



## CIRCULATION TYPES

ILS allows users to customize all aspects of circulation. Each library has unique patron groups and specific circulation requirements. ILS offers a flexible environment, capable of circulating any collection in a manner tailored to each library's needs.

## ITEM CIRC TYPE

Item types are created to identify the item and set loan settings. For example, patrons could borrow DVDs for a maximum of 3 days while books could be borrowed for a maximum of 3 weeks. By creating unique item types, different circulation limits can be defined for each. Common types are book, video, magazine, and CD/DVD. A basic rule is to only create multiple item types if the loaning privileges are different.

Patron Group	Loan Limit	Max Renew	Loan Period	Grace Period	Renew Period	Hold Period
Public	5	3	4 Day(s)	1 Day(s)	4 Day(s)	2 Day(s)
Staff	5	2	2 Week(s)	2 Day(s)	14 Week(s)	2 Day(s)
Students	5	3	2 Week(s)	0 Day(s)	1 Week(s)	5 Day(s)
Team Teachers	80	50	365 Day(s)	0 Day(s)	183 Day(s)	5 Day(s)

## NEW

1. Go to **Administration > Library Setting > Circulation Types**.
2. Click **New**.
3. Enter the Name of the Item Circ Type (Example: Book, Hourly, DVD, etc).
4. **Item Default:** Check this checkbox to set this item as the default to be used when cataloging new items in Catalog > Cataloging > Find/Add Item.
5. **Serials Default:** Check to set this type as the default to be used when adding new serials.
6. **Textbook Default:** Check to set this type as the default to be used when adding new textbooks.
7. If you would like the circulation type to change automatically after a set period of time, enter the amount of days after which the circulation type will change in the **After \_\_\_ Day(s)** box. Below this, use the dropdown to select the circulation type that these items will **Change To** after the specified period of time. (Example: this function might be used when cataloguing New Books that are only lent out for 1 week, whose circulation type may change to Books after a period of time, with a loan period of 2 weeks)
8. **Delete consumable copies after \_\_\_ days from Check out date:** Check to enable this setting where a consumable copy will be automatically deleted after a specified number of days from the check out date.
9. **Resource Manager Only:** Check to only show this item circulation type for Resource Manager sites.



10. **Suppress Pre-Overdue Notices:** Check to disable notifications from going out to patrons for this item circulation type.
11. Click **Save**.
12. Repeat steps 2 through 8 for as many Item Circ Types are needed.

## PATRON CIRC TYPE

Multiple patron circulation types only need to be created if there are different loan parameters for different types of patrons. (Example: Adult and Juvenile circulation types or Staff and Student circulation types in a school setting).

Administration > Library Setting > Circulation Types

Item Circ Type: Patron Circ Type Global Circ Type Grade Mapping During Patron Import

Name: Public Global Group: Global Patron Group

Loan Limits: 35 Reserve Limits: 10 Patron Fine Limit: \$100.00

Item Fine Limit: \$100.00 Overdue Limits: 10 Damage Limits: 10

Last Limits: 20  Default  Suppress Overdue Notices  No Renewal If Over Limit

Annual Reserve Limit: 0 If Annual Reserve Limit Exceeded, Charge: \$0.00 Per Reserve

Patrons can reserve from other libraries  Cops not reserve if over fine/overdue limit

Notes:

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Item Group	Loan Li.	Max. Res.	Loan Period	Grace Peri.	Renew Period	Hold Peri.	Recall Period
Books	5	3	4 Day(s)	1 Day(s)	4 Day(s)	2 Day(s)	0 Day(s)
Hourly	0	0	0	0 Day(s)	0	0 Day(s)	0 Day(s)
Kit	1	1	1 Day(s)	2 Day(s)	2 Day(s)	2 Day(s)	2 Day(s)
Laptop 2 hrs	5	1	2 Hour(s)	0 Hour(s)	0 Hour(s)	0 Hour(s)	0 Hour(s)
Magazines	2	2	7 Day(s)	2 Day(s)	7 Day(s)	2 Day(s)	0 Day(s)
Reference	0	0	0	0 Day(s)	0	0 Day(s)	0 Day(s)
Tablet	0	0	0	0 Day(s)	0	0 Day(s)	0 Day(s)
Textbooks	10	2	1 Semester	7 Day(s)	30 Day(s)	5 Day(s)	0 Day(s)
Videos	2	1	3 Day(s)	1 Day(s)	3 Day(s)	7 Day(s)	0 Day(s)

