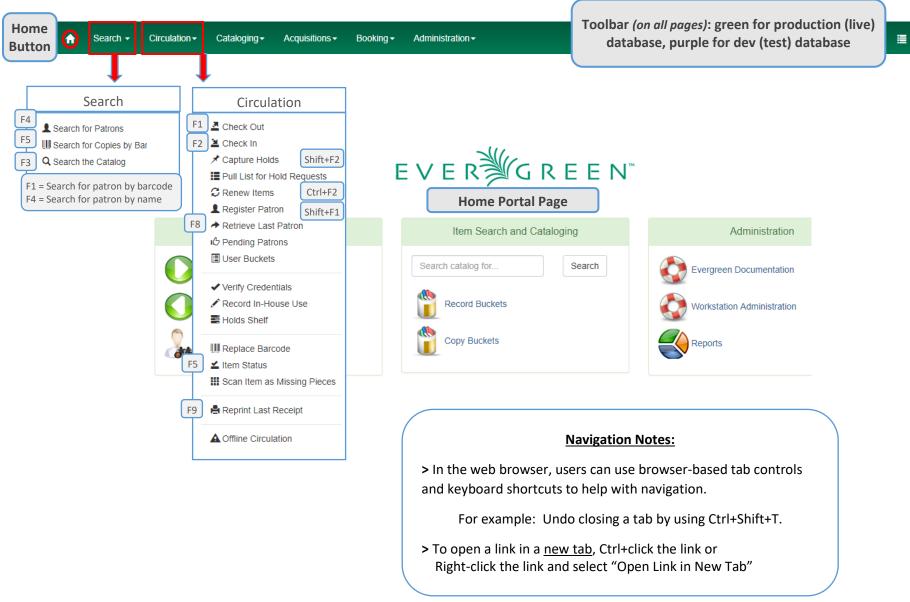
HOME SCREEN & TOOLBAR

In the web staff client, you can navigate using various methods including: Links found on the Home Page, Drop-Down Menus on the Toolbar, and Keyboard Shortcuts. You can always navigate back to the Home Portal page, by clicking on the little house on the upper left of the screen.



COLUMN CONFIGURATION

From many screens and lists, you can click on the column picker drop-down menu to change which columns are displayed. There are 3 components to column management using the column picker:

- Hide or Show a Column
- Order of Columns
- Column Width

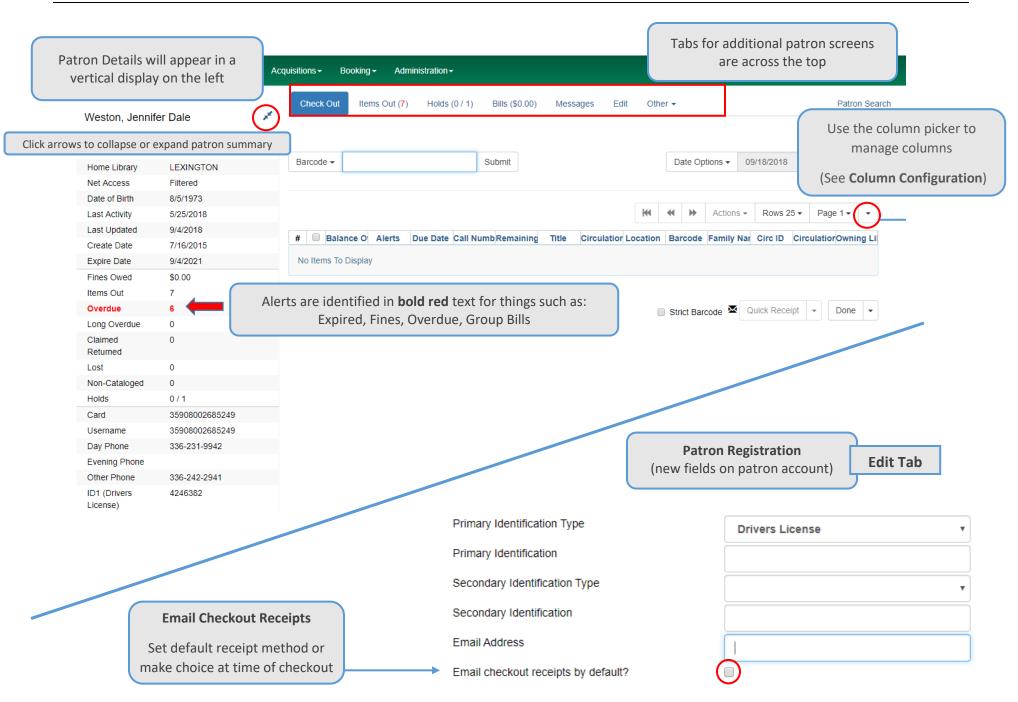
Item Statu	s									•	• •	Actions - Rows 25 - Page 1 -	
#	Barcode		Ow	ning Librar	у		Call Number	Title	A	Author		✤ Manage Columns	^
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.	Location	1	+	±	±	0	the v	vidth of the column	IS.			name in the menu.	
×	Copy Status	+	+	<u></u>	±	0							
×	Alerts	1	+	±	±	0			/				
×	Alert Message	1	+	±	±	0		Note: After cus	tomizing the di	isplay.			
×	Due Date	1	+	±	±	0			-				
	· ···· - ·							save your ch	anges by choos	sing			
4								Save	e Columns				

