

# Circulation Management

## Circulation



 This page has been moved over to <https://support.goalexandria.com/circulation/>.


### Contents

Circulation

Actions


Check Out (.)


Enter a command or barcode


 Darla Anderson

1001  
Jones / Dibb  
No Items Checked Out  
Credit \$0.00

High Student  
Grade: 11  
Lexile Score: 1334 + SAT  
Reading Level: 10.9


  
WHS


DETAILS   LOOKUP   

 The fellowship of the ring : being the first part of ...

32039  
FIC TOL  
Available  
2 of 2 copies available.  
Unknown  
Replacement: \$20.00

Fiction  
Accelerated Reader: 6.1


  
JES


COPY LIST   STATS   LOOKUP   

Click the tabs below to expand for more information on the Actions Menu, Command Line, Current Patron, and Current Item.

## Actions Menu

### Actions Menu


 Circulation > Actions menu

The Actions  dropdown menu contains specialized circulation functions such as the Advanced Bookings and Process Pending Bookings commands.

- **Cash Drawer Balance.** Enter the cash drawer Starting Balance, Start Date, End Date, and click Continue. The report totals your payments and refunds, and includes patron barcodes, dates and descriptions of charges, total refunds and/or payments, the initial drawer balance, and the new balance.

## Circul

Last Updated





### Cash drawer balance

Enter the starting balance for the cash drawer and a date range.

**Starting Balance \***

\$ 0.00

**Start Date \*** 6/23/2022 

**End Date \*** 6/23/2022 


**CANCEL** **CONTINUE**

### Example Report:

**Cash Drawer for WHS (414)**  
2022-06-17 at 1:56 PM -- 22.1 -- demo, demo

Patron Barcode	Date	Description
<b>Cash:</b>		
1001	06/17/2022	Fee Charged; - Paid in full
1148	06/17/2022	Fee Charged; - Charge Balance: \$1.00;
<b>Cash Totals</b>		
<hr/>		
<b>Totals</b>		
Starting Balance:		0.00
Total Payments:		5.00
Total Cash:		5.00
Total Refunds:		0.00
<b>New Balance:</b>		<b>5.00</b>
<hr/>		
<b>Cash Balance:</b>		<b>5.00</b>

- **Advanced Bookings.** This will open the Advanced Bookings window, which allows you to process reservations that begin on or between two selected dates.



### Advanced bookings

Only reservations that begin within the reservation range will be processed.

**Reservation range** From  - To

**Sort Picking Lists by**

☒ Call number

☐ Patron Homeroom

☐ Patron 2nd Location

☐ Patron site

**Sort Standard Reservation Lists by**

☐ Call number

☐ Patron name

☒ Patron Homeroom

☒ Patron 2nd Location

☒ Patron site

**Format options**

**CANCEL** **PROCESS**

- **Process Pending Bookings.** This performs the Process Pending Bookings command, which checks to see if any of the unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron.

The Actions dropdown menu contains specialized circulation functions such as the Advanced Bookings and Process Pending Bookings commands.

- **Cash Drawer Balance.** If you dispense or collect cash for lost or damaged materials—i.e. refunds or payments—the Cash Drawer Balance selection helps tally your cash drawer and safeguards against loss. Provide the cash drawer Starting Balance, Start Date (date you want the report to begin), and End Date (through date that you want the report to cover) and click OK. The report totals your payments and refunds and performs all the calculations for you; results include patron barcode numbers, dates and descriptions of charges, total refunds and/or payments, the initial balance, and your new balance.

### Cash Drawer

Enter the starting balance for the cash drawer and a date range.

Starting Balance

Start Date  13

End Date  13

Cancel
OK

Example Report:

cashDrawerReport.pdf

- **Advanced Bookings.** This will open the Advanced Bookings window, which allows you to process reservations that begin on or between two selected dates.
- **Process Pending Bookings.** This performs the Process Pending Bookings command, which checks to see if any of the unavailable items have recently become available. If they have, they're automatically assigned to the requesting patron.
- **Log Out.** Allows the Librarian to log out.
- **Switch Site.** This option is only available for libraries that are a part of a Centralized Catalog. It opens the Select A Site window, which allows an operator to select which site(s) they would like to log into; however, the choices offered depend on the sites that the operator has permission to access (review the Site Access window for more information). Therefore, an operator may have access to multiple sites, but not all the sites defined in the Sites Management window. The default selection in the window is always the last site that operator logged into.

