

Circulation

Contents

Dashboard

Circulation

- Circulation Tabs
- Circulation Videos

Textbooks

- Textbook Tabs
- Textbook Videos

Patrons

- Patron Tabs
- Patrons Videos

Operations

- Reports
- Labels
- Notices
- Utilities
- Import
- Export

Tools

- Sites
- Calendars
- Policies
- Security

Preferences

- Patron Preferences
- Textbook Preferences
- Circulation Preferences
- Codes
- Sounds Preferences
- Setup Preferences
- SIS Integration



see <https://support.goalexandria.com/circulation/>

The **Circulation** module includes a few important and distinct areas:

- Circulation toolbar on top, which includes the command line;
- [Current Patron](#) and [Current Item](#) panes in the middle;
- and the [Circulation tabs](#) at the bottom.

Circulation Preferences

System Patrons

Textbook Tracker

Dashboard

Circulation

Textbooks

Patrons

Operations

Tools

Preferences

Hi, Demo

Mia Middle School

?

Circulation

Still getting used to it? Switch to the old view.

Actions

Check Out (.)

Enter a command or barcode

Darla Anderson

1001

Jones / Dibb

8 Items, 0 Overdue

Credit \$0.00

High Student

Grade: 11

ALX

DETAILS

LOOKUP

Holt McDougal Biology

207202

SCI003

Checked out

848 of 1000

Unknown

Replacement: 50.00

Textbook

MIA

COPY LIST

STATS

LOOKUP

Circulation (TL)

Items out (QE)

Charges (F)

Command help (?)

Transaction log

Homeroom (HW)

Out	207202 'Holt McDougal Biology', to Patron: 1001	Due: Dec 1, 2023
Patron	1001 Anderson, Darla	06/02/2023 1:00 PM
Log In	9999 Demo Demo	06/02/2023 12:05 PM

Tips

Type x in the command line to clear the screen.

Read More

Actions Menu

Actions Menu

The Actions  dropdown menu is where you access the cash drawer.

- 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.

\$

Cash drawer balance

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

Starting Balance *

\$ 0.00

Start Date *

7/26/2023

End Date *

7/26/2023

CANCEL

CONTINUE

Example Report:

Cash Drawer for WHS (414)

2022-06-17 at 1:56 PM -- 22:1 -- demo, demo

Patron Barcode	Date	Description	Refunds	Pa
Cash:				
1001	06/17/2022	Fee Charged; - Paid in full		
1148	06/17/2022	Fee Charged; - Charge Balance: \$1.00;		
Cash Totals			0.00	

Totals

0.00

Starting Balance:	0.00
Total Payments:	5.00
Total Cash:	5.00
Total Refunds:	0.00
New Balance:	5.00

Cash Balance:

5.00

Command Line and Circulation Mode

Command Line and Circulation Mode

Select a circulation mode from the dropdown menu to the left of the command line. The circulation mode dropdown menu indicates which function will be implemented when patron/item barcodes are typed or scanned. Frequently used modes are Bookdrop (**B**), Check Out (**.**), and Renewal (**R**). To clear your current mode, type a period (**.**) and hit enter.

Hi, Demo
Mia Middle School




Circulation
[Still getting used to it? Switch to the old view.](#)
 **Actions**

Check Out (.)

Enter a command or barcode

Mode	Code	Usage
Bookdrop	B	Check in an items or items for one or more patrons. • If the barcode scanned was checked out, it will be checked in. • If the barcode scanned was already checked in, it will be inventoried.
Check Out	.	Check out items.
Discard Mode	DM	Move several copies to the Discarded Copies system patron and enter a note for each to explain why they are being discarded.
Inventory	I	Updates the inventory date for all items scanned to a date specified or the current date, and triggers a circulation exceptions alert for all materials entered.
Inventory Bookdrop	IB	Inventory mode with automatic bookdrop. All item barcodes scanned are inventoried as of the date specified in the inventory command, or to the current date, if no date is specified. If the item is checked out, it is automatically checked in.
Inventory Suppressed	IS	Inventory mode with suppressed dialogs, bypassing circulation exception alerts for all materials entered.
Inventory Bookdrop Suppressed	IBS	Inventory mode with automatic bookdrop and suppressed dialogs, bypassing circulation exception alerts for all materials entered. Useful in situations such as performing inventory with a wireless scanner.
In Transit Mode	IT	Assigns checked-out copies to the In Transit system patron (barcode 9). After which, the copy is placed In Transit to its home library (whichever library is specified in the copy's Copy Site field).
Renewal	R	Renew items that are currently checked out.
Transfer	.X	When you have a current patron open and the item you're scanning is already checked out to another person, the item will be transferred to the current patron instead of being checked in. Copies cannot be transferred to system patrons .
Check Out/In-Transit	CHX	Change copy locations to the new destination and place items in transit to that destination.

