User Guide

Standalone Circulation

Version 1.0
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Chapter 1. GETTING STARTED

Overview

The Standalone Circulation module is a Windows™ client application that allows for offline performance of basic circulation activities (check out and check in). The Standalone Circulation module logs check out and check in transactions for subsequent upload to your library's VERSO database.

**IMPORTANT:** The Standalone Circulation module is not intended as a replacement to the VERSO Circulation module, but rather as a temporary means of logging circulation transactions in the event of network/internet failure, or as a means of logging circulation transactions performed at a remote location (such as a Bookmobile).

Organization of the User Guide

This User Guide is designed to provide the step-by-step instructions necessary to use the Standalone Circulation module to perform basic circulation activities (check out and check in), and to upload logged transactions to your library's VERSO database. The User Guide is divided into four chapters, as follows:

**Chapter 1 – GETTING STARTED.** This chapter includes system requirements, installation instructions, and procedures for accessing and exiting the Standalone Circulation module.

**Chapter 2 – CHECK OUT AND CHECK IN.** This chapter provides the procedures to perform check out and check in transactions using the Standalone Circulation module.

**Chapter 3 – REVIEWING TRANSACTIONS.** This chapter provides the procedures to review logged circulation transactions, edit logged transactions, and create a file of transactions for upload to your library's VERSO database.

**Chapter 4 – UPLOADING CIRCULATION TRANSACTIONS.** This chapter provides the procedures to use the VERSO Circulation module to upload, process and post a circulation transaction file, to generate and view a "posting results" report, and to resolve "rejected" transactions.

System Requirements

The Standalone Circulation module requires a PC-compatible workstation using Windows.

Installing the Standalone Circulation Module

The Standalone Circulation module application software is available for download via the VERSO "Documentation" page.

**IMPORTANT:** Be sure to exit all Windows applications before beginning the installation process.
To install the Standalone Circulation module:

1. From the Windows Start menu, select Run.
   - The Run dialog displays.

2. Enter the full path and filename for the setup.exe (Standalone Circulation module setup) file in the Open text box; "C:\setup.exe" for example.
   - If desired, click the Browse button to search for the setup.exe file. A standard Find File dialog displays. Locate the setup.exe file, then click the Open button on the Find File dialog. The complete path and file name for the selected file is automatically entered in the Open text box.

3. Click the OK button on the Run dialog to begin the installation process.
   - A status dialog displays while setup and software files are extracted and copied to your workstation.
   - When the necessary files have been extracted and copied to your workstation, the VERSO Standalone Circulation Module Setup "start" screen displays.

4. Click the OK button to begin the installation process.
   - The Specify Directory dialog displays.

5. By default, the setup program installs the Standalone Circulation module software in the C:\Program Files\Standalone directory. If desired, you may specify an alternate directory for installation:
   - Click the Change Directory button; the Change Directory dialog displays.
• Enter the full path for the directory in which you wish to install the VERSO Standalone Circulation software in the Path text box, or locate the desired directory in the Directories menu; the full path for the directory will be entered in the Path text box automatically.

• Click the OK button to return to the Specify Directory dialog and continue to install the Standalone Circulation module software in the specified alternate directory. (Click the Cancel button to return to the Specify Directory dialog and continue to install the software in the default directory.

6. When the desired directory has been specified, click the Click this button to install Verso Standalone Circulation Module software button to install the software in the specified directory.

• The Choose Program Group dialog displays. The Program Group determines the location of the Standalone Circulation module in the Windows Program menu.

7. By default, the setup program adds items for the Standalone Circulation module to the Program Group Verso. If desired, you may specify an alternate Program Group:

• To specify a new Program Group, enter the desired group name in the Program Group text box.

• To select an existing Program Group, select the desired Program Group from the Existing Groups menu; the selected Program Group name will be entered in the Path text box automatically.

8. When the desired Program Group has been specified, click the Continue button to complete the installation process.

• Status dialogs will display as the necessary software components are installed.

9. When installation is complete, a confirmation dialog displays. Click the OK button to exit the Standalone Circulation Module Setup program.
**Accessing the Standalone Circulation Module**

To access the Standalone Circulation module:

- From the Windows Start menu, select Programs - Verso - Verso Standalone Circulation.
  - The Standalone Circulation Module Menu window displays.
- From the Standalone Circulation Module Menu window, you may access the following functions:
  - Check Out
  - Check In
  - Review/Upload Entries
  - Delete Posted Entries

To exit the Standalone Circulation module:

- Click the X box in the upper right corner of the Standalone Circulation Module Menu.
  - The Standalone Circulation Module Menu window closes.
Chapter 2. CHECK OUT AND CHECK IN

Overview

The Standalone Circulation module allows you to perform basic circulation functions (check out and check in transactions) under emergency conditions (such as network or internet failure) or at remote locations (such as a Bookmobile). This chapter provides the procedures to use the Standalone Circulation module to:

- Check out items
- Check in items

Circulation transactions must be periodically uploaded to your library's VERSO database (see Chapter 3, Reviewing Transactions and Chapter 4, Uploading Circulation Transactions for details).

