. If you select the **Send to Repair Location** check box, a message advises you to move the item to your repair location and an **Alert**  symbol displays in the **Action** column for the item. You must have the appropriate **Repair HoldingsCode** setting selected in **L•S Preferences** under **Location Setup > Miscellaneous** in order to be able to temporarily assign that item to a new collection.



The screenshot shows a library system interface with a 'Check In' dialog box open. The dialog box contains the following text:

Check In

Item "Breakout squad / by Ryder Windham." (32200009079821, Auth: Windham, Ryder, J W, WREP, , ,), in circulation/on the shelf, should be moved to Washington for repair.

The dialog box has a green header with a close button (X) and buttons for 'Print' and 'OK' at the bottom. An arrow points from the 'Alert' icon in the table below to the dialog box.

Item ID	Title	Borrower	Call #	Holdings	Due Date	Check In Date	Action
32200600045775	Gardening		J 635.083	WJNF		6/10/2015 2:28:34 PM	
32200006763401	Gardening for		635	MNF		6/10/2015 2:28:20 PM	
32200009079821	Breakout squad	J W		SJF		6/10/2015 2:26:43 PM	

Section 3

Staff Services

Learning Objectives

After completing this section, you will be able to:

- Search existing titles and items
- Add, edit, and delete titles and items
- View the **Requests Queue** for the displayed title
- Add and remove subject headings
- View general and cancelled requests messages
- Group collections
- Mark items as missing
- Export and print all messages
- Delete messages
- Print and cancel items on the **Requests Shelf**
- Transfer items from one collection and/or location to another
- Upload and merge files of externally supplied cataloging records into your **LS2 Staff** cataloging records database

Getting Started

The **Staff Services** tab allows you to manage non-borrower related circulation activity. Some options include adding, editing, and deleting titles and items, viewing system messages, compiling and picking early bookings, viewing the **Requests Shelf**, transferring items, and uploading and merging externally supplied cataloging records.

Titles & Items

Under the **Titles & Items** option on the **Staff Services** tab you can add, edit and delete titles and items, view the MARC record, add a check in / check out note, and view the **Requests Queue**. You can also add, edit, and delete standard numbers and subject headings. Quickly access **Titles & Items** by pressing **F4**.

Search Titles and Items

Search existing titles and items by scanning or typing the barcode, or by typing the title. By default, the **Smart** option searches for **Title** and **Item ID**.

You can also use other **Search** types such as **Author, Subject, Publisher, ISBN, Dewey, ISSN, LCCN, Control Num., Other Stand., Music Pub., LC Call, Local Call** or **GOP/SuDoc** by typing a search term in the **Search Titles and Items** box and using the **Smart** drop-down list. After making your selection, click **Search**.

Your search results display. You can expand or refine your results by selecting/clearing the **Home Location Only** check box. Clearing this check box will include results from all locations. Click any column header to sort the list by ascending or descending order. Click the title after locating the one you want.

Add New OTF

If you need to add a title to the catalog, and an existing title already displays, clicking **Add New Title** opens a blank *Add New OTF* form. You can also begin completing the information on the **Add New OTF** page.

You must complete the fields shown with an asterisk: **Title, Format, Type, Item ID, and Owned By Location** and **Collection** in order to save the new title. All other fields are optional. Here are tips for completing the fields:

- **Author:** Type last name, followed by first name. There is a limit of up to 50 characters.
- **ISBN, ISSN, UPC:** Type the appropriate number of digits; ISBN (10 or 13 digits), ISSN (8 digits) and UPC (12 digits).
- **Item ID:** Type the unique identifier for this item, which is generally a barcode number. The search is case-sensitive if using alphabetic characters.
- **Owned By Location / Collection:** Select the owning library and the collection code from the drop-down list. The appropriate **Holdings** will display.
- **Circulated By:** If another location is circulating the item, select this check box. Select the **Location** and **Collection** from the drop-down list. The appropriate **Holdings** will display.
- **Call Number:** In the **Prefix** field, only type a prefix if the title is a Dewey or LC call number. Do not type a prefix for non-standard call numbers.
- **Price:** Include the decimal but the dollar sign is not necessary.
- **Show:** If you add a **Note** and select the **Show** check box, an alert displays when this title is checked in or out.
- **User Defined Fields:** These fields, prior to the initial implementation of your database by TLC, are generally configured; however, they can be configured later if needed. Contact the TLC Support Department if you want to setup these fields.

