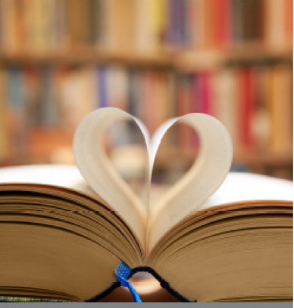




platform



search



share



 **VERSO**<sup>®</sup>  
Powered by Auto-Graphics

# Training Guide



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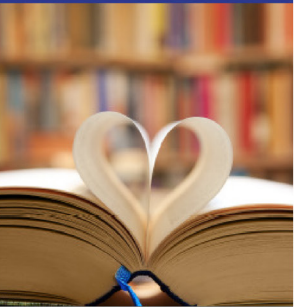
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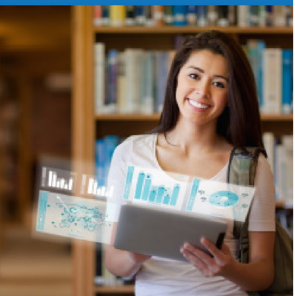
platform



search



share



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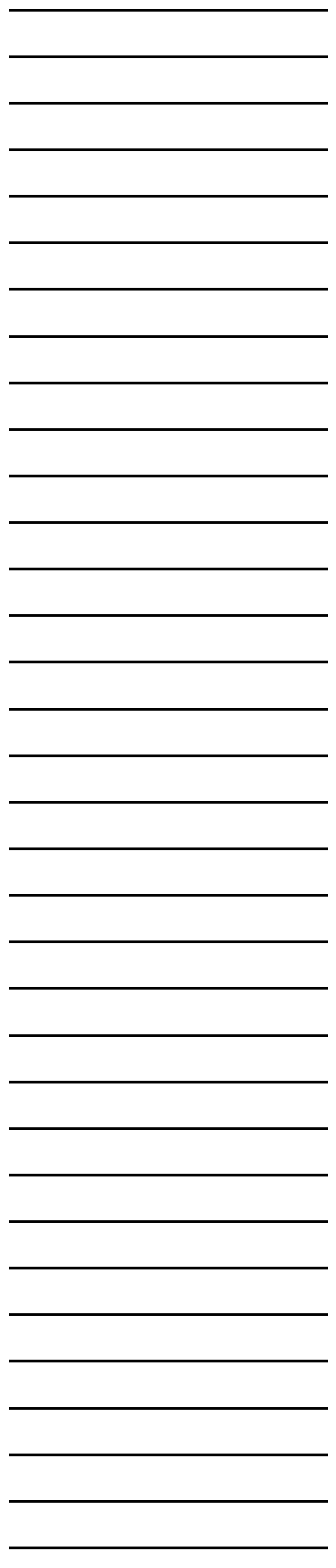




## SEARCH OVERVIEW

In VERSO, you can:

- **Search your library's catalog** - The VERSO interface provides both Quick (keyword) Search and Advanced Search capabilities
- VERSO utilizes a list or gallery display with clustered or merged grouping options that allows you to submit and navigate between multiple results from your search (with options to search other resources, too)
- **View search results** - Each time you submit a search your previous search is replaced. You can specify whether to save prior searches so it is easy to go back to a previous search



Demo Library

All Headings

Advanced

Staff Dashboard Search History Web Links for Staff Auto-Graphics Announcements Amazon

Hello, Auto-Graphics Your Account Logout

### ANNOUNCEMENTS

Check here for special announcements, events and opportunities at your library!

For Library Staff

#### Why Auto-Graphics?

We believe that the more libraries fully engage and make available their tools and information, the more central libraries become in the lives of their communities. We were one of the first companies to offer a full SaaS ILS, making us a true pioneer in the library automation software industry. All of our products are continuously enhanced with bug fixes, ongoing research & development improvements, and full-time support and maintenance. Each of them is designed to help your library more efficiently manage your collections and services through streamlined workflows and a high level of customizability while enabling patrons to easily search and access resources.

#### Our Mission Statement

Send Your Feedback

Name (required)  
Enter Your Name

Email (required)  
Enter Your Email

Phone  
Enter Your Phone

-- Select an Option (required)--

write us a message

reset Submit

Include Reply Email

Demo Library

All Headings

king

Advanced

Staff Dashboard Search History Web Links for Staff GLOBAL HOME Test6 logins Auto-Graphics Announcements Amazon dotest swls home

Hello, Auto-Graphics Your Account Logout

Added In Sort Group By Results

Available

Page 1: Showing 9561 of 9561 results for "king" Modify Search

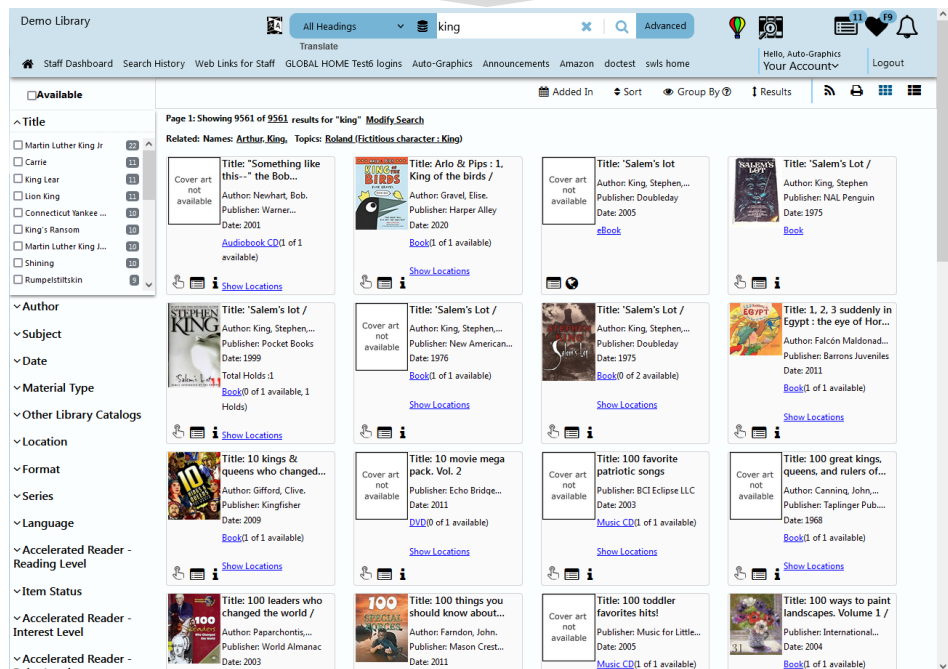
Related: Names: Arthur, King. Topics: Roland (Fictitious character : King)

|  |  |   |   |
|--|--|---|---|
| <p>Title: "Something like this-- the Bob..."<br/>Author: Newhart, Bob.<br/>Publisher: Warner...<br/>Date: 2001<br/>Audiobook CD(1 of 1 available)<br/><a href="#">Show Locations</a></p>       | <p>Title: Arlo &amp; Pips : 1. King of the birds /<br/>Author: Gravel, Elise.<br/>Publisher: Harper Alley<br/>Date: 2020<br/>Book(1 of 1 available)<br/><a href="#">Show Locations</a></p> | <p>Title: 'Salem's lot<br/>Author: King, Stephen...<br/>Publisher: Doubleday<br/>Date: 2005<br/><a href="#">eBook</a></p>                                       | <p>Title: 'Salem's Lot /<br/>Author: King, Stephen<br/>Publisher: NAL Penguin<br/>Date: 1975<br/><a href="#">Book</a></p>   |
| <p>Title: 'Salem's lot /<br/>Author: King, Stephen...<br/>Publisher: Pocket Books<br/>Date: 1999<br/>Total Holds: 1<br/>Book(0 of 1 available, 1 Holds)<br/><a href="#">Show Locations</a></p> | <p>Title: 'Salem's Lot /<br/>Author: King, Stephen...<br/>Publisher: New American...<br/>Date: 1976<br/>Book(1 of 1 available)<br/><a href="#">Show Locations</a></p>                      | <p>Title: 'Salem's Lot /<br/>Author: King, Stephen...<br/>Publisher: Doubleday<br/>Date: 1975<br/>Book(0 of 2 available)<br/><a href="#">Show Locations</a></p> | <p>Title: 1, 2, 3 suddenly in Egypt : the eye of Hor...<br/>Author: Falcón Maldonado...<br/>Publisher: Barrons Juveniles<br/>Date: 2011<br/>Book(1 of 1 available)<br/><a href="#">Show Locations</a></p> |
| <p>Title: 10 kings &amp; queens who changed...<br/>Author: Gifford, Clive.<br/>Publisher: Kingfisher<br/>Date: 2009<br/>Book(1 of 1 available)<br/><a href="#">Show Locations</a></p>          | <p>Title: 10 movie mega pack. Vol. 2<br/>Publisher: Echo Bridge...<br/>Date: 2011<br/>DVD(0 of 1 available)<br/><a href="#">Show Locations</a></p>   | <p>Title: 100 favorite patriotic songs<br/>Publisher: BCI Eclipse LLC<br/>Date: 2003<br/>Music CD(1 of 1 available)<br/><a href="#">Show Locations</a></p>      | <p>Title: 100 great kings, queens, and rulers of...<br/>Author: Canning, John...<br/>Publisher: Taplinger Pub...<br/>Date: 1968<br/>Book(1 of 1 available)<br/><a href="#">Show Locations</a></p>         |
| <p>Title: 100 leaders who changed the world /<br/>Author: Papparchonis...<br/>Publisher: World Almanac<br/>Date: 2003</p>  | <p>Title: 100 things you should know about...<br/>Author: Farnon, John.<br/>Publisher: Mason Crest...<br/>Date: 2011</p>   | <p>Title: 100 toddler favorites hits!<br/>Publisher: Music for Little...<br/>Date: 2005<br/>Music CD(1 of 1 available)</p>                                      | <p>Title: 100 ways to paint landscapes. Volume 1 /<br/>Publisher: International...<br/>Date: 2004<br/>Book(1 of 1 available)</p>  |

## SEARCH METHODS

### Quick Search

- Quick Search is the broadest search method
- It allows the user to search **All Headings (Title, Author, Subject, Notes, Publisher Information)** or a selected index to find items based on the keywords you enter
- You can use one or more keywords as your search term, and include wildcards or logical functions (**AND, OR** and **NOT**)
- When you use two or more words in a search term, the system searches for items that contain all the words
- Enter your search term in the Search text box, then click the **Search** icon to submit your search.



### Advanced Search

**Advanced Search** lets you create complex searches. You can use up to three search terms and the logical functions **And, Or** and **Not**.

- **And** - Finds items that contain the 1st search term **And** the 2nd search term.
- **Or** - Finds items that contain the 1st search term **Or** the 2nd search term.
- **Not** - Finds items that contain the 1st search term but **Not** the 2nd search term.

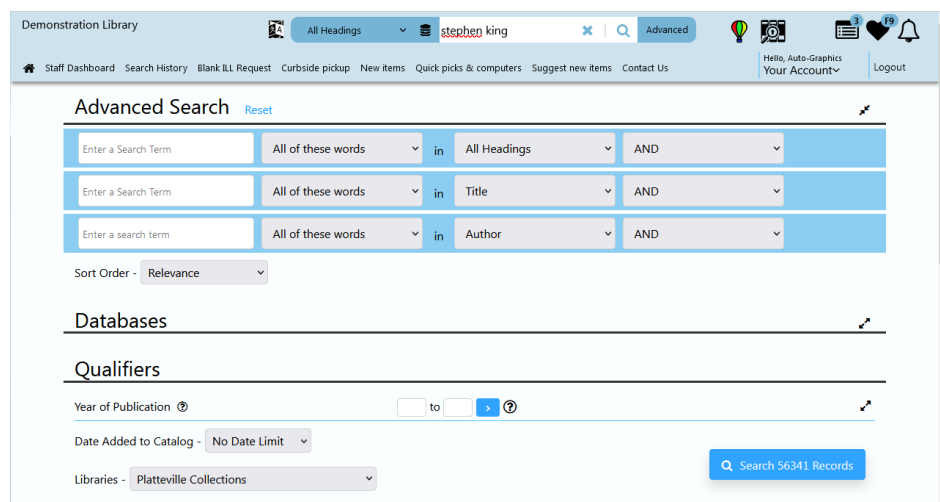
You can select a separate search index for each search term.

## SEARCH METHODS (CONTINUED)

### Qualify By

You can also add search qualifiers to your search. Search qualifiers let you limit your search results to items of a selected media, form, language and/or publication date. You can use one or more qualifiers on any **Advanced Search**.

- **Resources** – Lets you select the resources that the library has made available to the user
- **Year of Publication** – Lets you limit your search to materials published during a specific year, multiple years or a range of years
- **Date Items Added** – Lets you locate items recently added to your library's catalog based on date added.
- **Libraries** – Lets you limit your search to selected groups of libraries or library locations. You can search All Libraries, or narrow your search by choosing any other group listed
- **Formats** – Lets you limit your search to items in a specified media format (Books, Computer Files, etc.)
- **Languages** – Lets you limit your search to items in a specified language
- **Material Type** – Lets you limit your search to items of a specified material type (Books, CD, DVD, etc.)
- **Has OCLC** – Lets you to items with bibliographic records that contain an Online Computer Library Center (OCLC) number.
- **Reading/Interest Levels or Awards** – Lets you limit your search to items appropriate to a specified reading grade or interest level, or titles that have won one or more awards.



## VIEWING SEARCH RESULTS

### Content Panel

The Search Results screen shows a scrollable list of titles that matched your search and may include book jacket illustrations for listed titles. Use the navigation bar to view other pages of the list. You can sort the list by selecting a new sort option from the **Sort** menu, select a new grouping for search results from the **Group By** menu, or use the **Results** menu to set the number of records shown on each page of the list.

Once you have sorted the list and choose to load more items, the new items are inserted into the list according to the selected sort order.

- Jacket Art
- Title, Author, Format, and additional fields as desired
- Change sort order
- Change the grouping option
- Change records per page

## Gallery View

The screenshot shows the Verso library interface in Gallery View. The search term is "king". The interface displays a grid of book covers with their respective titles, authors, publishers, and dates. The left sidebar contains filters for Title, Author, Date, Subject, Material Type, Other Library Catalogs, Location, Format, Series, Language, Accelerated Reader - Reading Level, Item Status, Accelerated Reader - Interest Level, and Accelerated Reader - Interest Level. The main content area shows a grid of book covers with their respective titles, authors, publishers, and dates. The top navigation bar includes "All Headings", "king", and "Advanced" search options. The bottom navigation bar includes "Sort", "Group By", "Results", and "Logout".

## List View

The screenshot shows the Verso library interface in List View. The search term is "stephen king". The interface displays a list of book records with their respective titles, authors, publishers, and dates. The left sidebar contains filters for Title, Author, Subject, Date, Material Type, Other Library Catalogs, Location, Format, Series, Language, Item Status, and Awards. The main content area shows a list of book records with their respective titles, authors, publishers, and dates. The top navigation bar includes "All Headings", "stephen king", and "Advanced" search options. The bottom navigation bar includes "Sort", "Group By", "Results", and "Logout".

## VIEWING SEARCH RESULTS (CONTINUED)

### Left Panel

You can limit your search results using predefined filters, such as:

- **Available** – Lets you limit search results to items that are currently available for checkout
- **Format** – Lets you limit search results to only those for a selected Format included in your search
- **Title** – Lets you select a specific title included in your search results
- **Author** – Lets you select a specific Author included in your search results
- **Location** – Lets you select a specific Location included in your search results
- **Publisher** – Lets you select a specific Publisher included in your search results
- **Date** – Lets you select a specific publication date included in your search results
- **Libraries** – If your system contains more than one library you can select the records belonging to a library that was returned in your search results

The screenshot shows the Verso library system interface. At the top, there's a navigation bar with 'Demonstration Library' and a search bar containing 'ender'. Below the navigation bar, there are tabs for 'Staff Dashboard', 'Search History', 'Blank.ILL Request', 'Curbside pickup', 'New items', and 'Quick picks & recommendations'. The main content area shows search results for 'ender', with a filter menu on the left and a detailed filter menu on the right. The filter menu on the right is expanded, showing various filters such as 'Available', 'Subject', 'Material type', 'Location', 'Series', 'Author', 'Publication date', 'Audience Level', 'Title', 'Language', 'Format', 'Item Status', 'Awards', 'Reading Program', and 'Facility'. A grey arrow points from the 'Available' filter in the list to the 'Available' checkbox in the filter menu.

| Format  | Call Number            | Status    | Details |
|---|------------------------|-----------|---------|
| Audiobook CD (2 of 2 Available)                 |                        |           |         |
| Platteville Public Library - Adult - Book on CD | CD Car (Book on CD)    | Available |         |
| Viola Public Library - Adult - Book on CD       | BOCD Card (Book on CD) | Available |         |

## Full Record Display

A Full Record Display is shown when you select an item from the Search Results screen. The Full Record Display is a multi-tabbed screen that shows complete bibliographic information for the item (**Details**), the location of the item (**Where To Find**) and may include the **MARC Display** and any reviews of the item. **Shelf Browse** lets you view other titles located in the same physical area of the library as the current title.