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## Command Line

### Command Line and Circulation Mode

[Circulation > Circulation Controls](#)

Select a Circulation Mode from the dropdown menu located to the left of the Command Line. The Circulation Mode field indicates which function will be implemented when patron/item barcodes are typed or scanned. Frequently used modes are Bookdrop (**B**), Check Out (**.**), Hold (**H**), and Renewal (**R**).

Check Out (.)

Enter a command or barcode

#### Command Line

The *command line*, located at the top-center of **Circulation**, is where you enter [circulation commands](#) or barcode numbers for patrons and items. If you enter *only* a barcode, the current Circulation Mode (shown to the left of the *command line*) will determine what action is performed. By default, the *command line* assumes that *text input* is a circulation command *first* and a patron/item barcode *second*.

**Override Date.** An operator-provided Override Date can appear immediately after the Command Line. The function of an override date depends on the current Circulation Mode.

#### Circulation Mode

- [Bookdrop Mode \(B\)](#)
- [Change Destination Mod \(NT\)](#)
- [Check Out \(.\)](#)
- [Lost Copies \(1\)](#)
- [Discard Mode \(DM\)](#)
- [Hold \(H\)](#)
- [Hold Copy \(HC\)](#)
- [Inventory \(I\)](#)
- [Inventory with Bookdrop \(IB\)](#)
- [Inventory Bookdrop Suppressed \(IBS\)](#)
- [Inventory Suppressed \(IS\)](#)
- [In Transit Mode \(IT\)](#)
- [Item Res Checkout \(GG\)](#)

- Patron Res Checkout (GPP)
- Reservation by Patron (GP)
- Renewal (R)
- Reservations (G)
- Reserve (J)
- Statistics (Y)
- Transfer (.X)

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Bookdrop (B)

Change Destination Mode (NT)

Check Out (.)

Lost Copies (1)

Discard Mode (DM)

Hold (H)

Hold Copy (HC)

Inventory (I)

Inventory Bookdrop (IB)

Inventory Bookdrop Suppressed (IBS)

Inventory Suppressed (IS)

In Transit Mode (IT)

Item Res Checkout (GG)

Patron Res Checkout (GPP)

Patron Reservations (GP)

Renewal (R)

Reservations (G)

Reserve (J)

Statistics (Y)

Transfer (.X)

See the full list of [Circulation Commands](#).

## Command Line

Select a Circulation Mode from the dropdown menu located to the left of the Command Line. The Circulation Mode field indicates which function will be implemented when patron/item barcodes are typed or scanned. Frequently used modes are Bookdrop (B), Check Out (.), Hold (H), and Renewal (R).

Circulation Mode

Check Out (.)

▼

Command Line

Enter a Command or Barcode

### Command Line

The *command line*, located at the top-center of **Circulation**, is where you enter [circulation commands](#) or barcode numbers for patrons and items. If you enter *only* a barcode, the current [Circulation Management](#) (shown to the left of the *command line*) will determine what action is performed. By default, the *command line* assumes that *text input* is a circulation command *first* and a patron/item barcode *second*.

**Override Date.** An operator-provided Override Date can appear immediately after the Command Line. The function of an override date depends on the current Circulation Mode.

### Circulation Mode

- **Bookdrop (B).** Used to check in items for one—or many—patrons.
- **Change Destination Mode (NT).** Note: This option is available only in Centralized Catalog systems. This changes the destination of copies whose Status is currently In Transit to somewhere else.
- **Check Out (.)** Typically used to check out library material to patrons however that depends on two things: the Check Out Options preference (which allows you to change the behavior of Check Out (.) mode), the "status" of the patron, and the item.
- **Lost Copies (1).** Used to move several copies to the Lost Copies System Patron (barcode # 1).
- **Discard Mode (DM).** Used to move several copies to the Discarded Copies System Patron and provide a note for each on why they are being discarded.
- **Hold (H).** This places a Hold on any items that are entered.