All Commands

The command line is where you enter a command and/or patron and item barcodes to perform a circulation action. If you enter *only* a barcode, the current command mode (to the left of the command line) determines the action to be performed. By default, command line assumes that text input is a circulation command *first* and a patron/item barcode *second*.

Title	Command	Usage
Add /Show Copy Note	++	Displays all notes for the current copy, or appends a note to the Copy Notes. ++ Has CD Appends 'Has CD' to the Copy Notes for the current copy.
Add /Show Patron Note	+	Display the Notes for the Current Patron, or appends a note to the patron General Notes. + Likes cherry gummy bears Appends 'Likes cherry gummy bears' to the patron's General Notes.
Bookdr op	B	Starts bookdrop mode. In bookdrop mode, all item barcodes scanned are checked in if they are checked out; and if they are already checked in, they are inventoried. B 3000 Bookdrops item 3000 only.

Change Barcode Number	/	Quickly change the barcode of an item or patron. Enter the old barcode and new barcode in this format: /OldBarcode=NewBarcode Textbook Tracker will update all references and then issue the new barcode to the command line. This allows you to change barcode numbers as you are checking items out, performing inventory, bookdropping items, and so on. /10029=19929 Takes the copy of barcode 10029 and assigns it the new barcode of 19929.
Change Condition Mode	CL	Enters Change Condition Mode for the specified condition. You can also simply enter the command and a list of condition codes will be shown. CL 1 Changes the condition of any scanned copies to code "1".
Charge a Fee	F FF	Opens the Charges subtab, or adds a charge for the current patron. Opens the Payments subtab. F 3.25 Book Club Adds a charge of \$3.25 with a Charge Note of 'Book Club'.
Charge Damage Fee	DL	Logs damage on the current copy and charges the current patron, according to the chosen Damage Code. You can also simply enter the command and a list of damage codes will be shown. Damage codes are managed in Preferences > Codes > Damage Codes. If a custom damage code is specified, you can edit the description and cost. DL Pen Records the charge associated with the damage code of "Pen".
Check Out	. ..	Sets Check Out mode. Sets Check Out mode without clearing override dates.
Check Out/In-Transit	CHX	Changes copy locations to the new destination and place items in transit to that destination. A packing note may be included and a batch number is automatically generated. If items that are part of a batch are book dropped, then a dialog is displayed that can allow the entire batch to be book dropped. If an item barcode for an item that is part of a batch is entered while in Check In/Check Out mode, then a dialog is shown which will allow the entire batch to be processed or for the check in to be cancelled. The BP command can be used to print a report about a batch.
Clear Due Date	.	Clears the Override Date and any special modes, and returns to Check Out mode.
Clear Transaction Log	Z	Clears the Transaction Log in the Circulation display. There is no "Undo" for this command so use it with caution. Z Back in 5 Will clear the Transaction Log and add the note "Back in 5".
Details, Patron /Item	Q	Displays Patron Details for the specified patron. If no barcode is given, the Current Patron is selected. Q 1000 Displays details for patron 1000. Q Displays details for the Current Patron.
Enter Barcode Range	RG	Brings up the Barcode Range window which will allow you to enter a range of barcodes to process in the current mode. For example, if you are in inventory mode when using this command, the range of barcodes you entered will be inventoried. If you are in Check Out mode with a current patron, the range of barcodes entered will be checked out to that patron. If you are in Bookdrop mode, the range of barcodes will be checked in. After the barcodes are entered a utility will be added to the operations queue to process the barcode range. RG 3000 4000 Brings up the Barcode Range window with a barcode range of 3000 to 4000.