When you are finished, select the appropriate save option. Choose **Save and Check In OTF** if you want to check in the item for this location. Choose **Save OTF In Transit** if this item is going to another location.

The **Add New OTF** page closes and the new title displays on the **Title Info** sub-tab including the **Control #** along with the prefix OTF. Please note your library might have a different OTF prefix. The prefix indicates Circulation owns the title. To save the title as a 'permanent' record, you must add subjects.

There are **Subjects, MARC Record, and Reading Level** sub-tabs.

- Click the **Subjects** sub-tab to view the subject headings for the title.
- Click the **MARC Record** sub-tab to view the **Field Description**, **Field #**, (Indicators) **I1**, **I2**, and **Field Data**.
- Click the **Reading Level** sub-tab to view the **ISBN**, **Lexile Measure**, and **Accelerated Reader** information when available.

The **Actions** drop-down list includes **View Requests Queue**, **Edit Title**, **Delete Title** and **Add/Remove Subjects**. There are symbols for **Add Item** , **Edit Item** , and **Delete Item**  buttons to the right of the **Items** section. Hover over the symbol to display a tooltip. To show only the items from the current location, click the **Local Items Only** check box.

Requests Queue

The **View Requests Queue** option under the **Actions** drop-down allows you to make changes to the **Priority** and **Pickup Location** for the currently displayed title. The **Requests Queue** displays all of the borrowers in queue for the selected title. Click any column header to sort the list by ascending or descending order. Click the borrower's **Name** to go directly to **Check Out** for the associated borrower.

To change the **Priority** and/or **Pickup Location**, select the request from the list, enabling the **Priority** and **Pickup Location** options at the bottom of the page. Using the drop-down list, make your changes, and then click **Change Priority** and/or **Change Location**. A message briefly advises whether the change was successful.

Note: You cannot change the **Pickup Location** on any arrived request.

Edit Title

The **Edit Title** option under the **Actions** drop-down allows you to edit all record types, or OTF only. You can edit any of the **Title Info** fields with the exception of the control number. This includes subfields **a**, **b**, **h**, **n**, and **p**.

In addition, you can add, edit and delete ISSNs, ISBNs or UPCs. Click the **+ Add / Show Numbers** link to display all of the associated standard numbers for the selected title. To add a standard number, select the appropriate type from the drop-down list. Type or scan the number in the box, followed by clicking the **plus** sign. The number displays in the list. Click the **minus** sign to delete the standard number from the list. Click the **Subjects** sub-tab to add and delete subject headings.

Delete Title

The **Delete Title** option under the **Actions** drop-down allows you to delete records. Make sure if the title has any associated items, they all have a status of 'available'.

An **Are You Sure?** dialog warns you are about to delete this title. Click **OK**.

Add/Remove Subjects

The **Add/Remove Subjects** option under the **Actions** drop-down allows you to add or remove subject headings. Type a subject heading in the **Search** box. You can use an asterisk (*) to

perform a keyword search; however, since this search type covers a broader range of subject headings, results may take longer to display.

A list of subject headings found in the 600-699 fields displays alphabetically, along with the **Title Use Count**. The **Title Use Count** shows in parenthesis, which represents how often the heading appears in your database. Mouse over the suggested heading to view the MARC record's tag and subfields. Be sure to check the tag and/or second indicator for each result. Although some titles may look like a duplicate, it could have different tags or indicators.

Click the **Plus**  symbol to add the subject heading to the selected record. Click the **Minus**  symbol to delete the subject heading from the selected record. For more information on how to choose from the list of subject headings, click the **Question mark**  symbol in the upper-right corner.

When you save the record, it converts to a 'permanent' record; your library's predetermined prefix, followed by the next sequential control number.

Add New Item

The **Add New Item**  option allows you to add a new item to the currently displayed title. . You can also set this permission to **Own Location Only** to limit adding items to only your logon location. First, select an **Item ID** and then click the **Add New Item** button.

