

NetSouthwest

Best Practices Handbook

A Reference Guide to Policies,
Procedures, and Useful Information

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Quick Reference Guide:

Items from the Best Practices Handbook that have been formally agreed upon by the Director's Council

II. C. 2: Newly Acquired may only be used for the first two months of an item's circulation.

It was voted on and passed at the August 13, 2010 Director's Council meeting that newly acquired should be limited to "the first two months of a new item's circulation." Exceptions are items that are not new but suddenly gain excessive popularity (such as a children's book that is being turned into a movie, which causes an inundation in reserves on that book title). This agreement was reaffirmed at the August 26, 2011 meeting.

II. E. 2: Your library policy can override the owning library's checkout period.

It was voted on and passed at a NetSW meeting that the checkout location's checkout period should override the owning location's checkout period. This is done manually on a case-by-case basis, and owning library renewal limits should still be honored.

I. Cataloging, Acquisitions, and Holdings

A. Barcode Placement

- Books: Upper right-hand corner of the first page
- Board Books: Top corner of the back cover OR upper right-hand corner of first page
- AV materials: Upper right-hand corner of the front cover OR inside the case as long as it is at the top, preferably the right-hand corner whenever possible.

B. Database Holdings Maintenance

- Members are to add and delete their own holdings from specific Bib Records. If your library deletes the last holding on a record, do not delete the Bib Record. SWLS staff will do this, since they also need to remove the record from the OCLC database.

Item Deleted	
Title:	Truth-stained lies
Author:	Blackstock, Terri,
Item Barcode:	39896012764607
Last Item deleted. Click here to delete bibliographic record.	
Select Next Item:	<input type="text"/>

Don't click this link.
SWLS staff needs to
remove the record
from OCLC first.

- Bib Records found with no holdings attached will be deleted if the “create date” for the record is older than one year.
- You do not need to alert SWLS staff if you withdraw the last holding on a Bib Record. They systematically find these empty Bib Records and delete them.

C. Bib Records and Holdings

1. New Holdings

- Libraries should add their holdings to Bib Records within two weeks of receiving them. All circulating materials should be barcoded and added to the ILS.
- When adding holdings, search for items by ISBN. Make sure the entire Bib Record is consistent with the format you are adding (Blu-Ray, DVD, Hardcover, paperback, LTE, etc.)
 - For some reprints, ISBN may not match. As long as other Bib Record characteristics match, you may add your item to that record. Ask SWLS staff if you are unsure.
- If you aren't sure about which record to add your item to, check with SWLS catalogers. If you cannot find an item in the catalog, send the ISBN and title page to SWLS.
- For juvenile materials, hardcover/paperback is not as important and you may add either to a given record despite ISBN.
- If you find a record with incorrect holdings on it, inform SWLS (headquarters) staff of the discrepancy. If the incorrect holding is yours, remove it and add your item to the correct Bib Record.

2. Multiple Items/Volumes in a Record

- Bib Records will not be created for each individual item in a series (for example, each disc in a television program series DVD set)
- Instead, multiple holdings should be placed on the same Bib Record using Volume Number information to distinguish which part of the item is on each holding.
- Language on individual holdings on items such as a TV series should correspond to the language used on the Bib Record; for example, if each disc is listed as a volume (Volume I, Volume II, etc.) your holdings should reflect this in the volume field. If they are listed as “Disc 1,” “Disc 2,” they should be listed this way in the volume field on individual holdings.
- Periodicals that are entered into Iluminar should include issue information in the Chronology field so that a specific issue can be requested.

D. Property Stamps/Ownership Markings

- Only one stamp/marking is required, but it **should be easily visible**
- Periodicals that are added to the ILS and circulated should also include a barcode and ownership mark.
- Suggestions for ownership marking location include:
 - On the Barcode page of print materials
 - On the title page of print materials
 - On the pages (edge of book pages when the book is closed) of print materials
 - On the disc/item AND once on the outside of AV material cases

II. Circulation

A. Placing Reserves

1. Reserves in Illuminar

- When placing reserves on items in Illuminar, check that the item has holdings and is not an electronic resource.

2. Reserves via WISCAT

- Search the SWLS catalog for items first. If item is not found, then search WISCAT.
- For libraries who mediate patron requests on WISCAT, double check that the items are not in Illuminar before approving.
- For popular materials, check “Items in Constant Demand” on WISCAT before placing a request.

B. Filling Reserves

1. Reserves in Illuminar (*Reserves with Available Copies/ Holds*)

(View Appendix I. for Instructions)

- Reserves should be checked and filled at least once each day that the library is open.
- If an item that appears on your reserve list cannot be found within one week, it should be marked missing. If it is the only available copy, the library whose patron has a hold on the item should be notified.
- If an item is not in the location of “Newly Acquired,” the expectation is that the item will be sent promptly if a reserve is placed on it.
- See Appendix for instructions on how to check and fill holds.

2. Reserves for WISCAT

- If you will not lend an item to other SWLS libraries, you should not loan it through WISCAT.
- If you decide to loan an item that is marked Newly Acquired, move the item back to its permanent location and see if there are any SWLS holds before sending it to another system.

3. Special Considerations

- To select a specific copy of an item, un-check “Any Item” and click to checkmark the specific item(s). If more than one item has a checkmark, they will all be put on reserve.
- Special collections (such as the rotating audiobook collection—ABC—and the rotating LTE collection) should not be sent out on reserve. These items do not allow requests to be placed on them. (The only exception is the collection that is currently residing at SWLS headquarters.)
- When borrowing another library’s item, be sure to treat it appropriately. Avoid stamping, marking, or otherwise altering another library’s material.
- When returning another library’s item in the delivery, first check that it is complete—all discs are included, etc.

