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Training Guide

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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

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.
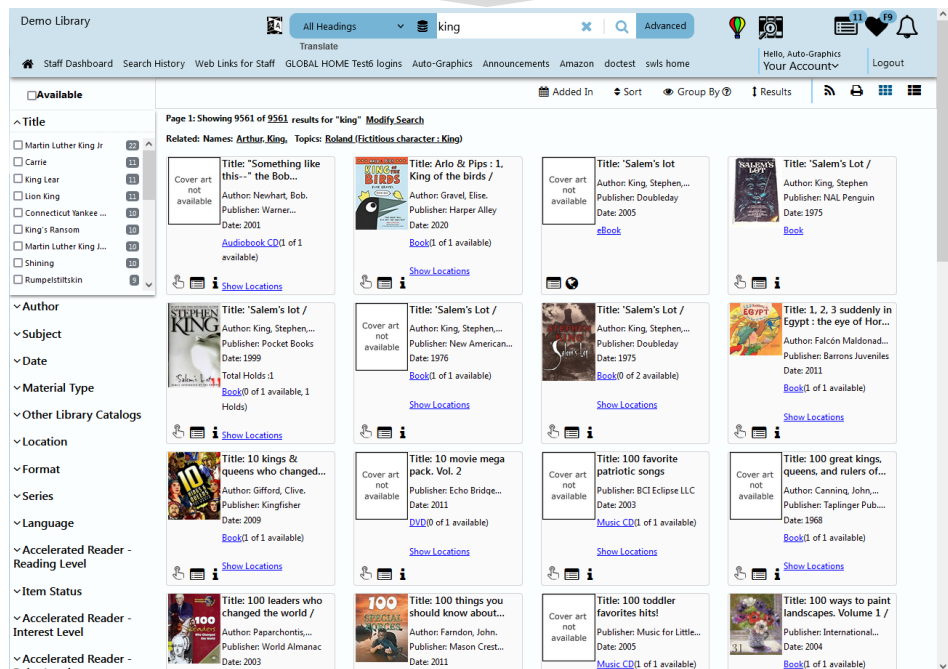
Advanced Search

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.

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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.
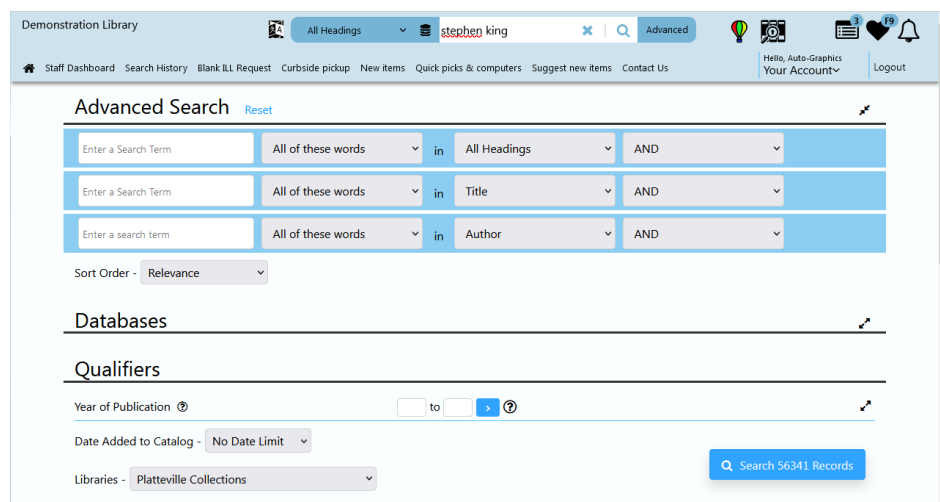
VIEWING SEARCH RESULTS

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.

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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

List View

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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

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.

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
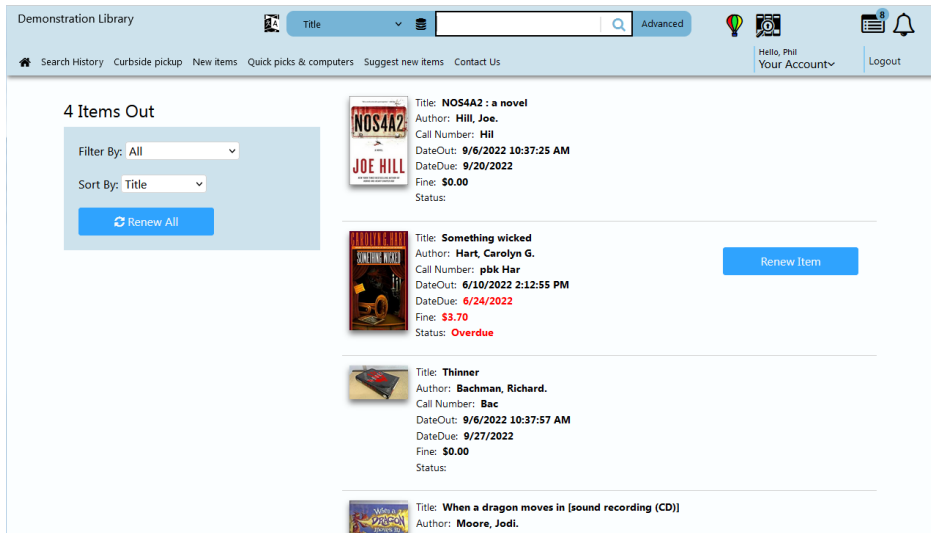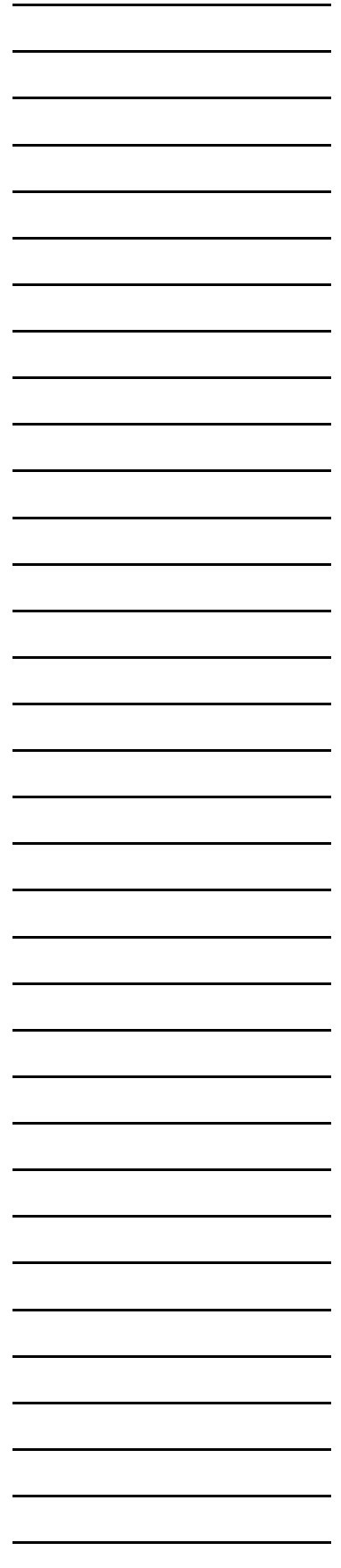
Search History

