Editing Records in Circulation

To **ADD** a Patron record:

1. Right click in the patron window
2. Select **ADD** from the menu
3. Click the **X** to close the **"PATRON SEARCH"** window if you're SURE the patron isn't in the system
4. If you have more than one template, select the one you want
5. Fill in the information needed for the record
6. Click **OK** button in upper right corner

To **EDIT** a Patron or Item record:

1. Right click the patron OR book information
2. Select **EDIT** from the menu (record will open)
3. Fill in missing information
4. Make any changes necessary:
   a. Add Fields/subfields
   b. Delete Fields/subfields
5. When done, Click **OK** button in upper right corner

Click your **RIGHT MOUSE BUTTON** in the left hand side gray area to bring up these options

To Mark Item **MISSING**:

If an Item is **Lost/Missing** OR **Damaged to the point** that <u>you need to take it out of circulation</u>

1. Pull up the Patron's record
2. Look for the Item under **PATRON TRANSACTIONS**
3. Click the box next to the missing Item
4. Right Click and select **LOST**

5. Click **YES** at the *"Are you sure you want to flag this item as missing or damaged?"* window
6. **Holding Record** will be tagged **MISSING (M)** and show up as **RED** in the web OPAC
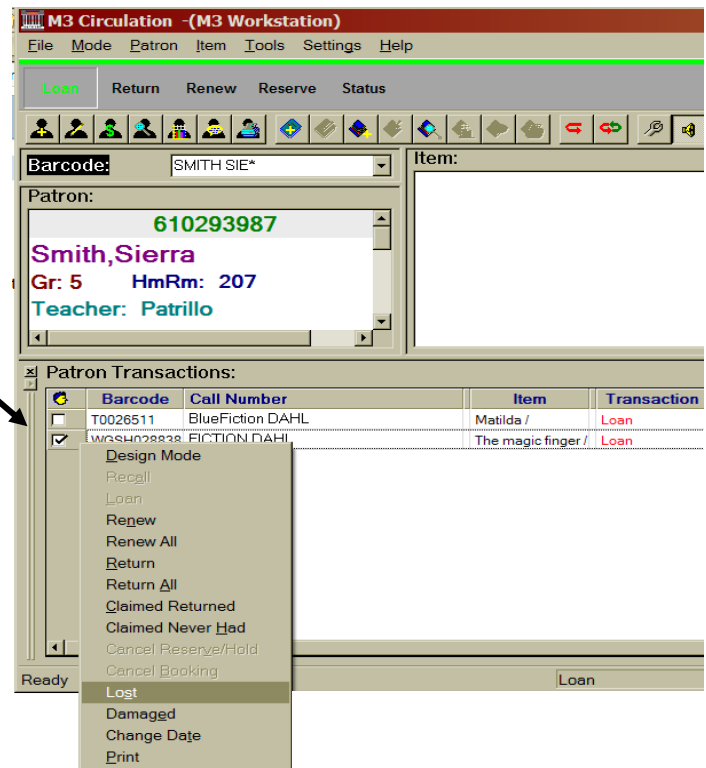
If an Item is **Damaged** <u>BUT can still circulate</u>

1. Pull up the Patron's record
2. Look for the Item under **PATRON TRANSACTIONS**
3. Click the box next to the missing Item
4. Right Click and select **DAMAGED**

5. Click **YES** at the *"Are you sure you want to flag this item as missing or damaged?"* window
6. **Holding Record** will be tagged **DAMAGED (D)** and show up as **GREEN** in the web OPAC
7. You might then want to **add a Message** to that record stating what the damage is so that anyone who's loaning and returning this book will be aware of it.

To **Add a MESSAGE** a Patron or Item record:

Here we'll add a message to a book:

1. Right click on the book information
2. Select **MESSAGES** from menu
3. Click **NEW** button
4. Type in Message and Click **OK**
5. Click **ACCEPT**
6. Click **ACCEPT** again
7. The message will appear the whenever this item is loaned/returned so that responsibility is not attached to the wrong patron.
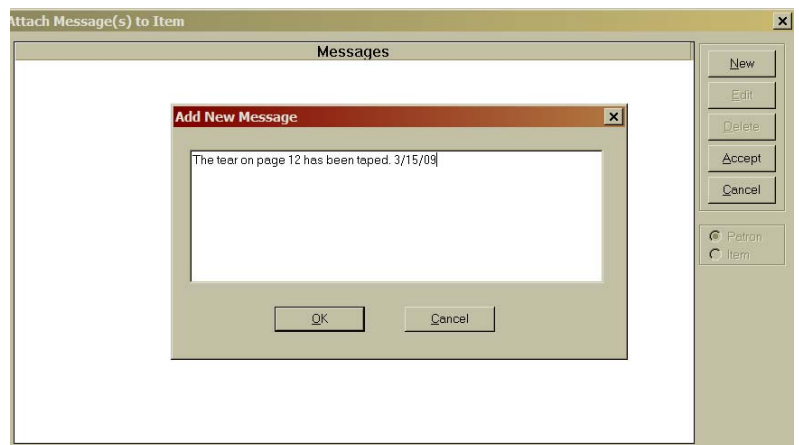
To **Detach a MESSAGE** a Patron or Item record:

1. Right click on patron OR book information
2. Select **MESSAGES** from menu
3. Click **DETACH** button
4. Click **ACCEPT**

You must "accept your detachment" of the message. Think of it as clicking OK.