C. Blocking Reserves

- To block reserves from other libraries on a new item, use the Current Location “Newly Acquired.” For non-circulating reference materials, use a non-circulating location.
- “Newly Acquired” may only be used for the first two months of an item’s circulation.
- To prevent items that are currently inaccessible within your library from appearing on your reserve list, place the items in a status of “Storage.”
- To block reserves on items that are currently inaccessible within your library, place the items in a location of “Storage.”

D. Reserve Limits

- Individual libraries may set limits on the number of reserves a patron may place if they choose.

E. Checkout and Renewal Periods and Limits

- Checkout and Renewal Periods and Limits are set by individual libraries according to their policies. These settings can be found in the **Circ Admin** tab in ILLUMINAR.
- Your library policy can override the owning library’s checkout period. This is done manually on a case-by-case basis.
- Libraries should not override owning library renewal limits.
- *See Appendix II for a chart of Checkout and Renewal Limits by location.*

F. Fines and Charges

- Individual libraries set their own fine and fee schedule. If your library does not collect fines, your fine schedules should be set to zero.
- Fine collection for items checked out at other locations: individual libraries should follow their own fine collection policies. If your library does not collect fines, do not delete fines accrued at another location.
- Patrons should be informed of their fines regardless of your library’s policy. For questions or notes to other libraries, use the **Messages** area in the patron account.
- Fine collection for items checked out at your location: individual libraries should follow their own fine collection policies. Fines totaling under \$10 can be retained by the collecting library.
- Fines over \$10 should be sent to the library at which those fines were accrued. Lost item fines and fees should be forwarded to the owning library.

G. Payment for Lost Interlibrary Loan Items

1. Lost Items in SWLS

- Each library decides on its own policy regarding lost items. If a patron loses another library’s item, the owning library should be notified so they can inform the other library of acceptable/proper procedure.
- Due diligence is requested in attempting to recover items lost by patrons, especially those items that belong to another library.
- Lost item fees are the patron’s responsibility and, if collected, should be forwarded to the owning library.

2. Lost items in WISCAT

- According to state agreements, your library is responsible for all WISCAT loaned items from the moment they are shipped.

H. Overdue Notices

- Individual libraries are responsible for running their own overdue notices.
- Overdue notices should be run a minimum of once per week, although whether or not they get mailed is up to each individual library to decide.

I. Patron Account Messages, Notes, and Comments

- All patron account messages, notes, and comments should include a library's two-letter library code. Some libraries may choose to also require the staff member's initials, a date, or both.
- Only delete your own library's notes or comments. (Messages can only be changed or deleted by the library which wrote them.)
- If an issue is resolved but the message, note, or comment was written by another library, that library should be notified so the message can be erased.
- Honor blocks placed on patron accounts by other libraries; if necessary, contact that library (or have the patron contact that library) to resolve the issue.
- *See Appendix III to see Where Information Appears in Illuminar.*

III. Library Cards and Patron Accounts

A. Issuing Cards

- **Before entering a patron into the ILS, the name should be searched for possible duplicates (perhaps from a previous address or maiden/married name).**
- Libraries should issue a physical card to patrons. This should normally be done immediately upon receiving a completed application form. (There may be an exception at your library such as mailing proof, etc.)
- Residents of SWLS can receive library cards by applying in person or by mail at any library in the system.
- The issuing library retains the hard copy of an application which holds the patron's signature.
- Application forms can be found and printed from the SWLS website. *See Appendix IV for an example of a Library Card Application Form.*

B. Replacement Cards

- Individual libraries set the fee for a replacement library card.
- Patron account information (address, phone number, etc.) should be verified before the account's barcode is changed and a new card is issued.

C. Forgotten Library Card

- Individual libraries may decide whether or not to check items out to a patron who has forgotten his/her library card.
- Patrons without library cards should be asked to show some form of ID if their identity is not known by circulation staff.

D. Entering Patron Account Information

- When entering a patron account into the ILS, it is important to choose the correct Township Code in order to ensure proper county reimbursement. Townships can often be looked up using the Geographies section of the following link:
<http://factfinder2.census.gov>
- When entering surnames with prefixes or suffixes (eg: Van Natta, John Smith III) use the phone book or patron's ID as a guide to spacing and capitalization. Spelling should be verified by the patron or via their ID.
- Birth date should be recorded in mm/dd/yyyy format so that it can be recognized by Illuminar.

E. Card Sharing and Multiple Cards

- Individual libraries should have a policy about sharing cards between more than one person.
- Some libraries may have a policy about giving certain people multiple cards (i.e. a child with divorced parents might have need for two cards—one for dad's house and one for mom's house). This is up to the individual library to manage.

IV. Van Delivery

A. Procedures

- Stacks of books should be rubber banded in heights not to exceed 4”.
- Books should not be stacked “pyramid style.”
- Routing slips or transit receipts should be taped (top and bottom) using removable tape only.
- Routing slips should not be slid underneath plastic covers on items like DVDs.

B. Routing Slips

- Transit receipts (printed from Illuminar) are a suitable replacement for blue routing slips.
- *For examples of blue Intersystem and Intrasystem routing slips, see the Appendix V.*
- Receipt-style transit slips should reflect a library’s municipality rather than its formal library name (i.e. “Lancaster” rather than “Schreiner Memorial”). This helps delivery drivers, especially substitutes, get items to the correct locations.
- To help save paper for all libraries, transit receipts should only include your library’s name. Library addresses, phone numbers, and other messages are unnecessary.

C. Supplies

- SWLS will handle bulk orders of library cards and barcodes. For more information, call SWLS headquarters.