- **Hold Copy (HC).** This places a hold on a particular copy (specific item barcode) of a title for the *current* patron.
- **Inventory (I).** This updates the Inventory Date for all materials entered and triggers an alert for Circulation Exceptions.
- **Inventory Bookdrop (IB).** This updates the Inventory Date for all materials entered while simultaneously bookdropping them and triggers an alert for Circulation Exceptions.
- **Inventory Bookdrop Suppressed (IBS).** This updates the Inventory Date for all materials entered while simultaneously bookdropping them and bypasses any Circulation Exceptions alerts.
- **Inventory Suppressed (IS).** This updates the Inventory Date for each item entered and bypasses any Circulation Exceptions alerts.
- **In Transit Mode (IT).** This assigns checked out copies to the In Transit System Patron (barcode # 9). Afterward, the copy will be placed In Transit to its home library (whichever library is specified in the copy's Copy Site field).
- **Item Res Checkout (GG).** This is for checking out items that have been reserved by a patron; if the item is entered during a reservation date range it will be checked out to the patron who requested it and that patron will appear in the current patron pane.
- **Patron Res Checkout (GPP).** This checks out any reserved items a patron has if their patron barcode number is entered during the reservation date range and said item will appear in the current item pane.
- **Patron Reservations (GP).** This reserves a specific item (specific item barcode) for multiple patrons. This mode saves times when multiple patrons want to reserve the same item however it *can't* be used if there isn't a current item in the current item pane.
- **Renewal (R).** This renews currently checked out items.
- **Reservations (G).** This reserves a specified copy (specific item barcode) to the current patron for a specified date range.
- **Reserve (J).** This reserves a specified copy (specific item barcode) for the patron in the current patron pane. This mode *can't* be used if there isn't a patron in the current patron pane.
- **Transfer (.X).** This works exactly like the Check Out (.), with one exception: when the copy that is scanned is checked out to a patron other than your current patron, instead of allowing you to bookdrop the copy, the copy will be *transferred* to the current patron.

Bookdrop (B)  
Change Destination Mode (NT)  
✓ Check Out (.)  
Lost Copies (1)  
Discard Mode (DM)  
Hold (H)  
Hold Copy (HC)  
Inventory (I)  
Inventory Bookdrop (IB)  
Inventory Bookdrop Suppressed (IBS)  
Inventory Suppressed (IS)  
In Transit Mode (IT)  
Item Res Checkout (GG)  
Patron Res Checkout (GPP)  
Patron Reservations (GP)  
Renewal (R)  
Reservations (G)  
Reserve (J)  
Transfer (.X)

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## Current Patron

### Current Patron

 [Circulation > Current Patron pane](#)

To check out, hold, or reserve an item, you need to have a Current Patron pulled up in Circulation.

The Current Patron pane shows important patron information such as barcode, name, checked out items, charges, and credits, as well as their grade, Lexile score, and reading level (when set in Preferences).

**Details:** [View](#) and [email](#) or [print](#) the current patron's account details, including currently loaned items, holds, reservations, fees and other charges, and general information. You can choose whether or not to include cover art when viewing, emailing, and printing patron details.

 **Darla Anderson**

1001  
Jones / Dibb  
No Items Checked Out  
**Charges \$2.00**  
Credit \$0.00

High Student  
Grade: 11  
Lexile Score: 1334 + SAT  
Reading Level: 10.9




WHS

[DETAILS](#) [LOOKUP](#) 




Patron Details will show relevant details for Library or Textbook data, depending on which Circulation window you access it from. To view Textbook data from Librarian or vice versa, adjust your [Circulation Preferences](#).

 Use the [Circulation Command](#) QN to open the Email Patron Details dialog.

 Circulation's Patron Details is interactive! Say you want to renew an item or forgive a charge for the patron whose Details you're viewing. Simply click on that section's heading (i.e. "Items Out" or "Charge Summary") to be taken to the right place in Circulation.

