

Editing Records in Circulation

M3 Circulation - (M3 Workstation)

File Mode Patron Item Tools Settings Help

Loan Return Renew Reserve Status

Barcode: SMI*

Patron: 610293987

Smith, Sierra
Gr: 5 HmRm: 207
Teacher: Patrillo
Video Perm.:
Lost:
Damaged:
Group: WGSB GR 4
Current Statistics:
Loans: 1 Reserves: 0
Note:

Item: T0009095

Call No. Gold Fiction SHAW
Title: Changes for Kirsten :
Author: Shaw, Janet Beeler.
Publisher: Pleasant Co., Date: c2000.
Pages: 64 p. :
Price: 6.00 Group: WGSB GENERAL COLL
Status:
Date Due: Tuesday, January 27, 2009
Summary: A tough Minnesota winter brings many changes to Kirsten's frontier life, including the new responsibility of helping her brother Lars set his traps and a move into a new house for her family.
Subjects: Frontier and pioneer life Historical fiction.
Swedish Americans Frontier and pioneer life
Current Statistics:
Loans: 1 Holds: 0 Reserves: 0 Fines: 0

Click your **RIGHT MOUSE** BUTTON to bring up this useful menu of shortcuts

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Item Transactions:

Barcode	Patron	Transaction	Created	Due	Price	STATUS	IF RETURNED - Date	Gr.	HomeRoom	Teacher
610293987	Smith, Sierra	Overdue Loan	21 Jan 2009	27 January 2009	0.00		February 02, 2009	5	207	Patrillo

Ready Loan WGSB Catalog 1 Feb 02, 2009 10:26 AM

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

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

Edit Patron Record

Leader
Control Number 0000000746
Date and Time Of 20090318100215.0
Creation Date 20070828103648.0
First Name Sierra
Last Name Smith
Gender F
Date of Birth 98/05/22
Middle Name
Primary Address 1
City
State or Province NY
Postal Code 13031
Telephone
Homeroom 207
Teacher or Advisor Patrillo
Grade Level
Parent or Guardian
Parent or Guardian
Barcode
Note
Standard Group
Current Due Amount
Renewal Count
Current Renewal Count
Loan Count
Current Loan Count
Picture
System Information
Example:

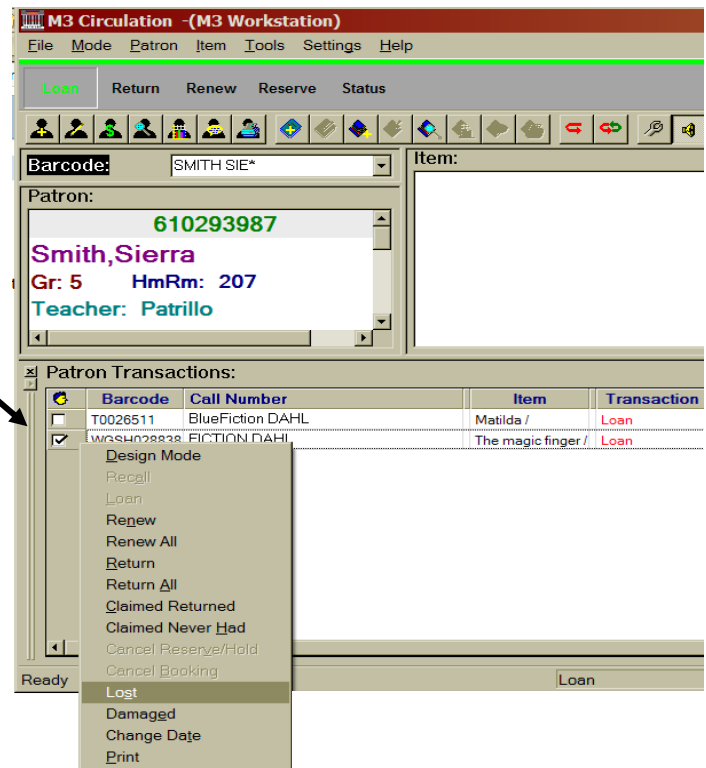
Insert Field... Shift+Ins
Insert Subfield... Ctrl+Ins
Delete Field Shift+Del
Delete Subfield Ctrl+Del
Cut Record Shift+Ctrl+X
Cut Field Shift+X
Cut Subfield Ctrl+X
Copy Record Shift+Ctrl+C
Copy Field Shift+C
Copy Subfield Ctrl+C
Paste Ctrl+V
Move Field Up Shift+Up

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 you need to take it out of circulation

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



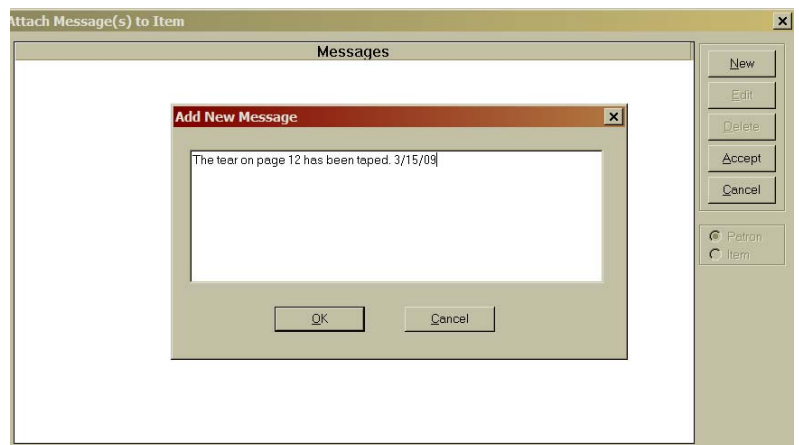
If an Item is **Damaged** BUT can still circulate

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 whenever this item is loaned/returned so that responsibility is not attached to the wrong patron.