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.
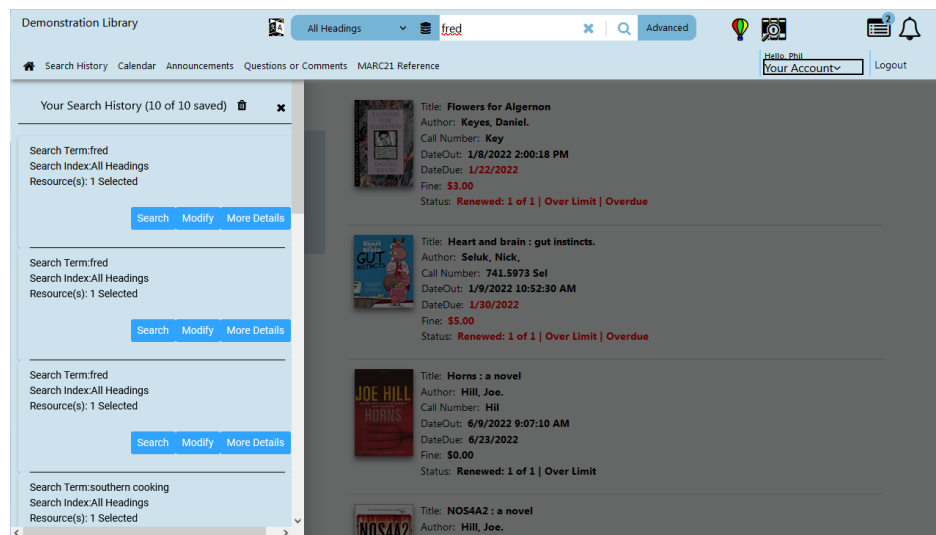
Your Lists

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

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Search Administration

SEARCH ADMINISTRATION

SEARCH ADMINISTRATION

Two Levels:

1. For each individual logon
2. System-wide (as set by the System Administrator in PAC Admin)

INDIVIDUAL LOGONS

VERSO allows users to manage lists and recent searches by clicking on

- Your Account
- Your List
- Search History

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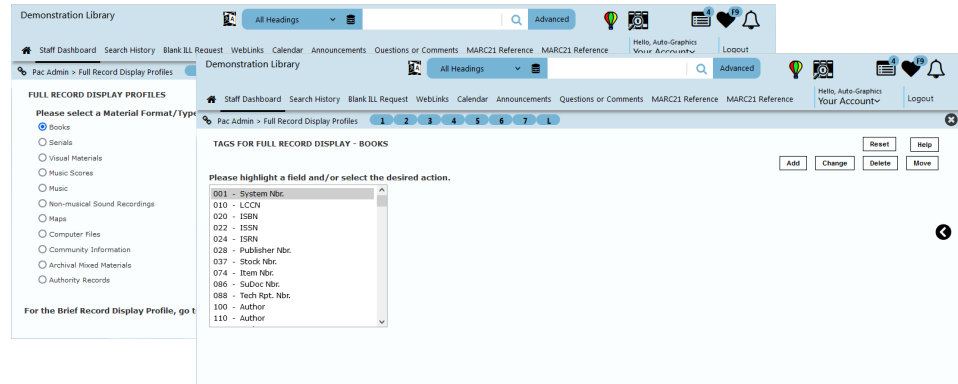
The **Record Display Hotlinks** function lets you specify the MARC tags that will serve as hotlinks in the Full Record Display for MARC records retrieved from *any* bibliographic database.
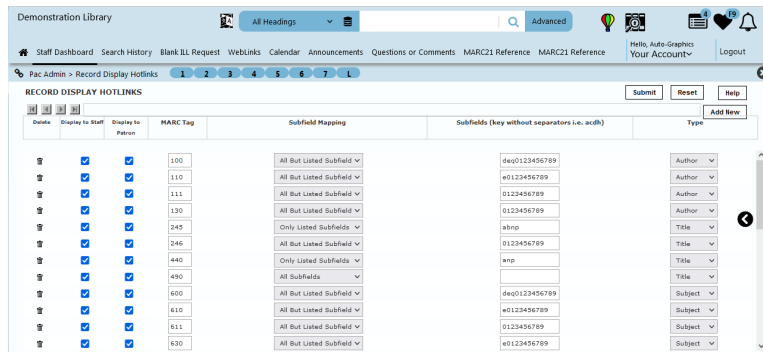
Control Search Scoping

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.
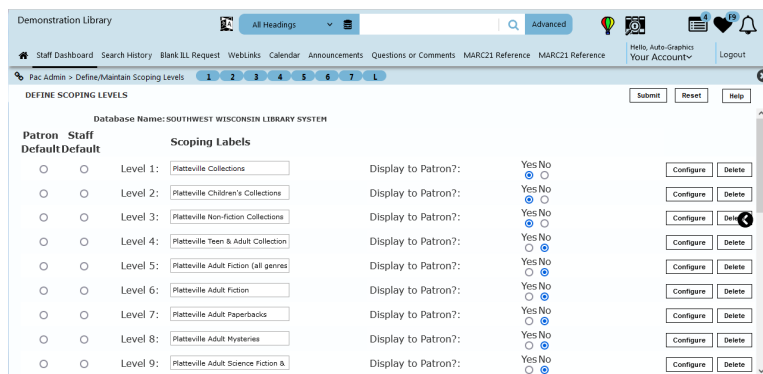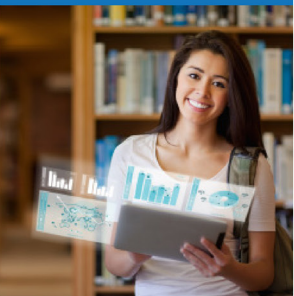
SEARCH ADMINISTRATION

Select Search Indexes

Using **Select Search Indexes**, staff may select the index points available for guests, patrons and library staff.