The **Add Item** dialog populates with all of the information associated with the previously selected item except the barcode. Scan the barcode for the newly added item, or type an **Item ID** and use the prior Item ID's information. Proceed with making other changes, if necessary.

When you are finished, select whether the item's status should be set to **Available**, meaning ready to be shelved, or **In Processing**, meaning transfer to another location, needs spine label, etc. Next, select **Save and Add Another** to clone additional items. Click the **Clear Fields** button to clear the previously added item's information, but keep the dialog open, allowing you to enter all new item level information. Click the **Save and Close** button to save the information and close the dialog.

Edit Item

The **Edit Item**  option allows you to edit items for the currently displayed title. Select the item you want to edit from the list. Click the **Edit Item** option. Modify the fields as necessary. When you are finished, click **Save Changes**.

In the **Item Details** area, you can view information about the current item. The active collection displays on the top. If this item is checked out, you can bring up the **Current Borrower** and **Renew** the item. If an item has an **Alert** symbol in the **Holdings Code** column, hover over it to display additional information.

Delete Item

The **Delete Item**  option allows you to delete items from the currently displayed title. Select the item you want to delete from the list. Make sure the status shows 'available'. Click the **Delete Item** option. A message asks if you are sure you want to delete the item. Click **OK**. A message briefly displays the item has been deleted successfully.

Messages

The **Messages** option on the **Staff Services** tab or **F7** displays the list of general messages or cancelled requests. You can also open the **Messages** page by clicking the **Envelope**  symbol.

Two types of messages are viewable. Select the list you want to view:

- **General Messages** - copies of the notifications displayed during check in, regarding any special handling that is required of checked in items. The messages displayed may advise to transfer an item to another location, place item back on shelf, or to retrieve the item from the shelf and check in the item. Click the **Item ID** link to go to the **Title Info** page for that title.
- **Cancelled Requests** - messages generated when a borrower cancels an arrived request in their **LS2 PAC** account under **Holds**. The **Destination** column displays where the cancelled request needs to go next. There are three destinations: *Circulation* (back to the stacks), *Requests Shelf* (next borrower in line for the request) and *Location* (item needs to be transferred). The **Borrower's Name** associated with the cancelled item also displays. Click the **Item ID** link to go to the **Title Info** page for that title.

Select Item to Fill Message **Select**

3 Message(s)

General Messages
 Cancelled Requests
 [Expand Groups](#)
[Group by Collection](#)

Date	Destination	Collection	Call Number	Title	Author	Item ID	
10/2/2014	Jefferson	E	E K	Sammy's mommy has cance...	Kohlenberg, Sherry	32200006331720	
10/2/2014	Lincoln	NEW	WOODR	Small blessings / Martha Wo...	Woodroof, Martha, 1...	32200200280475	
10/3/2014	Washington	JNF	J 793.73 S	Autumn : an alphabet acrost..	Schnur, Steven	32200004102198	

Group by Collection

Collections can be grouped by clicking the **Group by Collection** button. The number of items in each collection displays in parentheses. You can toggle between two different views: **Expand Groups** and **Collapse Groups**.

Mark Missing

To mark an item as missing, highlight the row from the list. This enables **Mark Missing** at the bottom of the screen. Click **Mark Missing** and a brief message advises the item has been marked missing. If the item is needed to fill a request, a **Request Replacement** dialog displays. If you select **User selects item to fill request**, type the specific barcode into the field.



Export All

Click the **Export All** button to export the entire table to a spreadsheet. The information displays in the same order currently displayed in **LS2 Staff**. If you export the **Cancelled Requests** messages, the **Collection**, **Call Number**, and **Author** also displays.

Print All

Click the **Print All** button to print the entire list as presented in the table. If you print the **Cancelled Requests** messages, the **Collection**, **Call Number**, **Author**, **Borrower's Name**, **ID**, and **Phone Number**, if available, also displays. Proceed accordingly with the **Print** dialog associated with your browser.

Delete Messages

To delete a message click the **minus sign**  at the end of the row. A message will ask you to confirm the deletion. Click **OK**. A brief message advises the message has been deleted.