Completing a transaction / Paying a Fine

1. You've deleted a patron or item by doing the following steps
   a. Open **M3 CATALOGING**
   b. Search for:
      i. Patron by barcode or last name
      ii. Item by barcode (Holding search) or title (Bibliographic search)
   c. Click in box next to patron or item record
   d. Right click and select "***Delete Selected Records***"
   e. Text of record will now be **RED** which indicates deleted status
2. Click the box next to the patron or item record again
3. Right click and select "***Purge Selected Record***"
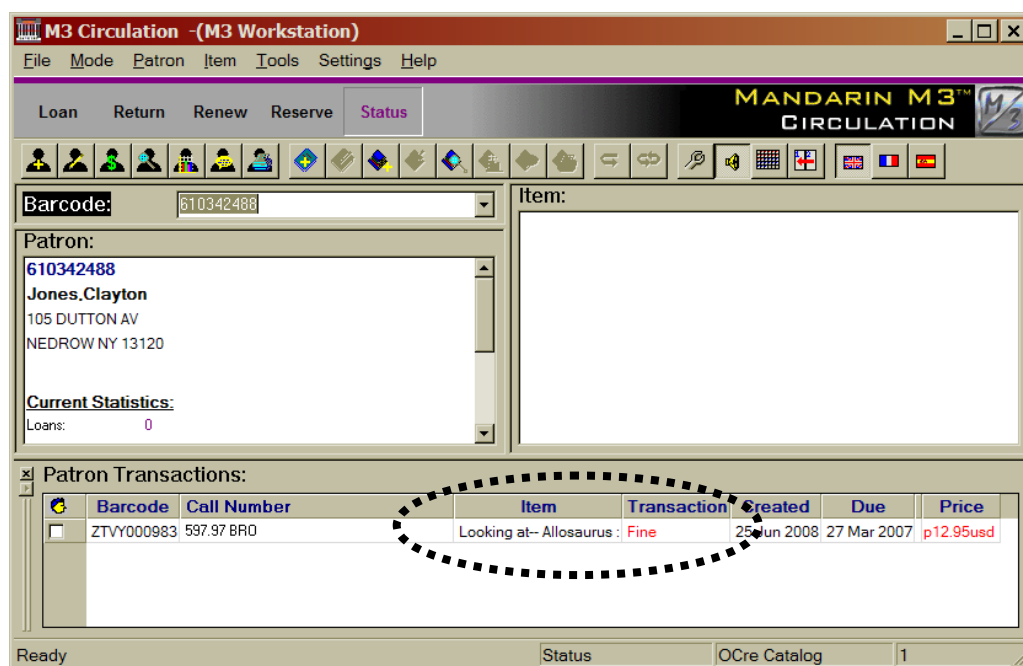4. And you get presented with the following window…
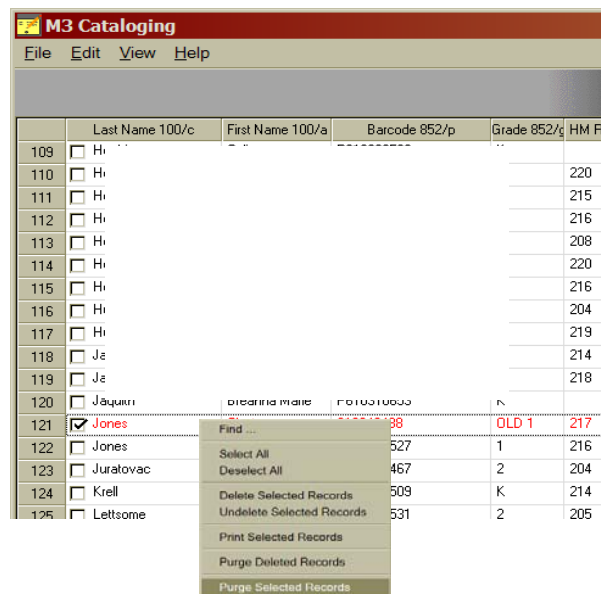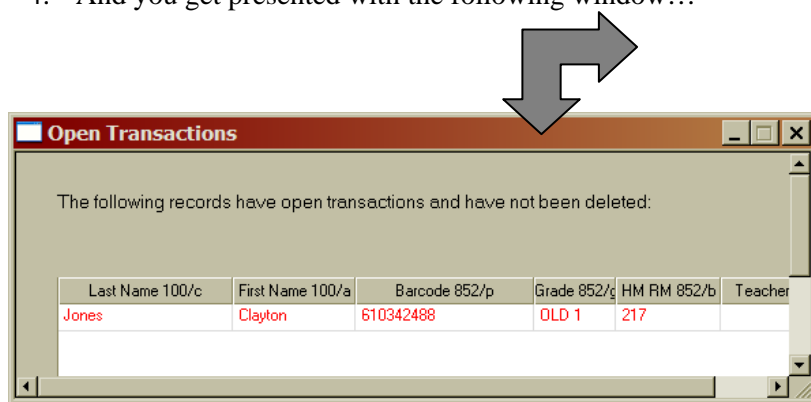
5. What this indicates is that there the patron either still has a book out or a fine attached to their record.
6. You must resolve this (i.e., complete the transaction) before the patron or the item can be purged.
   a. Open **M3 CIRCULATION**
   b. Click on **STATUS**

Using an **PATRON BARCODE**

In this scenario, we see that while the student does not have any books out on loan, they do have a fine that is still on their record.

Until the fine is cleared, the patron cannot be purged.

1. Click the Payment Button
2. The Payment window will appear
   a. If you are **NOT** accepting any money
      i. Type dollar amount in the "*Forgiven*" column
      ii. Click **OK**
   b. If you are **ARE** accepting any money
      i. Type dollar amount in the "*Tendered:*" box
      ii. Click **OK**

3. Fine will be cleared off of patron record
4. You can then "*Purge Select*" patron

Using an **ITEM BARCODE**

If you go in with an item barcode, you must double click on the patron record that is located in the bottom pane of the "*Item Transactions*" window.

This will give you access to the **Patron Payments** button if the book has a fine connected with it.