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UX
Administration

LOGIN OPTIONS

- Configure Login Form and "Select Your Library" menu content

SEARCH AND RESULTS OPTIONS

- Configure Quick Search and Advanced Search screens
- Configure search results, Brief Record and Full Record displays
- Manage facets

PAGE ADMINISTRATION

Pages and Widgets Manager

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

Page Components

Can create:

- Call to Action
- Image Block
- List Carousel
- Showcase Carousel
- Popular Carousel
- Feed Back
- Text Block
- Topic Search
- Embed Web Link
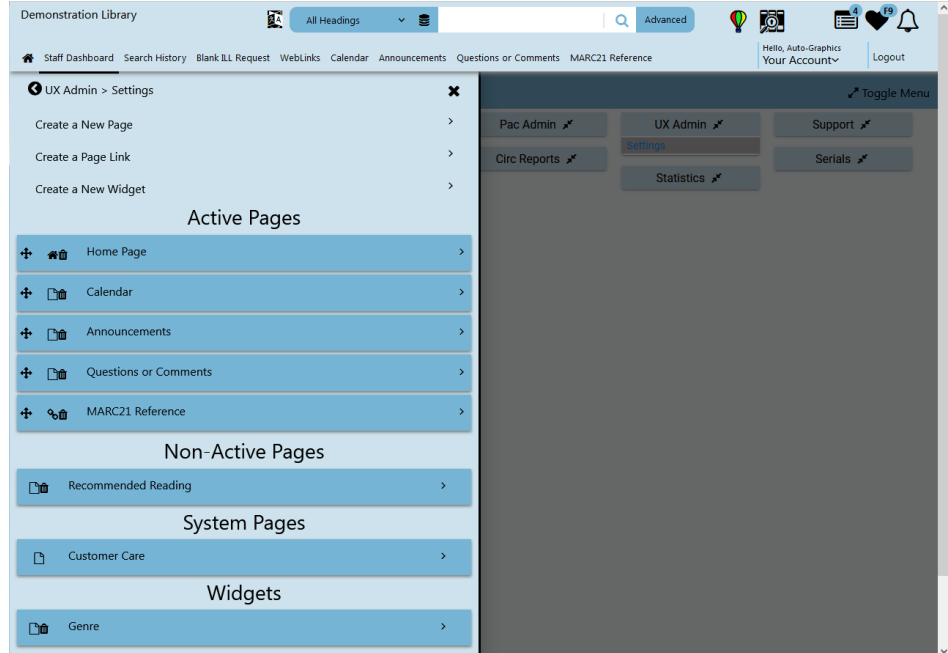
UX ADMINISTRATION

DESIGN OPTIONS

- Manage page headers and footers
- Customize color schemes
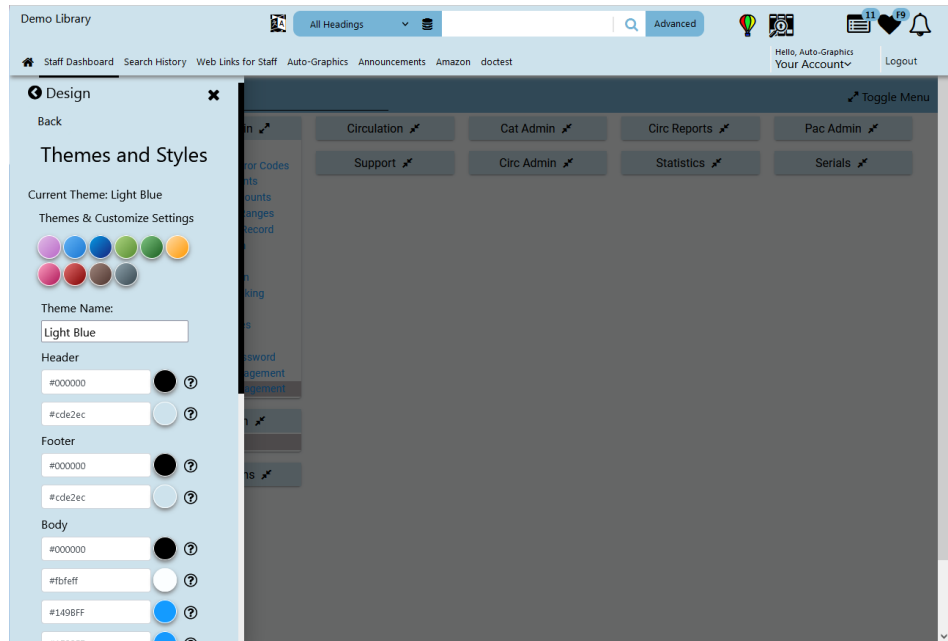
STAFF OPTIONS

- Configure the Staff Dashboard
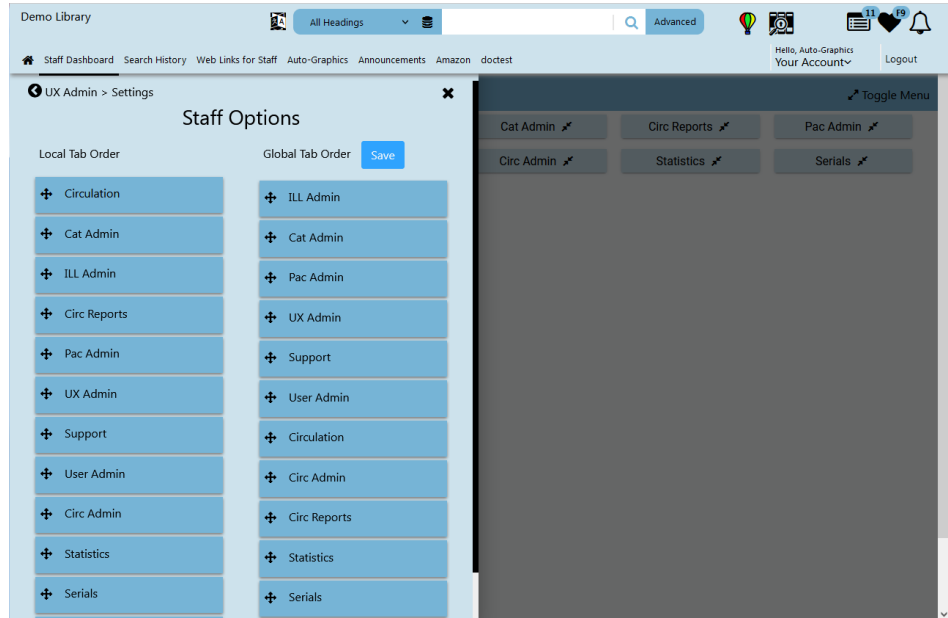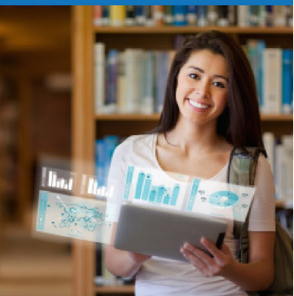
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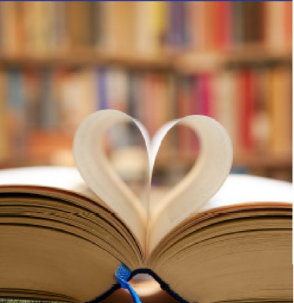
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VERSO®
Circulation