You can also clear the messages by printing the list and then pulling the items from the shelves. Scan the barcode for each item, or type the **Item ID** in the **Select Item to Fill Message** box, and then click **Select**. The message is removed from the list.

Requests Shelf

The **Requests Shelf** option on the **Staff Services** tab allows you to view all of the items currently waiting for borrower pick up at your logged in location. If a borrower requested pickup at a different location, the request does not display here. By default, the item with the earliest arrived date displays first. Sort the *Days Shelved* column to see what item is on the shelf for the most number of days.

The **Requests Shelf** page displays the **Title**, **Item ID**, **Borrower**, **Arrival Date**, **Days Shelved** and the number of **Pending** requests for the item. Click any column header to sort by ascending or descending order. Click the **Item ID** link or **Borrower** link to go to the **Title Info** page.

Requests Shelf

Title	Item ID	Borrower	Arr. Date	Days Shelved	Pending
The Frog	3008000077020	Czaja matos, Cassie Lynn	10/9/2013	0	0
All color book of mushrooms and fungi	30004000130498	Coan, Fisher	10/9/2013	0	0
The lost years	30161000146062	MARKIN, BRANDON TODD	10/9/2013	0	0
100 unforgettable moments in the Winter	30044000208639	DARLINGTON, AMBER JAMILLE	10/9/2013	0	0
The Segovia legacy	30060000283737	CATHCART, JAMIYA JOBDYNN	10/9/2013	0	0
Hans Brinker, or The silver skates	30021000103218	Puffinburger, Philip	10/9/2013	0	1
Head-on with Hurricane Camille	30032000130101	Czaja matos, Cassie Lynn	10/9/2013	0	2
Plays and sonnets	31998100015039	Inwood, Emma Elisabeth	10/9/2013	1	1
The jungle	30060000244671	MARTIN, AMBER LEE	10/9/2013	1	0
Harry Potter and the chamber of secrets	30001000100760	JOHNS HARRY ROOM 114	10/9/2013	1	0
A joke-a-day book	30007000127810	Bilbo, Jim	10/7/2013	3	0
Traffic pollution	30051000146834	Frankenstein, Frederick	9/30/2013	10	0
Images : The moon	30028000237102	PINEDA, CARMEN MANUELA	9/18/2013	22	0
The James Marshall library	30015000235079	TLC USES	8/23/2013	48	0

Cancel Request Print **Highlight the one to cancel, and then click Cancel Request. If another borrower is waiting on the title at this location, an Arrived Request Slip will display to print.**

Cancel Request

To cancel a request, highlight the title from the list and then click **Cancel Request**. The request is removed from the list. Please note, requests that have a pending (PE) status can be cancelled from the borrower's account under **Borrower Services > Requests**. If required, an **Enter Override Password** dialog will display. Type the appropriate password and click **OK**.

If the borrower has email notifications configured, a system message sent to the borrower's email account advises the cancelled request. Another system message advises the handling of the item and a notice of another borrower's request for the item.

Print

Click the **Print** button to print an *Arrived Request Slip* for the highlighted borrower. Proceed accordingly with the **Print** dialog associated with your browser.

Item Transfers

The **Item Transfers** option on the **Staff Services** tab allows you to move items easily from one collection and/or location to another. You can batch transfer items or transfer single items.

Transfer Type

Select the appropriate **Transfer Type**.

- **Change Owning Holdings Code:** Select this option and a second check box displays, **Clear Circulated By Holdings Code**. Select both check boxes to remove the currently assigned **Circulated By** holdings code when the item is transferred. Continue with

selecting the appropriate **Transfer Type**: *Assign to New Location*, *Assign to New Collection Within This Location*, or *Assign to New Location/Collection*. Select from the New Location and New Collection drop-downs

The screenshot shows the 'Item Transfers' interface. Under 'Transfer Type', the following options are listed:

- Change Owning Holdings Code
- Clear Circulated By Holdings Code
- Assign to New Location
- Assign to New Collection Within This Location
- Assign to New Location/Collection

Below these options are two drop-down menus: 'New Location' (with 'Select Location' as the current selection) and 'New Collection'.