D. Handling Other Libraries’ Materials

- Before sending another library’s materials in the delivery, please be sure that the material is complete. Check for missing discs, etc.
- Use only removable tape on other libraries’ materials.
- Avoid stamping, marking, or otherwise permanently altering another library’s material. If your library stamps due dates in materials, use a post-it note or other removable method.

V. ILS Maintenance Activities

A. List of Annual Maintenance Duties

1. Expired Patron Maintenance (*View Appendix VI for instructions*)

Patrons who have been expired for a certain length of time should be deleted from the system. Exceptions are patrons with large fines or lost items. Each library may choose the length of time a patron must be expired before they are deleted; a common choice is one year.

2. Annual Report Preparation (*View Appendix VII for instructions*)

A. Material Types—Make sure that if your library does not have Art Prints, there are no “Art Print” Materials in your collection

B. Township Codes—Check that Township Codes make sense for your location—do you have a lot of Bridgeport Township codes even though you’re not near there?)

C. Patron Categories—Make sure that your library does not have an inordinate number of homebound patrons (or Library Staff).

D. Tech Services Review—This location should be empty.

E. Items Without Prices—Your collection should not have items with no price; this makes annual report numbers harder for SWLS to compile.

3. Delete Lost and Missing Items (*View Appendix VIII for Instructions*)

In order to maintain the database, it is important to delete items that have been lost or missing for a long time; a common choice is to delete items that have been lost or missing for more than one year.

4. Aging Juvenile Patrons to Adult Patrons (*View Appendix IX for Instructions*)

In order to keep our database as accurate as possible, resident and non-resident juveniles should be changed to resident and non-resident adults as they turn 18.

B. List of Monthly Maintenance Duties

1. In Transit Items (To My Library and From My Library) (*View Appendix X for Instructions*)

Each month, someone in your library should check the shelves for all items in these categories. If found, the item should be checked in (and, if applicable, sent in transit).

2. Move Overdue Items to Patron Lost (*View Appendix XI for Instructions*)

This will help maintain our shared database and keep it as accurate as possible. This can be done with a monthly scheduled report.

3. Check shelves for Missing, Claimed Returned, and Patron Lost items (*View Appendix XII for Instructions*)

Shelf lists can be scheduled to run for these items if desired. Remember that **Missing** items need to be manually moved back to **Available**; checking them in will not change their status.

4. Move items older than 2 months off of Newly Acquired (*View Appendix XIII for Instructions*)

A report can be run that will list all items marked “Newly Acquired.” Their barcodes can be entered into “Temporary Transfer Return” to move them to their permanent collections.

5. Check settings in Circ Admin (*View Appendix XIV for Instructions*)

Due to frequent Illuminar updates from AutoGraphics which sometimes affect settings without warning, it is a good idea to be familiar with your library’s settings and check that they’re consistent each month.

VI. NetSouthwest Committees, Meetings, and Duties

A. NetSouthwest Meetings

- Meetings are held six times per year (every other month). Decisions are made at these meetings that directly affect this Best Practices Guide as well as financial obligations for ALL NetSouthwest libraries
- **A representative (either the director or someone authorized to vote on behalf of the library) should attend at least three of these meetings per year, including the June budget meeting.**
- Meeting minutes will be recorded on a volunteer basis.

B. Committee Formation and Meetings

- Committees are formed as necessary and comprised of those volunteering to serve on said committee.
- Individual committees decide when, where, and how often they need to meet.

C. New Director and ILS Staff Mentoring Program

- Volunteer directors and ILS staff are willing to help mentor new directors and ILS staff so that they can more easily transition into their new positions. Those who volunteer should agree to commit the necessary time and effort.
- New Directors and ILS staff can ask SWLS for assistance; if they see fit, they will direct you to an appropriate mentor.

Checking Reserves with Available Copies

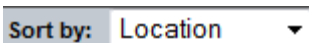
When you are logged in on Illuminar, click on the Circulation tab at the top of the screen.




Under the Reserves tab at the left of the screen,
click “View Reserves with Available Copies.”



Sort the list by Location.



If desired, click the  button at the top of the list. **DO NOT click File/Print in your browser- the format will be wrong.**

(Note: You may choose to increase font size through the Print options on your browser if the list prints too small.)

Find the items on the list from throughout the library. If there are any you can't find, circle it and keep the list. If not found within a week, mark the item missing.

Next click the Checkin tab on the left side of the screen.



Check in the items, put the transit slips on them and rubberband them together by location, and then put them in the delivery bin.

Attention: You can ignore reserves that are in the Newly Acquired section that are *not* for home location patrons (red patron barcodes).

Renewal Limit Policies

<u>Library</u>	<u>Books</u>	<u>DVD</u>	<u>Audio</u>
Argyle	2	2	2
Barneveld	5	1	1
Belmont	3	1	1
Benton	2	2	2
Blanchardville	2	1	2
Bloomington	2	1	1
Boscobel	3	1	2
Cassville	2	2	2
Cobb	3	3	3
Cuba City	1	1	1
Darlington	2	2	2
Dickeyville	2	2	2
Dodgeville	3	3	3
Fennimore	3	3	3
Gays Mills	3	2	3
Gratiot	2	2	2
Hazel Green	2	2	2
Lancaster	2	1	2
Livingston	2	2	2
Lone Rock	2	2	2
Mineral Point	4	2	4
Montfort	2	2	2
Muscoda	1	0	1
Platteville	1	1	1
Potosi	2	1	2
Prairie du Chien	3	0	3
Richland Center	2	2	2
Shullsburg	2	2	2
Soldiers Grove	2	1	1
Viola	2	1	2

Where Information Appears in Illuminar Patron Records

A **message** pops up on the screen as a warning when an account is called up. You must delete the message from the **Patron Edit** screen to make it stop popping up each time that account is accessed.