IMPORTANT: The Standalone Circulation module does not interact directly with your library's VERSO database. Because of this fact, no verification of patron or item barcodes is performed during check out and check in. The module simply logs transaction data as entered. If invalid patron or item barcodes are entered during check out or check in, the associated transactions will result in the creation of "rejected records" when the transactions are uploaded to your library's VERSO database. Exercise care when entering patron and item barcodes.

Additionally, the Standalone Circulation module will allow check outs to patrons who have exceeded established "maximum number of check outs" limits or "hard block" limits (for excessive overdue check outs or excessive fines). To avoid these occurrences, you may wish to periodically generate "Overdue Items" and "Patrons with Outstanding Fines" reports (refer to the Circulation Reports User Guide for details) to aid in identifying and prohibiting circulation to offending patrons.

Verifying Workstation Date and Time

The Standalone Circulation module uses the workstation calendar and clock to determine the date and time at which logged transactions occur. MAKE SURE the workstation calendar and clock settings are accurate before using the Standalone Circulation module to log circulation transactions.

Misadjustment of the workstation calendar and clock may result in the creation of invalid due dates and in the generation of invalid fines for overdue items.

Check Out

A patron barcode is mandatory to log check out transactions using the Standalone Circulation module. For libraries that do not use library cards with printed barcodes (such as some school libraries), it is recommended that you periodically generate a "Patron Listing" report (refer to the Circulation Reports User Guide for details) to aid in the entry of valid barcodes for check out transactions.

To check out items:

1. From the Standalone Circulation Module Menu, click the Check Out button (or press the F3 key on your workstation keyboard).
   - The Check Out window displays.
   - The Check Out window allows you to simultaneously check out up to ten items to a single patron.
2. Enter the name of the patron to which the associated items will be checked out in the **Patron Name** text box.
   - The **Patron Name** is optional.

   Check out transactions will be logged by the Standalone Circulation module without including a Patron Name; however, the Patron Name can serve as an aid in verifying the check out transaction has been registered against the correct patron in the event an incorrect Patron Barcode is entered. It is recommended that a Patron Name always be included during the check out process.

3. Enter the barcode of the patron to which the associated items will be checked out in the **Patron Barcode** text box.
   - The **Patron Barcode** is mandatory.

   If you do not enter a **Patron Barcode**, the message "You Must enter a Patron barcode" will display when the **Save** button is clicked.

   **IMPORTANT:** The **Save & Exit** button does not verify presence of a **Patron Barcode**. If you do not enter a **Patron Barcode**, and press the **Save & Exit** button, the current transactions will not be saved.

4. Enter the barcode for each item you wish to check out to the associated patron in the **Item to Check Out - Barcode** text boxes. You may enter item barcodes for up to ten items for the current patron.

   If you do not enter at least one item barcode, the message "You MUST enter at least one barcode" will display when the **Save** button is clicked.

   **IMPORTANT:** The **Save & Exit** button does not verify presence of item barcodes. If you do not enter at least one item barcode, and press the **Save & Exit** button, the current transaction will not be saved.

   - Enter the barcode for one item only in each **Item to Check Out - Barcode** text box. You may enter barcodes manually, or with a barcode reader.

   - When entering item barcodes manually, press the **<Enter>** or **<Tab>** key on your workstation keyboard to move the cursor from the current **Item to Check Out - Barcode** text box to the next available text box.

     When the *tenth* item barcode has been entered, and the **<Enter>** or **<Tab>** key is pressed, the "focus" of the cursor moves to the **Save** button. You must submit the current check outs (see step 5) before you can enter additional check outs (either for the *current* patron or for another patron).

   - When using a *barcode reader*, a "return" is automatically inserted after the barcode to move the cursor from the current **Item to Check Out - Barcode** text box to the next available text box.

     When the *tenth* item barcode has been entered, the "focus" of the cursor moves to the **Save** button. You must submit the current check outs (see step 5) before you can enter additional check outs (either for the *current* patron or for another patron).
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**IMPORTANT:** Exercise care when using a barcode reader to avoid scanning a barcode when the "focus" of the cursor is on the **Save** (or the **Save & Exit**) button. In these cases, the automatic return inserted after the barcode will actuate the button and save the current check outs **without** saving the last item scanned. This will result in "lost" transactions.