At the bottom of the form, there is a 'Select Item' search bar, an 'Upload File' section with a 'Choose File' button and 'No file chosen' text, and an 'Upload' button.

Below the form is a 'Transferred Items' table with columns: Time, Item ID, Title, Author, New Location, and New Holdingscode.

- **Return to Home Location/Collection:** Select this option to return the item to its owning location and collection. If this option does not show, clear the **Change Owning Holdings Code** check box.

The screenshot shows the 'Item Transfers' interface. Under 'Transfer Type', the following options are listed:

- Change Owning Holdings Code
- Return to Home Location/Collection
- Assign to New Location
- Assign to New Collection Within This Location
- Assign to New Location/Collection

A message box on the right side of the form states: "This option will return the item to its owning location and collection".

The rest of the interface, including the search bar, upload section, and table, is identical to the previous screenshot.

- **Assign to New Location:** Select this option to assign an item to a new location. Select the **New Location** from the drop-down list. Select **prompt me to choose a collection each time** if you want to manually select the collection for the item being transferred to the new location. Select **automatically assign it to the following** (allows you to automatically set up the collection for the item being transferred to the new location) if the item's current collection does not exist at the new location. After you scan or search for the items, select the collection from the drop-down list, and then click **Select**.

Item Transfers

Transfer Type

- Change Owning Holdings Code
- Return to Home Location/Collection
- Assign to New Location
- Assign to New Collection Within This Location
- Assign to New Location/Collection

New Location:

If the item's current collection does not exist at the new location then:

- prompt me to choose a collection each time
- automatically assign it to the following

Select Item: Search

Upload File: No file chosen

Item Transfers | File Uploads

Transferred Items

Time	Item ID	Title	Author	New Location	New Holdingscode

- **Assign to New Collection Within This Location:** Select this option to change the circulating collection for items owned by the current location. Select the **New Collection** from the drop-down list in the right panel.

Item Transfers

Transfer Type

- Change Owning Holdings Code
- Return to Home Location/Collection
- Assign to New Location
- Assign to New Collection Within This Location
- Assign to New Location/Collection

New Location:

New Collection:

Use this option to change the circulating collection for items owned by this location

Select Item: Search

Upload File: No file chosen

Item Transfers | File Uploads

Transferred Items

Time	Item ID	Title	Author	New Location	New Holdingscode

- **Assign to New Location/Collection:** Select this option to assign an item to a new location and collection. Select the **New Location** and **New Collection** from the drop-down lists in the right panel.

Item Transfers

Transfer Type

- Change Owning Holdings Code
- Return to Home Location/Collection
- Assign to New Location
- Assign to New Collection Within This Location
- Assign to New Location/Collection

New Location:

New Collection:

Select Item: Search

Upload File: No file chosen

Item Transfers | File Uploads

Transferred Items

Time	Item ID	Title	Author	New Location	New Holdingscode

Item Transfers

After you have selected the appropriate **Transfer Type(s)**, scan or type the item barcode or type the title in the **Select Item** box to transfer single items. Choose the appropriate item ID you want to transfer. The item displays under the **Item Transfers** sub-tab. Click the **Item ID** link to view the item details. Click any column header to sort the list by ascending or descending order.

File Uploads

After you have selected the appropriate **Transfer Type(s)**, click **Browse** to batch transfer items. Locate the text (.txt) file containing the barcodes you want to transfer.

IMPORTANT: The first line in your text file must contain only the term **barcodelist**.

Select the file and then click **Open**. The file name displays in the **Upload File** box. Click **Upload**.

View the results of the batch upload by clicking the **File Uploads** sub-tab. Click any column header to sort the contents of the column. Click the underlined entry in the **Total Barcodes** column to open the **Batch Upload Results** list and then click the underlined barcode to view the title details in **Titles & Items**.

Upload & Merge

The **Upload & Merge** option on the **Staff Services** tab allows you to upload and merge files of externally supplied cataloging records into your **LS2 Staff** cataloging records database.

To **Upload and Merge** records, click the **Browse** button. Navigate to the location of the file of records you want to upload. Locate and select the desired file. The selected file name displays in the **File name** box. Click **Open**. The path to the selected file name displays in the **Please specify a file** box. Click **Send** to begin the process.