PATRON SEARCH

- Click Search For Patron By Name on the home page or select Search → Search for Patrons or (F4)
- Click on the Show More Fields button for additional search options. (Click on it again to Show Fewer Fields)

	Check Ou	tt Items Out Holds	Bills Messages E	Edit Other 👻		Patron Search
	Last Name	First Name	Middle Name	Search	Clear Form O	Click arrow to show more fields
	Last Name	First Name	Middle Name	Search	Clear Form	Additional Search Fields
	Barcode	Alias	Username	Email	Identification	Additional Search Fields
	Database	D Phone	Street 1	Street 2	City	
ſ '	State	Post Code	Profile Group 👻	CARDINAL -	Include Inactive?	Always search all of CARDINAL and Include Inactive patrons
Search by DOB	DOB Year	DOB Month	DOB Day			
•	-	search terms and cliv ron Search Results. rch Results			Change numbe of rows display	
				Use Arr	me First Name Last Nam Jennifer Weston Ows to see tron Results	Click on the patron card number to open the patron's account (remember to Right-
				(nc	limit)	click for the "Open in a new tab" option)

PATRON ACCOUNT



PATRON GROUPS

Grouping provides a convenient way to see family accounts in one place, rather than looking them up one by one. The Group Member Details screen includes any balances owed on grouped accounts.

Staff can create or add to a group by bringing up an existing patron account, going to the Edit tab and clicking the Save & Clone button. This will open a new patron registration screen that includes some of the data (such as daytime phone and address) from the existing patron account. Staff should add the new patron's information (e.g. adding a new account for a child). When the new account registration is saved, the two accounts will be automatically grouped.

Grouping Existing Patron Accounts

- 1. Open the lead (parent) account and click the Other tab in the top-right portion of the screen.
- 2. Select Group Member Details and click box next to the lead account in list.
- 3. From the Actions menu, select Move Another Patron to This Patron's Group.
- 4. Scan or enter the barcode for the patron you wish to add to the group and click OK/Continue.

Staff can ungroup accounts using the same Actions menu. Note: Children need to be manually removed from a family group when they turn 18.

	Check	Out Items	Gout (1) Ho	olds (0 / 0)	Bills (\$49.95) Messages	Edit	Other -		Patror	n Searc
		Member Det a d: \$49.95 Tot	ails tal Out: 0 Tota	I Overdue: 0		₩ ₩ ▶		Display Alert ar Notes Triggered Even Message Cente Statistical Cate Surveys Group Member	ts / Notification er gories	^{ns} Page 1 ▼	•
#		Active	Last Name	First Name	Is Group L	ead Middle Nan	ne Balanco	e Owed Ite	ms Out	Items Ov	erdue
1		Yes	Cardinal	April	Yes	D	49.95	0		1	
2		Yes	Cardinal	April	No		0	0		0	

Note: Generally, only one parent is listed as the responsible party (Group Lead Account) in a family group with children's accounts. If a library system adds more than one adult account to a group, staff should use caution to maintain patron privacy and should not share information about an adult's account with another person without permission.