A **note** appears in the **Notes** tab in a patron's account. This tab turns red when there is a note in that tab. You must delete the note from **Notes** or the **Patron Edit** screen to make the **Notes** tab turn black.

A **comment** appears in the **Patron Summary** tab. This tab does not turn red. You must delete the comment from the **Patron Edit** screen to remove it from the **Patron Summary**.

REMINDER: Patrons CANNOT see notes, messages, or comments from their personal account. Only library staff can see them.

Primary/Home Phone Number is the only number to appear in the patron search screen AND the only number to print on reserve receipts.

Cell Phone, Work Phone, Unlisted Phone, and Phone 2 only appear in the Patron Summary and Patron Edit screens.

Linking Households:

When you link a household, it is important to begin the process from the Adult record (mother or father, etc.) This is because overdues and hold notices are mailed or emailed to the "head" of the household. Therefore, if you start with a child, that child could potentially be receiving overdue notices for his/her parent's items.

Passwords:

When you add a new patron, you can type the default password in on their account as you fill in other information.

You can also set a default password in your **User Admin** tab.

User Admin

On the left side, click on **Set Default Password**.

Default User Password

Enter the default password (userpass) and click **Submit**.

Submit

Notification Preferences:

At the bottom of the Patron Edit screen, there is a Notification Preference dropdown menu.

None: Overdues will always print out for mail

Email: Overdues and reserve notices will be emailed automatically (the patron must have an email address to choose this option.)

Paper: Overdues will print out for mail

Phone: **DO NOT CHOOSE.** This is for library systems that have automatic phone messaging systems.

Notification Preferences	
Email me on	Email ▼
Receive pre-overdues?	None
Date Added	Email
Date Updated	Paper
	Phone

Example of a Library Card Application

<p>Cardholder's Name</p> <p>_____</p> <p style="text-align: center;"><i>First name M.I. Last name</i></p> <p>Address 1 _____</p> <p>PO Box Address _____</p> <p>City/State _____ Zip _____</p> <p>Address 2 _____ State _____ Zip _____</p> <p><input type="checkbox"/> My residence is located in _____ COUNTY</p> <p><input type="checkbox"/> and in (check <u>✓</u> one) _____ Township _____ City _____ Village _____</p> <p><input type="checkbox"/> Name of Twp, City, OR Vlg _____</p> <p>Email _____ @ _____</p> <p>Primary Phone (____) _____ Alternate Phone (____) _____</p> <p>Date of Birth _____</p> <p>Parent/Guardian Name <i>[print]</i> _____</p> <p>Valid Driver's License or State ID required for all applicants (Parent/Guardian must provide a Driver's License or State ID # for unlicensed applicants under age 16.)</p> <p>State _____ DL# or other valid ID _____</p> <p>Language _____ English _____ Spanish _____ Other _____</p> <p>Signature of the applicant or juvenile applicant's Parent/Legal Guardian verifies their acceptance of library policies, including the Internet Use Policy, of financial responsibility for all use made of the library card issued to this applicant, and that the information herein is correct.</p> <p style="text-align: center;">_____ <i>(Signature of applicant/Parent/Legal Guardian)</i></p>	<p style="text-align: center; border: 1px solid black; padding: 5px;">BARCODE STICKER</p>
<small>Southwest Wisconsin Library System/1775 Fourth Street/Fennimore, WI 53809/608 822 3393</small>	

Examples of Intrasystem and Intersystem Routing Labels

SWLS VAN ROUTE DELIVERY SERVICE
Please circle or highlight the library

ARGYLE (AR)	HAZEL GREEN (HG)
BARNEVELD (BA)	LANCASTER (LA)
BELMONT (BE)	LIVINGSTON (LI)
BENTON (BN)	LONE ROCK (LR)
BLANCHARDVILLE (BR)	MINERAL POINT (MI)
BLOOMINGTON (BT)	MONTFORT (MO)
BOSCOBEL (BW)	MUSCODA (MU)
CASSVILLE (CA)	PLATTEVILLE (PL)
COBB (CO)	POTOSI (PO)
CUBA CITY (CU)	PRAIRIE DU CHIEN (PR)
DARLINGTON (DA)	RICHLAND CENTER (RC)
DICKEYVILLE (DI)	SHULLSBURG (SH)
DODGEVILLE (DO)	SOLDIERS GROVE (SO)
FENNIMORE (FE)	VIOLA (VI)
GAYS MILLS (GM)	SWLS (AA)
GRATIOT (GR)	

FROM: _____ **DATE:** _____

Print on blue paper

Regular Member Library Transit Slips

Route to _____
(System Delivery Hub)

For _____
(Receiving Library)

Date _____

Notes _____


From _____

Wisconsin Libraries Delivery Network

WISCAT or SCLS Routing Slips

Print on blue paper

SWLS INTRASYSTEM DELIVERY SERVICE
for Academic, School, & Special Libraries



TO: _____

FROM: _____

DATE: _____

Multi-type Routing Slips for Schools & Special Libraries

Expired Patron Maintenance

This report should be done annually. It is up to the individual library to decide how long an expired patron should remain in the database; some libraries leave expired patrons in the database 3-4 years, while others delete any patron who has been expired for a year or more.

If a patron comes in with an old card that doesn't scan to a patron record, we give them a new application and add them back into the database.

Patrons with large outstanding fines or lost items should not be deleted. It is up to the individual library to decide at what fine level the patron should no longer be deleted.

Some libraries may have additional policies about deleting expired patrons (i.e. they are dual cardholders with SCLS and need to be informed of their expiration by mail).

After logging in to Illuminar, go to **Circ Reports** and then click **Run Reports** in the left column. Next, choose **Expired Patrons** from the list of reports.