CIRCULATION OVERVIEW

The Circulation web interface is designed to provide a logical and efficient means of performing circulation activities. The screens are structured to assist workflow, and contain navigational links and "expandable" menus to provide "single-click" access to features and functions.

Patron Status & Checkout

Checkin

Express Renewal

Manage Reserves

Check Item Status

Manage item transfers from one location or collection to another

View your library's circulation history

Manage item exceptions

Delete patron records

Add brief records

Standalone CIRC utility

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	**View/delete fines history**
Renew items	**Suspend reserves**
Process lost items	**Override checkout limits**
View/edit/add patron record	**Modify due dates**
Process fines/fees payments	**Print receipts**
Add a patron block	

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

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

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

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

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

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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.

- 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.

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

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

TRANSFERS AND EXCEPTIONS (CONTINUED)

Exceptions

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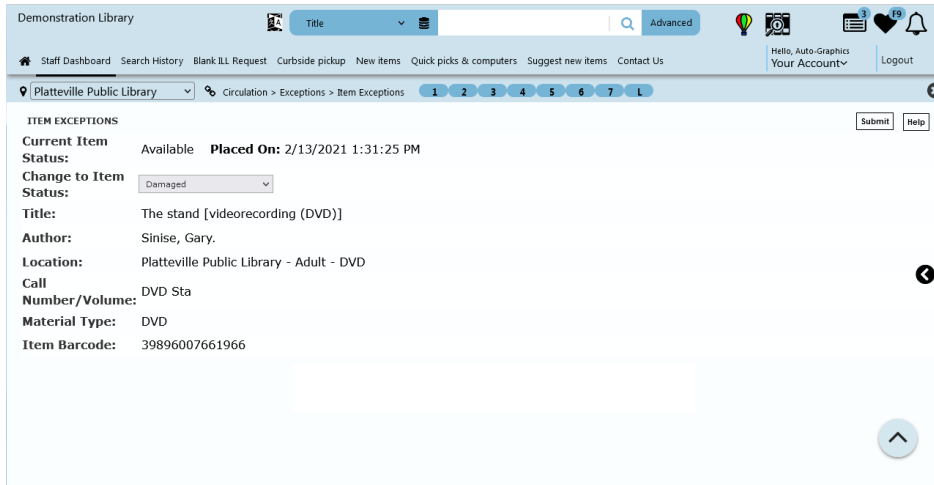
CIRCULATION HISTORY

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
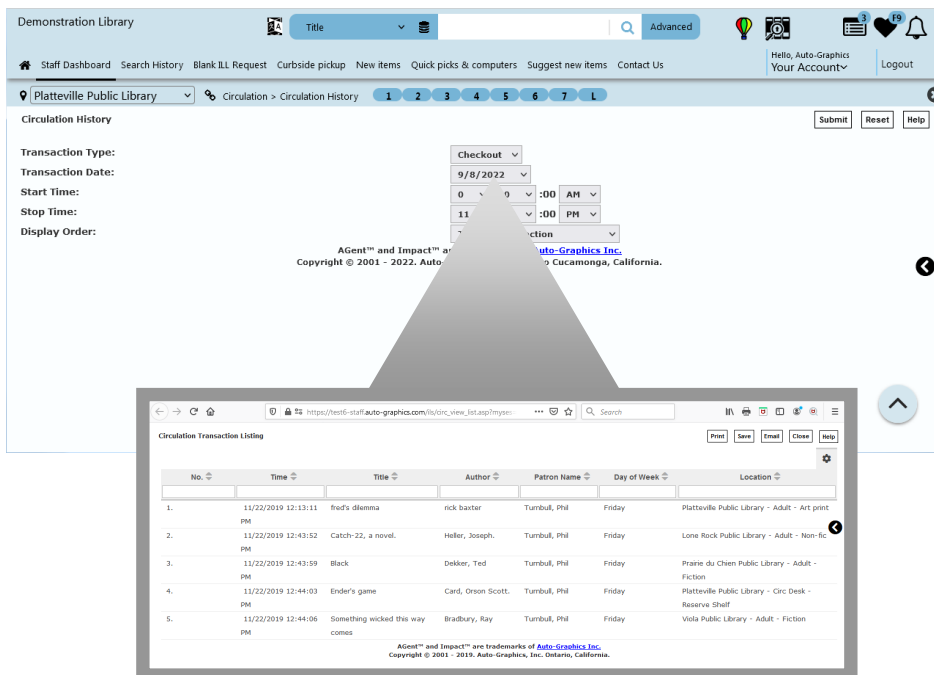
CIRCULATION SUMMARY

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 ↗

Patron Status & Checkout
Checkin
Express Checkin
Express Checkout
Express Checkout With Full Record
Renew Checkout
Reserves

View By Title
View All Reserves
View Patrons with Suspended
    Reserves
View Patrons with Expired
    Reserves
View Mediated
Reserves with Available Copies
Reserves by Pickup Location
View Expired Item Reserves
Move Reserves
Merge Users
Item Status
Add Item

Add Item
Set Add Defaults

In Transit Items

To My Library
From My Library
Transfer

Item Transfer
Multiple Item Transfer
Temporary Transfer Return
Branch Item Transfer
Branch Transfer Checkin
Global Item Transfer
Items on Shelving Cart
Circulation History
Exceptions

Item Exceptions
Multiple Item Exceptions
Delete Patron
Add Brief Record
Standalone Circ Utility
Set Workstation Printer
Phone Notification History