- Use the navigation bar to view the previous or next record in the list
- Click a link in the Full Record Display to submit a new search for the selected term (**Title**, **Author**, **Subject**, etc.).
- Click the **< Go Back** button to return to the Search Results screen.

The additional features and functions available through the Full Record Display depend on the specific configuration of VERSO for your library. The Full Record Display may provide access to one or more of the following features and functions:

- Modify Your Search
- Place a Hold
- Email Record Information
- Print Record Information
- Write a Review of the Item (requires a Goodreads® account)
- Summary
- Cover Image
- If logged in as staff member: Edit the bib record, check item status, edit the item, print the record, etc.

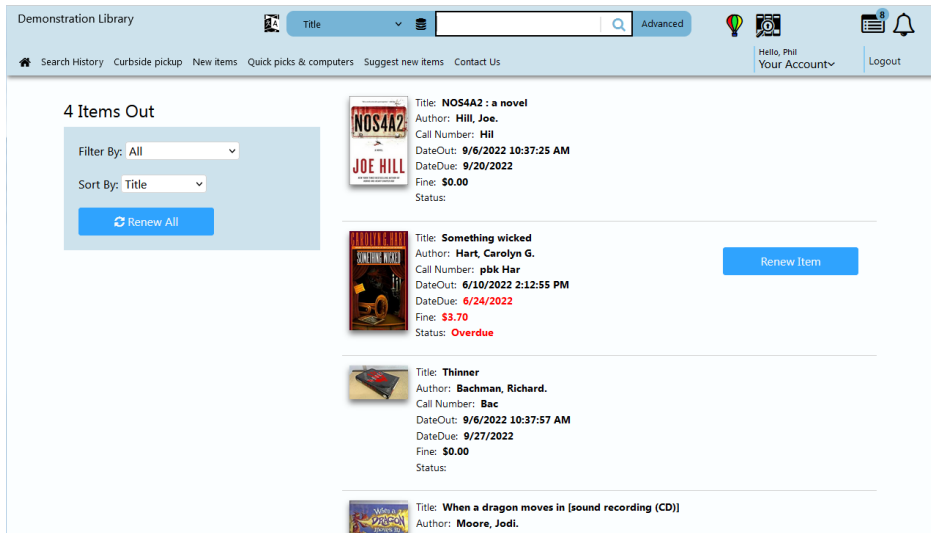
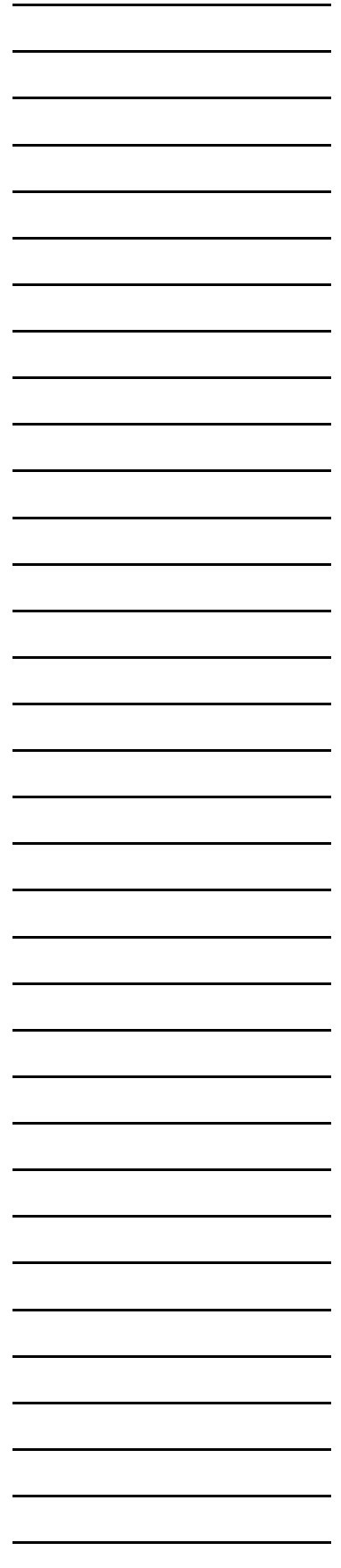
The screenshot shows the 'Details' tab of a book record. The book is 'Wizard and Glass' by Stephen King, published by Plume in 1997. It is part of the 'The Dark Tower' series. The 'Where To Find' section shows five library locations, all with 'Available' status and 'SMS' notification options.

| Location   | Call Number | Status    | SMS                      | Edit Item |
|--|-------------|-----------|--------------------------|-----------|
| Belmont (John Turgeson Public Library) - Adult - Fiction | Kin (Book)  | Available | <input type="checkbox"/> |           |
| Boscobel (Hildebrand Memorial Library) - Adult - Fiction | Kin (Book)  | Available | <input type="checkbox"/> |           |
| Cassville Public Library - Adult - Fiction               | Kin (Book)  | Available | <input type="checkbox"/> |           |
| Cobb Public Library - Adult - Fiction                    | (Book)      | Available | <input type="checkbox"/> |           |
| Cuba City Public Library - Adult - Fiction               | Kin (Book)  | Available | <input type="checkbox"/> |           |

## YOUR ACCOUNT

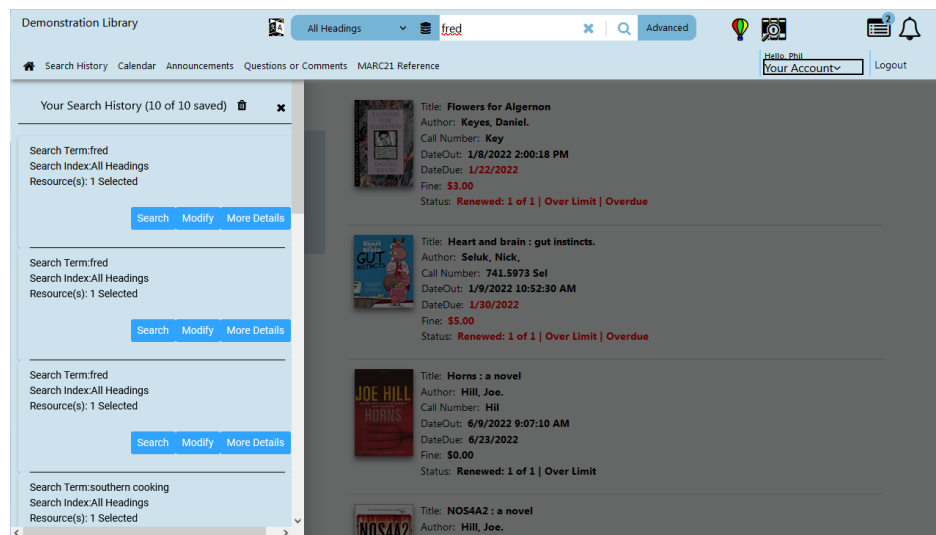
The **Your Account** feature lets you view information in your user record, and access other information associated with your account. The features and functions available through **Your Account** depend on the specific configuration of VERSO for your library. The **Your Account** panel may provide access to one or more of the following features and functions:

- Items from Other Libraries (for Circ-ILL systems only)
- Items Out
- Items On Hold
- Lost Items
- Checkout History
- Active Alerts
- Fine and Lost Item Payment
- Your Profile
- Your Preferences
- Your Favorite Resources
- Your Favorite Web Links



## Search History

**Search History** allows you to see the searches that you have recently executed. You can click on a search to perform the search again. You can manage the number of searches viewable and clear the searches.



## Your Lists

Your Lists lets you save items to specific lists to easily find or group them.

The screenshot shows the Verso library interface. At the top, there is a navigation bar with 'Demonstration Library' and a search bar. Below the navigation bar, there are several menu items: Search History, Curbside pickup, New items, Quick picks & computers, Suggest new items, and Contact Us. On the right side of the navigation bar, there is a user profile section with 'Hello, Phil', 'Your Account', and 'Logout'.

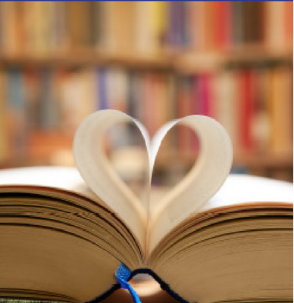
The main content area is titled 'Your Lists' and 'New Titles (5)'. On the left side, there is a 'Select a list or' section with a text input field 'Enter Name of New List' and a 'Create' button. Below this, there is a list of existing lists: 08/31/2022 (2), 12/23/2021 (1), Cookbooks (0), Dark Tower (7), New Titles (5), Summer Book Club (5), Ted Dekker (1), and Things to Read (2).

The 'New Titles (5)' section displays three book entries, each with a checkbox, a book cover, and metadata. The first entry is 'Showdown / Ted Dekker.' with author 'Dekker, Ted', publisher 'WestBow Press, c2006', and ISBN '1595540059'. The second entry is 'The 49th mystic / Ted Dekker.' with author 'Dekker, Ted', edition 'Large print edition', and ISBN '9781432851545'. The third entry is 'Phoenix without ashes / (created and written by Harlan Ellison...' with author 'Ellison, Harlan', publisher 'IDW ;Diamond [distributor], 2010', and ISBN '9781600108006'.





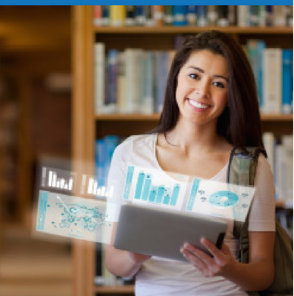
platform



search



share



**VERSO®**

# Search Administration

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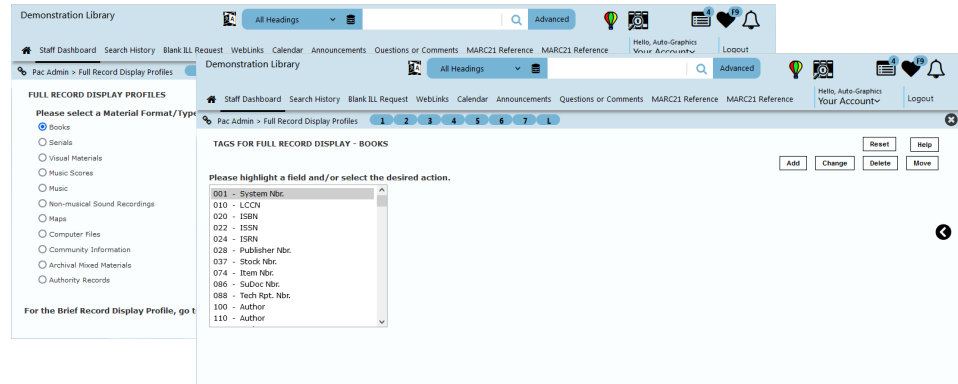


# SEARCH ADMINISTRATION

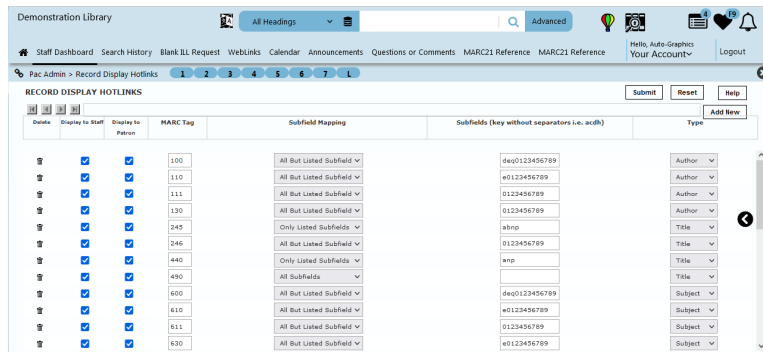
## SYSTEM WIDE (PAC ADMIN)

### Control Record Display Profiles and Hotlinks

The **Full Record Display Profiles** option lets you select the specific MARC tags and subfields that will be shown in the Full Record. You may set the display label for each tag and determine the order in which the selected tags are displayed. Record Display Profiles are configured *independently* for each material format.

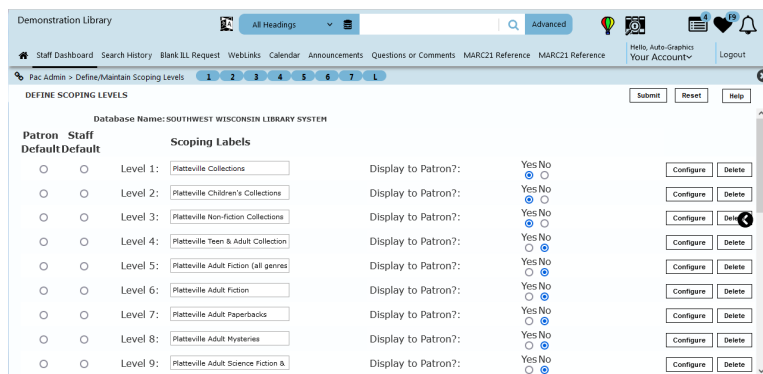


The **Record Display Hotlinks** function lets you specify the MARC tags that will serve as hotlinks in the Full Record Display for MARC records retrieved from *any* bibliographic database.



### Control Search Scoping

PAC Administration's scoping features allow library patrons and staff using VERSO to broaden or narrow the scope of their search to specified locations or collections in the database.









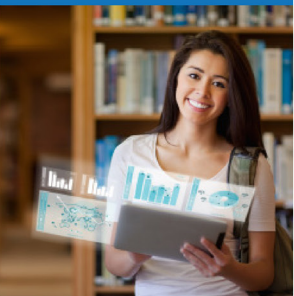
platform



search



share



# UX Administration

15218 Summit Ave, Suite 300  
Box #240  
Fontana, CA 92336  
Phone (800) 776-6939  
Fax (909) 595-3506  
[www.auto-graphics.com](http://www.auto-graphics.com)





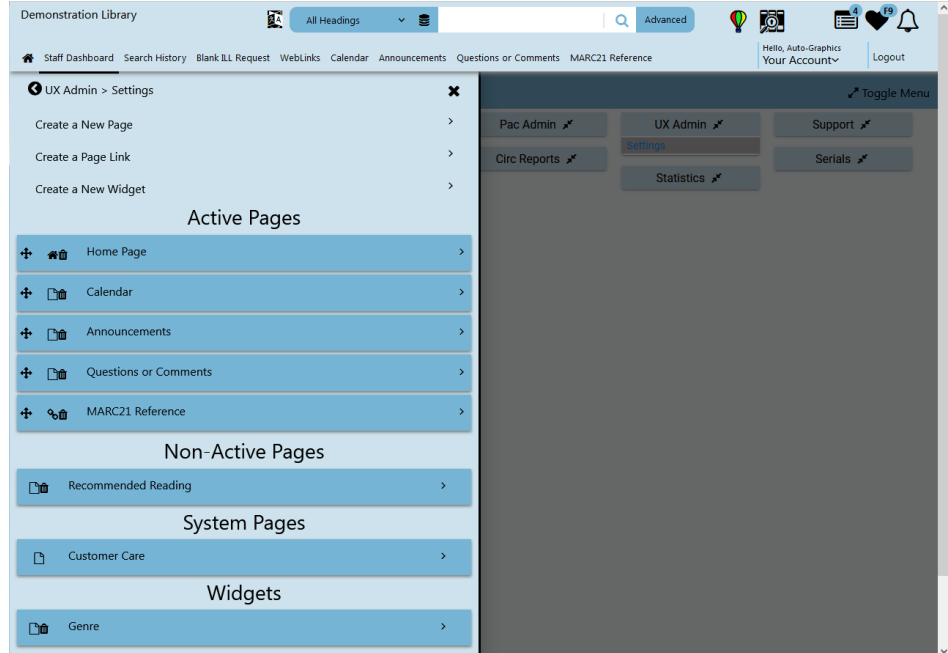


# UX ADMINISTRATION

## PAGE ADMINISTRATION

### Pages and Widgets Manager

- Create Local and Global Pages
- Manage and modify System Pages
- Design Page Layout
- Add Components
- Create Widgets