## NEW

1. Go to **Administration > Library Setting > Circulation Types**.
2. Select the Patron Circ Type tab.
3. Click **New**.
4. Enter the name for the new Patron Circ Type.
5. If these patrons will be borrowing items from other libraries in your district, select a Global Group. Global Groups are created by the district administrator. For further instructions, go to the Global Circulation Type section of the user manual.
6. **Default:** Check this checkbox to use this Patron Circ Type as the default when new patrons are added.
7. **Suppress Overdue Notice:** Check to stop overdue messages from being sent to this Patron Circ Type. Fine messages will still be sent.
8. **No Renewal If Over Limit:** Check to disable renewals for patrons who have surpassed any limit set in this window.
9. **Annual Reserve Limit { } If Annual Reserve Limit Exceeded Charge {\$} Per Reserve:** Set these values to set an annual maximum amount of reserves for this patron circulation type. If the patron exceeds the maximum number of reserves for that year, they can continue to reserve items but will be prompted about the amount charged per reserve on the Discovery Layer. In the ILS, a prompt will notify you that the patron has reached their maximum annual reserve limit.
10. **Patron can reserve from other libraries:** Check to allow patrons in this circulation type to reserve items from other libraries.



11. **Can not reserve if over fine/overdue limit:** Check to restrict patrons from reserving items if they are exceeding their fine and/or overdue items limit.
12. Specify all the parameters for this Patron Circ Type in the top of the window. These are overall loan parameters which are limits imposed on all the Item Circ Types combined. For example, even if a Patron Circ Type is allowed to take out 10 books and 10 magazines, if their overall Loan Limit is set to 15, they will only be able to take out 15 items total).
13. Click **Save**.

## GLOBAL CIRC TYPE

Global groups specify parameters used for Inter-branch lending. Every Patron Circ Type has a Global Circ Type for the system to apply the appropriate circulation parameters during Inter-branch lending.

**Tip:** Patrons groups that do not have a Global Circ Type cannot borrow books from other libraries.

Login as Admin All to create Global Circ Types. Enable Global Circ Types with the Item Circ Type as system based, not site based, click **Administration > System Setting > Custom Setting** and set "District Based" to 1.

Item Group	Loan Limit	Max. Renew	Loan Period	Grace Period	Renew Period	Hold Period
Books	3	1	7 Day(s)	1 Day(s)	7 Day(s)	1 Day(s)
Kit	5	0	1 Day(s)	0 Day(s)	1 Day(s)	0 Day(s)
Laptop 2 hrs	0	0	0	0 Day(s)	0	0 Day(s)
Magazines	1	1	7 Day(s)	1 Day(s)	7 Day(s)	1 Day(s)
Reference	0	0	0	0 Day(s)	0	0 Day(s)
Textbooks	3	2	1 Semester	14 Day(s)	1 Month(s)	1 Day(s)
Videos	1	1	3 Day(s)	1 Day(s)	1 Day(s)	1 Day(s)

## NEW

1. When logged in as **Admin All**, go to **Administration > Library Setting > Circulation Types**.
2. Select the Global Circ Type tab.
3. Click **New**.
4. Enter the name of the Global Circ Type.
5. Check the **Default** checkbox to set this global circ type as the default.
6. Click **Save**.
7. Click **Edit Grid** or double click the row.
8. Set up the loan settings in the **Loan Trap** window.
9. Click **Save**.



## MODIFYING SPECIFIC LOAN PARAMETERS

To change the loan limits for a specific Item and Patron Circ Type, you can use the lower grid in either the **Item Circ Type** or **Patron Circ Type** tabs.