5. When all desired items (up to the maximum of ten) have been entered for the current patron, save the check out transactions by clicking the **Save** or **Save & Exit** button, as appropriate:
   - Click the **Save** button to save the current check out transactions and continue with **additional** check outs. The Check Out window refreshes with all text boxes cleared. Enter additional check out transactions as described in steps 2 through 5. You may enter **additional** check outs for the **same** patron, or enter check outs for a **new** patron.
   - Click the **Save & Exit** button to save the current check out transactions and exit the check out function. The Check Out window closes and returns to the Standalone Circulation Module Menu.

**Check In**

**To check in items:**

1. From the Standalone Circulation Module Menu, click the **Check In** button (or press the **F2** key on your workstation keyboard).
   - The Check In window displays.
   - The Check In window allows you to **simultaneously** check in **up to ten** items.

2. Enter the barcode for **each item** you wish to check in the **Item to Check In - Barcode** text boxes. You may enter item barcodes for **up to ten** items.
   - **If you do not enter at least one item barcode**, the message "**You Must enter an Item barcode**" will display when the **Save** button is clicked.
   - Enter the barcode for one item **only** in each **Item to Check In - Barcode** text box. You may enter barcodes manually, or with a barcode reader.
   - When entering item barcodes **manually**, press the **<Enter>** or **<Tab>** key on your workstation keyboard to move the cursor from the current **Item to Check In - Barcode** text box to the next available text box.

   **When the tenth item barcode has been entered, and the** **<Enter>** or **<Tab>** **key is pressed, the "focus" of the cursor moves to the** **Save** **button. You must submit the current check ins (see step 3) before you can enter additional check ins.**

   - **When using a barcode reader**, a "return" is automatically inserted after the barcode to move the cursor from the current **Item to Check In - Barcode** text box to the next available text box.

   **When the tenth item barcode has been entered, the "focus" of the cursor moves to the** **Save** **button. You must submit the current check ins (see step 3) before you can enter additional check ins.**
3. When all desired items (up to the maximum of ten) have been entered, save the check in transactions by clicking the Save or Save & Exit button, as appropriate:

- Click the Save button to save the current check in transactions and continue with additional check ins. The Check In window refreshes with all text boxes cleared. Enter additional check in transactions as described in steps 2 and 3.

- Click the Save & Exit button to save the current check in transactions and exit the check in function. The Check In window closes and returns to the Standalone Circulation Module Menu.

**IMPORTANT:** It is recommended that you retain items checked in using the Standalone Circulation module in a temporary location until the associated transaction file has been uploaded and posted to your library's database (see Chapter 3, Reviewing Transactions and Chapter 4, Uploading Circulation Transactions for details) as an aid in resolving "rejected" transactions. Items may be shelved after any "rejected" transactions have been resolved.
Chapter 3. REVIEWING TRANSACTIONS

Overview

The Standalone Circulation module allows you to review (and edit, if necessary) logged transactions prior to preparing transactions for upload to your library's VERSO database. This chapter provides the procedures to:

- Review logged circulation transactions
- Edit a logged transaction
- Create a transaction file for upload
- Delete posted transactions

Reviewing Transactions

You can review check out and check in transaction records for errors prior to creating a transaction file for upload and, if necessary, edit certain values (patron barcode, patron name, item barcode) for one or more transactions. You can specify the date range for which you wish to view transactions, and may choose to view check out transactions, check in transaction or both. Additionally, you may select to view only those transactions associated with a specified patron, and may choose to include or exclude "posted" transactions (transactions for which upload files were previously created).

To review logged transactions:

1. From the Standalone Circulation Module Menu, click the Review/Upload Entries button.
   - The Review Entries window displays.
2. Enter your desired Search Criteria:
   - Select the type of transactions you wish to view from the Select Entry Type menu; either Check Ins, Check Outs or All (both check ins and check outs).
   - To view only those transactions associated with a specific patron, enter the patrons barcode in the Patron Barcode text box.
     - To view transactions for all patrons, leave the Patron Barcode text box blank.
   - Indicate whether or not you wish to include "posted" transactions (transactions for which upload files were previously created) in the search results using the Include Posted checkbox.
     - A checkmark ✓ indicates the option is selected ("posted" transactions will be included in the search results).
Reviewing Transactions

○ An empty checkbox indicates the option is not selected ("posted" transactions will not be included in the search results).
○ Clicking a checkbox repeatedly will toggle it on and off.

- Enter the starting date of the period for which you wish to view transactions in the Entry Dates - From text box; enter the ending date of the period for which you wish to view transactions in the Entry Dates - To text box.
- Enter dates using the format MM/DD/YYYY, i.e., "03/10/2001".
- To view transactions for a single day, enter the same date in both the Entry Dates - From and Entry Dates - To text boxes.