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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.
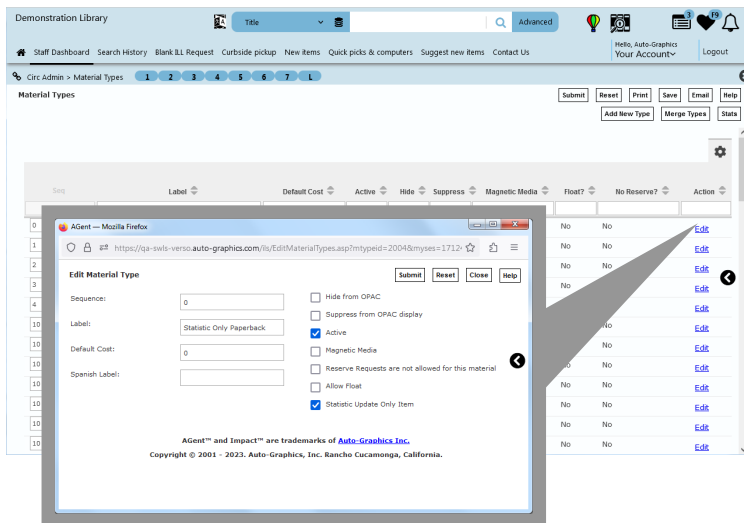
In this area of the software, you may:

- 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
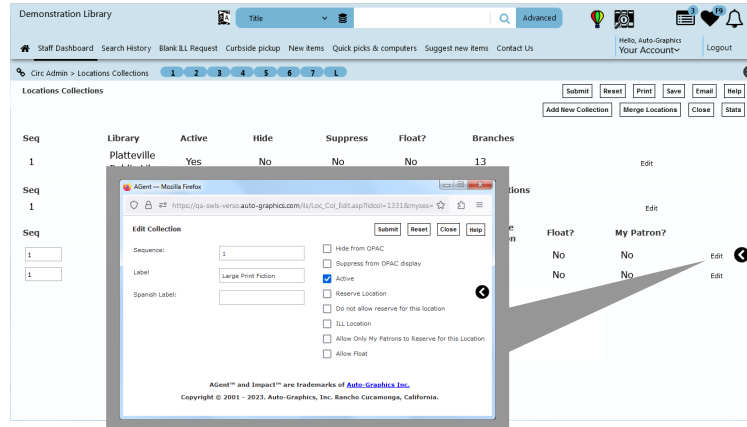
PATRON CATEGORIES/GROUPS

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
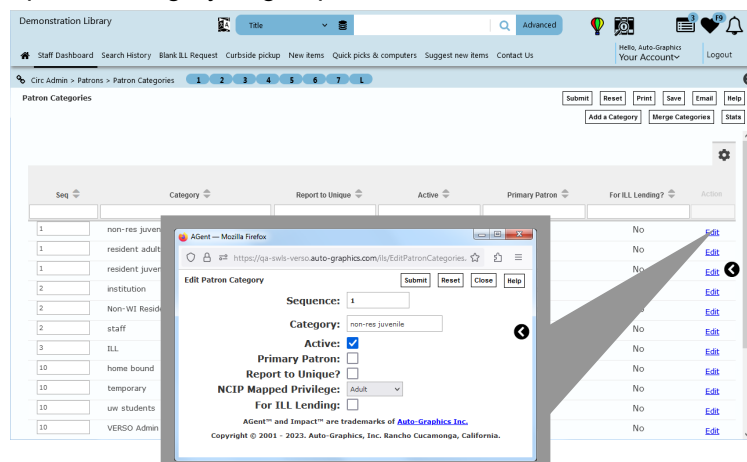
CIRCULATION ADMINISTRATION

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.
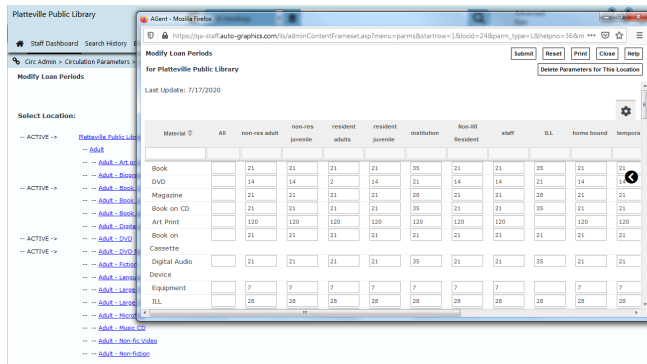
Renewal Periods

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".
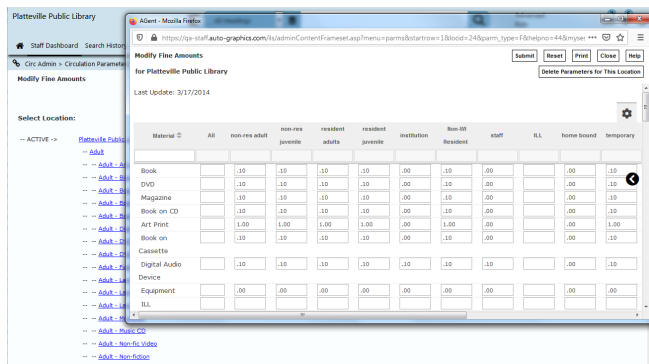
Fine Limits

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*.
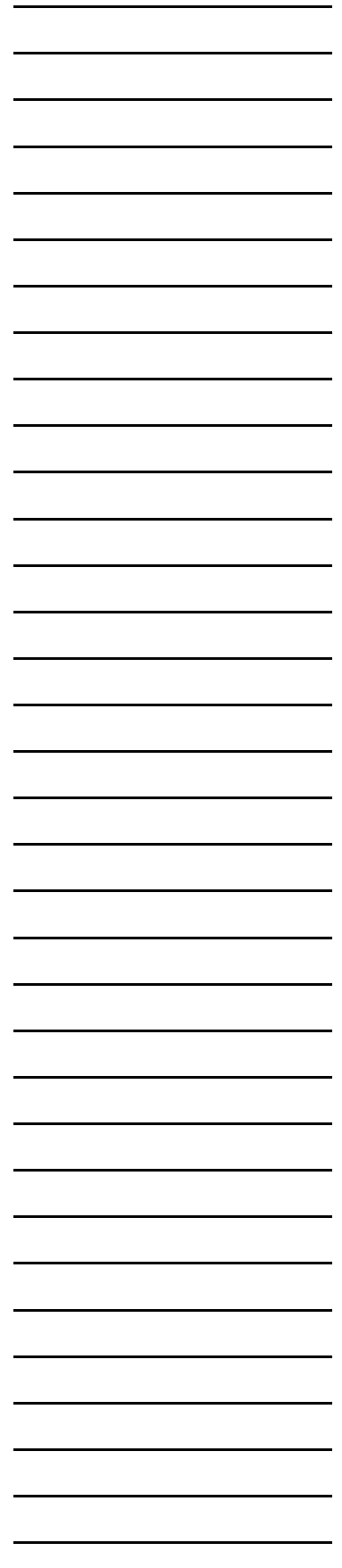
CIRCULATION ADMINISTRATION