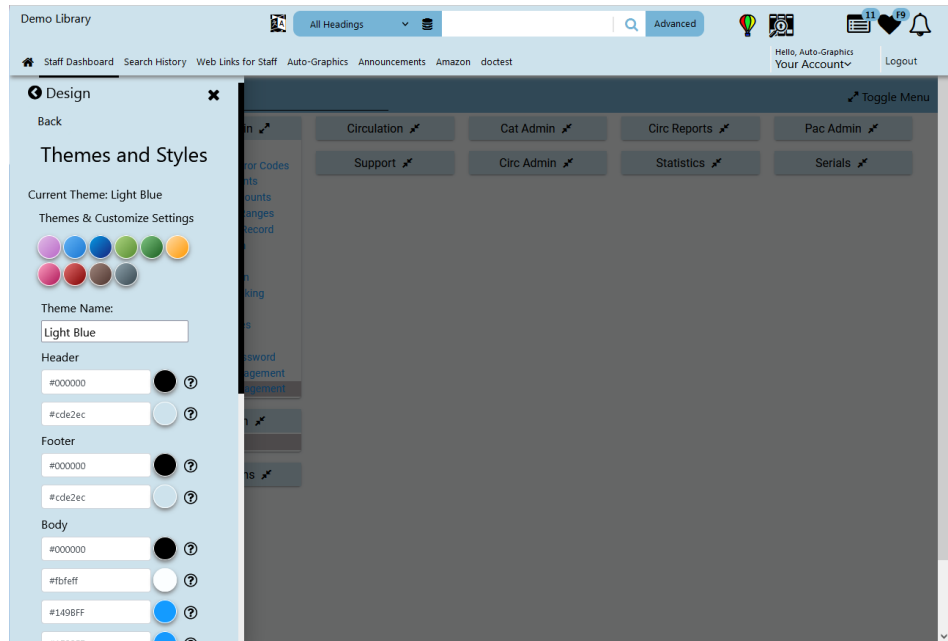




# UX ADMINISTRATION

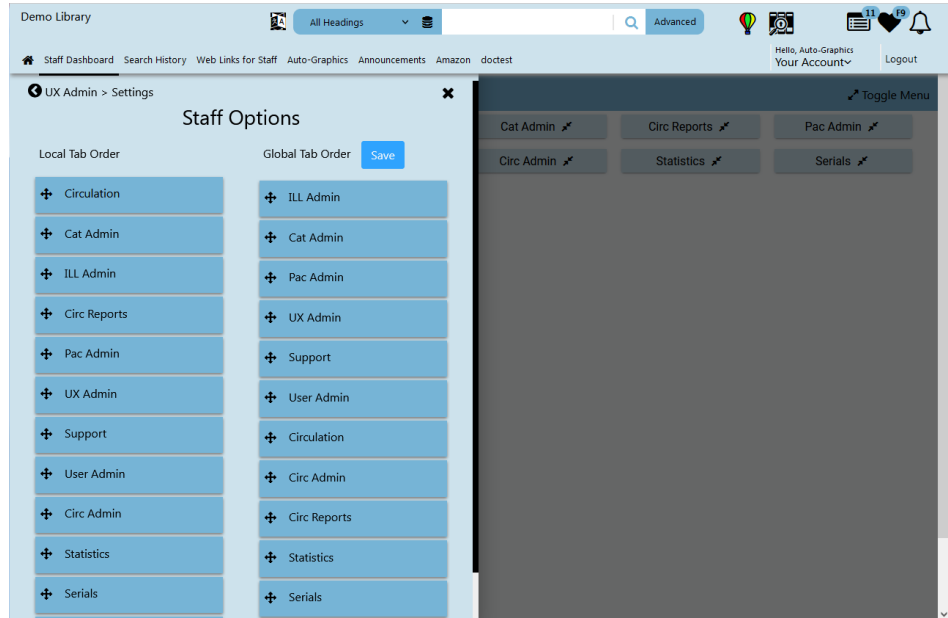
## DESIGN OPTIONS

- Manage page headers and footers
- Customize color schemes



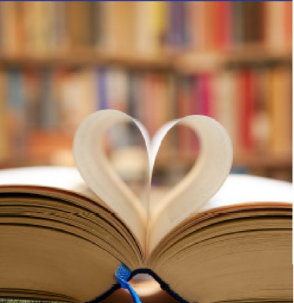
## STAFF OPTIONS

- Configure the Staff Dashboard





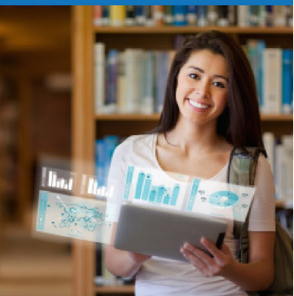
platform



search



share



# **VERSO<sup>®</sup>** **Circulation**

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Box #240  
Fontana, CA 92336  
Phone (800) 776-6939  
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# CIRCULATION

## PATRON AND STATUS CHECKOUT

The Patron Checkout, Status & Reserves screen lets you view the current status of a selected patron's activities with your library. It is where you will go to:

Checkout new items

Renew items

Process lost items

View/edit/add patron record

Process fines/fees payments

Add a patron block

View/delete fines history

Suspend reserves

Override checkout limits

Modify due dates

Print receipts

| No. | Title     | Author        | Barcode        | Call No.     | Due Date  | Expire Date | Patron Note | Staff Reserve Note | Notes |
|-----|-----------|---------------|----------------|--------------|-----------|-------------|-------------|--------------------|-------|
| 2   | The stand | King, Stephen | 38896005428442 | Kin          | 3/2/2023  |             |             |                    |       |
| 1   | Showdown  | William, Kate | 38896004610115 | pb + William | 2/23/2023 |             |             |                    |       |

## EXPRESS CHECKOUT OPTIONS

Displays the Express Checkout screen, from which you can checkout items to a patron without accessing the patron's full record.

### Express Checkout

- Barcode input only
- No link to patron full record
- Warnings must be resolved by authorized library staff
- Checked out items are counted & listed

| Title                           | Author                 | Barcode        | Call Number | Due Date  |
|---------------------------------|------------------------|----------------|-------------|-----------|
| Cool stuff and how it works     | Woodford, Chris.       | 33838005315142 | J 800 COOL  | 6/24/2022 |
| Pet sematary [videorecording]   | Rubinstein, Richard R. | 33838009917778 | DVD F PET   | 6/17/2022 |
| To kill a mockingbird           | Lee, Harper            | 33838005311051 | F LEE       | 6/24/2022 |
| Catch-22                        | Heller, Joseph.        | 33838006280964 | F HELL      | 6/24/2022 |
| Something wicked this way comes | Bradbury, Ray          | 33838003695008 | FA F BRAD   | 6/24/2022 |





# CIRCULATION

## EXPRESS CHECKOUT OPTIONS (CONTINUED)

### Express Checkout with Full Record

- Barcode input only
- Warnings can be resolved using link to patron full record
- Checked out items are counted & listed

Express Checkout With Full Record

Patron Information  
Name: Phil Turnbull  
Library Card Expires On: 10/17/2025  
Barcode:

Enter Barcode:

All Items Checked Out: 5  
Items Checked Out Now: 0

| Title                           | Author                 | Barcode        | Call Number | Due Date: |
|---------------------------------|------------------------|----------------|-------------|-----------|
| Cool stuff and how it works     | Woodford, Chris.       | 33838005315142 | J 600 COOL  | 6/24/2022 |
| Pet sematary [videorecording]   | Rubinstein, Richard P. | 33838009917778 | DVD F PET   | 6/17/2022 |
| To kill a mockingbird           | Lee, Harper            | 33838005131051 | F LEE       | 6/24/2022 |
| Catch-22                        | Heller, Joseph.        | 33838006280964 | F HELL      | 6/24/2022 |
| Something wicked this way comes | Bradbury, Ray          | 33838003695008 | FA F BRAD   | 6/24/2022 |

### RENEW CHECKOUT

Displays the Renew Checkout screen, from which you can renew one or more current checkouts for a selected patron.

- Patron barcode input only
- Express display of items eligible for renewal
- Check all or individual items
- No opportunity to manually revise renewal date

Renew Checkout

Patron Information  
Name: Ricci, Bruno  
Library Card Expires On: 10/17/2025  
Barcode: bar10p  
Enter Barcode:

[Check/Uncheck All](#)

| Title                   | Author               | Fines | Due Date  | Status                            | Fee  | Renew ?                  |
|-------------------------|----------------------|-------|-----------|-----------------------------------|------|--------------------------|
| Awesome animal kingdom. | Time for Kids Books. | 2.10  | 5/16/2022 | Renewed: 4   Over Limit   Overdue | 0.00 | <input type="checkbox"/> |
| Cats                    | Wilkins, Kelli A.    | 1.90  | 5/16/2022 | Renewed: 6   Over Limit   Overdue | 0.00 | <input type="checkbox"/> |

# CIRCULATION

## CHECKIN

Displays the Item Checkin screen, from which you can check in items returned to the library.

- Check in items
- Change checkin date
- Manual or automatic transfer of reserve item to hold location
- Edit patron record
- Process fine payments
- Checked in items are counted & listed

Demo Library

All Headings

Advanced

Staff Dashboard Search History Web Links for Staff Auto-Graphics Announcements Amazon doctest

Hi, Auto-Graphics Your Account Logout

Circulation > Checkin

Item Checkin

Enter Title or Barcode:

Change Checkin Date: 6/10/2022 Remember Checkin Date?

Effective Checkin Date: 6/10/2022

All Items Checked In Today: 5

Items Checked In Now: 1

Last Check In

Effective Date: 6/10/2022

Patron: Turnbull, Rhilla

Fine: 0.00

Balance: 0.00

Phone:

Email: jhandassoc@aol.com

Title: NDS442 : a novel

Author: Hill, Joe.

Barcode: 39896013086166

Call Number: Hil

Item Location: SWLS Library - SWLS Branch - SWLS Collection

Fine Assessed on this Check in

Fine assessed: 0.00

Days Overdue: 0

Fine per day:

Pay Fines

## EXPRESS CHECKIN OPTIONS

Displays the Express Checkin screen, from which you can check in items returned to the library.

- Barcode input only
- No link to patron full record
- No warnings for reserve or brief items
- Checked in items are counted & listed

Demo Library

All Headings

Advanced

Staff Dashboard Search History Web Links for Staff Auto-Graphics Announcements Amazon doctest

Hi, Auto-Graphics Your Account Logout

Circulation > Express Checkin

Express Checkin

Enter Barcode:

Change Checkin Date: 6/10/2022 Remember Checkin Date?

Effective Checkin Date: 6/10/2022

All Items Checked In Today: 6

Items Checked In Now: 1

| Barcode        | Patron | Effective Date | Days Overdue | Fines  | Fine Per Day | Location                                   | Call Number | Title  | Author         |
|----------------|--------|----------------|--------------|--------|--------------|--|-------------|--|----------------|
| 39896012878787 | [pat]  | 06-10-2022     | 0            | \$0.00 |              | Viola Public Library - Adult - DVD fiction | DVD Somet   | Something wicked this way comes [videorecording (DVD)] | Clayton, Jack, |

# CIRCULATION

## HANDLING FINES AND FEES

The **Payments/Fines History** function on the Patron Checkout screen lets you view the fines/fees history for a selected patron, assess fees for library services, and process payments from the patron.

| Date       | Type                  | Comments   | Rate       | Amount | Amount Due | Latest Checkout/Return Date | Due Date   | Checkout Library                   |
|------------|-----------------------|--|------------|--------|------------|-----------------------------|------------|------------------------------------|
| 10/27/2020 | Overdue Fine          | Epic fail  | 75 @ .0260 | \$2.00 | \$0.00     | \$2.00                      | 07/30/2020 | Platteville Public Library         |
| 1:44:12    | Overdue Fine          | fred's dilemma                                   | 16 @ .10   | \$1.60 | \$0.00     | \$1.60                      | 08/17/2020 | Southwest Wisconsin Library System |
| 9/23/2020  | Overdue Fine          | "Something like this--"                          | 7 @ .10    | \$0.70 | \$0.00     | \$0.70                      | 09/23/2020 | Southwest Wisconsin Library System |
| 9/23/2020  | Overdue Fine          | [Sound recording (CD)] : "Something like this--" | 28 @ .07   | \$2.80 | \$0.00     | \$2.80                      | 08/05/2020 | Southwest Wisconsin Library System |
| 9/23/2020  | Overdue Fine          | [Sound recording (CD)] : "Something like this--" | 10         | \$1.00 | \$0.00     | \$1.00                      | 08/05/2020 | Southwest Wisconsin Library System |
| 9:47:26    | Patron Lost Item Cost | To kill a mockingbird                            |            | \$5.00 | \$0.00     | \$5.00                      | 09/09/2019 | Platteville Public Library         |
| 1:05:25    | Claimed Returned      | Speaker for the dead                             |            | \$6.00 | \$0.00     | \$6.00                      | 08/31/2019 | Platteville Public Library         |
| 10:27:45   | Overdue Fine          | Ender in exile                                   | 291 @ .017 | \$5.00 | \$0.00     | \$5.00                      | 08/31/2019 | Platteville Public Library         |
| 7/8/2020   | Overdue Fine          |  |            |        |            |                             |            |                                    |

- Assess fees
- Process payments
- Print fine/fee transaction receipts
- View fines history

## WORKING WITH RESERVES

The Reserve functions let you reserve materials requested by patrons and view a list of:

- reserves for a specific title or all titles,
- patrons with suspended or expired reserves,
- all mediated reserves,
- all reserves for which copies are currently available.

You may also delete unwanted reserves. Multiple reserves may be placed against a single item. Multiple reserves are numbered sequentially, from the earliest to the most recent. VERSO provides the ability to place both “soft” reserves and “hard” reserves.

| Title                          | Call Number | Item Barcode          | Author       | Pickup Loc                 | Action        |
|--------------------------------|-------------|-----------------------|--------------|----------------------------|---------------|
| Preschool - Easy Picture Books |             |                       |              |                            |               |
| Flat Stanley /                 | E BROW      | 33838020288746        | Brown, Jeff. | Diberville Library         | View Reserves |
| 1 available copy               | 1.          |                       | kam          | [Patron:Kam AGTest]        |               |
| Adult - Fiction                |             |                       |              |                            |               |
| Beach house for rent           | F MONR      | 33838020767665        |              | Sausser Childrens Library  | View Reserves |
| 1 available copy               | 1.          | [Item:33838020767665] | 2850         | [Patron:Romance Book Club] |               |
| Adult - Fiction - Large Type   |             |                       |              |                            |               |
| Paradise valley                | LP MY F BOX | 33838020776450        |              | Sausser Childrens Library  | View Reserves |
| 1 available copy               | 1.          | [Item:33838020776450] | 2850         | [Patron:Romance Book Club] |               |

### Patron-initiated options

- mediated vs. unmediated

### Reserve Title (soft hold)

- request for a specific title has been placed by/for a patron

### Checkout Reserve (hard hold)

- specific item has been reserved for checkout for a specific patron

# CIRCULATION

## VIEWING ITEM STATUS

You can view the current **Item Status** of any item in your library's catalog. Status information includes the date added, current circulation status, date of last check out, and circulation activity.

- Availability
- Location
- Date of last checkout
- Last check-out patron (optional)
- Circulation activity

The screenshot shows the 'Item Status' page for 'The stand [videorecording (DVD)]'. The interface includes a search bar, navigation tabs, and a detailed view of the item's metadata and circulation history.

| Item Information                |  | Related Items     |  |
|---------------------------------|--|-------------------|--|
| Circ Note: <input type="text"/> |  |                   |  |
| Title:                          | The stand [videorecording (DVD)]                   | Barcode:          | 39896007661966 <input type="button" value="Update"/> |
| Author:                         | Sinise, Gary.                                      | Captions:         |  |
| Call#::                         | DVD Sta  | Date Inventoried: | 3/26/2016 12:00:00 AM                                |
| Date Added:                     | 7/27/2004 12:00:00 AM                              | Cost:             | 15.00  |
| Date Modified:                  | 1/11/2011 12:00:00 AM                              | Transaction Type: | Check In   |
| Status:                         | Available  | Previous User:    | <a href="#">Phil Turnbull</a>                        |
| Last Checkin Date:              | 2/13/2021 1:43:00 PM<br>Platteville Public Library |                   | <a href="#">Shelia Berry</a>                         |
| Last Check Out:                 | 2/13/2021 1:31:25 PM<br>Platteville Public Library |                   | <a href="#">Tony Coy</a>                             |
| Last Activity Date:             | 2/13/2021 1:43:00 PM                               |                   | <a href="#">SHAWN MCKERNAN</a>                       |
| Current Location:               | Platteville Public Library - Adult - DVD           |                   | <a href="#">Katherine Deckert</a>                    |
| Permanent Location:             | Platteville Public Library - Adult - DVD           |                   | <a href="#">Lawrence Parrott</a>                     |
| Owner Location:                 |  |                   | <a href="#">STANLEY ABING</a>                        |
| Categories:                     |  |                   | <a href="#">Elaine Kellogg</a>                       |
| Comment:                        |  |                   | <a href="#">Angie Wills</a>                          |

## TRANSFERS AND EXCEPTIONS

The **Transfer** functions let you transfer items from one library location to another location. Transfers can be specified as permanent or temporary. You can choose to transfer single items, one at a time, or sequentially transfer multiple items. You may also return temporarily transferred items to their permanent locations.

Exceptions refer to item exceptions or statuses. Some examples of statuses are **Available**, **Checked Out**, **Discarded**, **In Process**.