Be sure to include the slashes "/" when entering dates. Do not include alphabetic characters when entering dates.

3. When the desired criteria has been entered, click the Search button to submit your search.

- The Review Entries window refreshes to display the results of your search.
- Search results are listed in chronological order, from earliest to most recent, with one line shown for each transaction. Each line in the listing includes the transaction Type (Check In or Check Out), the Date and Time at which the transaction occurred, the Patron Barcode and Patron Name associated with the transaction (shown for Check Out transactions only), the Item Barcode associated with the transaction, and the Posted status for the transaction, either Yes (the transaction has been included in an upload file) or No (the transaction has not been included in an upload file).

If no matching transactions are found, the message "There are no Entries matching your Search Criteria" displays. Click the OK button on the message dialog to close the message and return to the Review Entries window. Revise your search criteria, as necessary, and click the Search button to resubmit your search.

4. If necessary, you may edit the Patron Barcode, Patron Name and/or Item Barcode for any Check Out transaction, or the Item Barcode for any Check In transaction (see Editing Transactions on page 11 for details).

5. If desired, you may create an upload file for the displayed transactions (see Creating an Upload File on page 11 for details).

6. Click the Done button to close the Review Entries window and return to the Standalone Circulation Module Menu.
Editing Transactions

If necessary, you may edit the **Patron Barcode**, **Patron Name** and/or **Item Barcode** for any **Check Out** transaction, or the **Item Barcode** for any **Check In** transaction.

**To edit a transaction:**

1. Locate the transaction you wish to edit (see **Reviewing Transactions** on page 9 for details).
2. Double-click the transaction you wish to edit.
   - The Edit Entries dialog displays.
3. Make the desired changes to the **Patron Barcode**, **Patron Name** and/or **Item Barcode**, as appropriate.
   - The **Patron Barcode** and **Patron Name** fields are “grayed out” when editing Check In transactions.
4. When all desired changes have been made, click the **Submit** button to submit your changes.
   - The Edit Entries dialog closes automatically, and the Review Entries window refreshes to display your changes.

   To close the Edit Entries window without making changes, click the **Done** button.

Creating an Upload File

The Upload File is the means by which circulation transactions logged using the Standalone Circulation module are transferred to your library's VERSO database. Once an Upload File has been created, it must be uploaded, read and posted to your library's VERSO database using the **Standalone Circ Utility** available through the Circulation module (see **Chapter 4, Uploading Circulation Transactions** for details). Once an upload file has been posted to your library's database, the posting results have been reviewed, and any rejected records have been resolved, "posted" transactions in the Standalone Circulation module should be deleted (see **Deleting Posted Transactions** on page 12 for details).

**IMPORTANT:** In most cases, "posted" transactions should not be included in a new Upload File. "Posted" transactions should be included in a new Upload File only in the event the original Upload File containing the "posted" transactions is missing or damaged, or if you wish to replace the original Upload File containing the "posted" transactions. If "posted" transactions the have already been uploaded to your library's VERSO database are included in a new Upload File, duplicate transactions will be created, resulting in potential errors in the database.

**To create and Upload File:**

1. Locate the transactions you wish to include in the Upload File (see **Reviewing Transactions** on page 3-9 for details).
   - Only those transactions shown in the "search results" section of the Review Entries screen will be included in the Upload File.
2. If necessary, edit any listed transactions (see **Editing Transactions** on page 11 for details).
3. Once all desired transactions are displayed in the "search results" section of the Review Entries screen, click the **Create Upload File** button.
• The message "Continue to Create the Upload file?" displays. Click the Yes button on the message dialog to continue (click the No button to cancel file creation and return to the Review Entries window).

If you have selected to include "posted" transactions in the Upload File, the message "Continue to Create with Posted Entries?" displays. Click the Yes button on the message dialog to continue (click the No button to cancel file creation and return to the Review Entries window). A confirmation dialog displays the message "Are you Sure?". Click the Yes button on the message dialog to continue (click the No button to cancel file creation and return to the Review Entries window).

4. A "Save As" dialog displays. The "Save As" dialog includes a default path and filename for the Upload File.

5. If desired, edit the path and filename for the Upload File in the Select the Upload File text box.

When editing the filename, be sure to include the .TXT extension.

• If desired, click the Browse button on the "Save As" dialog to browse for a location.
  ○ A standard Windows "Open" dialog displays. Browse for the desired location and edit the filename as necessary. When the desired location and filename have been specified, click the Open button. The "Open" dialog closes automatically, and the specified path and filename are automatically entered in the Select Upload File text box on the "Save As" dialog.