Patron Details - Librarian - Washington High School 06/23/2022 3:28 PM

**Darla Anderson**

 Status: Active  
Homeroom: Jones  
2nd Location: Dibb  
Grade: 11  
Last Used: 12/03/2014

Items Out: 0  
Overdue: 0  
Holds: 0  
Reservations: 0  
Textbooks Out: 7


Lexile: 1334 + SAT  
Reading Level: 10.9

**Items Out**  
Call #Barcode Item Due Date Due

No items checked out.

**Textbooks**  
Title IDBarcode Item Due Date Due


MATH003  
100501 Algebra 2 (\$50.00) 04/26/2023

 SCI001 Chemistry: The Molecular Nature of Matter ... 04/26/2023

CLOSE ☒ COVERT ART PRINT

**Lookup:** Opens the Patron Lookup dialog, allowing you to search your database for patron records; performs the same action as using the "L" command.

### Actions Menu

- **Notes.** Available when the current patron has associated notes. Notes are provided for patrons in the Notes tabs of Patrons Management. When clicked you are also able to add notes directly to the resulting Patron Notes dialog.
- **Reserves.** Provides a list of the current patron's reserves; you can remove some or all reserves from the resulting Patron Reserves dialog.
- **History.** Runs an individual [Patron History report](#), which shows recent payments, credits, renewals, lost items, refunds, Lexile history, and returned items. The PDF will automatically download. You can also run this report by clicking **Show History** in the  **Actions** menu of **Patrons Management**.

**Patron lookup**  
Refine your search using the field below

AMS - Adams Middle School

Name	Barcode	Homeroom
Austin, Joseph	2027	Griffith
Barrera, Kiyan	2061	Artman
Barry, Preston	2041	Vaughan
Beckman, Rachel	2037	Hester
Bell, Brooke	2065	Vaughan
Benton, Danielle	2068	Miner
Blackwolf, Spencer	2067	Simon
Bodine, Max	2106	Hester
Bowling, Haley	2134	Griffith
Boxer, Jonathan	2102	Boyle
Boyle, Molly	2909	
Boyles, Jeff	2123	Jones

CANCEL SELECT

## Current Patron

**Darla Anderson**

1001 High Student

Jones / Dibb

No Items Checked Out

Lexile Score: 1334 + SAT

Reading Level: 10.9



WHS

Details Lookup 

Many Alexandria functions and commands depend on the **Current Patron** or **Current Item**. For example, you *must* have a **Current Patron** to check out, hold, or reserve an item.

The Current Patron pane consists of two areas: The larger, white area contains patron name, barcode, policy, homeroom, picture, and a short summary of the number of items checked out, on hold, reserved, with reservations, overdue, and the total fines or credits accrued; other things, such as the patron's current Lexile or Reading Level measurement, can be displayed here if you have your preferences set correctly.

The colored strip at the bottom of the pane contains buttons for **Details** and **Lookup**; the Actions menu located at the bottom-right contains identical (and some exclusive) selections.

## Details

[View](#) and [email](#) or [print](#) the current patron's account details, including currently loaned items, holds, reservations, fees and other charges, and general information. You can choose whether or not to include cover art when viewing, emailing, and printing patron details. The email button does not appear if your email settings have not been configured.



Patron Details will show relevant details for Library or Textbook data, depending on which Circulation window you access it from. To view Textbook data from Librarian or vice versa, adjust your [Circulation Preferences](#).



Circulation's Patron Details is interactive! Say you want to renew an item or forgive a charge for the patron whose Details you're viewing. Simply click on that section's heading (i.e. "Items Out" or "Charge Summary") to be taken to the right place in Circulation.

## Lookup

Opens the Patron Lookup dialog, allowing you to search your database for patron records; performs the same action as using the "L" command.



## Actions Menu

- **Notes.** Available when the current patron has associated contact, alert, categorical, or general notes. Notes are provided for patrons in the Notes tabs of Patrons Management. When clicked you are also able to add notes directly to the resulting Patron Notes dialog.
- **Reserves.** Provides a list of the current patron's reserves; you can remove some or all reserves from the resulting Patron Reserves dialog.
- **History.** Runs an individual [Patron History report](#), which shows recent payments, credits, renewals, lost items, refunds, Lexile history, and returned items. The PDF will automatically download to your device. You can also run this report by clicking **Show History** in the **Actions** menu of **Patrons Management**.

