Loans management

Thanks to the loans management module, BiblioMaker offers the possibility to record loans, reservations, check in and loan renewals.

This document describes how to record these different transactions. It is intended for the persons in charge of these tasks. However, the software settings for loan management are not covered here; a more complete explanation can be found in the reference manual.

Contents

1. Access to the loan management window

When the software starts, it automatically displays the last file that was opened when you left the software: Titles, Addresses, Loans, etc. The first operation therefore consists in displaying the Loans file via the **Data>Loans** menu.

To access the Loan Management window, then choose **Action>New** or click the **New** button in the button bar at the top of the main window.

1.1 The window

The loan management window allows you to perform all the transactions recording operations with the readers, such as the loan, reservation, return, loan renewal, cashing in, printing the reader account status, etc. In general, this window remains permanently open at the lending desk during library opening hours.

The window contains several zones :

Entry zone

In this zone, you identify the reader and the titles and you check the current entering status (*Loan / Reservation / Renewal / Remove-Return / Internal traffic*).

Messages zone

This zone displays several warnings such as overdue loans, open due amount, expired subscription, etc.

Reader zone

This zone displays information about the current reader.

Titles zone

This zone displays loans and reservations for the current reader.

Selection zone

This zone displays further information about the title selected in the titles zone.

Buttons zone

This zone contains several buttons for renewing or removing loans/reservations or cashing in.

1.2 Menus

The loan management window is accompanied by two menus offering various commands.

The **File** menu essentially allows you to print the reader's account status on an A4 page or on a ticket (if you have a receipt printer).

The **Entry** menu contains commands to change the entering status and tell the software what your next actions will be: recording loans, reservations, renewals, returns, internal traffic. It also allows you to search titles, modify title or reader records, recall one of the last readers for which you made a transaction or view their history of loans.

1.3 Entering status

The **Entering status** is displayed in the upper right corner of the loan management window. This status is very important as it influences the processing of the title you identify in the **Entry code** field.

The **Loan** entering status indicates that the titles you will identify will be considered borrowed.

The **Remove-Return** status indicates that the titles you will identify will by considered returned or - if in case of a reservation - the reservation cancelled.

The **Reservation** entering status indicates that the titles you will identify will be considered reserved.

The **Internal traffic** entering status indicates that the titles you will identify will be considered borrowed in Internal traffic mode. You will find at § 6 an explanation about this entering status.

The **Renewal** entering status indicates that the loans you will identify will be renewed.

You can change the entering status in three different ways :

A) With help of the mouse, choose another status in the **Entry** menu.

B) With help of the keyboard, enter one of the shortcuts displayed on the right-hand side of the **Entry** menu.

C) Use the **Barcode status reference list** you have printed and scan one of its barcodes.

If you choose the wrong entering status, the software would not understand what you want to do and could display error messages or do the wrong thing (for instance return a title that is still lent). This is why it is important to always check the current entering status.

You can change the entering status at any time. For instance, you can register the loan of titles for a reader with the *Loan* entering status, then change the Entering status to *Remove-Return* in order to register titles coming back. Doing the same operation in reverse order is of course also possible, as usually readers begin with giving titles back before taking new titles. Of course, when you change the entering status, it is not necessary to identify a reader again if his account is already displayed.

1.4 Identifying a reader

During some operations (loan, reservation, internal traffic), you must begin with the reader identification. Several methods are available for doing it :

A) If the reader has a library card with a barcode, just scan it.

B) Without a library card, enter in the **Entry code** field the "/" character followed by the reader name/surname (for instance */smith* ; the beginning of the name could be enough), then start the search by pressing the Tab key. If the software finds only one reader, his name is automatically displayed in the Reader zone. If several readers have been found, a window for selecting the reader is displayed.

Entry code	/smith

Once the reader has been identified, the next step is usually to identify the titles.

1.5 Identifying a title

A title can be identified in several ways :

A) If the title has a barcode (on a label or the ISBN printed on the back), scan it.

B) In the **Entry code** field, enter a search criterion : words from the title after the "\" character (for instance *harry potter*), record number after the "#" character (for instance *#1234*), then start the search by pressing the Tab key.

Entry code	\harry potter

C) In the **Entry** menu, call the **Find title** or **Search title** command and define the search criterion : Title, Number, Shelf mark, etc. and start the search.

If the software finds only one title, it is automatically displayed in the titles zone. If several titles have been found, a window for selecting the title is displayed.

If the goal is to renew a loan or to delete a reservation, a title can be identified by selecting it with the mouse in the titles zone, after the corresponding reader has been identified.