Patron Reports	
Patron Listing	A list of all patrons from a particular patron category.
Patron Check-Out Listing	A list of all checked out items by patron.
Overdue Items	A list of all overdue items.
Indefinite Items	A list of all indefinite checked out items.
Expired Patrons	A list of all patrons with expired dates.

Set the report to run so that it cuts off at the desired date; for patrons who've expired more than 3 years ago, set the cutoff date to three years before today. Make sure to limit the report to your patrons only.

Expired Patrons

Submit Reset Close Help

Patron Category:

All

Cutoff Date:

06/11/2009

Set to three years before today's date.

Limit By Group:

Dodgeville Public Library

Limit to your library patrons only.

Schedule the report to run. After the report runs, it will appear in **View Reports**. You may open the Excel spreadsheet and manipulate the columns as you wish. The patrons in your report may be deleted from the system by using the **Delete Patron** tab in the **Circulation** section. (*Note: Illuminar will not allow you to delete a patron with items out, with a blocked account, or with outstanding fines. You will have to enter a patron record in order to clear these things if you want to delete the patron.*)

Annual Report Preparation

A. Material Types

It is important to clean up your collection's material types so that your annual report numbers are easier to compile. For example, most libraries do not have Art Prints in their collection, yet it is the default material type when an item is added—and it is possible to mistakenly leave it there rather than change it to the proper material type.

TO CHECK YOUR MATERIAL TYPES: Go to **Circ Admin** and click on the **Material Types** tab on the left side of the screen. When that loads, click “Stats” in the top right corner. A screen will pop up with a list of the material types and the number of items your library has in each section. Run a shelf list for any material type with mistaken items in them.

(For help running a shelf list, visit the ILS Blog or the SWLS website.)

B. Township Codes

It is very important for your library to use the correct township code for each patron based on their address. This is how county funding is calculated, and incorrect township codes could be giving you incorrect circulation totals for certain townships.

TO CHECK YOUR PATRONS' TOWNSHIP CODES: You can run a Patron Listing and sort the Excel spreadsheet by Township code. This will allow you to see if there are any patrons who are missing township codes, and you can also see if there are an excessive number of Bridgeport township codes (the default code). Patron Listing reports can be found under **Circ Reports**→ **Run Reports**.

C. Patron Categories

It is important that each of your patrons has the correct patron category associated with him/her for annual report purposes.

TO CHECK PATRON CATEGORIES: You can use the same Patron Listing report that you used to check Township codes to look at patron categories. Simply re-sort the Excel spreadsheet by Patron Category and look for those that are clearly incorrect (such as Library Staff, which is the default for that category).

D. Tech Services Review

This collection code was created during the transition from Horizon to Illuminar for all of the items that didn't want to automatically transition into the correct collections. You should not have anything left in this category.

TO CHECK TECH SERVICES REVIEW: Run a shelf list for items in either the temporary location or the permanent collection labelled Tech Services-Review.

Instructions for Deleting Lost and Missing Items

1. The first step in deleting Patron Lost or Missing items is running a shelf list for each category based on Status. For help running a shelf list, visit the ILS blog or the Autographics Help File. Make sure that the shelf list Output Fields include last activity date so that you can see how long an item has been lost or missing.

After running shelf lists listing all of the Patron Lost and Missing items that your library owns, you may decide to sort the list by last activity date (so that you can focus only on those lost for a certain length of time—common practices are either six months or a year, but you may decide what works best for your library.)

2. Check your library shelves for each item. If possible, have two people check individually (or check at two different points in time) so that it doesn't get missed.

- a. If an item is found, check it in and make sure it is marked "Available."

(Note: Missing items do not automatically move back to Available if they are checked in. You need to do this manually.)

3. Delete the items that still cannot be found. The easiest way to do a large quantity of these is to go to **Cat Admin** → **Edit Item**. Then you can copy and paste (or type, if you prefer) each barcode into the search bar and select "Delete this Item." **There is no "undo" feature.**

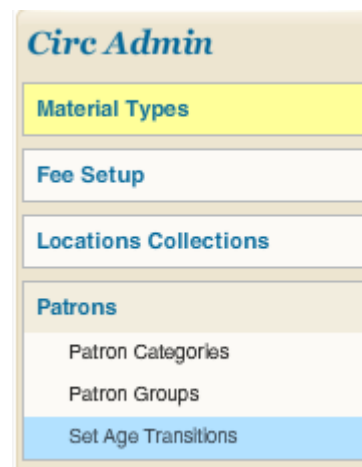
Setting up Automatic Age Transitions

When a juvenile turns 18, he/she should be changed to an adult in our system to maintain accuracy in annual report statistics. Previously, we had to do this manually on a case-by case basis.

Now, however, there is a report that you can schedule. You can choose to set it up on a daily, weekly, monthly, or annual basis.

After signing in on Illuminar, go to **Circ Admin** and then **Set Age Transitions**.

The screen that appears will give you options to set your age transitions. You will need to set up two different events. Below is an example of Lancaster's events.



Set Age Transitions Close Help

Existing Age Transaction

Age	Patron Category	Patron Group	Remove Family	Option
18	from non-res juvenile to non-res adult	from Lancaster (Schreiner Memorial Library) to Lancaster (Schreiner Memorial Library)	No	Delete
18	from resident juvenile to resident adults	from Lancaster (Schreiner Memorial Library) to Lancaster (Schreiner Memorial Library)	No	Delete

Add New Transition

At Age: **With Patron Category:** **Set Patron Category to:** **Remove Family:** ☐ [Add](#)

With Patron Group: **Set Patron Group to:**

[View Report of Latest Batch](#)
[Set Report Schedule](#)

Make sure you change the patron group to your library. Also make sure that each transition keeps the patron in either resident or non-resident status. Once you've done that, click "Add."