### Transfers

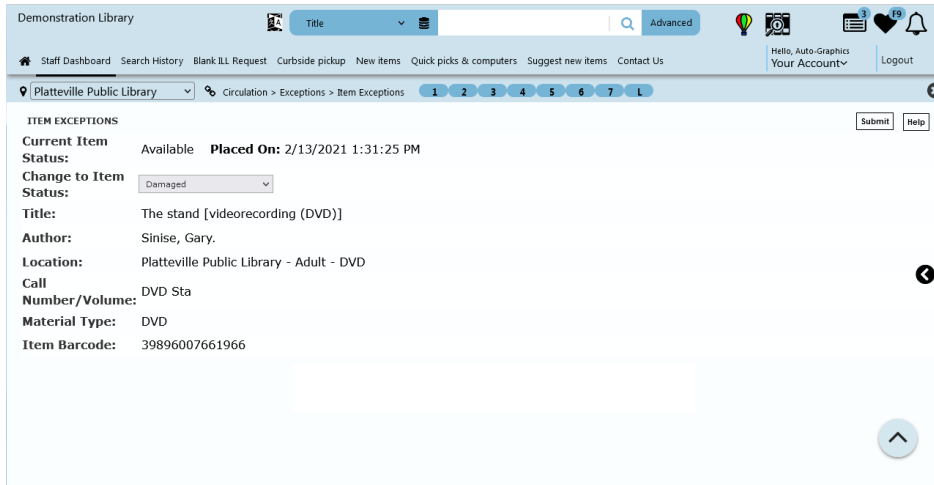
- Individual/multiple item processing
- Permanent vs. temporary

# CIRCULATION

## TRANSFERS AND EXCEPTIONS (CONTINUED)

### Exceptions

- Individual/multiple item processing
- **At bindery, Patron lost, Claim returned, Discarded, Non-circulating, etc.**

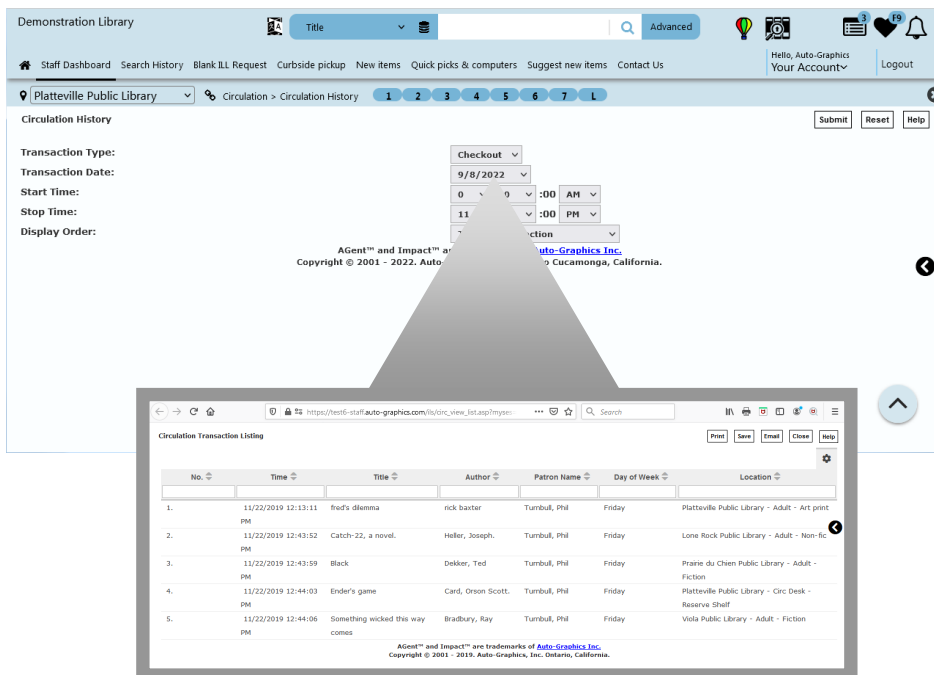


## CIRCULATION HISTORY

**Circulation History** lets you view a history of your library's circulation activities for a selected day from the previous 30 day period. You can view circulation history for the entire day, or for a specified period of hours during the selected day.

### Displays transactions of specified period

- Checkout file
- Checkin file



# CIRCULATION

## CIRCULATION SUMMARY

Circulation is an online application that provides control over circulation activities for your VERSO system. Using Circulation, you can:

- Checkout, checkin, renewal
- View item status
- Manage patron records
- Handle transfers & exceptions
- View circulation history
- Work with reserves
- Process fines & fees

| Circulation ↗  |
|--|
| <a href="#">Patron Status &amp; Checkout</a>                 |
| <a href="#">Checkin</a>                                      |
| <a href="#">Express Checkin</a>                              |
| <a href="#">Express Checkout</a>                             |
| <a href="#">Express Checkout With Full Record</a>            |
| <a href="#">Renew Checkout</a>                               |
| <b>Reserves</b>  |
| <a href="#">View By Title</a>                                |
| <a href="#">View All Reserves</a>                            |
| <a href="#">View Patrons with Suspended Reserves</a>         |
| <a href="#">View Patrons with Expired Reserves</a>           |
| <a href="#">View Mediated Reserves with Available Copies</a> |
| <a href="#">Reserves by Pickup Location</a>                  |
| <a href="#">View Expired Item Reserves</a>                   |
| <a href="#">Move Reserves</a>                                |
| <a href="#">Merge Users</a>                                  |
| <a href="#">Item Status</a>                                  |
| <b>Add Item</b>  |
| <a href="#">Add Item</a>                                     |
| <a href="#">Set Add Defaults</a>                             |

| In Transit Items                           |
|--|
| <a href="#">To My Library</a>              |
| <a href="#">From My Library</a>            |
| <b>Transfer</b>                            |
| <a href="#">Item Transfer</a>              |
| <a href="#">Multiple Item Transfer</a>     |
| <a href="#">Temporary Transfer Return</a>  |
| <a href="#">Branch Item Transfer</a>       |
| <a href="#">Branch Transfer Checkin</a>    |
| <a href="#">Global Item Transfer</a>       |
| <a href="#">Items on Shelving Cart</a>     |
| <a href="#">Circulation History</a>        |
| <b>Exceptions</b>                          |
| <a href="#">Item Exceptions</a>            |
| <a href="#">Multiple Item Exceptions</a>   |
| <a href="#">Delete Patron</a>              |
| <a href="#">Add Brief Record</a>           |
| <a href="#">Standalone Circ Utility</a>    |
| <a href="#">Set Workstation Printer</a>    |
| <a href="#">Phone Notification History</a> |



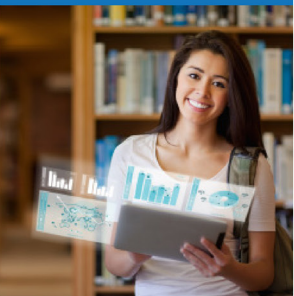
platform



search



share



**VERSO®**

# Circulation Administration

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# CIRCULATION ADMINISTRATION

## CIRCULATION ADMINISTRATION OVERVIEW

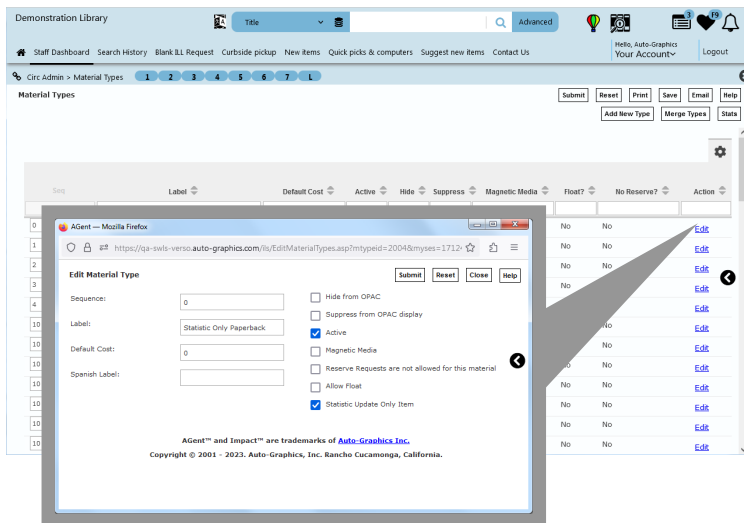
This is the area of the software where you manage the circulation functions in VERSO. It is here that you will setup and maintain:

- **Material Types:** what kind of material does your library collect?
- **Locations & Collections:** where are the materials located?
- **Patron Categories/Groups:** how do you classify your patrons?
- **Circulation Parameters:** how long are your loan periods?
- **Circulation Options:** do you automatically print a receipt for each patron's checkouts?
- **Overdue/Fine/Reserve Notice templates & options:** specify the wording on your notices
- **Reserve Pickup Locations:** where do you want your patrons to pick up items held for them?
- **Receipts Header/Footer Text:** you can customize your receipts
- **Library Fees:** do you charge for lost library card replacements?

## MATERIAL TYPES & LOCATIONS MANAGEMENT

### Material Types Management

Item material type names are assigned to item records to specify the material type or format of the associated items. You define the item material types for your library based on what types of items you have in your collection.



In this area of the software, you may:

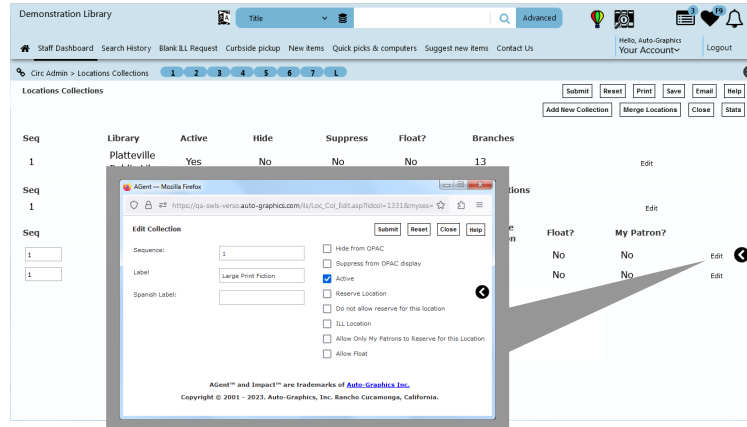
- Add an item material type
- Modify the item material type name
- Merge two material types into one
- Print, save, and/or email a copy of the Item Material Types
- View material type statistics

# CIRCULATION ADMINISTRATION

## LOCATIONS MANAGEMENT

VERSO allows you to organize your library's holdings into separate libraries, branches, and collections. From this area of the software you may:

- Add a location/collection
- Modify the location/collection name
- Merge two locations into one
- Print, save, and/or email a copy of Locations/Collections
- View location statistics



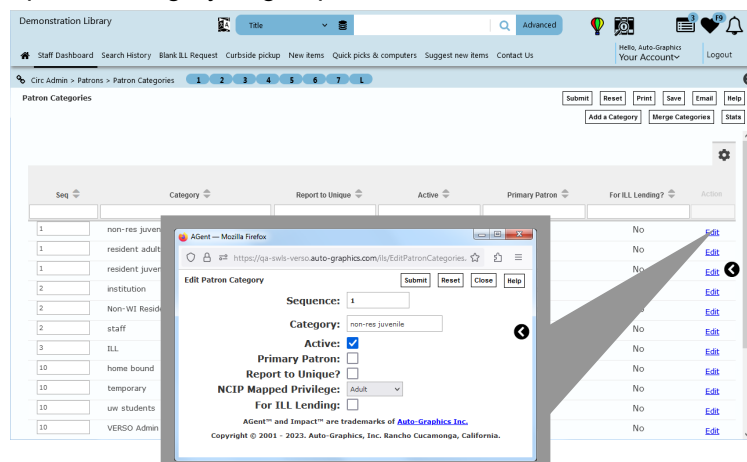
## PATRON CATEGORIES/GROUPS

VERSO's **Patron Category** and **Patron Group** functions allow you to associate each library patron with a specified "patron type" (student, staff, etc.) and to assign library patrons to specified "patron groups".

- **Patron Categories determine which circulation parameters apply**
- **Patron Groups support statistical granularity**

From the Patron Categories and Patron Groups screens, you may select to:

- Add a category or group
- Modify the category or group name
- Merge two categories or groups into one
- Print, save, and/or email a copy of Patron Categories or Patron Groups
- View patron category or group statistics

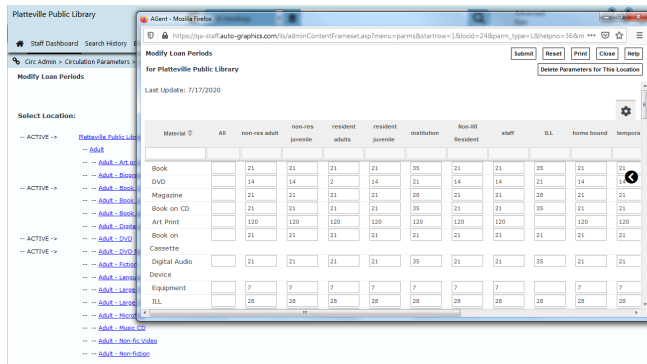


# CIRCULATION ADMINISTRATION

## CIRCULATION PARAMETERS

### Loan Periods

The **Loan Periods** function allows you to set the number of days (or hours) for which an item may be borrowed by a given patron.



### Renewal Periods

The **Renewal Periods** function allows you to set the number of days (or hours) for which an item currently on loan may be renewed by the current borrower.

### Renewal Limits

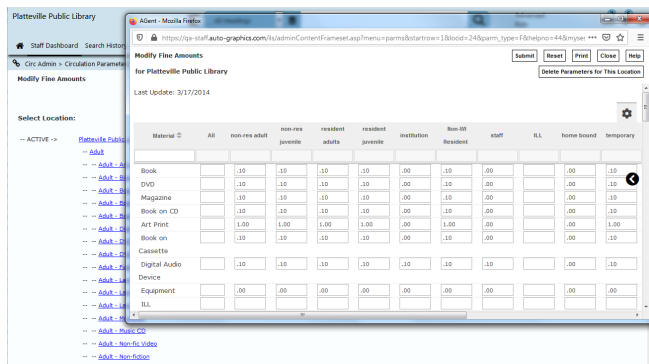
The **Renewal Limits** function allows you to set the number of times a loan for a given item may be *successively* renewed by a given borrower.

### Checkout Limits

The **Checkout Limits** function allows you to set the *maximum* number of items a user can have "checked out" at any given time. Checkout Limits cause an Over Checkout Limit Warning to display in VERSO's Circulation module when a patron attempts to check out an item in excess of the specified limit.

### Fine Amounts

The **Fine Amounts** function allows you to set the *daily* fine amount for overdue materials. Optionally, you may also specify "grace days" and "grace fines".

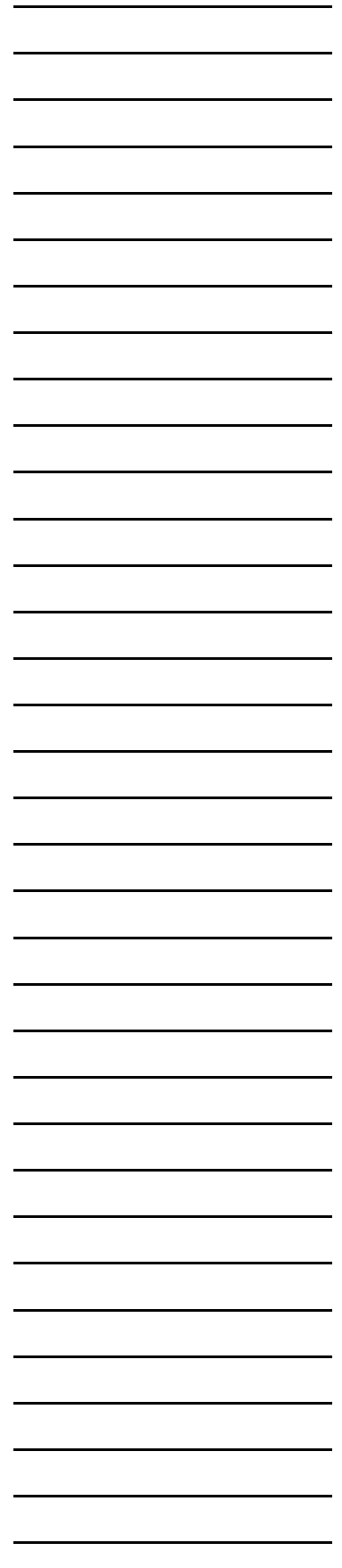


### Fine Limits

The **Fine Limits** function allows you to set the *maximum* fine charged (regardless of the number of days overdue) for *each type* of material borrowed by *each class* of user (patron category) for *each library location*.

### Checkout Fees

The **Checkout Fees** function allows you to set a schedule of fees due when checking out items of certain material types (video tapes, CDs, DVDs, etc.) for *each type* of material borrowed by *each class* of user (patron category) for *each library location*.