6. Click the Submit button on the "Save As" dialog to create the Upload File (click the Cancel button to close the dialog without creating the Upload File).

If you do not include a filename on the "Save As" dialog, the message "You MUST specify a Filename to create," displays. Click the OK button to close the message and return to the Review Entries window. Click the Create Upload File button, and enter a filename in the "Save As" dialog.

• The message "Upload File Created" displays. Click the OK button to close the message and return to the Review Entries window.

Deleting Posted Transactions

Once circulation transactions have been successfully uploaded to your library's VERSO database, the "posted" transactions in the Standalone Circulation module should be deleted.

**IMPORTANT**: You should not delete "posted" transactions from the Standalone Circulation module until you have verified that the transactions have been successfully uploaded to your library's VERSO database. If desired, you can use the Circulation Backup Report as an aid in verifying that "posted" transactions in the Standalone Circulation module have been successfully uploaded to your library's VERSO database (see Viewing the Circulation Backup Detail Report on page 17 for details).
To delete "posted" transactions

1. From the Standalone Circulation Module Menu, click the Delete Posted Entries button.
   - The Delete Posted Entries dialog displays.

2. Enter the criteria for the "posted" entries you wish to delete:
   - Enter the starting date of the period for which you wish to delete posted entries in the From text box; enter the ending date of the period for which you wish to delete "posted" entries in the To text box.
     - Enter dates using the format MM/DD/YYYY, i.e., "03/10/2001".
     - To delete "posted" transactions for a single day, enter the same date in both the From and To text boxes.
   - Be sure to include the slashes "/" when entering From and To dates. Do not include alphabetic characters when entering From and To dates.
   - Select the type of "posted" transactions you wish to delete from the Transaction Type menu; either Check Ins, Check Outs or All (both check ins and check outs).

3. When the desired criteria has been entered, click the Delete button to delete the specified "posted" transactions (click the Exit button to cancel the deletion and return to the Standalone Circulation Module Menu).
   - The message "Continue to Delete (transaction type) posted transactions?" displays. Click the Yes button to continue with the deletion (click the No button to cancel the deletion and return to the Delete Posted Entries dialog).

4. A confirmation dialog displays the message "Deleted (number of transactions) posted transactions". Click the OK button to close the confirmation dialog and return to the Delete Posted Entries dialog.

5. Click the Exit button to close the Delete Posted Entries dialog and return to the Standalone Circulation Module Menu.
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Chapter 4. UPLOADING CIRCULATION TRANSACTIONS

Overview

The Circulation module includes a **Standalone Circ Utility** function that lets you upload and post circulation transaction records created using the Standalone Circulation module to your library's database. Additionally, the system generates a report that lets you view posting results for the purposes of resolving "rejected" transactions.

Access to the **Standalone Circ Utility** is controlled through the granting or denying of the appropriate permission in a user's configuration (see the *User Administration User Guide* for details).

To access the Standalone Circ Utility function:

1. Log into your library's VERSO system in Staff Mode.
2. Click the **Staff Dashboard** link to access the Staff Dashboard.
3. From the **Circulation** menu, select **Standalone Circ Utility**.
   - The Circulation Backup Report screen displays.

Processing a Circulation Transaction File

Once a transaction file has been created using the Standalone Circulation module, the file must be uploaded and posted to your library’s VERSO database.

Uploading a File

The **Standalone Circ Utility** supports upload of *only* those transaction files created using the Standalone Circulation module.

To upload a transaction file:

1. From the Circulation Backup Report screen, click the **Add New Upload** button.
   - The Upload New Circulation Backup screen displays.
2. Click the **Browse** button to locate the desired file.
A standard Find File dialog displays. Locate the desired file, then click the Open button on the Find File dialog. The file name for the selected file is shown to the right of the Browse button.

3. Click the Upload File link.
   - The selected file is added to the Uploaded Files list.

4. If desired, repeat steps 2 and 3 to add additional files to the Uploaded Files list.
   - If you wish to remove a file from the Uploaded Files list, click the Remove button for the desired file.

5. When all desired files have been added to the Uploaded Files list, click the Submit button to upload the files.
   - When the file upload is complete, the Circulation Backup Report screen displays. The Circulation Backup Report screen shows a listing of uploaded files from the Standalone Circulation Utility. Each line in the listing provides the following information:
     ○ ID - A unique system-assigned identification number for the uploaded file(s).
     ○ Library Name - The name of the library to which the upload was submitted.
     ○ Files - The name(s) of the file(s) included in the upload.
     ○ Created By - The name of the staff member that uploaded the file(s).
     ○ Status - The current status of the upload; this field will show the word Finished when the upload is completed.
     ○ Create Date - The date and time at which each file included in the upload was created (from within the Standalone Circulation Utility).
     ○ Process Date - The date and time at which processing of the upload was completed.
     ○ Checked Out - The total number of checkout transactions in all files included in the upload.
     ○ Checked In - The total number of check in transactions in all files included in the upload.
     ○ Rejected - The total number of rejected transactions in all files included in the upload (see Resolving Rejected Records on page 21 for more information).
     ○ Fines - The total dollar amount of fines assessed against transactions for all files included in the upload.