After the Age Transitions are set up, you will need to schedule the report to run. Do this by clicking "Set Report Schedule" at the bottom of the screen.

Here is the setup that Lancaster uses for its age transitions. You will see a completed report notice in your "View Reports" screen, although there will not be a viewable report at this time. Autographics is working to make the report available to us.

NOTE: This is an ACTION report, meaning that the system automatically makes changes in your patron records based on your setup.

Set Age Transitions - Schedule Batch Run

Schedule the Batch Run

Run Frequency:

Start Date:

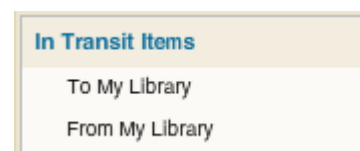
Start Time: h m

Day of Month:

[Update Batch](#)

In Transit Items To My Library/From My Library

Occasionally items are scanned improperly or skipped altogether which leaves an item's status "In Transit" even though the physical item is on a shelf somewhere. In order to maintain our collection, each library should regularly check the In Transit lists in the **Circulation** Tab (about halfway down the page on the left side).



You will need to look through the items in both the "To My Library" and "From My Library" categories. The items will appear in chronological order from oldest to newest (see example below). Go through the appropriate steps with each item that has been in transit for longer than two weeks, since it should not take that long to get an item from any one library to another.

<i>Items in transit - From my library</i>						
Print						
Title	Barcode	To Library	Type of In	Patron	Patron Barcode	Date
Shot in the heart	39896008796498	Darlington (Johnson Public Library)	Check-in In Transit			1/29/2013
This Calder sky	39896000458667	Richland Center (Brewer Public Library)	Check-in In Transit			5/22/2013
Each kindness	39896013051475	Soldiers Grove Public Library	Check-in In Transit			8/5/2013
Eating the alphabet : fruits and ve	39896009367646	Potosi Branch (branch of Schreiner Memorial))	Check-in In Transit			8/21/2013
Flawless : a pretty little liars nove	39896010286694	Darlington (Johnson Public Library)	Reserve In Transit	Hastings, Tabitha	29896002272886	9/3/2013
Forbidden falls	39896011529068	Dickeyville (Brick Memorial Library)	Reserve In Transit	KRESS, MADONNA	29896001905858	9/3/2013
Colorado camping	39896012870412	Soldiers Grove Public Library	Check-in In Transit			9/9/2013
John Carter [videorecording (DVD)]	39896012479123	Soldiers Grove Public Library	Reserve In Transit	DOUDNA, AMANDA	29896001835618	9/10/2013
The Chinese language for beginn	39896006126680	Lone Rock Public Library	Check-in In Transit			9/11/2013
Indian mounds of the middle Ohio	39896008787851	Barneveld Public Library	Reserve In Transit	Lancaster, Heather	29896002239901	9/11/2013
Alone [sound recording (CD)]	39896012771594	Potosi Branch (branch of Schreiner Memorial))	Reserve In Transit	Oyen, Aleise	29896002196143	9/11/2013
Bad apple : a tale of friendship	39896012482820	Shullsburg (McCoy Public Library)	Reserve In Transit	Daentl, Katie	29896002298154	9/11/2013
Little apple goat	39896010290068	Shullsburg (McCoy Public Library)	Reserve In Transit	Daentl, Katie	29896002298154	9/11/2013
Dog behavior	39896007416874	Blanchardville Public Library	Check-in In Transit			9/12/2013
Montana, Wyoming and Idaho ca	39896012870263	Soldiers Grove Public Library	Check-in In Transit			9/12/2013

Steps to take in order to complete In Transit Item Maintenance:

1. Check your library's shelves for the item.
2. If found, check the item in and follow any directions in Illuminar (ex: send in transit).
3. If not found, email the specific "From" or "To" library in the item's record and ask them to check their shelves. (For example, in the screen shot above, Lancaster would contact Darlington about "Shot in the Heart" and "Flawless," etc.)
4. If item is not found at either location, the owning library should check the item in and mark it Missing. If there is a reserve on the item, that reserve should be deleted and a new reserve placed on a different copy of the item.

Terminology:

Reserve In Transit = item is filling a request at the receiving library

Check-In In Transit = item is returning to its home location for shelving

Moving Overdue Items to Patron Lost Status

This process will be relatively simple if it is done on a regular basis. The report itself can be scheduled on a weekly or monthly basis so that the action is done for you.

Running the Remove Overdue Items Report:



From the staff functions menu, choose **Circ Reports**,

Circ Reports

then click on **Run Reports**.

Run Reports

Under Patron Reports, choose **Remove Overdue Items**.

Patron Reports
Patron Listing
Patron Check-Out Listing
Overdue Items
Indefinite Items
Expired Patrons
Overdue Notices
Item Due Notices
Fines/Fees Notices
Remove Overdue Items



This is not just a report- it completes the action of moving items from Overdue to Patron Lost.

Remove Overdue Items		Submit	Reset	Close	Help
Enter Minimum Number of Days Overdue:	<input type="text" value="60"/>				
Default Book Cost:	<input type="text"/>				
Patron Category:	<input type="text" value="All"/>				
Limit By Group:	<input type="text" value="Lancaster (Schreiner Memorial Library)"/>				

Choose your own library.

You can decide at what point your items should be moved to Patron Lost. Some libraries choose 60 days overdue, and some choose 90 days overdue.

Default Book Cost is only used on items that do not have a cost in the cost field of the item holding record. If your library still has items with no cost, you may want to enter a default cost.

When you hit “Submit,” you will be able to schedule your report so that it runs automatically.