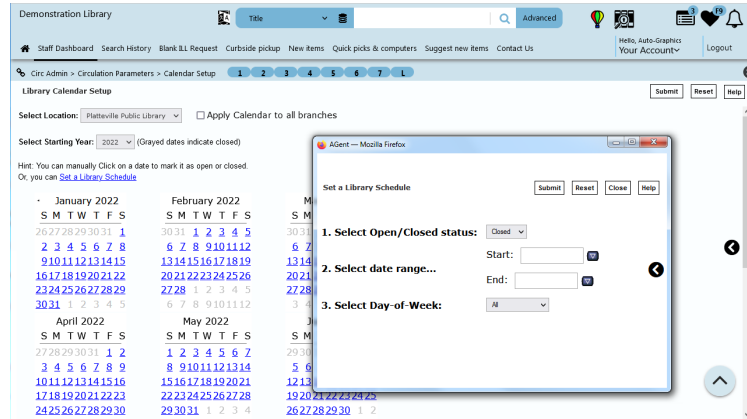


# CIRCULATION ADMINISTRATION

## CALENDAR SETUP/LIBRARY HOURS

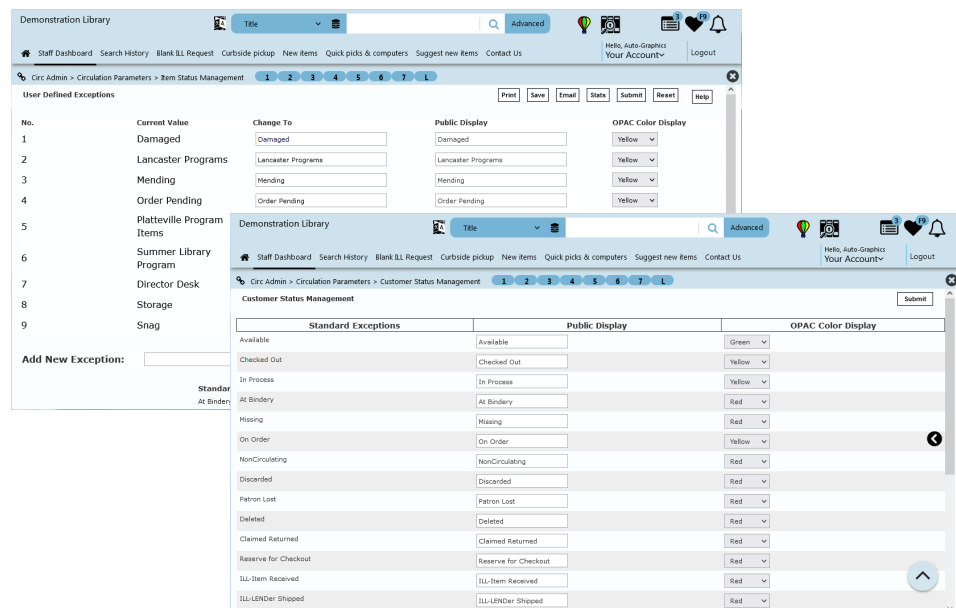
The **Calendar Setup** function lets you create a calendar of “normally closed” days, holidays and vacation days for your library. VERSO uses the calendar in conjunction with **Library Hours** to determine due dates.

The **Library Hours** option lets you set a schedule of "open" hours for any library, branch or collection. Library hours are used by the system in conjunction with the **Calendar Setup** in determining due dates and times for items with hourly loan periods.



## USER DEFINED EXCEPTIONS AND CUSTOMER STATUS MANAGEMENT

In VERSO, exceptions and item status mean the same thing. There are system-supplied standard statuses, like **Checked Out**, **Available**, **At Bindery**, **Patron Lost**, etc., but you also have the ability to define your own exceptions, like **In Workroom** for items that are being mended for example. **Customer Status Management** allows the library to rename the item status to display status in a consistent manner to the patron. As an example, **Patron Lost** can be renamed to **Not Available**. Each status can also be assigned a color value that displays in the OPAC.



# CIRCULATION ADMINISTRATION

## HARD BLOCK LIMITS

“Hard blocks” may be applied against a patron’s borrowing privileges in the event the patron has an excessive number of overdue checkouts or excessive fines. Additionally, a “hard block” may be set on the number of reserves a patron may have active at any given time. When a “hard block” is encountered during a check out transaction in the VERSO Circulation module, a warning screen displays. You may select to continue the checkout, or cancel the transaction and return to the previous Patron Status, Checkout & Reserves screen.

“Hard blocks” may be established separately for each patron category.

| Category              | Fine Limit | Accrued Overdue Fine Limit | Overdue Item Limit | Reserve Limit |
|-----------------------|------------|----------------------------|--------------------|---------------|
| non-res juvenile      | 100        |                            |                    | 10            |
| resident adults       | 100        |                            |                    | 10            |
| resident juvenile     | 100        |                            |                    | 10            |
| instuborn             | 100        |                            |                    | 998           |
| Non-WI Resident       | 100        |                            |                    | 10            |
| staff                 | 100        |                            |                    | 100           |
| ILL                   | 100        |                            |                    |               |
| home bound            | 100        |                            |                    | 10            |
| temporary             | 100        |                            |                    | 10            |
| uw students           | 100        |                            |                    | 10            |
| VERSO Admin           | 100        |                            |                    | 10            |
| non-res adult         | 100        |                            |                    | 10            |
| staff duplicate staff | 100        |                            |                    | 10            |
| Self-Registered       |            |                            |                    |               |
| Test Add Category     | 100        |                            |                    | 10            |

## CIRCULATION OPTIONS

**Circulation Options** allow you to customize your VERSO system to meet your library’s needs.

**Some examples of circulation options are:**

- Audible warnings
- Show last patron checkout in item status
- Add item cost to lost book fee
- Allow receipt printing
- Allow patron self-reserve

| Option   | Current Value         | Change To             |
|--|-----------------------|-----------------------|
| General  |                       |                       |
| Email Server Address (e.g., 100.100.100.1):          | 127.0.0.1             | 127.0.0.1             |
| First Month of Fiscal Year for Reports:              | 1                     | January               |
| Circ Reports - Email Checkboxes on by Default?       | No                    | No                    |
| Is Multi-Branch Library?                             | Yes                   | Yes                   |
| User Registration - Default State                    | WI                    | Wisconsin             |
| Item Barcode Template Constant Leading Digits        | 39896                 | 39896                 |
| Item Barcode Template Total Length                   | 14                    | 14                    |
| Patron Barcode Template Constant Leading Digits      | 29896                 | 29896                 |
| Patron Barcode Template Total Length                 | 14                    | 14                    |
| Locally Defined Field 1 to display on Patron Summary | Township Code         | Township Code         |
| Locally Defined Field 2 to display on Patron Summary | Unlisted Phone Number | Unlisted Phone Number |

# CIRCULATION ADMINISTRATION

## NOTICES MANAGEMENT

VERSO lets you create and maintain Overdue Notices, Fine Notices, reserve “pickup” and cancellation notices, and receipts text.

### Overdue Notices

The **Overdue Notice Setup** function lets you create a common notice header (usually your library's name and address), *up to four* individual overdue notices, a *courtesy* item due notice and text for *single* overdue notices (generated on a *patron-by-patron* basis). Additionally, you can create an email notice header for inclusion on *all* overdue notices transmitted via email.

- Notice Header
- 1st – 4th Notice Text
- Item Due Notice Text / Auto Renew Text / Single Overdue Notice Text
- E-mail Setup
- Notice Options

### Configure

notice header

notice text

email setup

### For notices for

Infrequent User Set-up

Reserve Pickup

Reserves Cancellation

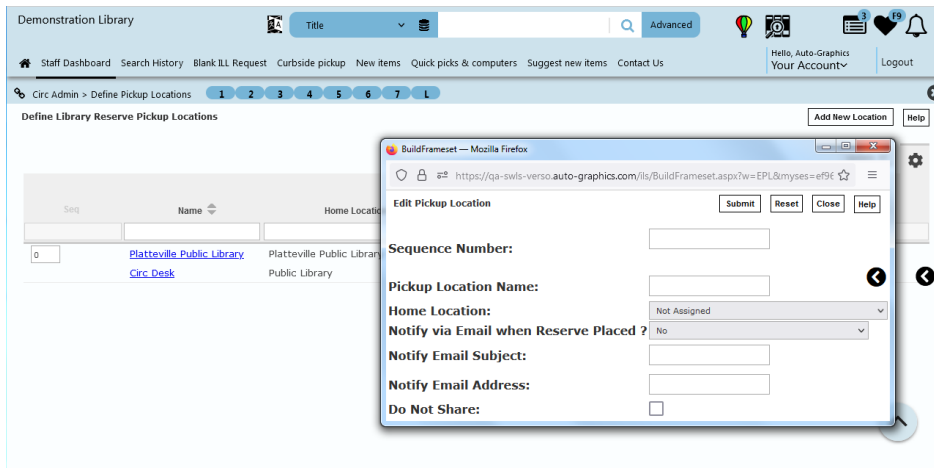


# CIRCULATION ADMINISTRATION

## RESERVE PICKUP LOCATIONS

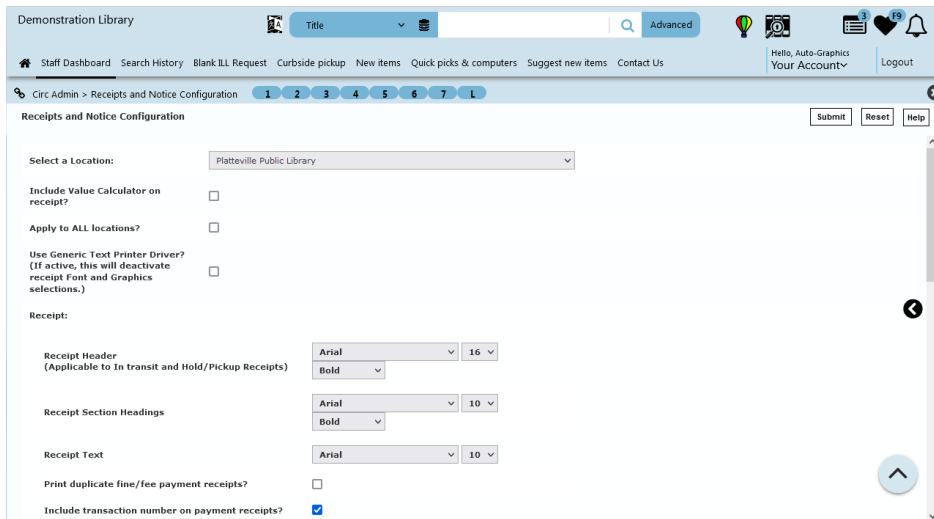
The **Define Pickup Locations** function allows pickup locations to be specified for your VERSO system. Once defined, Pickup Locations may be *selectively* added to each reserve placed for a patron through the Circulation module or placed by a patron through the Search interface.

There is also an option for library staff to be notified whenever a patron has submitted a reserve request.



## RECEIPTS CONFIGURATION

The **Receipts and Notice Configuration** function lets you create and maintain the header, footer, and optional features included on all “transaction” receipts generated in the Circulation module.



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# CIRCULATION ADMINISTRATION

## FEES MANAGEMENT

The **Fee Setup** feature allows you to maintain a schedule of fees your library charges to provide certain services (such as photocopy services, library card replacement, equipment rentals, etc.).

The screenshot shows the 'Fee Setup' page in the 'Demonstration Library' system. The page has a navigation bar with 'Circ Admin > Fee Setup' and a breadcrumb trail. Below the navigation, there are buttons for 'Print', 'Save', 'Email', 'Help', and 'Add New Fee'. The main content area is a table with the following data:

| Fee Name                                       | Amount  |        |
|--|---------|--------|
| <a href="#">Replacement DVD case (PL)</a>      | \$2.50  | Delete |
| <a href="#">Laptop Rental Deposit</a>          | \$25.00 | Delete |
| <a href="#">Replacement CD case (PL)</a>       | \$2.00  | Delete |
| <a href="#">Damaged Item Fee</a>               | \$1.00  | Delete |
| <a href="#">Postage Due Fee</a>                | \$0.60  | Delete |
| <a href="#">Lost Magazine Processing Fee</a>   | \$0.00  | Delete |
| <a href="#">Playaway View USB AC Adaptor</a>   | \$15.00 | Delete |
| <a href="#">Replacement Playaway case (PL)</a> | \$5.00  | Delete |
| <a href="#">Default Reshelving Fee</a>         | \$0.00  | Delete |
| <a href="#">Lost Item Processing Fee</a>       | \$0.00  | Delete |
| Patron Lost Book Default Fee                   |         |        |
| Lost Item Processing Fee                       |         | Change |

## TEXT MESSAGING NOTIFICATION SETUP

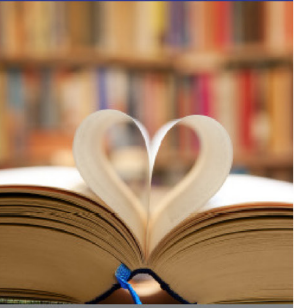
**Text Messaging Notification Setup** allows you to configure text messages for Reserve Pickup, Item Due Notices, Overdue Notices and Fines Notices. Notices can be setup for single and multiple items. Patron records must be configured for text messaging.

The screenshot shows the 'Text Messaging Notification Setup Multiple Titles' page. It includes a 'Select Location' dropdown set to 'Un-Assigned'. The 'HEADER FOR ALL TEXT MESSAGES' section has 'From' set to 'Platteville Public Library' and 'Lib. Phone' set to '608-348-7441'. Below this are input fields for 'RESERVE PICKUP MESSAGE', 'ITEM DUE NOTICE', 'OVERDUE NOTICE', 'FINES FEES NOTICE', 'AUTO-RENEW NOTICE', and 'FOOTER FOR ALL TEXT MESSAGES'. A legend at the bottom explains the symbols used in the messages: %T% for Title, %D% for Date, %L% for Location, and %F% for Fine Due. An example shows a message: 'This title: %T% is due on %D%. Please return it to %L%.' which appears as 'Computers for Dummies is due on 11/21/2011. Please return it to Sesame Public Library - East Branch.'





platform



search



share



**VERSO®**

# Standalone Circulation Utility

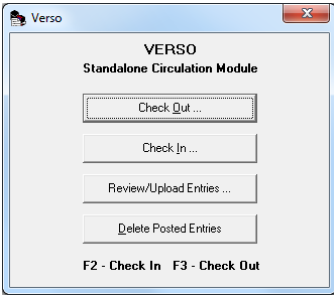
15218 Summit Ave, Suite 300  
Box #240  
Fontana, CA 92336  
Phone (800) 776-6939  
Fax (909) 595-3506  
[www.auto-graphics.com](http://www.auto-graphics.com)



# STANDALONE CIRCULATION UTILITY

## STANDALONE CIRCULATION OVERVIEW

The VERSO 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.



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The first step is to download the software from **Staff Dashboard/Support/Utility Downloads** and install it on your computer. Once installed, Standalone Circulation is accessed from the Start menu.

## CHECK OUT & CHECK IN

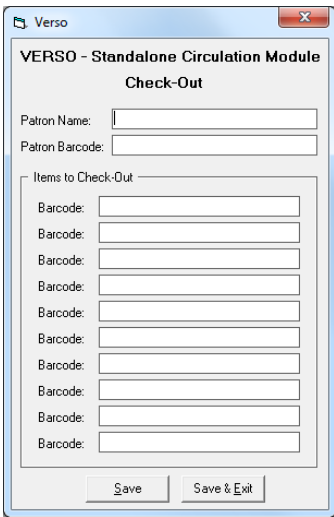
Uses workstation date and time so make sure that these are correct.

### To Checkout:

- Enter patron name
- Scan patron barcode
- Scan item barcodes
- Click Save

### To Checkin:

- Scan barcode for each item
- Click Save



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## REVIEWING TRANSACTIONS

### You can:

- review check out and check in transaction records for errors prior to creating a transaction file for upload;
- if necessary, edit certain values (patron barcode, patron name, item barcode) for one or more transactions.
- 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).

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# STANDALONE CIRCULATION UTILITY

Once you have reviewed the entries, click **Create Upload File**:

Review Entries

VERSΟ - Standalone Circulation Module

Review Entries

Search Criteria

Select Entry Type: All Entry Dates From: 09/15/2018 To: 09/15/2018

Patron Barcode: [ ] (Enter date in this format: mm/dd/yyyy For example: 01/06/2001)

Include Posted

Search Done

| Type      | Date       | Time     | Patron Barcode | Patron Name    | Item Barcode    | Posted |
|-----------|------------|----------|----------------|----------------|-----------------|--------|
| Check In  | 09/15/2018 | 13:23:55 |                |                | 339830112058269 | No     |
| Check In  | 09/15/2018 | 13:23:55 |                |                | 39896003353931  | No     |
| Check In  | 09/15/2018 | 13:23:55 |                |                | 39896012119752  | No     |
| Check Out | 09/15/2018 | 13:23:27 | pqt            | Turnbull, Phil | 39896011625759  | No     |
| Check Out | 09/15/2018 | 13:23:29 | pqt            | Turnbull, Phil | 39896008297281  | No     |
| Check Out | 09/15/2018 | 13:23:29 | pqt            | Turnbull, Phil | 39896007989144  | No     |
| Check Out | 09/15/2018 | 13:23:29 | pqt            | Turnbull, Phil | 39896008336709  | No     |

Create Upload File ...

## UPLOADING TRANSACTIONS

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 VERSO Circulation module.

Access **Staff Dashboard/Circulation/Standalone Circ Utility**

Click **Add New Upload**, select the transaction file(s) to upload, then **Submit**.

Once the process has finished, click **Detail** to view the report. You may review the:

- posted items
- rejected items
- checked out items with exceptions
- fines posted

Resolve rejected items if necessary.