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.
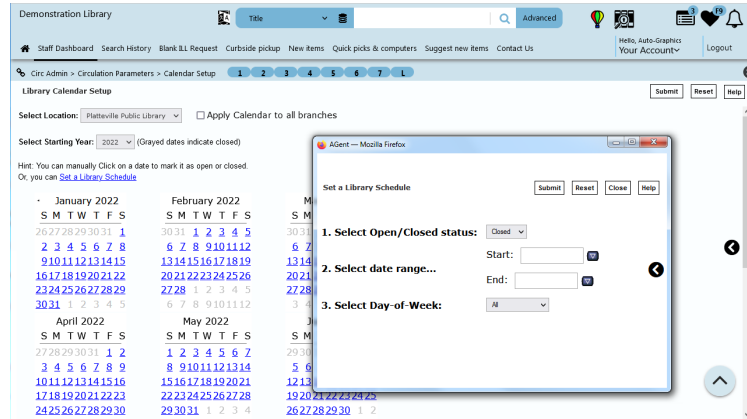
USER DEFINED EXCEPTIONS AND CUSTOMER STATUS MANAGEMENT

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 renamed to **Not Available**. Each status can also be assigned a color value that displays in the OPAC.
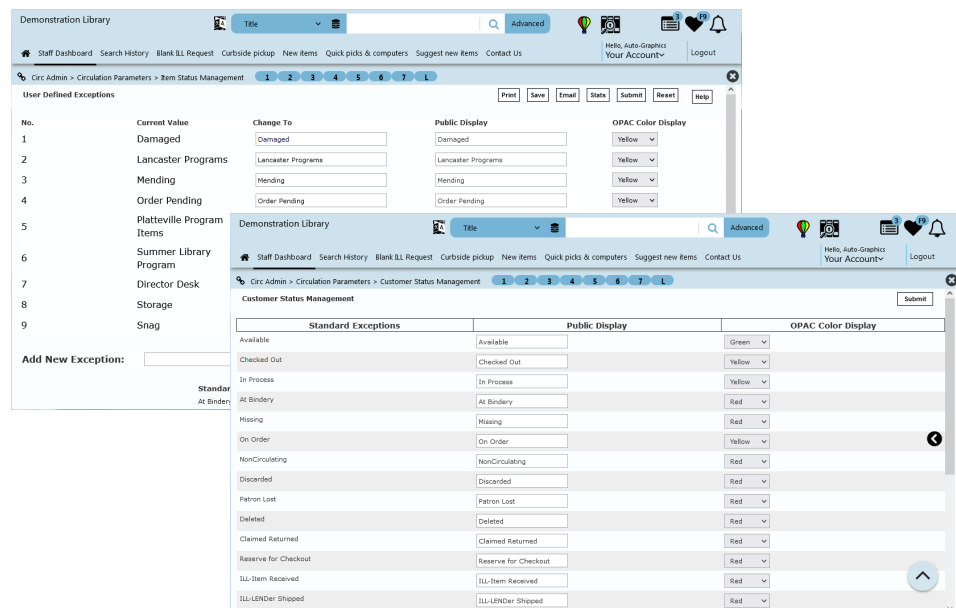
CIRCULATION ADMINISTRATION

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.

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

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	**For notices for**
notice header	Infrequent User Set-up
notice text	Reserve Pickup
email setup	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.
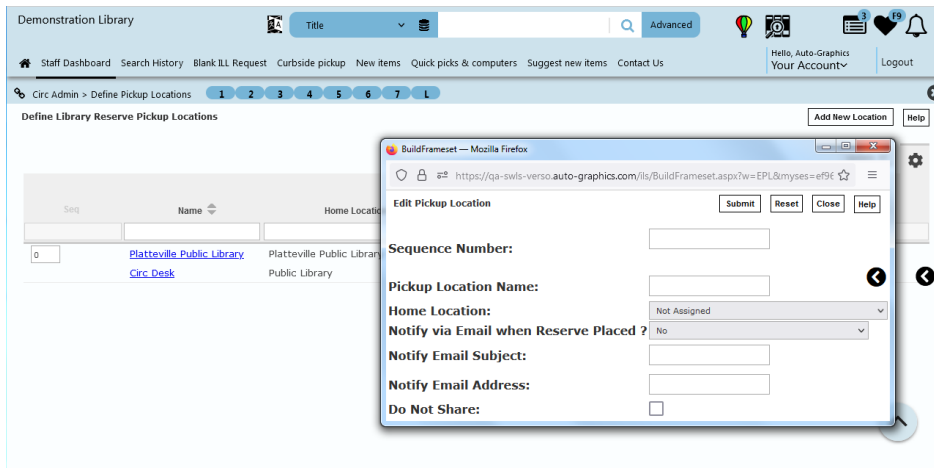
RECEIPTS CONFIGURATION

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.
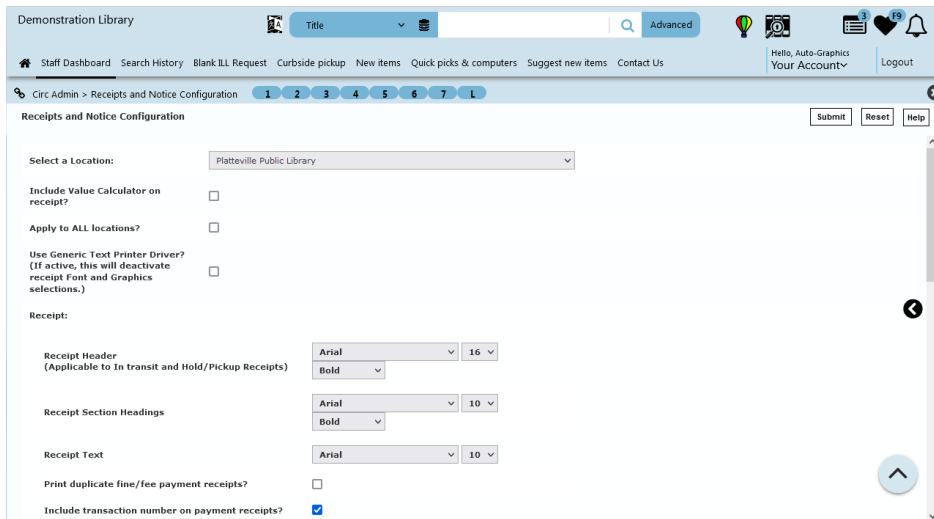
FEES MANAGEMENT

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.).