Remove Overdue Items		Submit	Reset	Close	Help
Schedule this report ...					
Report Frequency:	<input type="text" value="Monthly"/>				
Start Date:	<input type="text" value="9/19/2013"/>				
Start Time:	<input type="text" value="10"/> h <input type="text" value="25"/> m				

Viewing Your Report:

To see the items that were moved to Patron Lost, look under **View Reports** for the report with a blue hyperlinked File Name. It will open as an Excel file which you can view. You can look at the list to see if there are patrons you would like to contact, items you would like to reorder, etc.

Checking Missing, Claimed Returned, and Patron Lost Items

Checking these items regularly is important because it can help keep our catalog cleaner and more accurate. There are two ways of doing this, and both are effective.

Option A:

Go to the **Statistics** tab and click on **Item Exceptions**.

A list containing each possible item status will appear. Each status will have a number next to it, and if the number is not zero, it will also have a blue hyperlink that gives you the option to view the items that are currently in that status. You can click that link to look at a list of the items listed and decide to look for them or correct them if they are in a status that doesn't make sense.

Item Exception Statistics			
Date: 9/19/2013			
Seq	Exception	Number	Action
1.	Available	33310	
2.	Checked out	2267	View Items
3.	At Bindery	0	
4.	Claim Returned	8	View Items
5.	Discarded	0	
6.	In Process	0	
7.	Missing	19	View Items
8.	Noncirculating	3	View Items
9.	On Order	0	
10.	Deleted	0	
11.	Patron Lost	141	View Items
12.	Lost and Paid	0	
13.	Damaged	3	View Items
14.	Lancaster Programs	3	View Items
15.	Mending	0	
16.	Order Pending	0	
17.	Platteville Program Items	0	
18.	Summer Library Program	7	View Items
19.	Director Desk	0	
20.	Storage	1849	View Items
21.	Snag	0	

Statistics

Circulation Statistics

- Patron Category
- Patron Group
- Item Material Type
- Item Location
- Intra-Library
- Item Category
- Patron Activity
- Fine Activity
- Library Defined Patron Stats
- Item Activity
- Bib Activity

Item Exceptions

- In Transit Items
- Floating Items Add
- Floating Items Remove
- Floating Items Material Types

Option B:

You may run a shelf list based on item status. From there, you can look for items within a certain item status and correct those that are incorrectly labeled. For help running a shelf list, visit the ILS blog or the Autographics Help File.

Changing Newly Acquired Status (Directions on page 1, Example on page 2)

NOTE: When you enter new records, only current location needs to be “Newly Acquired” in order to keep the item from transit to other libraries. Permanent location should be whatever location the item will end up in eventually—after the “Newly Acquired” status is removed. In addition, the material type should be entered as the permanent type (ex: book)—“New Book” is not necessary unless you use that to change the loan period.

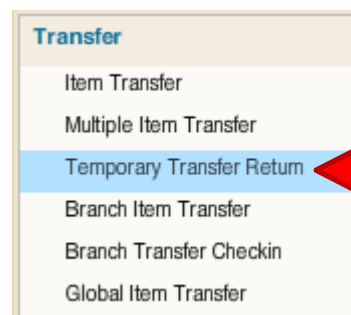
When you are logged in on Illuminar, click the wrench to open the staff menu. 

Click the circulation tab.



After you have gathered all the items you wish to take off of Newly Acquired status, click on “Temporary Transfer Return” on the left side of the screen.

***If you do not have the physical items, a list of the barcodes will suffice as well. (to run a shelf list, see “Running a Shelf List” in the Autographics Help File.)**



Scan the barcodes of the items you are changing. There is no need to click submit; just watch that each item record comes up as you scan it. Watch the new location of each item; if one appears to remain in “Newly Acquired” you will need to change the permanent location manually in the item’s record. When you are finished, you can check that it worked by clicking Item Status and scanning one of your items (or entering the barcode).

*If you only have a list of barcodes, you will have to press “Enter” after each barcode to submit.

Example of this process: Lancaster Adult Fiction

When we added our holdings, they looked like this:

Title	Minding Frankie /	
Author	Binchy, Maeve.	
Barcode	39896011816556	
Copy		
Material Type	Book	
Current Location	Lancaster (Schreiner Memorial Library) - Newly Acquired - Newly Acquired	Shelving Cart
Permanent Location	Lancaster (Schreiner Memorial Library) - Adult - Fiction	
Current Location	Lancaster (Schreiner Memorial Library) - Adult - Fiction	
Categories		
Prefix		
Suffix		
Item Call Number	BINCH	
Status	Available	
Cost	\$26.95	
Alternate ID		

Current Location is Newly Acquired.

Do not use **New Book** as the material type unless your library has different loan periods for New Books.

Permanent Location is Adult Fiction.

To remove several of these items from Newly Acquired status, we go to **Temporary Transfer Return** and scan each barcode we would like to move back to their Permanent Locations.

After each barcode, a record pops up to show the Last Item Returned (meaning it has been returned to its permanent location). The first book we scanned in this session was Full Black by Brad Thor. This is what the screen looks like:

TEMPORARY TRANSFER RETURN	
Enter Item Barcode:	<input type="text"/>
Item Barcode:	39896012110231
Action:	transfer completed
Title:	Full black : a thriller
Author:	Thor, Brad.
Permanent Location:	Lancaster (Schreiner Memorial Library) - Adult - Fiction
Call Number/Volume:	THOR

Last Item Returned

*If you have your books listed as New Book in the material type, you'll have to go into each item record individually to change them.

Checking Settings in Circ Admin

It is important to check your library's settings on a regular basis for a few reasons. First, it will keep you familiar with the options that exist in Illuminar should your library ever decide it wants to try something different. Second, and perhaps more importantly, Illuminar is constantly being enhanced and upgraded by Autographics. They make changes to the system and update the programs at night. On occasion, we have found that some of our settings have been changed without our knowledge during these updates. By recording your desired settings and then checking them frequently, your library staff can be more confident that Illuminar is working as consistently as possible.