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# Current Item



Circulation > Current Item pane

The Current Item pane consists of two areas: The white area contains the copy, barcode, policy, call number, status, picture, and a short summary of available title copies. At the bottom, access the **Copy List**, **Stats**, **Lookup**, and the actions menu.

**The goose girl**

21228	Fiction	
FIC HAL	Lexile Score: 870	
Available	Accelerated Reader: 5.9	
2 of 2 copies available.		
Unknown		
Replacement: \$20.00		AMS

[COPY LIST](#)
[STATS](#)
[LOOKUP](#)


## Copy List

The Copy List shows how many copies are available, the holds queue, and lists each copy's site, location, status, and details. It can be [viewed](#) or [printed](#), and you can use the Q= command for quick access. Several parts of the Copy List are clickable:

- **Author's name.** Performs an automatic item lookup by author.
- **Open item details:** Pulls up that title's Item Details.
- **Patron names:** Makes that patron current.
- **Copy call numbers and barcodes:** Makes that copy current.

Copy List - Librarian - Adams Middle School

06/24/2022 10:27 AM



The golden compass

Pullman, Philip

Dark materials : 001

[book]

[open item details](#)

2 of 2

Copies Available

Copies from AMS

Call #Barcode	Status	Details	Copy Location
FIC PUL 21761	Available		Shelving

Off-site Copies


Call #Barcode	Status	Details	Site
FIC PUL 12018	Available		WHS

CLOSE

PRINT


## Copy Stats

See the copy's checkout count, last use date, previous checkouts, and more with [Copy Stats](#).



Copy statistics

Run on 2022-06-23 04:01 PM.



21228 - The goose girl

Lifetime checkouts: 0

Days in circulation: 0

Copy policy: Fiction

Checked out by: Available

Prior checkouts: None

CLOSE

PRINT

## Lookup

Enter your search term and then scroll through your results below. In a Centralized Catalog, select the site you want to search from the dropdown menu in the bottom left corner of the dialog.

You can also start a “begins with” search from the command line using an asterisk in the T command. For example, you would type "har\*" if you were looking for Harry Potter.





## Item lookup by title

Refine your search using the field below

AMS - Adams Middle School

dog

Title (T)	Call number (C)	Author (A)
dog called Kitty	FIC WAL	Wallace, Bill
dogs life the autobiography of a stray	FIC MAR	Martin, Ann M.
Berta a remarkable dog	FIC LOT	Lottridge, Celia B...
Bow wow meow meow its rhyming cats and ...	811 FLO	Florian, Douglas
Cam Jansen and the mystery of the television...	FIC ADL	Adler, David A.
Cracker the best dog in Vietnam	FIC KAD	Kadohata, Cynthia
Diary of a wimpy kid dog days	FIC KIN	Kinney, Jeff
Dogboy	FIC RUS	Russell, Christoph...
Draw 50 dogs	743 AME	Ames, Lee J.
Everything for a dog	FIC MAR	Martin, Ann M.
Flawed dogs the shocking raid on Westminst...	FIC BRE	Breathed, Berke
Ghost dog secrets	FIC KEH	Kehret, Peg

CANCEL

SELECT



### Actions Menu

- **Details.** Contains information about the item, including reviews, summary, links, genres, subjects, Study Programs, awards, and publisher information. It can be [viewed](#), [printed](#), or emailed. While viewing Item Details in Circulation, you can click on **open copy list** to pull up the Copy List or on the review stars to open Reviews Management. Use the QI command for quick access.
- **Notes.** Add a new note or view existing notes for the current copy. Copy Notes and Alert notes can be entered here or in [Items > Copy Records](#).
- **Reserves.** Shows if any Patron has placed a reserve on the copy.
- **Show Map.** If the current copy's call number falls within the range of a corresponding map (created in Maps Management), selecting Show Map will display the the map, detailing where the copy is located in your library. These maps can be conveniently printed from your browser and handed to interested patrons. If the current copy lacks a call number (or there is no map with an associated call number range), Show Map is disabled.
- **Vendors.** This selection opens a secondary menu containing a list of Alexandria third-party partners that, when selected, link to their respective websites. Individual vendors can be disabled in [Services Preferences](#).