While the upload is running, a notice under **Merge Summary** advises, *A merge is currently running for this workstation. Please check back later to view the results of this merge.* The time to complete the **Upload and Merge** will vary depending upon the number of records contained in the uploaded file, and the capabilities of the system used to perform this function.

Merge Summary

When the merge is complete a notice advises the time and date of when the last merge was ran. A summary of the merge results displays: *Records added, Records merged, Records rejected, Records with no action taken* and *Total records processed*. If necessary, continue to the **Retrieve Records** options.

Retrieve Records

The **Retrieve Records** section provides options to download the original MARC file, download the rejected MARC records, view a summary of rejected MARC records, or view a list of processed records in **Merge Summary**.

- *Original MARC File*

To download the original file of MARC records, with the original file name, click the **Download** button to the right of **Original MARC file**. Depending on the browser you are using, you have choices to **Open** and/or **Save** the file.

Warning! When using this option, if you elect to save the file, the file name presented in the **Opening <filename>** dialog will be the same name as the original file you used in the **Upload and Merge**. If you want to avoid overwriting the original file, use another file name, or direct the file to another folder.

- *Rejected MARC Records*

During the **Upload and Merge** process, records are rejected for various reasons. You can download a file of just the **Rejected MARC Records** that you can open in a cataloging application to correct the problems. Click the **Download** button to the right of **Rejected MARC records**. Depending on the browser you are using, you have choices to **Open** and/or **Save** the file.

To distinguish this file from the original file, when you save it, insert in the file name a unique prefix or suffix. For example, if the original file name was "recmerge," using "err" would result in "errrecmerge" or "recmergeerr").

The file name will have an extension of **.err**. If you want to open this file in a cataloging application, you will need to rename the file, changing the file extension from **.err** to **.mrc** (or another acceptable file type, as appropriate).

- *Summary of Rejected MARC Records*

Click the **View** button to the right of **Summary of Rejected MARC records** to open a printable list of the rejected records in a separate window. Click **Print** or **Close Window**.

- *Merge Summary*

To download a file containing a list of the records processed and a statistical summary of the merge, click the **Download** button to the right of **Merge Summary**. The file extension will be **.log**. **Notepad** can be used to open this file. Depending on the browser you are using, you will be provided choices to **Open** and/or **Save** the file.

Section 4

Lists & Actions

Learning Objectives

After completing this section, you will be able to:

- Search for lists and saved searches, apply filters
- Create a new list and add items to an existing list
- Remove items, entire lists, and saved searches
- Save column settings
- Export items to a spreadsheet

Getting Started

The **Lists & Actions** tab allows you to compile and view lists and searches. Favorite uses for this option include:

- Identify lost and/or missing items
- Identify items in a specific format, series, or author
- Create lists for Lexile or Accelerated Reader Reading Programs
- Alternative to running LS2 Reports for item level info
- Ability to print a list or save a list to share with staff

You can also export, add and delete items, and create new lists and searches.

This option is a powerful ad hoc tool for item level information and different from **LS2 Reports**. It does not have the parameters for any borrower statistics.

Lists & Searches

Lists & Searches on the **Lists & Actions** tab allows you to view lists and saved searches you compiled under **Lists & Actions > Items**. You can export your items to a spreadsheet in .csv format, create a new list, add items to a list, remove items or lists/searches, share lists, and save column settings.

Search for a List or Saved Search

Search existing lists and saved searches by typing the name into the field box. Typing at least three characters starts to populate the list of saved searches and lists. Highlight the name you want to display, and then click to load the associated items.

Jefferson Circulation Monday, June 01, 2015 8:50 AM 3

Lists & Searches

Search for a List or Saved Search | Or [Browse Lists and Searches](#)

Name: | Type: Shared:

Description: | Creator:

Type your list or saved search name here

0 Item(s)

Item ID	Location	Title	Author	Format	Status	Overdue...