6. Click the Detail button in the Options column to view posting results for the uploaded file(s) (see Viewing the Circulation Backup Detail Report on page 17 for details). Click the Delete button in the Options column to delete the uploaded file(s) (see Deleting Uploaded Files on page 21 for details).

7. When finished, click the button to close the Circulation Backup Report screen and return to the Staff Menu Dashboard.
Viewing the Circulation Backup Detail Report

The Circulation Backup Detail Report provides detailed posting results for a specific upload. The Circulation Backup Detail Report should be printed (or downloaded) for each transaction file upload to your library's database.

**IMPORTANT:** You can use the Circulation Backup Detail Report as an aid in verifying that "posted" transactions in the Standalone Circulation module have been successfully uploaded to your library's VERSO database prior to deleting the files (see Deleting Posted Transactions on page 12 and Deleting Uploaded Files on page 21 for details).

To view the Circulation Backup Detail Report:

1. Log into your library's VERSO system in Staff Mode.
2. Click the **Staff Menu** link to access the Staff Menu Dashboard.
3. From the **Circulation** menu, select **Standalone Circ Utility**.
   - The Circulation Backup Report screen displays.
4. Click the **Detail** button in the **Options** column for the upload for which you wish to view the Circulation Backup Detail Report.
   - The screen refreshes to display the Circulation Backup Detail Report for the selected upload.
5. The Circulation Backup Detail Report provides the following information:
   - The circulation backup summary is shown at the top of the screen. The circulation backup summary lists:
     - the **Total Number of Check In** transactions
     - the **Total Number of Check Out** transactions
     - the **Total Number of Rejected Items**
     - the **Total Number of Items with Exception** for which checkout transactions were performed
     - the **Total Amount of Fines Posted** for checkin transactions
     - the **Total Amount of Check Out Fees** for checkout transactions
     - the **Total Number of Multiple Checked Out Items** (items for which more than one checkout transaction was posted)
     - the **Total Number of Already Checked Out Items** for which checkout transactions were posted
   - Each line in the circulation backup summary for which data is present serves as a link to the detail section for the associated item.
**POSTED ITEMS:** This section of the report provides a listing for each transaction that was successfully posted to your library’s database.

<table>
<thead>
<tr>
<th>Type</th>
<th>Date</th>
<th>Item Code</th>
<th>Title</th>
<th>Patron Code</th>
<th>Patron Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CO</td>
<td>5/23/2007 12:06 PM</td>
<td>061510649525*</td>
<td>Slaughterhouse; or, The children's</td>
<td>PQT</td>
<td>Turnbull, Phil</td>
</tr>
<tr>
<td>CO</td>
<td>5/23/2007 12:06 PM</td>
<td>5110006234745</td>
<td>Ginter's game</td>
<td>PQT</td>
<td>Turnbull, Phil</td>
</tr>
<tr>
<td>CO</td>
<td>5/23/2007 12:06 PM</td>
<td>5110001263865</td>
<td>Ginter-22</td>
<td>PQT</td>
<td>Turnbull, Phil</td>
</tr>
<tr>
<td>CO</td>
<td>5/23/2007 12:13 PM</td>
<td>0602290808025</td>
<td>Freds Inferno</td>
<td>JWF</td>
<td>Thornsill, Jeff</td>
</tr>
<tr>
<td>CI</td>
<td>5/23/2007 12:29 PM</td>
<td>5091209036902</td>
<td>2 Cat</td>
<td>JWF</td>
<td>Thornsill, Jeff</td>
</tr>
<tr>
<td>CI</td>
<td>5/23/2007 12:24 PM</td>
<td>5110006957975</td>
<td>The dummyknuckles</td>
<td>JWF</td>
<td>Thornsill, Jeff</td>
</tr>
</tbody>
</table>

For check out transactions, each entry shows the transaction **Type** (CO = check out), the **Date** and time at which the transaction was entered in the Standalone Circulation module, the **Item Code** (barcode) as entered in the Standalone Circulation module, the item **Title** (taken from the item record for the associated **Item Code**), the **Patron Code** (barcode) as entered in the Standalone Circulation module, and the **Patron Name** of the patron to whom the item was checked out (taken from the patron record for the associated **Patron Code**).