## Current Item

## The battle of the Labyrinth

31860  
FIC RIO  
Available

Fiction

1 of 3 copies available.  
Unknown  
Replacement Cost: \$20.00  
Lexile Score: 590  
Accelerated Reader: 4.1

[Copy List](#)
[Copy Stats](#)
[Lookup](#)

Many Alexandria functions and commands depend on the **Current Patron** or **Current Item**. You *must* have a **Current Patron** to check out, hold, or reserve an item.

The Current Item pane consists of two areas: The white area contains the copy, barcode, policy, call number, status, picture, and a short summary of available title copies. The colored strip at the bottom of the pane contains some actions and helpful reports.

### Copy List

The Copy List shows how many copies are available, the holds queue, and lists each copy's site, location, status, and details. It can be [viewed](#) or [printed](#), and you can use the Q= command for quick access. Several parts of the Copy List are clickable:

- **Author's name.** Performs an automatic item lookup by author.
- **Open item details:** Pulls up that title's Item Details.
- **Patron names:** Makes that patron current.
- **Copy call numbers and barcodes:** Makes that copy current.


### Copy Stats

See the copy's checkout count, last use date, previous checkouts, and more with [Copy Stats](#).

### Lookup

Enter your search term and then scroll through your results below. In a Centralized Catalog, select the site you want to search from the dropdown menu in the bottom left corner of the dialog.

To perform a "begins with" search, enclose a phrase in quotation marks and an asterisk. For example, you would type "har\*" if you were looking for Harry Potter. You can also start a "begins with" search from the command line using the T command (e.g. T "har\*").



## Item Lookup

Search

Title	Call Number	Author
Harry Potter and the Chamber of Secrets Chamber of Secrets	FIC ROW	Rowling, J. K. GrandPré, Mary Rowling, J. K.
Harry Potter and the Chamber of Secrets	FIC ROW	Rowling, J. K. GrandPré, Mary GrandPre, Mary
Harry Potter and the deathly hallows	FIC ROW	Rowling, J. K. (Joanne Kat... GrandPré, Mary
Harry Potter and the deathly hallows	FIC ROW	Rowling, J. K. GrandPré, Mary Rowling, J. K.
Harry Potter and the Goblet of Fire	FIC ROW	Rowling, J. K. GrandPré, Mary
Harry Potter and the Half-Blood Prince	FIC ROW	Rowling, J. K. GrandPré, Mary GrandPre, Mary
Harry Potter and the Order of the Phoenix	FIC ROW	Rowling, J. K. (Joanne Kat... GrandPre, Mary
Harry Potter and the prisoner of Azkaban	FIC ROW	Rowling, J. K. (Joanne Kat...

COMP - COMPAnion Demonstration Library ▼
Cancel Select

## Actions Menu

- Details.** Contains information about the item, including reviews, summary, links, genres, subjects, Study Programs, awards, and publisher information. It can be [viewed](#), [printed](#), or emailed. While viewing Item Details in Circulation, you can click on **open copy list** to pull up the Copy List or on the review stars to open Reviews Management. Use the QI command for quick access.
- Notes.** Add a new note or view existing notes for the current copy. Copy Notes and Alert notes can be entered here or in [Items > Copy Records](#).
- Reserves.** A list of patrons who have the current copy reserved.
- Show Map.** If the current copy's call number falls within the range of a corresponding map (created in Maps Management), selecting Show Map will display the the map, detailing where the copy is located in your library. These maps can be conveniently printed from your browser and handed to interested patrons. If the current copy lacks a call number (or there is no map with an associated call number range), Show Map is disabled.
- Vendors.** This selection opens a secondary menu containing a list of Alexandria third-party partners that, when selected, link to their respective websites. Individual vendors can be disabled in [Services Preferences](#).

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