Find Item by Author	A	Displays a list of titles by author in the Item Lookup dialog. Pick the title you want from the list, and the first copy is made the Current Item.  For clarity, this command requires a space between the command and lookup term. For example, to find titles by an author named Johnson, you would type "A Johnson." A McGraw-Hill Displays a list of titles with "McGraw-Hill" listed as the author.
Find Item by Title	T	Displays a list of titles in the Item Lookup dialog. Pick the title you want from the list, and the first copy is made the Current Item.  For clarity, this command requires a space between the command and lookup term. For example, to find a title that includes the word "history," you would type "T history." T eats Displays a list of titles with 'eats" (exact match) in the title, e.g. starting with Eats, shoots & leaves.
Find Item by Title ID	C	Displays a list of titles by title ID in the Item Lookup dialog. Pick the title you want from the list, and the first copy is made the Current Item. C ENG Displays a list of titles with title IDs that begin with ENG.
In Processing	7	Check out items to the In Processing Patron (barcode 7) while they are being processed and are not yet available for checkout. When the items are Bookdropped, they will become available for use. Enter 7 in the command line, then scan or type barcodes to check items out to the In Processing patron.
In Transit Mode	IT	Assigns checked-out copies to the In Transit system patron (barcode 9). After which, the copy is placed In Transit to its home library (whichever library is specified in the copy's Copy Site field).
Inventory	I	Starts Inventory mode with today's date. In Inventory mode, all item barcodes scanned are recorded as inventoried as of the date specified in the inventory command, or the current date if no date is specified. I 6/18 Starts Inventory mode with a date of 6/18 in the current year.
Inventory Bookdrop Suppressed	IBS	Starts Inventory mode for the current date with automatic bookdrop and with dialogs suppressed. This mode is the same as Inventory Bookdrop mode (IB command), except that dialogs are suppressed. This mode can be used when you are performing inventory with a wireless scanner or in a similar situation. IBS 6/18 Starts Inventory Bookdrop with suppressed dialog mode with a date of 6/18 in the current year.
Inventory Suppressed	IS	Starts Inventory Suppressed mode for the current date. This mode is the same as Inventory mode (I command), except that dialogs are suppressed. This mode can be used when you are performing inventory with a wireless scanner or in a similar situation. IS 6/18 Starts Inventory mode with dialogs suppressed with a date of 6/18 in the current year.
Inventory with Bookdrop	IB	Starts Inventory mode for the current date with automatic Bookdrop. During Inventory Bookdrop, all item barcodes scanned are recorded as inventoried as of the date specified in the inventory command, or the current date if no date is specified. If the item is checked out, it is automatically checked in. IB 6/18 Starts Inventory with Bookdrop mode with a date of 6/18 in the current year.



Locate Patron	L	Locate a patron by name. You can specify as much of the first or last name as you want and Textbook Tracker will display a list of names close to the name you specified.  For clarity, this command requires a space between the command and lookup term. For example, to find patrons named Jayson, you would type "L Jayson." L SMITH, JAMES L JAMES SMITH L SMITH L SMITH CINDY L CINDY The comma is not required between the last and first name. Use a space between the command and the name to avoid confusion with other commands or barcodes. Typically, entering the last name is sufficient. <u>LA</u> Locate a patron by looking across all sites (Centralized Catalog only).
Lost Copies	1	The Lost Copies system patron (barcode 1) allows you to maintain a record of lost items for statistical purposes without allowing them to circulate. You can remove Lost Copies with a utility. Enter 1 in the command line, then scan or type barcodes to check items out to the Lost Copies patron.
Make Patron or Item Current	X	Clears the Current Patron and Current Item panes. X 1000 Makes patron 1000 current without invoking the command of the current mode. For example, in Change Policy mode, this patron's policy would not be changed. X 3000 Makes item 3000 current without invoking the command of the current mode. For example, in Check Out mode, this item would not be checked out to the current patron.
Print Patron Details	QP	Prints Patron Details for the specified patron. If no barcode is given, the Current Patron (if available) is selected. If you have a slip printer configured, the Patron Details will automatically print on the slip printer. If you do not have a slip printer, your regular machine print dialog will appear. QP Prints Patron Details for the current patron. QP 2100 Prints Patron Details for patron 2100.
Print Transactions	D	Prints the current receipt for the current patron. D 3 Prints 3 copies of the current receipt for the current patron.
Renew All Items	RA	Renews all copies checked out to the current patron. This command can be used to renew up to 200 items. RA 1001 Renews all items checked out to patron with patron barcode 1001. RA 1001 3/17 Renews all items checked out to patron 1001 and sets the due date to 3/17.