Demo Library

Staff Dashboard Search History

Biloxi Central Library - Chang

Circulation > Standalone Circ Utility

Circulation Backup Report

| ID  | Library Name                   | Files       | Created By  | Status   | Create Date       | Process Date      | Checked Out | Checked In | Rejected | Fines  | Options       |
|-----|--------------------------------|-------------|-------------|----------|-------------------|-------------------|-------------|------------|----------|--------|---------------|
| 286 | Harrison County Library System |             | Lavin, Eyal | Created  | 1/27/2021 2:18 PM | N/A               | N/A         | N/A        | N/A      | N/A    | Delete        |
| 282 | Harrison County Library System | hccls hccls | Lavin, Eyal | Finished | 10/1/2020 1:53 PM | 10/1/2020 1:56 PM | 2           | 0          | 0        | \$0.00 | Detail Delete |
| 281 | Harrison County Library System | hccls       | Lavin, Eyal | Finished | 10/1/2020 1:52 PM | 10/1/2020 1:53 PM | 1           | 0          | 0        | \$0.00 | Detail Delete |
| 280 | Harrison County Library System | hccls       | Lavin, Eyal | Finished | 10/1/2020 1:43 PM | 10/1/2020 1:51 PM | 1           | 0          | 0        | \$0.00 | Detail Delete |
| 279 | Harrison County Library System | hccls       | Lavin, Eyal | Created  | 10/1/2020 1:37 PM | N/A               | N/A         | N/A        | N/A      | N/A    | Delete        |

# STANDALONE CIRCULATION UTILITY

## COMPLETING THE PROCESS

Once you have successfully completed the process, return to the Standalone Circulation software to **Delete Posted Entries**. This prevents possible duplicate transactions being posted the next time you need to use the Standalone Circulation module.

Demo Library

All Headings

Advanced

Staff Dashboard Search History

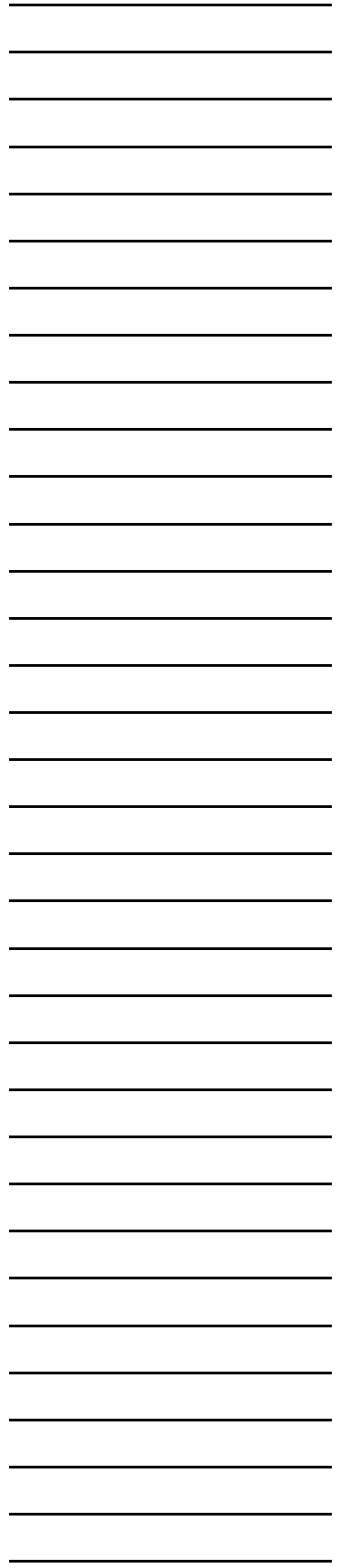
Biloxi Central Library - Chang

Circulation > Standalone Circ Utility

Harrison County Library System  
CIRCULATION BACKUP REPORT - UPLOAD #260

Total Number of Check In: 0  
[Total Number of Check Out: 791](#)  
[Total Number of Rejected Items: 12](#)  
[Total Number of Items with Exception: 6](#)  
 Total Amount of Fines Posted: \$0  
 Total Amount of Check Out Fees: \$0  
[Total Number of Multiple Checked Out Items: 784](#)  
[Total Number of Already Checked Out Items: 404](#)

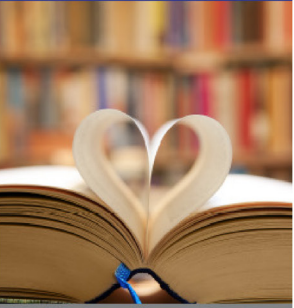
| Type | Date              | Item Code      | Title                                    | Patron Code    | Patron Name   |
|------|-------------------|----------------|--|----------------|---------------|
| CO   | 6/29/2017 3:26 PM | 33838005138783 | The fallen                               | 23838002724439 | FAVRET, TRIPP |
| CO   | 6/29/2017 3:26 PM | 33838005491612 | Red light                                | 23838002724439 | FAVRET, TRIPP |
| CO   | 6/29/2017 3:26 PM | 33838005138783 | The fallen                               | 23838002724439 | FAVRET, TRIPP |
| CO   | 6/29/2017 3:26 PM | 33838005491612 | Red light                                | 23838002724439 | FAVRET, TRIPP |
| CO   | 6/29/2017 3:36 PM | 33838006914794 | The beach house [sound recording]        | 23838001870514 | ELLIS, CAROL  |
| CO   | 6/29/2017 3:36 PM | 33838020650143 | Obelidian chamber                        | 23838001870514 | ELLIS, CAROL  |
| CO   | 6/29/2017 3:36 PM | 33838006914794 | The beach house [sound recording]        | 23838001870514 | ELLIS, CAROL  |
| CO   | 6/29/2017 3:36 PM | 33838020650143 | Obelidian chamber                        | 23838001870514 | ELLIS, CAROL  |
| CO   | 6/29/2017 3:41 PM | 33838020615836 | New Tricks: Season 11: [videorecording]  | 23838002349963 | MAHER, BRIAN  |
| CO   | 6/29/2017 3:41 PM | 33838020746941 | American sickness: how healthcare became | 23838002349963 | MAHER, BRIAN  |
| CO   | 6/29/2017 3:41 PM | 33838020615836 | New Tricks: Season 11: [videorecording]  | 23838002349963 | MAHER, BRIAN  |
| CO   | 6/29/2017 3:41 PM | 33838020746941 | American sickness: how healthcare became | 23838002349963 | MAHER, BRIAN  |
| CO   | 6/29/2017 3:47 PM | 33838006460673 | Pinocchio [videorecording]               | 2383800249775  | BROWN, KELLIE |
| CO   | 6/29/2017 3:47 PM | 33838009950688 | Babe [videorecording]                    | 2383800249775  | BROWN, KELLIE |







platform



search



share



# **VERSO<sup>®</sup>** **Cataloging**

15218 Summit Ave, Suite 300  
Box #240  
Fontana, CA 92336  
Phone (800) 776-6939  
Fax (909) 595-3506  
[www.auto-graphics.com](http://www.auto-graphics.com)





# CATALOGING

## CATALOGING OVERVIEW

### Cat Admin Module

The Cat Admin module allows you to manage the bibliographic and item records in your library's catalog.

### Download AGCat Utility to manage bibliographic records

The AGCat Cataloging Client is a Windows™ based utility designed to support copying, creating, editing and deleting bibliographic records within your VERSO database. Each cataloger downloads the software onto his/her computer.

### Manage item records by adding, editing or deleting

You may also add, edit, or delete item records from the OPAC

### Import MARC records from external sources

You may load MARC records from your book jobber or bibliographic utility using MARC Import

### Export MARC records

Your complete VERSO database or subset may be exported at any time by you.

### Perform authority control functions

You may "authorize" a record you are working with to use VERSO's interactive authority control.

### Manage your library's inventory

Inventory may be done by entering barcodes online or uploading a file of barcodes

### Print spine, pocket labels and smart barcodes

Labels are printed using your printer and Brodart label stock

### Print barcodes

You may choose to print either patron or item barcodes using Avery stock.

### URL (856) Checker

If logged in as a Customer Superuser, you may run this report to check whether the URLs in tag 856 subfield u are valid.

# CATALOGING

## WORKING WITH BIBLIOGRAPHIC RECORDS

AGCat, the VERSO MARC record editor, supports

- Copy cataloging
- Original cataloging
- Editing bibliographic records
- Deleting bibliographic records

To edit or copy existing records, you access the editor by clicking **Edit this Record** from the full record display in the OPAC.

The screenshot shows the OPAC interface for the book 'Wizard and Glass' by Stephen King. The top navigation bar includes 'All Headings', a search box with 'wizard and glass', and 'Advanced' search options. Below the navigation are tabs for 'Details', 'Where To Find It', 'MARC Display', 'Goodreads® Reviews', and 'Shelf Browse'. The 'Details' tab is active, displaying the book's cover, title, author, and various identifiers (LCCN, ISBN, etc.). A table under 'Where To Find It' lists library locations and their availability status.

| Location   | Call Number             | Status    | SMS | Edit Item |
|--|-------------------------|-----------|-----|-----------|
| Platteville Public Library - Adult - Sci-fi Fiction      | Kin Dark Tower 4 (Book) | Available | 📱   | Edit Item |
| Belmont (John Turgeon Public Library) - Adult - Fiction  | Kin (Book)              | Available | 📱   | Edit Item |
| Boscobel (Hildebrand Memorial Library) - Adult - Fiction | Book                    | Available | 📱   | Edit Item |
| Cassville Public Library - Adult - Fiction               | Kin (Book)              | Available | 📱   | Edit Item |

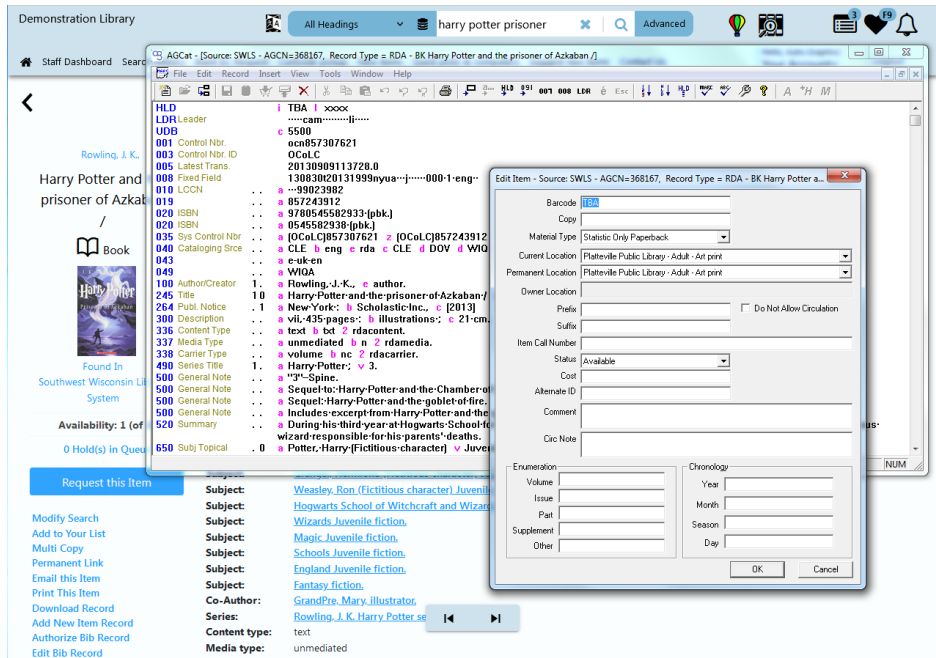
The screenshot shows the AGCat MARC record editor interface. The top bar indicates the source (STW) and record type (RDA). The main area displays the MARC record in a structured format, including fields for LDR, UDB, 001, 003, 005, 008, 010, 019, 020, 035, 040, 043, 090, 100, 245, 264, 300, 336, 337, 338, 490, 500, 520, 650, 651, 655, 700, 800, 994, 952, 952, 952, and 952. The record includes fields for title, author, publication information, and subject terms.

# CATALOGING

## WORKING WITH ITEM RECORDS

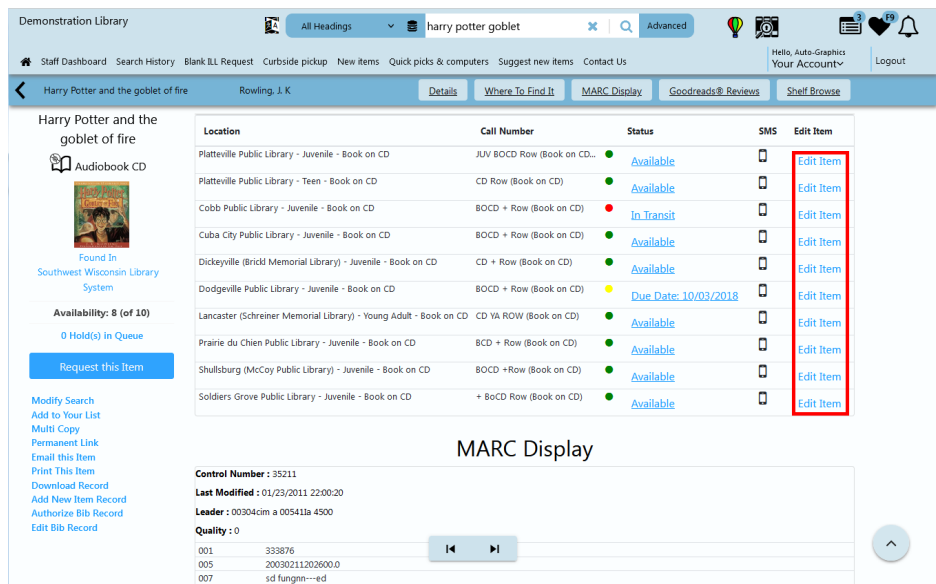
- To **add** another copy or item record to a title that is already in your VERSO database, you may use the **Add New Item Record** link on the Full Record Display, or the AGCat editor.
- From the OPAC, search for the title, open the Full Record, then click the **Add New Item Record** link. Enter the required data and click **Submit**.

To **add** via AGCat, open the record in the editor and click the **HLD** icon. Enter the required data and click **OK**. File the record to the database by clicking the yellow barrel icon.



## Editing and Deleting Item Records

You may edit the item from the **Cat Admin** menu or by clicking the **Edit Item** link next to the item status in the OPAC.



# CATALOGING

## Editing and Deleting Item Records (Continued)

The Edit Item screen allows you to delete an item.

Demonstration Library

All Headings harry potter goblet Advanced

Staff Dashboard Search History Blank ILL Request Curbside pickup New items Quick picks & computers Suggest new items Contact Us

Hello, Auto-Graphics Your Account Logout

1 2 3 4 5 6 7 L

Edit Item

Title Harry Potter and the goblet of fire [sound recording (CD)] /

Author Rowling, J. K.

Field Value

Barcode 39896014567685  Do Not Allow Circulation

Copy

Material Type Book on CD

Current Location Platteville Public Library - Juvenile - Book on CD Apply Permanent Location

Permanent Location Platteville Public Library - Juvenile - Book on CD Apply Current Location

Owner Location Platteville Public Library - Juvenile - Book on CD

Categories

Prefix

Suffix

Item Call Number JUV BOCD Row

Status Available

Cost \$70.00

Alternate ID

Comment

Circ Note 17 CDs

Submit Reset Delete this Item

## Loading MARC Records

VERSO allows you to load MARC records from other sources to your library's database. There are some additional tools to help you accomplish this: automatic item generation and duplicate checks.

Demonstration Library

All Headings harry potter goblet Advanced

Staff Dashboard Search History Blank ILL Request Curbside pickup New items Quick picks & computers Suggest new items Contact Us

Hello, Auto-Graphics Your Account Logout

Cat Admin > MARC Import > Item Generation Setup 1 2 3 4 5 6 7 L

Import Items Setup

New Submit Reset Help

Mapping ID:

Mapping Name:

Description:

Generate Item record for each Tag:

Tag Containing Item Data:

Copy Number:

Barcode:

Call Number:

Location:

Sublocation:

Material (Format) Type:

Price:

Comment:

Notes:

Volume:

Issue:

Part:

Supplement:

Other:

Lookup...

Subfield:

HoldingsMapLookup - Mozilla Firefox

Select a Holds Mapping Setup

|     |                                       |        |
|-----|---------------------------------------|--------|
| 536 | eZcat records - eZcat records import  | Delete |
| 503 | Initial Load (pl) - Initial Load (pl) | Delete |
| 538 | SDSV dup test -                       | Delete |

## Automatic Item Generation

If the incoming records contain local holdings information, you may map that data to automatically create item records in VERSO.

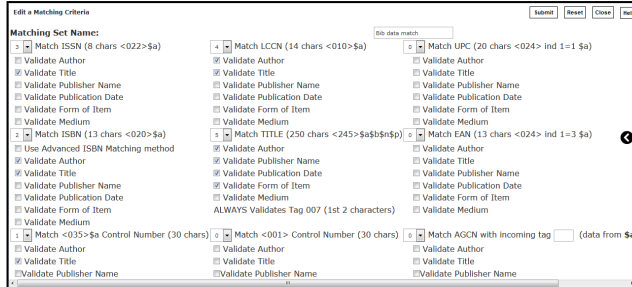
## DUPLICATE CHECKS

- VERSO's **Matching Sets Admin** lets you decide how to match the incoming records against your existing VERSO database.



# CATALOGING

- Choose the match points and validation checks from the ISBN, ISSN, LCCN etc.
- **Bib Tool Admin** is where you will go to submit the file for loading.
- When completed, look at the statistics to verify the number of records loaded.