CHECK OUT

Open a Patron Account.

The Check Out screen opens by default.

Scan or Enter Item Barcode(s)

When all barcodes are entered, finalize the transaction in one of the following ways:

- Click Quick Receipt to trigger the default checkout receipt option (email or print) and stay in the patron account
- Click **Done** to trigger the default checkout receipt option and close out the patron account
- Click on the arrow next to the Quick Receipt or Done buttons to select which receipt option to use, regardless of the default

Search -	Circulation -	Cataloging -	Acquisitions -	Booking -	Administration -			jenniferd @ L	.EXINGTON-ILS_Manager 🗮
		n summary for			ut (8) Holds (0 / 1)	Bills (\$0.00) N	Messages Edit	Other - Date Options - 09/18/2	Use the column picker to manage columns (See Column Configuration)
# 1 1	Due Date 0/2/2018	Barcode 259frog17	Frog	Title	Author Royston, Angela	Call Number J R	Location Easy New	Image: Market of the second	brary Owning Library LEXINGTON
	Item Alerts Add / Manage Item Alert at Check Out		Check bo Use Actio	x at beginni	Actions - Add Copy Alerts Manage Copy Alerts ng of row for item. Vn menu to Add or Alert.	Cho cho not Cho	oose Quick Re osen to receive , the printer i	Strict Barcode Quick (See Patron Account to see ceipt to print or email a re- e emails by default, the envi con will display [see below] close out the patron accou	et default Email Receipt) ceipt. If the patron has velope icon will display. If J. nt window.

CHECK IN

Click on **Check In Items** on the home page or select **Circulation** → **Check In** or (F2)

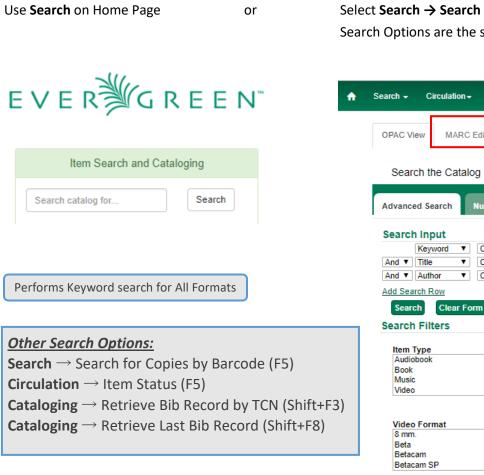
Consider the need to change the Effective Date or use a Checkin Modifier

Scan or Enter Item Barcode(s) and click **Submit**

earch +	Circulation -	Cataloging -	Acquisitions -	Booking -	Administration -					j	enniferd @ LEXING	TON-ILS_Manage
					(Checkin Item	S					
		C	an backdate i	tem during	Check In usin	ng Effective l	Date on righ	nt – red bar	will ap	pear here.		
Barcode	Barcode		Submit							Effective Dat	e 09/24/2018	-
										Use the colum	n picker to man	age columns
Item	ns Checked In								144	↔ → Acti	ons - Rows 25 -	Page 1 🗸 💽
#	Balance Owe	d Title	Start	Route To	Family Name	Checkin Date	Finish	Location	Circulat	tion ModCirculatio	n Libra Bill #	Barcode
1	\$5.00	<u>Frog</u>	6/4/2018 7:47	. THOMASVIL	. Hall	9/24/2018 4:2	9/24/2018 4:2	Easy	BOOK	THOMAS	/IL 55570213	25908004158

Overdue Fine	Check Out Items Out (1)	Holds (0 / 1)	Bills (<mark>\$5.00</mark>)	Messages	Edit	Other -
Fine Tally: \$5.00 Transaction for 25908004158692 billed: \$5.00 If there is an overdue fine associated with the checkin, an alert will appear at the top of the screen with a fine tally for the current checkin session.	Total Owed: Total Billed: Total Paid/Credited:	\$5.00 \$5.00 \$0.00	Cred	nds Available: it Available: ion Voided:		\$0.00 \$0.00 \$0.00
To immediately handle fine payment, click the alert to jump to the patron's Bill tab.	Owed for Selected: Billed for Selected: Paid/Credited for Selected:	\$0.00 \$0.00 \$0.00		ling Payment: ling Change:		\$0.00 \$0.00