Renew Item	R	Enters Renewal mode. Use Renewal mode to renew multiple checked-out items. If an item isn't checked out, this command does nothing. <i>R 3000</i> Will renew item 3000. <i>R 3000 3/17</i> Will renew item 3000 and set the due date to 3/17.
Replace Copy Notes	++#	Replaces the Current Item's Copy Notes. If you use this command with no text, the Copy Notes for the Current Item will be cleared. <i>++# Cover needs to be repaired soon.</i> Replaces Copy Notes for the current item with "Cover needs to be repaired soon."
Replace Patron Alert Notes	!#	Replaces the Current Patron's Alert Notes. If you use this command with no text, the Alert Notes for the Current Patron will be cleared. <i>!# Left backpack in class.</i> Replaces Alert Notes for the Current Patron with "Left backpack in class."
Replace Patron Notes	+#	Replaces the Current Patron's General Notes. If you use this command with no text, the General Notes for the Current Patron will be cleared. <i>+# Teaching Assistant</i> Replaces General Notes for the Current Patron with "Teaching Assistant."
Set All Copy Locations	CH	Sets Site, Copy Location, and Copy Shelving for a number of copies. <i>CH</i> Brings up a dialog where you can enter in the fields for Site, Copy Location, and Copy Shelving. <i>CH _a WHS</i> This will change the Site to WHS for each copy entered <i>CH _b OFFICE</i> Changes the Copy Location to OFFICE for each copy entered. <i>CH _c DISPLAY</i> Changes the Copy Shelving to DISPLAY for each copy entered. The CH command can take one or any combination of these fields in any order: <i>CH _c WAREHOUSE _b OFFICE</i> Changes the Copy Shelving to WAREHOUSE and the Copy Location to OFFICE for each copy entered. Substitute a hyphen (-) for the term (e.g. OFFICE) to clear the corresponding location value from each copy entered: <i>CH _b - _a LHS</i> Clears the Copy Shelving and changes the Site to LHS for each copy entered.

Set All Patron Locations	PH	Sets Site, Location, and Sublocation for a number of patrons. PH Brings up a dialog where you can enter in the fields for patron Site, Location (i.e. Homeroom), and Sublocation. PH _a WHS This will change the Site to WHS for each patron entered. PH _b JONES Changes the Location to JONES for each patron entered. PH _c PYPER Changes the Sublocation to PYPER for each patron entered. The PH command can take one or any combination of these fields in any order. PH _c PYPER _b JONES Changes the Sublocation to PYPER and the Location to JONES for each patron entered. Substitute a hyphen (-) for the term (e.g. JONES) to clear the corresponding location value from each patron entered. PH _b - _a LHS Clears the Location and changes the Site to LHS for each patron entered.
Set Current Patron	P [barcode]	Selects a new Current Patron. Generally, you can just enter the barcode number of a patron, but if for some reason you have patron and item barcodes that are the same, this command allows you to specify a patron directly. P 100 Makes patron 100 current.
Set Due Date	.[date]	Sets an override due date Manual due dates may be from one year in the past to any time in the future. If the date falls on a closed date, it is adjusted forward during check out. The override date will remain in use even if the patron is changed. .3/14/16 or .3/14 or .mar 14 All set the due date to March 14th. If you don't specify a year, the current year is used. . 3/14/17 1001 Sets a due date of 3/14/17 for all items checked out to the patron with barcode 1001. . 3/14/17 11482 Sets a due date of 3/14/17 for the copy with barcode 11482.
Show Command Help	?	Opens the Command Help tab.
Show Items out	QE	Opens the Items out tab.

Show Patron Location	HW	Opens the Location (Homeroom) subtab under the Circulation tab.
Transfer Mode	.X	Starts Transfer mode. When you have a current patron open and the item you're scanning is already checked out to another person, the item will be transferred to the current patron instead of being checked in. Copies cannot be transferred to system patrons .