2. Registering loans

Registering loans happens as follows :

1) Check that the **Entering status** is *Loans*, otherwise select it in the **Entry** menu (see § 1.3).

2) Identify the reader with his barcode or his name (see § 1.4 *Identifying the reader*), unless his account is already displayed.

3) Identify the title with its barcode or by doing a search (see § 1.5 *Identifying a title*). If the reader borrows several titles, repeat this step for each title.

Each title identified is added to the titles zone table. The table displays the date of the loan, the title, the expected date of return and in the **Operations performed** column the mention *Loan*.

Once you have finished with a reader, you can click on the **Validate** button or immediately identify the next reader without clicking on **Validate** : when switching reader, the operations performed with the current reader are automatically saved.

3.   Registering returns

Registering the return of titles can happen in two ways :

Identifying the reader and selecting titles with the mouse :

1)   Identify the reader with his barcode or his name (see § 1.4 *Identifying the reader*), unless his account is already displayed.

2)   Select in the titles zone the title to return, then click on the **Delete** button. Repeat this step with other titles from the same reader.

Tip : if you press the Alt key when clicking on the **Delete** button, ***all*** titles lent by this reader will be returned. This shortcut can nevertheless be dangerous, because you have to be sure that all titles have physically been returned, what can be difficult to check if the reader has borrowed many titles.

Identifying titles directly with the scanner :

1)   Check that the **Entering status** is *Remove-Return*, otherwise select it in the **Entry** menu (see § 1.3).

2)   Identify the title with its barcode or by doing a search (see § 1.5 *Identifying a title*). If the reader gives several titles back, repeat this step for each title.

Each title identified stays in the titles zone table with the *Remove-Return* mention in the **Operations performed** column. Nevertheless, the **Number of loans** field below the loans table is updated in order to mirror the reader account status.

Once you have finished with a reader, you can click on the **Validate** button or immediately identify the next reader without clicking on **Validate** : when switching reader, the operations performed with the current reader are automatically saved.

Fine	7.80	**Reminder fee**	0.00	**Due amount**	7.80

If overdue titles have been returned and your library bills a fine, a due amount is displayed below the table in the titles zone. When validating loans, a dialog box can be displayed, demanding the payment of the fine. This dialog box is described at § 8 (*Cashing in*).

## 4.	Registering renewals

Registering renewals happens in two possible ways :

Identifying the reader and selecting with the mouse titles to renew :

1)	Identify the reader with his barcode or his name (see § 1.4 *Identifying the reader*), unless his account is already displayed.

2)	Select in the titles zone the loan to renew, then click on the **Renew** button. A dialog box is displayed, suggesting a renewal duration and a new date of return. If you agree with the suggestion, validate the dialog box, otherwise change either the renewal duration or the new date of return before validating.
Repeat this step with other titles from the same reader.

Tip : if you press the Alt key when clicking on the **Renew** buttton, *all* loans for this reader will be renewed : the renewal dialog box will be displayed for each title to renew.

Identifying titles directly with the scanner :

1)	Check that the **Entering status** is *Renewal*, otherwise select it in the **Entry** menu (see § 1.3).

2)	Identify the title with its barcode or by doing a search (see § 1.5 *Identifying a title*). A dialog box is displayed, suggesting a renewal duration and a new date of return. If you agree with the suggestion, validate the dialog box, otherwise change either the renewal duration or the new date of return before validating.
Repeat this step with other titles from the same reader.

Notice : if the title to renew has been reserved in the meantime by another reader, the software warns you and it's up to you to decide if you allow the renewal of the loan.

Each title identified stays in the titles zone table with the *Renewal* mention in the **Operations performed** column.

Once you have finished with a reader, you can click on the **Validate** button or immediately identify the next reader without clicking on **Validate** : when switching reader, the operations performed with the current reader are automatically saved.

5. Registering reservations

Managing reservations happens in three steps : registering the reservation for the second reader, registering the title return for the first reader and finally registering the loan for the second reader.

5.1 Registering a reservation

1) Check that the **Entering status** is *Reservation*, otherwise select it in the **Entry** menu (see § 1.3).

2) Identify the reader with his barcode or his name (see § 1.4 *Identifying the reader*), unless his account is already displayed.

3) Identify the title by doing a search (see § 1.5 *Identifying a title*). If the title to reserve is available, you will be informed of it.
If the reader wants to reserve several titles, repeat this step for each title.

Each title identified is added to the titles zone table. The table displays the date of the loan, the title, the expected date of return and in the **Operations performed** column the mention *Reservation*.

Once you have finished with a reader, you can click on the **Validate** button or immediately identify the next reader without clicking on **Validate** : when switching reader, the operations performed with the current reader are automatically saved.