CATALOG SEARCH

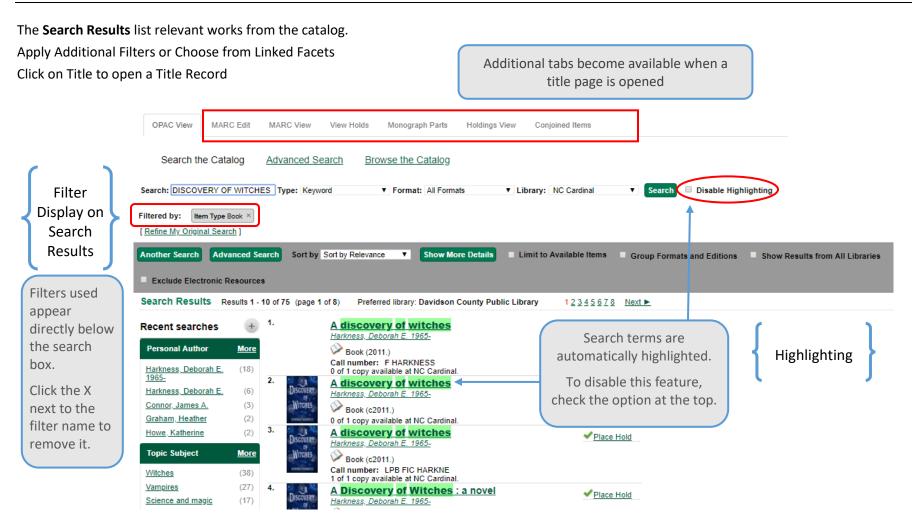


Select Search → Search the Catalog or (F3)

Search Options are the same as the old Staff Client (Advanced Options with Filters)

ch - Circulation	- Ca	ataloging - Acqui	isitions -	Additional t a tit	0.100	become ac age is open	
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earch Filters Item Type Audiobook Book Music		Braille Direct electronic Electronic		Chinese English French		Adult Age 0-5 yrs Age 14-17 yrs	*
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earch Filters Item Type Audiobook Book Music		Braille Direct electronic Electronic	•	Chinese English French	▲	Adult Age 0-5 yrs Age 14-17 yrs	↓ ▼ ion
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earch Filters Item Type Audiobook Book Music Video Video Video Format 8 mm. Beta Betacam Betacam SP	×	Braille Direct electronic Electronic Large print Bib Level Collection Serial	× • •	Chinese English French German Literary Form Comic strips Dramas Essays Fiction	×	Adult Age 0-5 yrs Age 14-17 yrs Age 6-8 yrs Shelving Locati Adult Audiobook Adult Biography	A
earch Filters Item Type Audiobook Book Music Video Video Format 8 mm. Beta Betacam	×	Braille Direct electronic Electronic Large print Bib Level Collection	* * *	Chinese English French German Literary Form Comic strips Dramas Essays		Adult Age 0-5 yrs Age 14-17 yrs Age 6-8 yrs Shelving Locati Adult Audiobook Adult Biography Adult DVD Fictio Adult DVD New	A

SEARCH RESULTS



TITLE RECORD

North Davidson Public Library

FH (Text)

Click on a title in the search results to view a detailed record of the title and its holdings.

Some of the Action Items have been transformed into new tabs on the Bibliographic/Title Record, e.g. View Holds.