## EXPORTING MARC RECORDS

The records from your VERSO database may be exported by you at any time. The records are exported in MARC21 format.

## Define Holdings Mapping

You have the choice of which MARC tag and subfields to use to output your local holdings information. The default is 059.

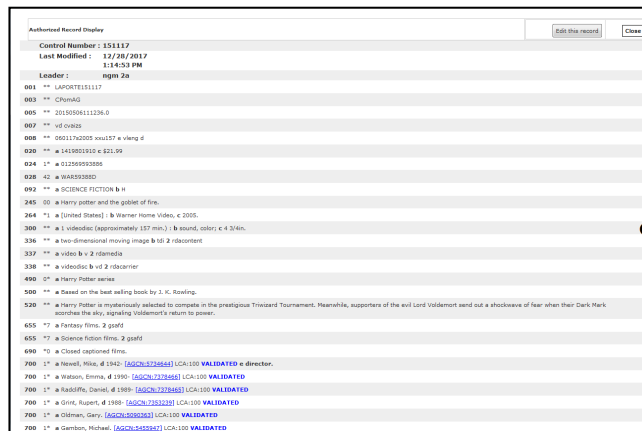
## Export Admin

You may select a subset of your database using certain item material types or collection or by date added/edited.

## MANAGING AUTHORITIES

### Online authority control

Authority Control within VERSO helps you ensure consistency of headings in bibliographic records by validating the headings against authority records to obtain the authoritative, or preferred, headings.



### Links to view authority records

After clicking **Authorize Bib Record** from the Full Record Display, you will see links to the authorized form of the heading. If the heading in the bibliographic record matches a 4xx tag in the authority record, the bibliographic heading is flipped to the authorized form automatically.

# CATALOGING

## MANAGING INVENTORY

The **Inventory** functions let you:

- Upload an inventory file from a handheld scanner or use the Optional online barcode entry
- Run the inventory file by selecting the collection
- Produce an inventory report to see the exceptions
- Optionally set the **Missing** exception once all collections have been inventoried

## SPINE AND POCKET LABELS

The **Print Labels** functions let you print spine, pocket, and/or smart barcode labels for selected items. The content of the labels is derived from the item record. The program works best with Brodart Style K, Catalog No. 55-398-023 spine labels and Brodart Style C, Catalog No. 55-395-013 (plain paper) spine + pocket labels. The barcode label stock is Avery 5366 or 5160.

Demonstration Library

All Headings | harry potter goblet | Advanced

Staff Dashboard | Search History | Blank ILL Request | Curbside pickup | New items | Quick picks & computers | Suggest new items | Contact Us

Hi, Auto-Graphics | Your Account | Logout

Cat Admin > Print Labels > Select Labels

Label Print - Select Records

9 Records in currently in print set.

Choose which items you want to generate labels for by using one of the options below.

Select By Selection value

Date Added: Start: [ ] Stop: [ ]

Date Edited: Start: [ ] Stop: [ ]

Single Item: Enter Title or Barcode: [ ]

Multiple Items: Start Barcode: [ ] Stop: [ ]

Submit Help

## Spine and Pocket Labels

- Select labels for printing by date added, date edited, title or barcode (for single items), or barcode range.
- Review selected items prior to printing
- Print spine or pocket labels
- Print smart barcode labels

## Barcode Labels

- Specify barcode Patron/Item type
- Specify starting sequence
- Specify number of labels to print
- Specify label format
- Print labels



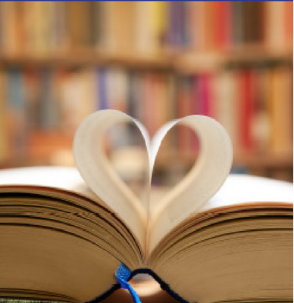








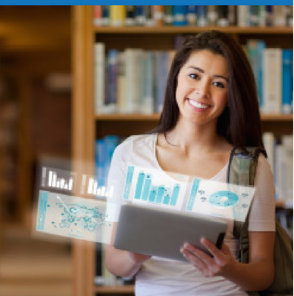
platform



search



share



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Fax (909) 595-3506  
[www.auto-graphics.com](http://www.auto-graphics.com)



# CIRCULATION REPORTS

## CIRCULATION REPORTS OVERVIEW

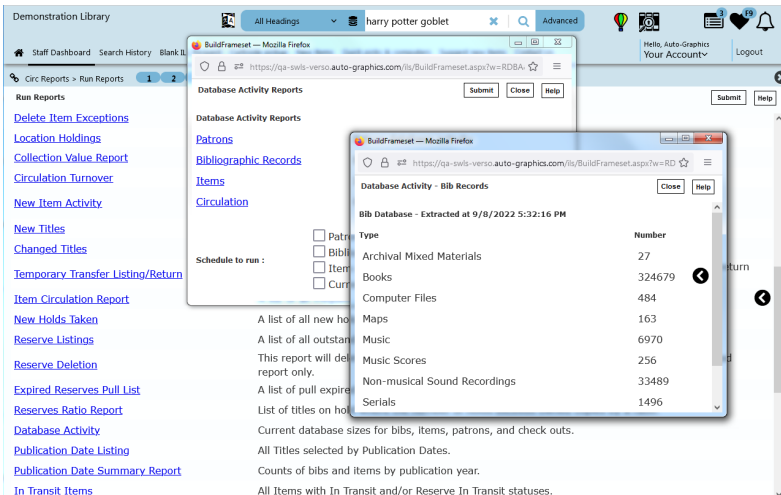
The Circ Reports module lets you generate reports related to your library's circulation activities, item records, and fines/fees transactions. The Report Writer allows you to create customized reports based on patrons, bibliographic records, item records or a combination of all three.

### Reports Overview

There are 45+ reports available for you to choose from. You may generate reports related to:

- Patrons and patron activities
- Library holdings and circulation activities
- Fines and fees

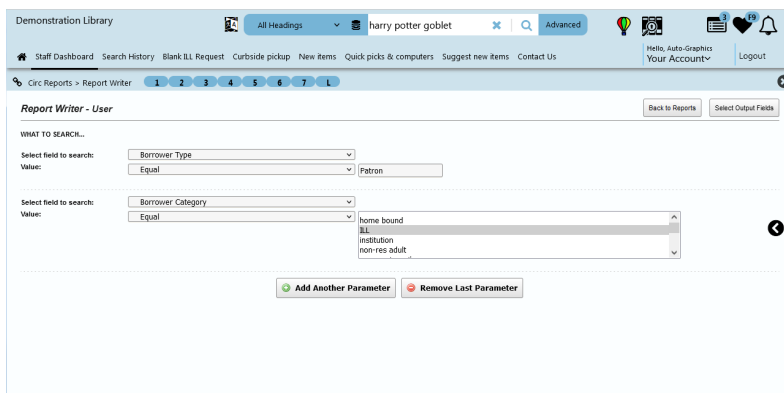
To obtain current up-to-the-minute statistics on your collection (both bibliographic and item records), patrons, and checkouts, choose **Database Activity**.



## CUSTOMIZE WITH OPTIONAL REPORT WRITER

This feature allows you to choose the content of the reports, save them and run again as needed.

**Example:** A report showing you all items that circulated more than one time in the prior year.



# CIRCULATION REPORTS

## RUNNING REPORTS

### Running Reports

- Click the name of the report
- Select the parameters
- Schedule to run once, daily, weekly, or monthly
- Click **Submit**

Demonstration Library

Staff Dashboard Search History Blank ILL Request Curbside pickup New Items Quick picks & computers Suggest new items Contact Us

Circ Reports > Run Reports

Run 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.
- [Global Notice Generation](#): Generate Global Notice report.
- [Overdue Notices](#): Generate Patron Overdue notices for mailing or emailing to the Patron.
- [Item Due Notices](#): Generate Patron notices of items due for mailing or emailing to the Patron.
- [Fines/Fees Notices](#): Generate Fine/Fee notices for mailing to the Patron.
- [Remove Overdue Items](#): Move all overdue items to a Patron Lost status.
- [Infrequent User Notices](#): Sends message if user has been inactive.
- [Library Card Expiry Notices](#): Sends message when library card is nearing expiration date.
- [Reserve Pickup Notices](#): Generate Patron Reserve Pickup notices for mailing or emailing to the Patron.
- [Global Reserve Pickup Notices](#): Generate Global Patron Reserve Pickup notices for mailing or emailing to the Patron.

Item Reports

- [Bibs Without Items](#): A list of all bibliographic records on the system that do not have at least one item attached.
- [Delete Bibs Without Items](#): Delete bibliographic records on the system that do not have at least one item attached.

### Viewing Reports

You may view the report, print it or save it to your hard drive. All reports except the notices and the Database Activity screens are viewed in Microsoft Excel.

Depending on your circulation options for dealing with reserves, you may see some system-generated reports on a daily basis. These reports list information on cancelled and new reserves.

### Deleting Reports

Once you have completed and saved the work you need, you may delete the reports. Place a checkmark in the first column then click **Submit**.

Demonstration Library

Staff Dashboard Search History Blank ILL Request Curbside pickup New Items Quick picks & computers Suggest new items Contact Us

Circ Reports > View Reports

View Reports

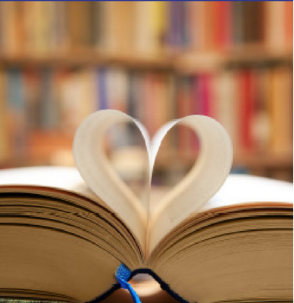
[Check/Uncheck All](#) [View Reports under All Locations](#)

| Delete                   | Name             | File Name                              | Frequency | Run Date            | Status                | Specifications  | Home Location              | Comments                                    |
|--------------------------|------------------|--|-----------|---------------------|-----------------------|---|----------------------------|---|
| <input type="checkbox"/> | New Titles       |  | Once      | 9/8/2022 5:49:00 PM | Completed with errors | Start Date: 01/01/2022; Stop Date: 08/31/2022; ORDER BY Title   | Platteville Public Library | An error occurred creating the Report File. |
| <input type="checkbox"/> | In Transit Items | <a href="#">IN_TRANSIT_ITEMS_90...</a> | Once      | 9/8/2022 5:49:00 PM | Completed             | For: All Locations; Status: In Transit; Order By: ORDER BY Title;   | Platteville Public Library |   |
| <input type="checkbox"/> | Overdue Items    | <a href="#">OVERDUE_ITEMS_9082...</a>  | Once      | 9/8/2022 5:47:00 PM | Completed             | Overdue by 1 to 365 day(s); For Location: Platteville Public Library; Do not include Anticipated Fines; Do not include Book Cost; ORDER BY Lastname | Platteville Public Library |   |





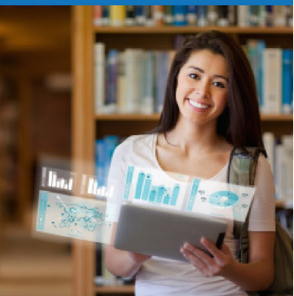
platform



search



share



**VERSO<sup>®</sup>**

# Statistics and Documentation

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# STATISTICS AND DOCUMENTATION

## STATISTICS OVERVIEW

VERSO provides you with statistics on your circulation, cataloging, and patron record activities, as well as on number of patron logins, and most commonly used search terms, for example.

Statistics are available for you to print, save or email.

### Circulation Statistics

These represent activities organized by:

- Patron category or group
- Item material type, location or category
- Patron activity and library-defined patron stats
- Fine activity
- Item activity
- Bib activity
- Item exceptions
- Intra-library, in-transit and floating item stats

### Patron Statistics

These statistics allow you to see current counts for:

- Patron Categories
- Patron Groups

### Database Statistics

These statistics allow you to see current counts for:

- Number of records and MARC tag occurrences
- Number of index points
- Locations / collections
- System activities
- Material Types
- System activities

## OUTPUT

For **Circulation Statistics** and **Patron Statistics**, you may choose to see statistics by day, month, specified range of months, or year. The year refers to your fiscal year which is set in **Circ Admin/Circulation Options**. If your fiscal year starts on July 1, for example, VERSO considers a year to cover July 1 to June 30.

These stats may be viewed in HTML, PDF, or Excel, with the option of saving and/or emailing them in PDF or Excel formats. The statistics are current as of the day before.

(See screenshot on following page)

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# STATISTICS AND DOCUMENTATION

Demonstration Library

Home Staff Dashboard Search History Blank ILL Request Curbside pickup New items Quick picks & computers Suggest new items Contact Us

Statistics > Circulation Statistics > Item Location Detail

Item Location Report

Select a Library: [All]

Run Statistics:  By Year  By Month  By Day  By Month Span

Report Arrangement:  Location Detail  Location Group

Report Format: **OR**  
**View Report :**  HTML  PDF  Excel  
**Email Report :**  PDF  Excel

Select a Date:

[September, 2022](#)  
[August, 2022](#)  
[July, 2022](#)  
[June, 2022](#)  
[May, 2022](#)  
[April, 2022](#)  
[March, 2022](#)  
[February, 2022](#)  
[December, 2021](#)  
[November, 2021](#)  
[October, 2021](#)  
[August, 2021](#)  
[July, 2021](#)  
[June, 2021](#)  
[April, 2021](#)

[next](#)

**Circ Activity by Item Location Report for March 2019**  
All Libraries

| Library ID                   | Home Location | Item Location                       | Check Out | Renewal  | Check Out and Renewal Total | In-House Use | Check Out, Renewal and In-House Total | Check-in  | Check Out, Renewal, In-House, and Check-in Total |
|------------------------------|---------------|-------------------------------------|-----------|----------|-----------------------------|--------------|---------------------------------------|-----------|--|
| <b>ARGY</b>                  |               |                                     |           |          |                             |              |                                       |           |  |
| <b>Argyle Public Library</b> |               |                                     |           |          |                             |              |                                       |           |  |
| Argyle Public Library        |               |                                     |           |          |                             |              |                                       |           |  |
|                              |               | Adult - Book on CD                  | 1         | 0        | 1                           | 0            | 1                                     | 1         | 2  |
|                              |               | Adult - DVD                         | 1         | 0        | 1                           | 0            | 1                                     | 1         | 2  |
|                              |               | Adult - Fiction                     | 3         | 0        | 3                           | 0            | 3                                     | 3         | 6  |
|                              |               | Adult - Large print fiction         | 3         | 0        | 3                           | 0            | 3                                     | 3         | 6  |
|                              |               | Adult - Non-fiction                 | 3         | 0        | 3                           | 2            | 5                                     | 3         | 8  |
|                              |               | Adult - Reference                   | 1         | 0        | 1                           | 0            | 1                                     | 1         | 2  |
|                              |               | Juvenile - ARGY_DVD                 | 2         | 0        | 2                           | 1            | 3                                     | 2         | 5  |
|                              |               | Juvenile - Board Book               | 3         | 0        | 3                           | 0            | 3                                     | 3         | 6  |
|                              |               | Juvenile - Easy reader              | 21        | 0        | 21                          | 5            | 26                                    | 20        | 46   |
|                              |               | Juvenile - Fiction                  | 11        | 0        | 11                          | 3            | 14                                    | 10        | 24   |
|                              |               | Juvenile - Non-fic                  | 6         | 0        | 6                           | 1            | 7                                     | 6         | 13   |
|                              |               | Juvenile - Non-fiction picture book | 3         | 0        | 3                           | 1            | 4                                     | 3         | 7  |
|                              |               | Juvenile - Paperback                | 1         | 0        | 1                           | 0            | 1                                     | 1         | 2  |
|                              |               | Juvenile - Picture book fiction     | 33        | 0        | 33                          | 8            | 41                                    | 33        | 74   |
|                              |               | Young Adult - Fiction               | 2         | 0        | 2                           | 0            | 2                                     | 2         | 4  |
|                              |               | Young Adult - Graphic novel         | 1         | 0        | 1                           | 0            | 1                                     | 1         | 2  |
|                              |               | <b>Subtotal</b>                     | <b>95</b> | <b>0</b> | <b>95</b>                   | <b>21</b>    | <b>116</b>                            | <b>93</b> | <b>209</b>                                       |
|                              |               | <b>Total - ARGY</b>                 | <b>95</b> | <b>0</b> | <b>95</b>                   | <b>21</b>    | <b>116</b>                            | <b>93</b> | <b>209</b>                                       |



# STATISTICS AND DOCUMENTATION

## CIRCULATION STATISTICS

### Item Exception Statistics

These are viewed under **Statistics/Circulation Statistics/Item Exceptions**. Selecting this option lets you see the number of items you have in each status with a link to all associated titles, except **Available**. The list of titles provides you with the ability to change the status for individual titles or globally. This feature is commonly used for changing **In Process** items to **Available**.