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.

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Standalone Circulation Utility

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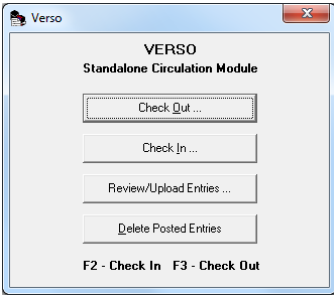
The first step is to download the software from **Staff Dashboard/Support/ Utility Downloads** and install it on your computer. Once installed, Standalone Circulation is accessed from the Start menu.

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
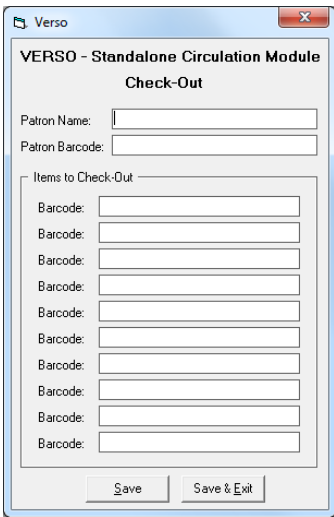
REVIEWING TRANSACTIONS

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).

Once you have reviewed the entries, click **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.

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.

platform

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VERSO®
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.

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.

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.
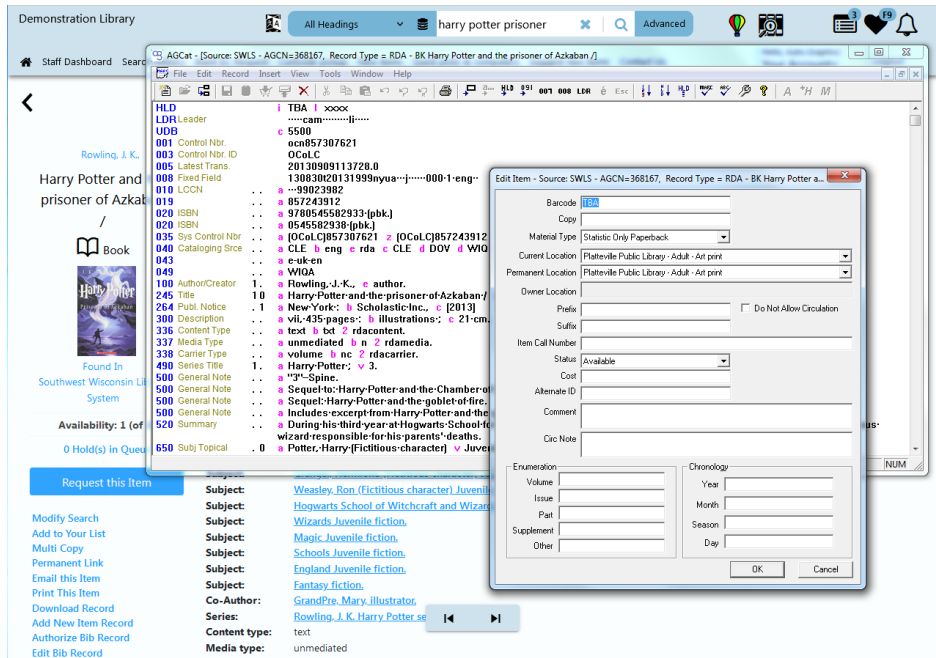
Editing and Deleting Item Records

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.
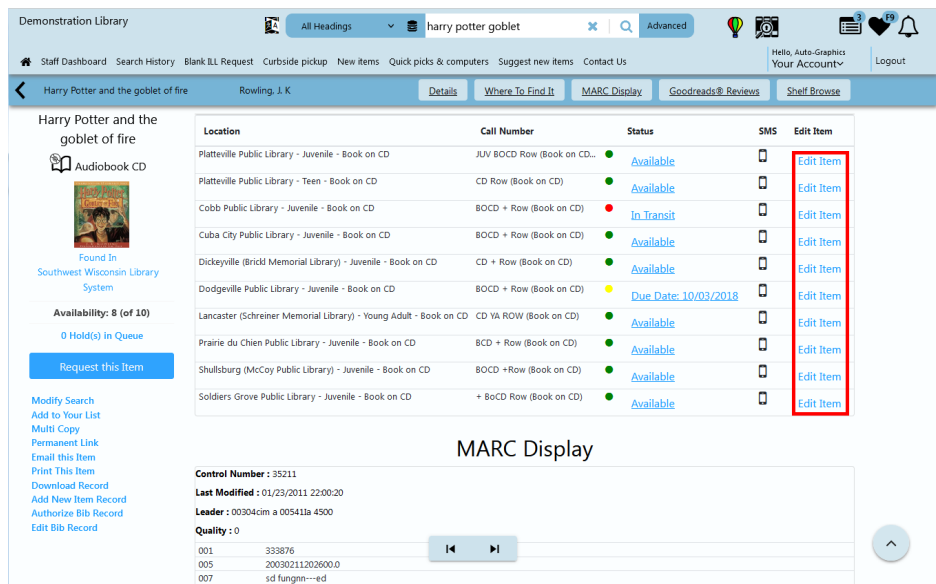
Editing and Deleting Item Records (Continued)

The Edit Item screen allows you to delete an 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.

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.