For check in transactions, each entry shows the transaction **Type** (CI = check in), the **Date** and time at which the transaction was entered in the Standalone Circulation module, the **Item Code** (barcode) as entered in the Standalone Circulation module, and the item **Title** (taken from the item record for the associated **Item Code**).

**REJECTED ITEMS:** This section of the report provides a listing for each rejected transaction (transactions that were not posted to your library's database).

<table>
<thead>
<tr>
<th>Reason</th>
<th>Type</th>
<th>Date</th>
<th>Operator Name</th>
<th>Item Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO PBC</td>
<td>CO</td>
<td>5/23/2007 12:10 PM</td>
<td>John Doe</td>
<td>5110006464152</td>
</tr>
<tr>
<td>NO PBC</td>
<td>CO</td>
<td>5/23/2007 12:09 PM</td>
<td>JGF</td>
<td>5110006361711</td>
</tr>
<tr>
<td>NO PBC</td>
<td>CO</td>
<td>5/23/2007 12:26 PM</td>
<td>John Faulkner</td>
<td>999</td>
</tr>
<tr>
<td>NO PBC</td>
<td>CO</td>
<td>5/23/2007 12:20 PM</td>
<td>John Faulkner</td>
<td>999</td>
</tr>
</tbody>
</table>

Each line in the listing shows the **Reason** for rejection (NO PBC = invalid patron barcode; NO IBC = invalid item barcode), the **Type** of transaction (CO = check out; CI = check in), the **Date** and time at which the transaction was entered in the Standalone Circulation module, the **Patron Code** (barcode) and **Operator Name** (patron name) (for rejected check out transactions only), and the **Item Code** (barcode) as entered in the Standalone Circulation module.

**IMPORTANT:** To maintain your library’s database in valid condition, you must resolve all rejected transactions, and manually enter the correct information using the VERSO Circulation module (see Resolving Rejected Records on page 21 for details).

**CHECKED OUT ITEMS WITH EXCEPTION:** This section of the report provides a listing for each checkout transaction for items to which an exception has been applied.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Date</th>
<th>Item Code</th>
<th>Title</th>
<th>Checked Out Patron Code</th>
<th>Checked Out Patron Name</th>
<th>Phone</th>
</tr>
</thead>
</table>

Each line in the listing shows the **Reason** (exception) applied to the item, the **Date** and time at which the transaction was entered in the Standalone Circulation module, the **Item Code** (barcode) as entered in the Standalone Circulation module, the item **Title** (taken from the item record for the associated **Item Code**), the **Checked Out Patron Code** (barcode) of the patron to whom the item was checked out as entered in the Standalone Circulation module, and the **Checked Out Patron Name** and **Phone** number of the patron to whom the item was checked out (taken from the patron record for the associated **Checked Out Patron Code**).
FINES POSTED: This section of the report provides a listing for check in transactions for items to which fines have been applied.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Item Code</th>
<th>Title</th>
<th>Patron Code</th>
<th>Patron Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/12/2007</td>
<td>$2.00</td>
<td>00081200000027*</td>
<td>Cat</td>
<td>6432041</td>
<td>Jung, Eric</td>
</tr>
</tbody>
</table>

Each line in the listing shows the Date and time at which the transaction was entered in the Standalone Circulation module, the fine Amount, the Item Code (barcode) as entered in the Standalone Circulation module, the item Title (taken from the item record for the associated Item Code), the Patron Code (barcode) of the patron against whom the fine has been assessed, and the Patron Name (taken from the patron record for the associated Patron Code).

CHECK OUT FEES POSTED: This section of the report provides a listing for check out transactions for items to which checkout fees have been applied.

<table>
<thead>
<tr>
<th>Date</th>
<th>Amount</th>
<th>Item Code</th>
<th>Title</th>
<th>Patron Code</th>
<th>Patron Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/12/2007</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each line in the listing shows the Date and time at which the transaction was entered in the Standalone Circulation module, the fee Amount, the Item Code (barcode) as entered in the Standalone Circulation module, the item Title (taken from the item record for the associated Item Code), the Patron Code (barcode) of the patron against whom the fee has been assessed, and the Patron Name (taken from the patron record for the associated Patron Code).

MULTIPLE CHECKED OUT ITEMS: This section of the report provides a listing for multiple check out transactions for the same item.

<table>
<thead>
<tr>
<th>Item Code</th>
<th>Title</th>
<th>Date</th>
<th>Patron Code</th>
<th>Patron Name</th>
</tr>
</thead>
</table>

Each line in the listing shows the Item Code (barcode) as entered in the Standalone Circulation module, the item Title (taken from the item record for the associated Item Code), the Due Date and time at which each transaction was entered in the Standalone Circulation module, the Patron Code (barcode) of each patron to whom the item was checked out, and the Patron Name (taken from the patron record for the associated Patron Code).