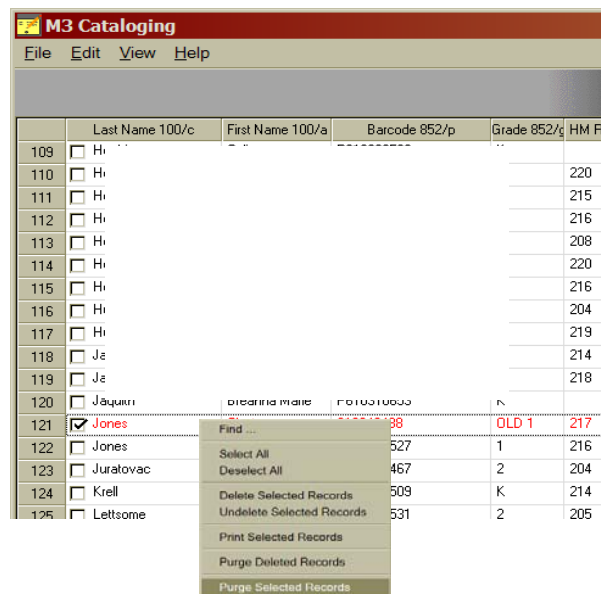
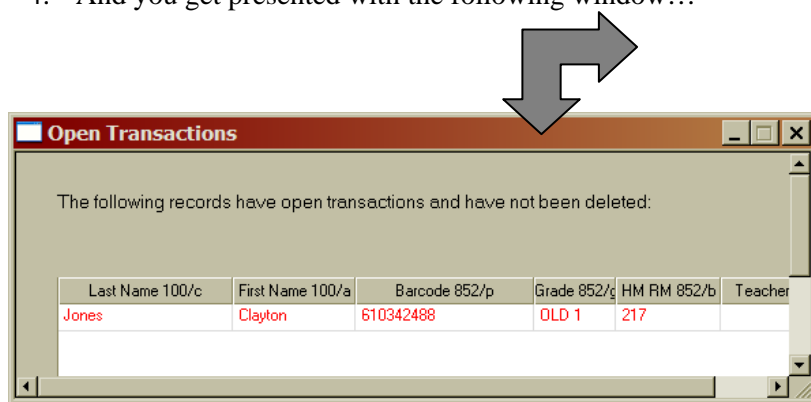


To **Detach a MESSAGE** a Patron or Item record:

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...

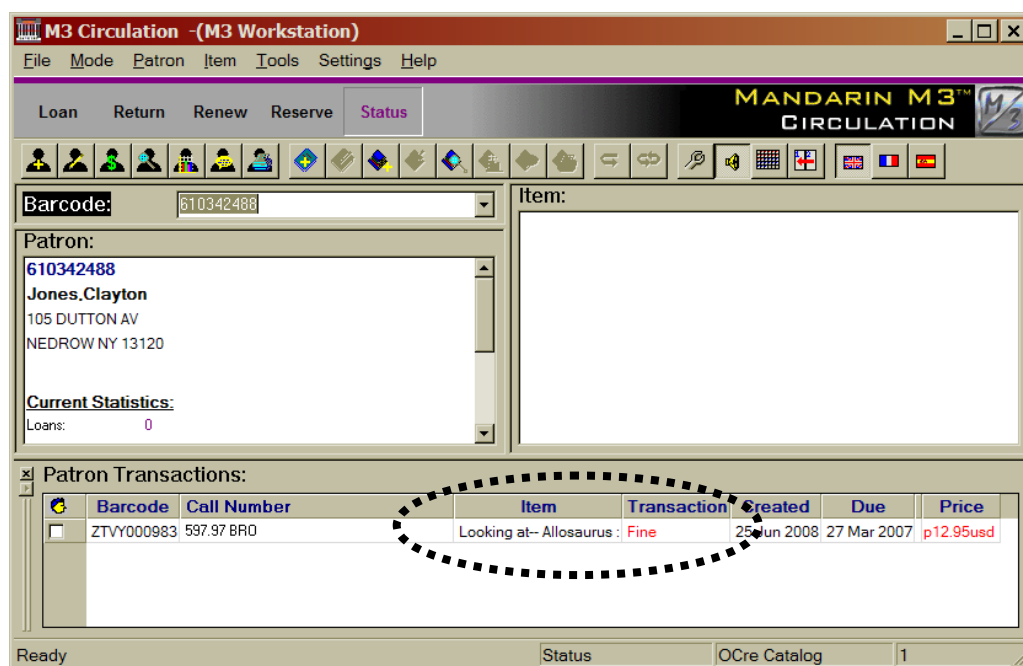


5. What this indicates is that there the patron either still has a book out or a fine attached to their record.
6. You must resolve this (i.e., complete the transaction) before the patron or the item can be purged.
 - a. Open **M3 CIRCULATION**
 - b. Click on **STATUS**

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.



CLEARING A FINE FROM A PATRON RECORD

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**

Title	Fine	Refunded	Balance	Payment	Forgiven	Reason	Claimed Paid	Date Returned	Date
Looking at-- Allosaurus :	17.95	0.00	17.95	17.95	0.00	MISSING		06/25/2008	03

Total:	17.95	0.00
Tendered:		
Change:		0.00

- 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.

Barcode	Patron	Transaction	Created	Due	Price
610328304	Rowe, Anthony D	Overdue Loan	28 Apr 2008	05 May 2008	0.00