The next step usually happens several days or weeks after this first step.

5.2 Warning when the reserved title returns

When a reader brings back a title reserved by another reader, you register the return as usual (see § 3). The system warns you during this operation that the title has been reserved, in order to prevent you from putting the title back to the shelf. You just have to validate the warning.

The next step usually happens several days after the second step.

5.3 Loaning a reserved title

When a reader who has reserved a title comes to the library, you can identify him as usual (see § 1.4 *Identifying a reader*). In the titles zone, the reserved title is accompanied by the *Available* mention in the **Information** column. If several readers have reserved the same title, the *Available* label is followed by two numbers giving the priority order for the reservation. For instance, *Available (2/3)* means that the reader is the second out of three in the reservation queue. The system gives the priority to the first reader who has reserved.

The operations for registering the loan of a reserved title are the same ones as described at § 2 *Registering loans*. The only difference with a standard loan is that the reservation record is converted into a loan record in the titles zone.

6.   Registering an internal traffic

An internal traffic is very similar to a loan. The only difference is that when generating reminders, internal traffic records are skipped. Internal traffic is a loan without any date of return.

Internal traffic can be used in the following situations :

- Loan for a reader you don't want to send a reminder to (for instance the librarians or a teacher in a school)

- Temporary exclusion of a title from the circulation. For instance, in order to repair a damaged title or to exhibit it, you could loan the title to a fictive reader called "Repair" or "Library". By doing so, the title will be displayed as "not available" in the catalogue.

You register an internal traffic in a way that is very similar to a loan :

1)   Check that the **Entering status** is *Internal Traffic*, otherwise select it in the **Entry** menu (see § 1.3).

2)   Identify the reader with his barcode or his name (see § 1.4 *Identifying the reader*), unless his account is already displayed.

3)   Identify the title with its barcode or by doing a search (see § 1.5 *Identifying a title*). If the reader borrows several titles, repeat this step for each title.

Each title identified is added to the titles zone table. The table displays the date of the loan, the title and in the **Operations performed** column the mention *Internal Traffic*.

Once you have finished with a reader, you can click on the **Validate** button or immediately identify the next reader without clicking on **Validate** : when switching reader, the operations performed with the current reader are automatically saved.

7. Printing

When managing loans, you can print at any time one of the following print templates by calling the **File>Print** command :

7.1 Loans list

List of loans on an A4 page.

7.2 Loans list on ticket

List of loans on a ticket (this option is available only if a slip printer has been configured in the software).

7.3 Labels with reader address

Reader address printed on a label. This print template is useful if you send loans to a reader's home

7.4 Labels with title barcode

Barcode label for the selected title. This print template is useful should you notice that the barcode label is damaged.

7.5 Subscription letter

Letter inviting the reader to pay his subscription.

8. Cashing in

When managing loans, you can have to cash in fines for overdue loans, reader subscriptions or for any other reason (for instance title damaged or lost). You can register the cashing in.

8.1 Cashing in a fine for overdue loans

If the software has been configured for calculating fines for overdue loans or reminder fees, a due amount is automatically displayed below the table in the titles zone.

Fine	7.80	**Reminder fee**	0.00	**Due amount**	7.80

If you register the return of a title, when validating loans, you get a dialog box displaying the due amount :

If the reader pays the due amount, the cashed amount will have the same amount. In this case, you can enter a value in the **Payment method** and **Label** fields.

But if the reader is not able to pay the due amount, you can choose between cashing in a smaller amount (and the remainder will be discounted) or cash in nothing (the **Cashed amount** will be 0). In this last case, you can decide to cash in the next time the reader comes to the library or fully cancel if you tick the **Discount the remainder** check box.

If the cashed amount is 0 and the **Discount the remainder** check box is not ticked, an alert is displayed in the messages zone the next time you identify the reader, so that you don't forget to cash in the due amount.

If the reader pays the due amount, you can print a slip. Validate the payment with the **OK** button.

8.2   Cashing in for other reasons

You can register the cashing in from the loans management by clicking on the **Payment** button. A dialog box is displayed and you can choose the payment reason :

After you have selected the reason, validate with **OK**. A second dialog box is displayed :

Enter the needed information in the fields. If you cash in the due amount, enter it in the **Cashed amount** field. If you cash in only a part of the due amount, enter it also in the **Cashed amount**. The **Discount the remainder** check box is automatically ticked, as you will not be able to demand the remainder to be paid later on.

If necessary, enter a value in the **Cause**, **Label**, **Payment method**, **Voucher Nr.** and **Cash register code** fields before validating.