25908006624436 view | edit

Record Summary										1
Title:	A discovery of witches	Edition:		TCN:	642	1581	Created By	:	admin	
Author:	Harkness, Deborah E. 1965-	Pub Date:	2011	Database I	D: 642	1581	Last Edited	I By:	hcatsupe	rt
Bib Call #:	813/.6			Record Ow	/ner:		Last Edited	I On:	4/2/2018	11:39 AM
Start Previous Ne	xt End Back To Results (8/75)	Addition	al tabs are active	e on title page		4	Add Copies	Serials 🗸 🛛 🛚	Mark for: -	Other Actions: -
OPAC View MARC E	dit MARC View View Holds Mon	ograph Parts Holdings View	Conjoined Items							
										Set default
Search: DISCOVERY OF	WITCHE Type: Keyword V For	mat: All Formats V Lit	orary: NC Cardinal	Search Al	I Libraries					
Filtered by: Item Type B	book ×									
Recent searches	Showing Item 8 of 7	5 Preferred library: Davidson	County Public Library	Previous Next	<u>></u>					
+	A discovery of witches									
Harkness, Deborah E. 19										
🥂 🖓	e 🖗 Book							<u> ✓ </u> <u></u>	lace Hold	
n NI	Available copies		Curre	nt holds						
DISCOVERY	 52 of 89 copies available at NC Ca 5 of 5 copies available at Davidson 			urrent hold with 89 total	copies.				<u>Print / Email</u> Disable Highli	<u>ghting</u>
	View other formats and editions							Clea	r AddedConte	ant Cache
WITCHES	-									
C IIIII	Book (5) English (11) E-book (1)									
* *	CD Audiobook (3)									
DEBORAH HARKNESS	Large Print Book (1)									
	- View all formats and editions (11)									
1 1				or 1.0						
Location	Call Number / Copy No		Shelving Location	Circulation Modifier	Age Hold Protection	Active/Create Date	Holdable?		Status	Due Date
Denton Public Library	FH (<u>Text</u>)	25908006105089 <u>view</u> <u>ec</u>	dit Adult Fiction	BOOK	None	01/30/2012	Copy hold / Vo	olume hold	Available	-
Lexington Public Library	FH (Text)	25908007003697 view ed	dit Adult Fiction	BOOK	None	02/18/2011	Copy hold / Vo	olume hold	Available	-

Adult Fiction

BOOK

6month

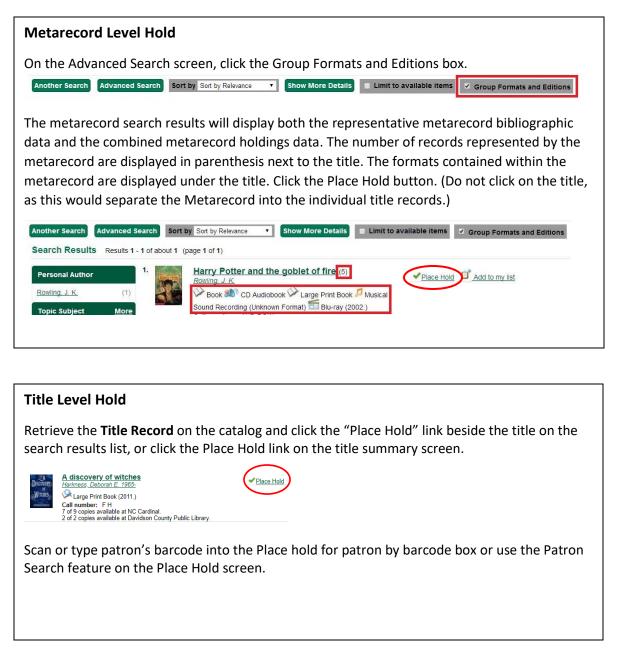
02/28/2015

Copy hold / Volume hold

Available

PLACING HOLDS

Patrons and staff should place Metarecord or Title level holds to allow for the maximum number of potential copies available to fill holds. Staff should avoid placing Volume or Copy holds unless a specific copy is required, as **only** the targeted volume/copy would ever fill the hold, even if other copies are available in the consortium.



Placing Holds in Patron Records

In the **Patron Record** on the **Holds** screen, click the "Place Hold" button.

DAVIDSON, TE	EST ADULT	*	Check Out Items Out (1) Holds (0 / 1)
Profile	Adult - 3 Yr		Open Hold Requests Recently Canceled Holds
Home Library	THOMASVILLE		
Net Access	Filtered		
Date of Birth	1/1/1970		Place Hold Detail View
Last Activity	3/6/2018		# Hold ID Hold Type Request Date
Last Updated	5/9/2018		# 0 10010 1001 1998 Request Dater
Create Date	9/18/2017		
Expire Date	9/18/2020		

The catalog is displayed in the Holds screen to search for the desired title. Search for the title and click "Place Hold"

Patron Search from Place Hold

When placing a hold for a patron who does not present their card, click on the Patron Search button to access the patron search interface.