| Seq | Exception          | Number | Action                     |
|-----|--------------------|--------|----------------------------|
| 1.  | Available          | 52156  |                            |
| 2.  | Checked out        | 5428   | <a href="#">View Items</a> |
| 3.  | At Bindery         | 0      |                            |
| 4.  | Claim Returned     | 13     | <a href="#">View Items</a> |
| 5.  | Discarded          | 1      | <a href="#">View Items</a> |
| 6.  | In Process         | 14     | <a href="#">View Items</a> |
| 7.  | Missing            | 159    | <a href="#">View Items</a> |
| 8.  | Noncirculating     | 333    | <a href="#">View Items</a> |
| 9.  | On Order           | 4      | <a href="#">View Items</a> |
| 10. | Deleted            | 80     | <a href="#">View Items</a> |
| 11. | Patron Lost        | 919    | <a href="#">View Items</a> |
| 12. | Lost and Paid      | 191    | <a href="#">View Items</a> |
| 13. | Damaged            | 34     | <a href="#">View Items</a> |
| 14. | Lancaster Programs | 0      |                            |
| 15. | Mending            | 69     | <a href="#">View Items</a> |
| 16. | Order Pending      | 46     | <a href="#">View Items</a> |

## PATRON STATISTICS

These statistics provide the number of unexpired and expired patrons in specific categories and groups.

| Patron Categories Statistics - 02/08/2023 |                       |                     |             |            |            |            |
|---|-----------------------|---------------------|-------------|------------|------------|------------|
| Argyle Public Library (ARGY)              |                       |                     |             |            |            |            |
| LibraryId                                 | Home Location         | Category            | Active      | Unexpired  | Expired    | Totals     |
| ARGY                                      | not defined           |                     |             |            |            |            |
|   |                       | not defined         | not defined | 3          | 1          | 3          |
|   |                       | non-res adult       | Active      | 1          | 1          | 2          |
|   |                       | <b>SubTotal</b>     |             | <b>4</b>   | <b>2</b>   | <b>5</b>   |
|   | Argyle Public Library |                     |             |            |            |            |
|   |                       | home bound          | Active      | 1          | 0          | 1          |
|   |                       | institution         | Active      | 3          | 0          | 3          |
|   |                       | non-res adult       | Active      | 47         | 194        | 241        |
|   |                       | non-res juvenile    | Active      | 4          | 56         | 60         |
|   |                       | resident adults     | Active      | 18         | 219        | 237        |
|   |                       | resident juvenile   | Active      | 19         | 118        | 137        |
|   |                       | staff               | Active      | 1          | 3          | 4          |
|   |                       | Test Add Category   | Active      | 0          | 5          | 5          |
|   |                       | VERSO Admin         | Active      | 5          | 1          | 6          |
|   |                       | <b>SubTotal</b>     |             | <b>98</b>  | <b>596</b> | <b>694</b> |
|   |                       | <b>Total - ARGY</b> |             | <b>102</b> | <b>598</b> | <b>699</b> |

# STATISTICS AND DOCUMENTATION

## DATABASE STATISTICS

### System Activities

These statistics are viewed under **Statistics/Database Statistics/System Activities**. They show you the number of:

- Logins: for example, how many patrons are logging in with their ID and password
- Searches: for example, how many keyword or advanced searches are being done
- Cataloging: for example, how many bibliographic records are added or edited
- Checkouts
- Checkins

### Current up to the minute

The screenshot shows the 'System Activities for SWLS' report. It includes filters for Start Date (06/06/2022), End Date (06/06/2022), Start Time (00:00:00), and End Time (23:59:59). The report displays the following data:

|                              |           |
|------------------------------|-----------|
| Admin Login:                 | 8         |
| Patron Login:                | 2         |
| Guest Login:                 | 7         |
| <b>Login Total:</b>          | <b>17</b> |
| Simple Search Request:       | 2         |
| Alpha Search Request:        | 0         |
| Advanced Search Request:     | 2         |
| Number Search Request:       | 0         |
| <b>Search Request Total:</b> | <b>4</b>  |
| Simple Search:               | 2         |
| Alpha Search:                | 0         |
| Advanced Search:             | 2         |
| Number Search:               | 0         |
| Link Search:                 | 0         |
| <b>Search Total:</b>         | <b>4</b>  |
| ILL Request:                 | 0         |
| ILL Blank Request:           | 0         |
| Open ILL Request:            | 0         |
| <b>ILL Total:</b>            | <b>0</b>  |
| Web Cat Downloads:           | 0         |
| Cat Holders Added:           | 2         |

### Statistics Report

The **Statistics Report** allows you to specify information relating to database usage by date or name. Another function supported in Statistics Reports allows you to view the most frequently submitted search terms, such as the

- Top 100 Search Terms
- Top 100 Search All Headings
- Top 100 Search Authors
- Top 100 Search Subjects
- Top 100 Search Titles

The screenshot shows the 'STATISTICS REPORT' configuration page. It includes options for 'Reload Saved Report' (none), 'Report For' (All Libraries or Lib Code: RLATT: Plattville Public Library), 'Type of Report' (Library Code (multiple)), 'Start Date' (January 1, 2022), 'End Date' (September 8, 2022), 'Content Includes' (Login Data, Search Data, ILL Data), 'Output Report To' (The Screen or A File for Download), 'Maximum number of records display per page', and 'Save Report As'.







platform



search



share



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# VERSO TRAINING AID

## CIRCULATION/CHECK-IN

The first column describes a condition or action and the second column describes the message you will see on the screen.

| Action   | Screen Message   |
|--|--|
| Set effective date of Checkin                          | Enter date at <b>Change Checkin Date</b> . The checkin date can be set for the user's session by selecting <b>Remember Checkin Date</b> .  |
| Checkin of brief record                                | System displays "Brief Cataloged Item: Send to Cataloging."  |
| Checkin of item with checkin note                      | <b>Item Checkin</b> screen displays "Item has Notes: [Circ Note]."   |
| Item lacks barcode                                     | Enter title and system displays <b>Title Lookup</b> list where user selects title matching item in hand.   |
| Barcode entered and system displays Title Lookup list  | Barcode entered incorrectly, or barcode is not on file. Select <b>Modify Search</b> , or <b>Checkin</b> .  |
| Checkin of item which is not checked out               | <b>Item Checkin</b> screen displays <b>Item Shelved</b> . Use <b>Item Status</b> to display exception.   |
| Checkin of checked out item                            | System displays <b>Last Check In</b> . Status of item is changed to <b>Available</b> . System displays <b>Fines Assessed on this Check in</b> with <b>Pay Fines</b> button to patron's record. If library uses CILL, system displays message "NOTE: The temporary bib record for this ILL request has been deleted from the catalog.", and the status of the ILL request is changed to Returned.   |
| Checkin Patron Lost item                               | System displays <b>Patron Found Book</b> screen. User may declare item found, or delete item, and apply credits against the patron's record.   |
| Item checked in fills reserve requests at its location | System displays <b>Item Shelved</b> and message "THIS TITLE HAS OUTSTANDING RESERVE REQUESTS" System displays "Outstanding Reserve Requests at this location for this Title" User selects <b>Reserve for Checkout</b> link and system displays <b>Reserve Title for Checkout</b> . Item is transferred to pickup location, and reserved for checkout on patron's record. User has the option to add notes from the <b>Add Staff Notes</b> link. Reserve for Checkout Transaction receipt is available. |

(continued)

# VERSO TRAINING AID

## CIRCULATION/CHECK-IN (CONTINUED)

The first column describes a condition or action and the second column describes the message you will see on the screen

| Action   | Screen Message   |
|--|--|
| Item checked in fills reserve request at a different location                        | System displays <b>Item Shelved</b> and message "THIS TITLE HAS OUTSTANDING RESERVE REQUESTS". System displays "Outstanding Reserve Requests at other locations for this Title" User selects <b>Reserve for Checkout</b> . Item set in transit to location. Reserve Item In Transit Receipt is available.                  |
| In transit reserve item checked in at its destination where it fills reserve request | System displays <b>In Transit Item</b> and message "Reserve In Transit Checkin Item." System displays <b>Reserve Title for Checkout</b> . User selects pickup location, then <b>Reserve for Checkout</b> link. Item is transferred to pickup location, and reserved for checkout on patron's record. Reserve for Checkout. |
| In transit reserve item checked in from the patron whose reserve request was filled  | System displays Last Check In. Checkin In Transit receipt available.   |
| In transit reserve item checked in at its original location                          | System displays <b>Item Shelved</b> and message "Item has Notes: In Transit Checkin Item."   |



# VERSO TRAINING AID

## DEALING WITH DAMAGED ITEMS

### Scenarios for Dealing with Damaged items

Add the Damaged Item Fee to the patron's record (this scenario assumes there is a standard fee for damaged items set up in **Circ Admin/Fee Setup**)

**Responsibility:** Library Staff Member

**Action:**

1. Checks in the item and separates the damaged items into a separate pile.
2. On the **Circulation** menu, selects **Item Status** and scans the item barcode
3. Clicks the link for the previous user's name.
4. Once on the patron screen, clicks **Pay Fine** button
5. Clicks link **Choose a standard fee**
6. Clicks radio button beside **Damaged Item** (or whatever you have named the fee)
7. Clicks **Close**
8. Adds a comment **Fee for Damaged Item Title** in question
9. Clicks **Close**

**Responsibility:** Library Staff Member

**Action:**

1. Accesses **Exceptions/Item Exceptions** in the **Circulation** menu.
2. Scans the barcode
3. Changes the item status to **Damaged** from the drop down menu
4. Clicks **Submit**

All items with the item exception of **Damaged** may be found in **Statistics/Circulation Statistics/Item Exceptions**. You have the option of changing the status to **Available** on this screen. There is also a report in **Circ Reports/Run Reports** called **Item Exception Listing** which will generate a report in Excel of all items with the specified exception, for further analysis.

# VERSO TRAINING AID

## DEALING WITH LOST ITEMS

### Scenario 1 - Dealing with Lost Items

*The patron comes in and tells the staff the item is lost. The patron pays for it right away.*

**Responsibility:** Library Staff Member

**Action:**

1. Access the patron's status record and click **Items Out**.
2. Click the **Lost** button beside the title in question.
3. In the Override column, the staff member ignores all amounts, leaves as is.
4. Click **Submit**.
5. Click **Pay Fines**.
6. Select **Payment** from the transaction type menu.
7. Enters the amount and comment Payment for lost item Title.
8. Clicks **Submit**.
9. Prints Receipt.

*If the item is returned within 30 days.*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record and clicks **Items Out**, scrolling to Lost Items.
2. Clicks the **Found** button next to the appropriate title.
3. Clicks the radio button for **Found** (this will change the status from **Patron Lost** to **Available**).
4. Leaves the Apply Credit amounts present on this screen and clicks **Submit**. This shows a balance decrease on the patron's Fines History record.
5. Clicks **Pay Fines**.
6. Selects **Cash out** from the transaction type menu.
7. Enters the amount for reimbursement and enters a comment, if desired.
8. Clicks **Submit**.
9. Prints Receipt.

*If the item is not returned within 30 days.*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record and clicks **Items Out**, scrolling to **Lost Items**
2. Clicks the **Found** button next to the appropriate title
3. Clicks the radio button for **Delete**
4. Zeroes out the amounts in the **Apply Credit** column.
5. Clicks **Submit**. (These steps will remove the item from the catalog and from the patron record. The Fines History for the patron retains the Patron Lost and payment information).

# VERSO TRAINING AID

## DEALING WITH LOST ITEMS (CONTINUED)

### Scenario 2 - Dealing with Lost Items

*The patron comes in and tells the staff the item is lost. The patron does not pay for it right away.*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record and clicks **Items Out**.
2. Clicks the **Lost** button beside the title in question.
3. In the **Override** column, leaves the amounts as found.
4. Clicks **Submit**.

*When the patron wants to pay for the Lost item*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record.
2. Clicks the **Pay Fines** button.
3. Selects **Payment** from the transaction type menu.
4. Enters the amount and comment (if desired)
5. Clicks **Submit**
6. Prints Receipt

*If the item is returned within 30 days*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record and clicks **Items Out**.
2. Scrolls to **Lost Items**, clicks **Found** beside the title in question.
3. Clicks the radio button for **Found** (this will change the status from **Patron Lost** to **Available**).
4. Leaves the **Apply Credit** column as is.
5. Clicks **Submit**

*If the item is not returned within 30 days, the staff member*

**Responsibility:** Library Staff Member

**Action:**

1. Accesses the patron's status record and click **Items Out**, scrolling to **Lost Items**
2. Clicks the **Found** button next to the appropriate title
3. Clicks the radio button for **Delete**
4. Zeroes out the amounts in the **Apply Credit** column.
5. Clicks **Submit**. (which will remove the item from the catalog and from the patron record. The patron's Fines History retains the Patron Lost and outstanding fine information).

# VERSO TRAINING AID

## CHECKIN AND RESERVES MANAGEMENT

### Scenarios for Checking In an Item

*Checkin when an outstanding title level reserve for the title exists:*

VERSO checks the staff member's **Home Location** against the patron's **Pickup Location**.

**Condition:** If the staff member's **Home Location** and patron's **Pickup Location** *do* match

**What Happens:** VERSO places the title on **Checkout Reserve** for the patron and generates a Checkout Reserve Receipt.

**Condition:** If the staff member's **Home Location** and patron's **Pickup Location** *do not* match

**What Happens:** VERSO applies a status of **In Transit** to the item and generates an In Transit Receipt.

- The item is shipped to the library designated as the **Pickup Location** for the patron.
- Staff at the receiving library (**Pickup Location**) checks in the item. The system places the title on **Checkout Reserve** for the patron and generates a Checkout Reserve Receipt.

*Checkin when no outstanding title level reserve for the title exists:*

VERSO checks the staff member's **Home Location** against the item's **Current Location** and **Permanent Location**.

**Condition:** If the staff member's **Home Location** and the item's **Current Location** or **Permanent Location** *do* match

**What Happens:** VERSO checks in the item and applies a status of **Available** to the item, and the item is placed on the Shelving Cart.

**Condition:** If the staff member's **Home Location** and the item's **Current Location** or **Permanent Location** *do not* match

**What Happens:** VERSO applies a status of **In Transit** to the item and generates an In Transit Receipt to the owning library's location.

- When the item is checked in by the owning library, the system applies a status of **Available** to the item.

# VERSO TRAINING AID

## CHECKIN AND RESERVES MANAGEMENT (CONTINUED)

### Scenarios for Reserve Cancellation

**Condition:** If the Number of days to cancel Reserve if not picked up value (under Circulation Options in the Circulation Administration module) is set to 9999, the system will do nothing for that length of time.

**What Happens:**

- Staff will manually check the shelf each day. If items have been on the shelf too long, staff will pull the items and check them in.
- If there are other patrons with active reserves for an item, the same workflow as *Normal checkin when an outstanding title level reserve for the title exists* is invoked as described above.
- If there are no other patrons with active reserves for an item, the same workflow as in *Normal checkin when no outstanding title level reserve for the title exists* is invoked as described above.

**Condition:** If the **Number of days to cancel Reserve if not picked up** value (under **Circulation Options** in the Circulation Administration module) is set to **8** days, the system checks backwards from the current calendar date for items that meet the criteria to cancel the reserve.

**What Happens:**

- VERSO checks backwards from the current calendar date for items that meet the criteria to cancel the reserve.
- If the system locates an item for which a **Checkout Reserve** should be cancelled, it cancels the reserve, but retains a title-level reserve that can be reactivated within the number of days specified by the **Number of days to display expired Reserves** value (under **Circulation Options** in the Circulation Administration module). The patron or staff member can reactivate the reserve within this time period. If neither party reactivates the reserve, the system will remove the reserve once the specified number of days has passed

**Condition:** Once the **Checkout Reserve** has been cancelled

**What Happens:**

VERSO checks to see if title-level reserves for other patrons exist for the item.

- If title-level reserves exist, the system assigns a **Checkout Reserve** for the item to the next patron in line. *There are no In Transit statuses in this process.*
- If *no* title-level reserves for the item exist, the system applies a status of **Available** to the item. *There are no In Transit statuses in this process.*

# VERSO TRAINING AID

## CHECKIN AND RESERVES MANAGEMENT (CONTINUED)

**Condition:** To manage the *automatically* cancelled reserves, the following *system-generated* reports are used: Cancelled Hard Reserves, Cancelled Hard Reserves Not Emailed, New Hard Reserves Receipts and New Hard Reserves Notifications.

### What Happens:

- **Cancelled Hard Reserves** provides a listing of the items that were not picked up along with the name of the patron to whom the reserve was assigned. Staff should print the report and pull the items from the reserve shelf.
- **Cancelled Hard Reserves Not Emailed** notifies the patrons that the time frame for picking up the item has expired and their reserve has been cancelled. The report contains two sections: reserves cancelled for which patrons are to be notified by phone or mail, and reserves cancelled for which patrons were notified by email. Staff should print this report and contact the patrons that were not notified by email.
- **New Hard Reserves Receipts** should be printed and each receipt should be matched to the items pulled as a result of staff using the **Cancelled Hard Reserves** list. The Reserve Receipt should be inserted in the book, and the book shipped to the patron's pick-up location. For items *not matched* to a Reserve Receipt, staff will check in the item using the workflow described in **Scenarios for Checking in an Item**, above. Items that *have receipts* should NOT be checked in because it will *cancel the reserve*.

**New Hard Reserve Notifications** contains two sections: a listing of patrons that have not been notified of which items have been placed on **Checkout Reserve** to them, and a listing of email addresses for patrons who have been notified. The notification lets the patron know which title is available for them to pick up. Staff should print the notifications and contact those patrons that were not notified by email.