ALREADY CHECKED OUT ITEMS: This section of the report provides a listing of check out transactions for items already registered as checked out to another patron.

<table>
<thead>
<tr>
<th>Patron Code</th>
<th>Patron Name</th>
<th>Due Date</th>
<th>Item Code</th>
<th>Title</th>
<th>Prev Check Out Paton Code</th>
<th>Prev Check Out Patron Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>JWT</td>
<td>Thompkins, Jeff</td>
<td>11/11/2005</td>
<td>51100800957977</td>
<td>The Tommyknockers</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each line in the listing shows the Patron Code (barcode) of the patron to whom the item was checked out, the Patron Name (taken from the patron record for the associated Patron Code), the Due Date for the item for the prior check out, the Item Code (barcode) as entered in the Standalone Circulation module, the item Title (taken from the item record for the associated Item Code), and the Prev Check Out Patron Code (barcode) and Prev Check Out Patron Name of the patron to whom the item is currently checked out.

6. If desired, you can:

- Save a copy of the Circulation Backup Detail Report to your local workstation (see Saving the Circulation Backup Detail Report on page 20 for details)
Email a copy of the Circulation Backup Detail Report to yourself or to another party (see Emailing the Circulation Backup Detail Report on page 20 for details)

7. When finished, click the X button to close the Circulation Backup Report screen and return to the Staff Menu Dashboard.

**Saving the Circulation Backup Detail Report**

You can save a copy of the Circulation Backup Detail Report to your local workstation.

The Circulation Backup Detail Report is saved in HTML format.

**To save the Circulation Backup Detail Report:**

1. On the Circulation Backup Detail Report screen, click the Save As button.
   - A File Download dialog displays.
2. Select to save the file.
   - A standard Save As dialog displays.
3. Enter a name for the file in the File name text box. Be sure to retain the .htm extension.
4. Select the location in which you wish to save the file.
5. Click the Save button to download the file.
   - Depending on your browser, a status dialog may display while the file is being downloaded. When the file has been downloaded, a "Download Complete" message displays. Click the Close button to close the status dialog.

**Emailing the Circulation Backup Detail Report**

You can email a copy of the Circulation Backup Detail Report to yourself or another staff member.

**To email the Circulation Backup Detail Report:**

1. On the Circulation Backup Detail Report screen, click the Email button.
   - The Email Report screen displays in an additional browser window.
2. Enter a subject line for the email in the Subject text box.
3. Enter your email address (or the email address of the person to whom you wish to send the statistics report) in the Send To text box.
4. Use the Send as Attachment radio buttons to select the desired method for sending the Circulation Backup Details.
   - Select the Yes radio button to send the Circulation Backup Detail Report as an HTML file attached to the email.
Select the No radio button to embed the Circulation Backup Detail Report in the body of the email.

5. Click the Send Report link to send of copy of the Circulation Backup Detail Report to the specified email address.

### Resolving Rejected Records

If the Circulation Backup Report indicates rejected items, you must resolve the rejected items, and manually enter the correct transactions using the Circulation module (see the Circulation User Guide for details). The following suggestions may be helpful in resolving rejected records.

**To resolve rejected "check out" transactions:**

Check out transactions are rejected due to the entry of either an invalid patron barcode or an invalid item barcode (or both) during checkout. In these events, the checked out items will still appear as "AVAILABLE" in your library's VERSO catalog.

- **For invalid patron barcodes:** If a patron name was entered during the check out process, search your library's patron directory for the specified name to determine the correct barcode for the patron.
- **For invalid item barcodes:** It may be necessary to contact the patron to whom the item was checked out to determine the correct barcode for the item.

**To resolve rejected "check in" transactions:**

Check in transactions are rejected only due to the entry of an invalid item barcode. In this event, the checked in items will still appear as "unavailable" in your library's VERSO catalog. If you have retained the physical copies of checked in items in a temporary location, you may be able to inventory the items to resolve any "rejected" check in transactions. Otherwise, it may be difficult or impossible to resolve "rejected" check in transactions.

If "rejected" check in transactions are not resolved, they will result in the generation of invalid fines against the associated patron.

### Deleting Uploaded Files

Once the Circulation Backup Detail Report for an uploaded file has been viewed and printed, and any discrepancies have been resolved, the uploaded file can be deleted.

**To delete an uploaded file:**

- On the Circulation Backup Report screen, click the Delete button in the Options column for the upload file you wish to delete.
  - The screen refreshes with the selected file deleted.