Actions +

Privacy 1.6.1

Browse Lists and Searches

Click the **Browse Lists and Searches** link to view all of the lists and saved searches. The **My Lists & Searches** check box, selected by default, displays only lists you created. Click the **Shared Lists & Searches** check box to view all of the lists and saved searches. Lists, shown by the list  icon, display an **Item count** since they are static. Searches, designated by the search  icon, display **N/A** for **Item count** since the search updates each time it is loaded. A green check mark  displays in the **Shared** column if the list is a shared list. Click the name of the list or search.

Browse Lists and Searches

My Lists & Searches Shared Lists & Searches ← Select to view ALL Shared

Type	Name	Description	Item count	Shared
	All Clancy	all Clancy titles all locations	N/A	<input checked="" type="checkbox"/>
	Call Numbers H 133 - H 154	All Call Numbers for Bird	9	<input type="checkbox"/>
	Clancy copy count	Hunt for Red October	15	<input type="checkbox"/>
	Dr Seuss Project	2 titles being used in Project	12	<input checked="" type="checkbox"/>
	Lost Harry Potter	All Lost items for Harry Potter	N/A	<input type="checkbox"/>

Icon shows whether list or search

N/A = search, # = list, checked if shared

Cancel

Results

The list loads with its related items. Saved searches display breadcrumbs below the **Description**. Hover over the breadcrumbs to view the searching parameters.

- Click any column header to sort the list in ascending or descending order.
- Right-click on any column header to hide columns.
- Rearrange the columns by dragging the header or to re-size the column, drag the column borders.
- Click the **Item ID** link to open **Staff Services > Titles & Items** for the selected ID.

Changes made to the column sequence are only applicable during the current log on session. Click **Edit Properties** to update the list/search name and its description, column layout, sort order or to share or un-share the list or search.

Actions

Actions drop-down list options: *Export Items*, *Create New List*, *Add Items To List*, and *Remove Items*. Before choosing any of the options, select the individual check boxes or to select all items, click the check box in the header.

- *Export Items* - Select **Export Items** if you want to export your items into a spreadsheet in .csv format. Depending on your browser, you have the option to **Open** and/or **Save** the file.
- *Create New List* - Select **Create New List** if you want to save the items in a new list. Type a **Name** and **Description**. Click the check box(es) if you want to save any column heading modifications, save sort order or share list or search with others. Click **Save**.
- *Add Items To List* - Select **Add Items To List** if you want to add the items to an existing list. Select the name of the list and then click **Add**.
- *Remove Items* - Select **Remove Items** if you want to remove specific items from the list. You cannot remove items from a saved search, or from a shared list for which you are not the creator.

Delete

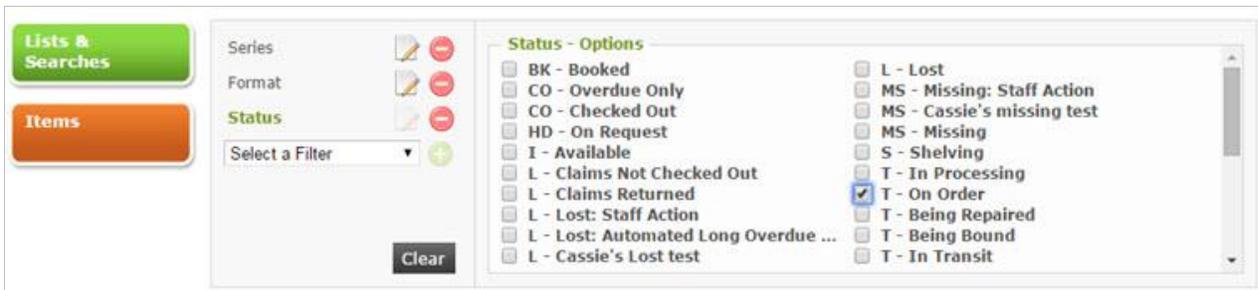
To delete an entire list or search, click **Delete**. You are not deleting the actual items from your database, only the list or search you created.

Items

Items on the **Lists & Actions** tab allows you to apply filters to use in a search. You can export your items into a spreadsheet in .csv format, create a new list, add items to a list, remove items or lists/searches, share list, and save column settings.