Your first step is to record the settings you currently use. You can do this by the use of screen shots or by keeping a file with this information in it.

Here is a list of places you should check each time this maintenance is done:

Circulation Options → scroll through the list of options that appears on the screen.

Loan Periods → click on the top hyperlink and make sure your loan periods are correct. It is important that none are blank.

Renewal Periods → click on the top hyperlink and make sure your renewal periods are correct. It is important that none are blank.

Renewal Limits → click on the top hyperlink and make sure your renewal limits are correct. It is important that none are blank.

Checkout Limits → click on the top hyperlink and make sure your checkout limits are correct. It is important that none are blank.

Fine Amounts → click on the top hyperlink and make sure your fine amounts are correct. It is important that none are blank.

Fine Limits → click on the top hyperlink and make sure your fine limits are correct. It is important that none are blank.

Hard Block Limits → click on the top hyperlink and make sure your hard block limits are correct. It is important that none are blank.

Suggested Calendar of ILS Maintenance Activities

This list is only a suggested timeline; if a certain activity works better at a different time in a month or throughout the year, feel free to adjust your own library's schedule accordingly. You will find definitions or instructions in the previous pages of the Appendix.

JANUARY

Monthly Tasks:

Jan 2: Remove Newly Acquired
 Jan 8: In Transit Items
 Jan 15: Check Shelves for Missing, Lost, & Claimed Returned
 Jan 22: Move Overdue Items to Lost
 Jan 30: Check Settings in Circ Admin

Special Tasks:

- Delete Lost and Missing Items (see Appendix VIII for instructions)

FEBRUARY

Monthly Tasks:

Feb 2: Remove Newly Acquired
 Feb 8: In Transit Items
 Feb 15: Check Shelves for Missing, Lost, & Claimed Returned
 Feb 22: Move Overdue Items to Lost
 Feb 28: Check Settings in Circ Admin

Special Tasks:

- NetSW Director's Meeting

MARCH

Monthly Tasks:

Mar 2: Remove Newly Acquired
 Mar 8: In Transit Items
 Mar 15: Check Shelves for Missing, Lost, & Claimed Returned
 Mar 22: Move Overdue Items to Lost
 Mar 30: Check Settings in Circ Admin

Special Tasks: None

APRIL

Monthly Tasks:

Apr 2: Remove Newly Acquired
 Apr 8: In Transit Items
 Apr 15: Check Shelves for Missing, Lost, & Claimed Returned
 Apr 22: Move Overdue Items to Lost
 Apr 30: Check Settings in Circ Admin

Special Tasks:

- Aging Juvenile Patrons to Adult Patrons (see Appendix IX for instructions)
- NetSW Director's Meeting

MAY

Monthly Tasks:

May 2: Remove Newly Acquired
 May 8: In Transit Items
 May 15: Check Shelves for Missing, Lost, & Claimed Returned
 May 22: Move Overdue Items to Lost
 May 30: Check Settings in Circ Admin

Special Tasks: None

JUNE

Monthly Tasks:

Jun 2: Remove Newly Acquired
 Jun 8: In Transit Items
 Jun 15: Check Shelves for Missing, Lost, & Claimed Returned
 Jun 22: Move Overdue Items to Lost
 Jun 30: Check Settings in Circ Admin

Special Tasks:

- NetSW Director's Meeting

JULY***Monthly Tasks:***

Jul 2: Remove Newly Acquired
 Jul 8: In Transit Items
 Jul 15: Check Shelves for Missing, Lost, & Claimed Returned
 Jul 22: Move Overdue Items to Lost
 Jul 30: Check Settings in Circ Admin

Special Tasks: None

AUGUST***Monthly Tasks:***

Aug 2: Remove Newly Acquired
 Aug 8: In Transit Items
 Aug 15: Check Shelves for Missing, Lost, & Claimed Returned
 Aug 22: Move Overdue Items to Lost
 Aug 30: Check Settings in Circ Admin

Special Tasks:

- Expired Patron Maintenance (see Appendix VI for instructions)
- **NetSW Director's Meeting**

SEPTEMBER***Monthly Tasks:***

Sept 2: Remove Newly Acquired
 Sept 8: In Transit Items
 Sept 15: Check Shelves for Missing, Lost, & Claimed Returned
 Sept 22: Move Overdue Items to Lost
 Sept 30: Check Settings in Circ Admin

Special Tasks: None

OCTOBER***Monthly Tasks:***

Oct 2: Remove Newly Acquired
 Oct 8: In Transit Items
 Oct 15: Check Shelves for Missing, Lost, & Claimed Returned
 Oct 22: Move Overdue Items to Lost
 Oct 30: Check Settings in Circ Admin

Special Tasks:

- Annual Report Preparation A & B (see Appendix VII for Instructions)
- **NetSW Director's Meeting**

NOVEMBER:***Monthly Tasks:***

Nov 2: Remove Newly Acquired
 Nov 8: In Transit Items
 Nov 15: Check Shelves for Missing, Lost, & Claimed Returned
 Nov 22: Move Overdue Items to Lost
 Nov 30: Check Settings in Circ Admin

Special Tasks:

- Annual Report Preparation C, D, & E (see Appendix VII for Instructions)

DECEMBER***Monthly Tasks:***

Dec 2: Remove Newly Acquired
 Dec 8: In Transit Items
 Dec 15: Check Shelves for Missing, Lost, & Claimed Returned
 Dec 22: Move Overdue Items to Lost
 Dec 30: Check Settings in Circ Admin

Special Tasks:

- **NetSW Director's Meeting**