Current Patron

Current Patron

To check out, hold, or reserve a Textbook, 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 (for Textbook Tracker items only), and credits.

Details: [View](#), [print](#), or [email](#) 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.



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

Darla Anderson

1001
Jones / Dibb
7 Items, 0 Overdue
Credit \$0.00

High Student
Grade: 11



ALX

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

Patron Details - Textbook Tracker - Alexandria Academy
07/26/2023 12:20 PM

Darla Anderson
Status: Active
Homeroom: Jones
2nd Location: Dibb
Grade: 11
Last Used: 10/25/2022

Textbooks Out: 7
Overdue: 0
Library Items: 2

Textbooks
Title ID/Barcode
MATH003
100501

Item
Algebra 2 (\$50.00)

Due Date
05/28/2024

Due

SCI001
102001

Chemistry: The Molecular Nature of Matter ... (\$50.00)

05/28/2024

[CLOSE](#)
[COVER 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.
- **History.** Runs an individual *Patron History* report, which shows recent payments, credits, renewals, lost items, refunds, 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

ALX - Alexandria Academy

Name	Barcode	Homeroom
Allen, Dylan	1148	Haderlie
Alton, May	1142	Haderlie
Amstead, Lonnie Ann	1088	Jones
Anders, Spencer	1182	Bennett
Anderson, Darla	1001	Jones
Anthony, Wilda	1116	White
Arches, Sunny Ralph	1091	DeMartino
Arias, Mark	1002	Jones
Arnold, Camille	1003	Tripp
Arreola, Colby	1164	Tripp
Banner, Bruce	1905	
Barch, Janet	1908	

[CANCEL](#)
[SELECT](#)

Current Item

Current 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. At the bottom, access the **Copy List**, **Stats**, **item Lookup**, and the actions menu.

Understanding Art

214914
ART003
Available
1000 of 1000
Unknown
Replacement: 50.00

Textbook
Series: 007

MIA

COPY LIST STATS LOOKUP

Copy List

The Copy List shows how many copies are available 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.



If there are more than 1000 copies, the Copy List will only show copies from the current site.

Copy List - Textbook Tracker - Alexandria Academy
07/26/2023 12:33 PM

Art Fundamentals: Theory and Practice
Ocvirk, Otto and Stinson, Robert E. and Wigg, Philip R. and...
ART006
open item details

1000 of 1000
Copies Available

Copies from ALX [collapse]

Title ID / Barcode	Status	Details	Copy Location/Copy Site
ART006 101000	Available		
ART006 101001	Available		
ART006 101002	Available		
ART006 101003	Available		
ART006			

CLOSE PRINT

Copy Stats

See the copy's checkout count, last use date, previous checkouts, and more with Copy Stats.

Copy statistics
Run on 2023-07-26 01:05 PM.

101125 - Art Fundamentals: Theory and Practice
Lifetime checkouts: 0
Days in circulation: 0
Copy policy: Textbook

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.

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 by title

Refine your search using the field below

ALX - Alexandria Academy

a

Title (T)	Title ID	Author (A)
Algebra 1	MATH002	McGraw-Hill Education
Algebra 2	MATH003	McGraw-Hill Education
Art Fundamentals: Theory and Practice	ART006	Ocvirk, Otto and Stinson, ...
Campbell Biology	SCI004	Urry, Lisa A. and Cain, Mi...
Chemistry: The Molecular Nature of Matter and Change	SCI001	Silberberg, Martin and A...
Drawing: A sketch and Textbook	ART004	Lazzari, Margaret and Sch...
Exploring Art	ART002	McGraw-Hill Education
Foundations of Economics	ECO001	Bade, Robin and Parkin, ...
Glencoe Health	HEALTH001	McGraw-Hill Education
Glencoe World Geography	HIST002	McGraw-Hill Education
Grammar for High School	ENG003	Killgallon, Donald and Kill...
Grammar for Middle School	ENG001	Killgallon, Donald and Kill...

CANCEL

SELECT

 Actions Menu

Item Details

[View](#), [print](#), or email a textbook's publisher information, adoption dates, and availability.

Notes

View, edit, and enter notes for the current item here. Notes can also be entered in **Textbooks > Notes**.