Place Hold

Place hold for patron by barcode:

Patron Search

Use the **Patron Search** interface to find the patron.

Click the row of the desired patron account and click Select. The patron barcode will be added automatically in the hold screen.

ITEMS

Λ STATUS Item Status β	page is now found und	er Circulation →	Item Status (F5)	To access from the Barcode	Catalog/OPAC View	Select row t	Clicking on this button will togg between Detai View and List Vie
can Item	Submit OR Choose File	No file chosen		2590800610508	sview) edit	activate Actions mer	nu Detail View
m Status						A 44 PP PA	ctions + Rows 25 + Page 1 + +
Barc	code Owning Library	Call Numb	er Title	Author	Location	Copy Status	Alerts
	36 N_DAVIDSON	FH	a discovery of witches	harkness, deborah e	Adult Fiction	Available	0 Manage
2590800700369		FH	a discovery of witches		Adult Fiction	Available	0 Manage
2590800610508	89 DENTON	FH	a discovery of witches	harkness, deborah e	Adult Fiction	Available	0 Manage
Scan Item		le No file chosen					Actions- List View
Record Summary Title: Author:	(MARC) A discovery of witches Harkness, Deborah E. 1965-	Editic	on: e for view only informat	TCN: Database ID: tion Record Owner:	6421581 6421581	Created By: Last Edited By: Last Edited On:	admin ht Click arrows to
Record Summary Title: Author: Bib Call #:	(MARC) A discovery of witches Harkness, Deborah E. 1965-	Editio Tabs are available		Database ID:		Last Edited By:	admin ht 4/ Click arrows to collapse or
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Record Summary Title: Author: Bib Call #: Quick Summary Barcode Price Acquisition Cost	(MARC) A discovery of witches Harkness, Deborah E, 1965- 813/.6 Recent Circ History Circ History List 25908006624436 28.95	Edition Tabs are available Holds / Transit Catal Circ Library Owning Library Copy Location	e for view only informat loging Info Triggered Events N_DAVIDSON N_DAVIDSON Adult Fiction	Call # Prefix Call # Suffix	6421581	Last Edited By: Last Edited On: Status Due Date Checkout Date	admin ht Click arrows to collapse or expand Record Summary Available 10/18/2017 9/20/2017 12:53 PM
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EDITING ITEMS	To access from the Catalog/OPAC View
<u>Accessing the Volume/Item Editor by Barcode</u> Click Search → Search for Items by Barcode, or use Circulation→ Item Status or (F5)	Barcode
Scan or manually enter barcode. Use Actions drop down menu or Right-click on the entry in the grid and click Edit → Volumes and Items	25908006105089 view edit

Scan Item OR Choose File No file chosen Submit Detail View Item Status H 41 Actions -Page 1 🗸 👻 ows 25 🗸 Edit # Barcode Owning Library Call Number Title Author Alerts Volumes 1 25908006068436 THOMASVILLE FH a discovery of witches harkness, deborah e Manage Items Volumes and Items Drint Volume/Item Editor Edit Copy Templates Defaults Show Volume/Copy Details Hide Copy Attributes Use the column picker to Working Copies Completed Copies manage columns Store Selected Save & Exit -Apply Template -Barcode Created Activated CN Prefix Call Number CN Suffix Circulate? Status Statistical Categories ☑ 25908006... 3/9/2011 ... 3/9/2011. FH Yes O No Available Filter by Library v Circulation Library Reference? O Yes No THOMASVILLE -To Edit: Shelving Location OPAC Visible? Apply Template, if desired O No Yes Adult Fiction (CARDINAL) v or make changes to individual Circulation Modifer Price fields/attributes BOOK 28.95 ۳ Click Save & Exit Acquisition Cost Loan Duration

Normal

Circulate as Type		Deposit?	
<none></none>	•	O Yes	No

v