Item Circ Type	Books	Notes	Default
Patron Circ	Staff		Save
Loan Limit	5		Cancel
Max Renew	2		
Loan Period	2 Week(s)		
Grace	2 Day	<input type="checkbox"/> Fixed Due Date 05/29/2017	
Renew Period	14 Week(s)	<input type="checkbox"/> Due By Closing Time	
Fine Rate	\$0.10 Day(s)	Editing History	
Hold Period	2 Day	Created Dec 12 2005 11:23:00 AM	
Recall Period	2 Day	Created By Admin All	
<input type="checkbox"/> Due Time	3:29 PM	Last Modified Jan 20 2017 06:14:00 PM	
<input checked="" type="checkbox"/> Allow Reserve From OPAC		Last Modified By School Library	

1. Go to **Administration > Library Setting > Circulation Types**.
2. Select either the Item Circ Type or Patron Circ Type tab depending on which you would like to modify.
3. Select the Item/Patron Group in the lower grid that you want to edit loan limits for.
4. Click **Edit Grid** or double click the selection.
5. Set up the loan settings in the **Loan Trap** window.
  - 5.1. **Loan Limit:** This is the maximum number of items of this type that a patron can check out at a given time. This number cannot exceed the overall loan limit set in Patron Circ Type.
  - 5.2. **Max Renew:** This is the number of times an item of this type can be renewed.
  - 5.3. **Loan Period:** This is the number of hours, days, weeks, months, years, semesters, or academic years an item belonging to this type can be checked out for.
  - 5.4. **Grace:** This is the grace period allowed for patrons for overdue items when calculating fines. Set the grace period to 0 to remove the grace period function.
  - 5.5. **Renew Period:** This is the number of hours, days, weeks, months, years, semesters, or academic years the patrons can have particular items renewed for.
  - 5.6. **Fine Rate:** The fine rate is the rate at which overdue fines are calculated for the item type.
  - 5.7. **Hold Period:** This value represents the number of days for which items will remain on reserve.
  - 5.8. **Recall Period:** This value represents the number of days set for a recall. If the item is not returned within that time frame, it will become overdue.
  - 5.9. **Due Time:** Select a time of day when items will become overdue.
  - 5.10. **Allow Reserve from OPAC:** Check this checkbox if these patrons will be able to place reserves on this type of item from the discovery layer.
  - 5.11. **Notes:** Enter any relevant notes to the circulation type in this field.
  - 5.12. **Fixed Due Date:** If you check this checkbox and fill in a date, this type of item will always be due on that date whenever it is checked out to this type of patron.
  - 5.13. **Due By Closing Time:** This checkbox will make the item overdue at closing time of the due date.
6. Click **Save**.

## GRADE MAPPING DURING PATRON IMPORT

Grade mapping assigns patron circulation types to certain grades for circulation purposes. This feature is useful for K-12 libraries where data is imported from their student information system and the school has different loan



periods for different grades. Once this feature is enabled, the system will automatically change the circulation type based on the grade in which the student is enrolled.

Grade	Circulation Type	Room Name	Circulation Type
JK		Homeroom 1	[Select a Circulation Type]
PK		Homeroom 2	[Select a Circulation Type]
Grade 1	[Select a Circulation Type]	Homeroom 3	[Select a Circulation Type]
Grade 2		Homeroom 4	[Select a Circulation Type]
Grade 3		Homeroom 5	[Select a Circulation Type]
Grade 4		Homeroom 6	[Select a Circulation Type]
Grade 5		Homeroom 7	[Select a Circulation Type]
Grade 6		Homeroom 8	[Select a Circulation Type]
Grade 7		Homeroom 9	[Select a Circulation Type]
Grade 8		Homeroom 11	[Select a Circulation Type]
Grade 9		Homeroom 10	[Select a Circulation Type]
Grade 10			
Grade 11			
Grade 12			

## EDIT

1. Go to **Administration > Library Setting > Circulation Types**.
2. Select the **Grade Mapping During Patron Import** tab.
3. Click **Edit**.
4. From the dropdown menu choose the Patron Circ Type to assign to each grade.
5. Click **Save**.