Search Options

Using the **Items** option, from the **Select a Filter** drop-down list, choose a filter. Click the **Add**  icon and select the parameters you want to use from the right panel. Repeat these steps for each additional filter you want to add. You can have a maximum of five filters.



After applying all of your filters, click **Search**. From your search results you can select items to create a new list, or add items to the list using the Actions drop-down options.

The screenshot shows the 'Lists & Actions' section of a library catalog. The breadcrumb trail is 'Bird Circulation > Monday, June 08, 2015 1:56 PM'. The 'Format' filter is selected, showing 262 items. The 'Format - Options' panel includes checkboxes for 'Generic Formats', 'Specific Formats', 'Archival/Mixed Materials', 'Artifact', 'Book', 'Cartographic Materials', 'Electronic Resource', 'Generic Microform', and 'Generic Musical Sound Recording'. The 'Book' option is checked. The table below lists items with columns for Item ID, Location, Title, Author, Format, Status, and Overdue.

Item ID	Location	Title	Author	Format	Status	Overdue...
20063500166456	Bailey Bridge	Star wars : the last command / ...	Zahn, Timothy		Available	
20063500123879	Bailey Bridge	Prophets of the dark side / by F...	Dauids, Paul,		Checked Out	Overdue
20063500149779	Bailey Bridge	Star wars : a new hope / by Geo...	Lucas, George, Ph. D.		Missing	
20063500123838	Bailey Bridge	The glove of Darth Vader / by Pa...	Dauids, Paul,		Checked Out	Overdue
20063500224016	Bailey Bridge	Star wars : tales from the Mos E...	Anderson, Kevin J., ed.		In Transit	
20063500123846	Bailey Bridge	Mission from Mount Yoda / by P...	Dauids, Paul,		Available	
20063500166469	Bailey Bridge	Star wars : Dark force rising / Ti...	Zahn, Timothy		Available	
20063500162158	Bailey Bridge	Star wars : truce at Bakura / by ...	Tyers, Kathy		Available	
20063500129280	Bailey Bridge	Star wars : the empire strikes b...	Glut, Donald F.		Available	
20063500123853	Bailey Bridge	Zorba the Hutt's revenge / by Pa...	Dauids, Paul,		Checked Out	Overdue
2000000353171	Bellwood	The phantom menace.	Wrede, Patricia C.		Available	
20066000114152	Bellwood	The glove of Darth Vader.	Dauids, Paul,		Checked Out	Overdue
20066000114152	Bellwood	The Phantom Menace	Wrede, Patricia		Checked Out	Overdue

The 'Actions' menu is open, showing options: 'Export Items', 'Create New List', and 'Add Items To List'. The version number '1.6.1' is visible in the bottom right corner.

Results

Breadcrumbs display the filters used. Hover over the breadcrumbs to view the searching parameters. Below the breadcrumbs is a count of the total number of results.

Click any column header to sort the list in ascending or descending order. Right-click on any column header to hide columns. You can rearrange the columns by dragging the header or to resize the column, drag the column borders. Click the **Item ID** link to open **Staff Services > Titles & Items** for the selected ID.

Click the **Edit**  icon to modify the options for that specific filter. Click the **Remove** sign  if you want to remove an individual filter. Click **Clear** to remove all of the filters.

Actions

From the **Actions** drop-down list, there are three options: *Export Items*, *Create New List*, and *Add Items To List*. Before choosing any of the options, select the individual check boxes, or to select all items click the check box in the header.

- *Export Items* - Select **Export Items** if you want to export your items into a spreadsheet in .csv format. Depending on your browser, you will have the option to **Open** and/or **Save** the file.

- *Create New List* - Select **Create New List** if you want to save the items in a new list. Type a **Name** and **Description**. Click the check box(es) if you want to save any column header modifications, save sort order or share list with others. Click **Save**.
- *Add Items To List* - Select **Add Items To List** if you want to add items to an existing list. Select the name of the list and then click **Add**.

Save Search

Click **Save Search** to save your selected search filters. Type the **Name** and **Description** of the search. Select whether you want to save the column layout, sort order, or to share the saved search. You can locate your saved searches and lists under **Lists & Searches**.

Last modified: 06/18/2015