- 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.
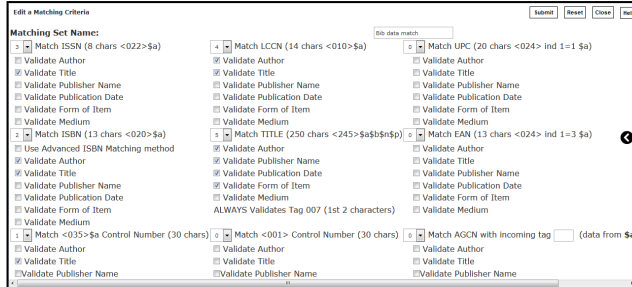
EXPORTING MARC RECORDS

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.
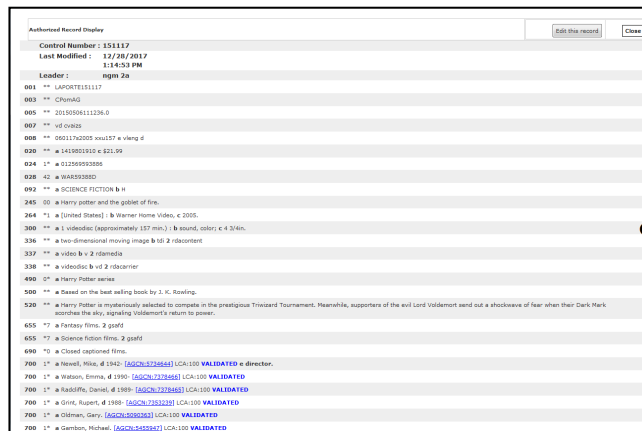
Links to view authority records

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.

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
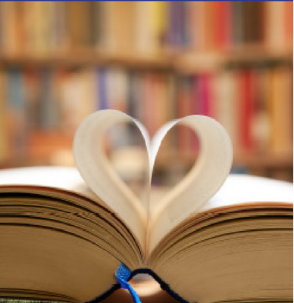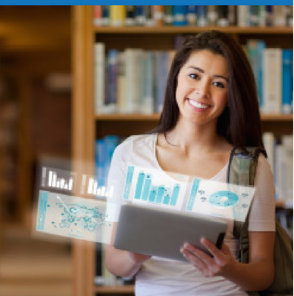
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CATALOGING SUMMARY

Managing

- Bibliographic records
- Authorities
- Item records
- Inventory

Loading and Exporting MARC Records

Printing

- Spine/pocket labels
- Barcode labels

platform

search

share

VERSO®
Circulation Reports

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**.
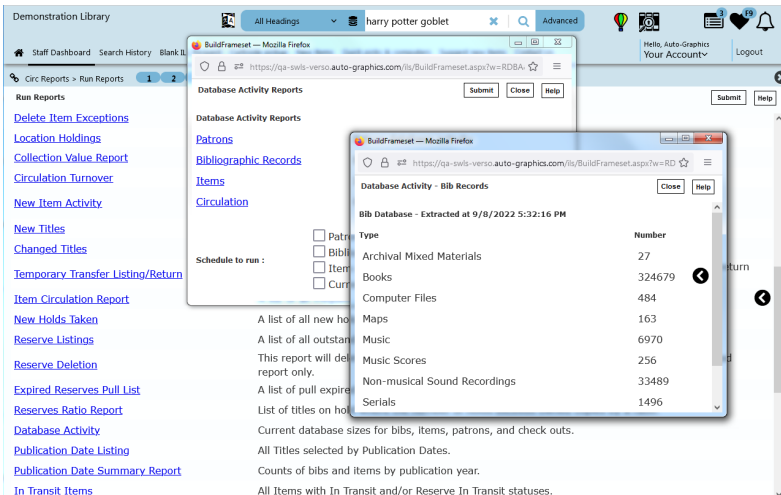
CUSTOMIZE WITH OPTIONAL REPORT WRITER

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.
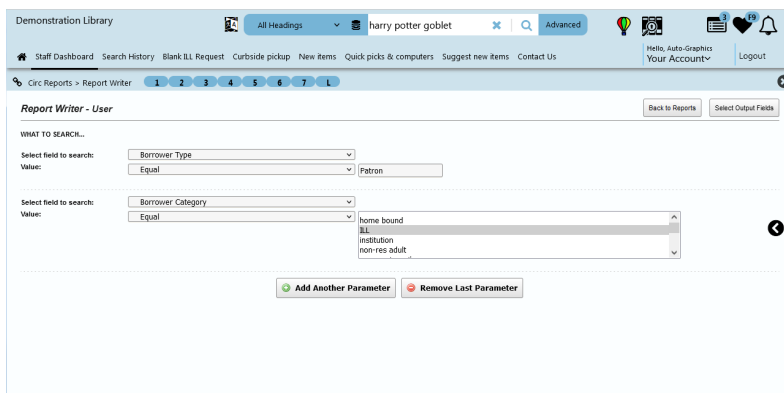
RUNNING REPORTS

Running Reports

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

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**.

V VERSO®
Statistics and Documentation

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)

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**.

PATRON STATISTICS

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

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

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

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STATISTICS AND DOCUMENTATION

DOCUMENTATION

All documentation is available for downloading to your computer and printing on your local printer.

Go to the Staff Dashboard / Support for

- User Guides (PDF and HTML)
- Training Videos
- Bulletins (Software Release Bulletins and Product Information Bulletins)
- Utilities and Downloads (including the Standalone Circulation module)

platform

search

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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 **Change Checkin Date**. The checkin date can be set for the user's session by selecting **Remember Checkin Date**.
Checkin of brief record	System displays "Brief Cataloged Item: Send to Cataloging."
Checkin of item with checkin note	**Item Checkin** screen displays "Item has Notes: [Circ Note]."
Item lacks barcode	Enter title and system displays **Title Lookup** 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 **Modify Search**, or **Checkin**.
Checkin of item which is not checked out	**Item Checkin** screen displays **Item Shelved**. Use **Item Status** to display exception.
Checkin of checked out item	System displays **Last Check In**. Status of item is changed to **Available**. System displays **Fines Assessed on this Check in** with **Pay Fines** 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 **Patron Found Book** 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 **Item Shelved** and message "THIS TITLE HAS OUTSTANDING RESERVE REQUESTS" System displays "Outstanding Reserve Requests at this location for this Title" User selects **Reserve for Checkout** link and system displays **Reserve Title for Checkout**. Item is transferred to pickup location, and reserved for checkout on patron's record. User has the option to add notes from the **Add Staff Notes** link. Reserve for Checkout Transaction receipt is available.

(continued)

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 **Item Shelved** and message "THIS TITLE HAS OUTSTANDING RESERVE REQUESTS". System displays "Outstanding Reserve Requests at other locations for this Title" User selects **Reserve for Checkout**. 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 **In Transit Item** and message "Reserve In Transit Checkin Item." System displays **Reserve Title for Checkout**. User selects pickup location, then **Reserve for Checkout** 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 **Item Shelved** and message "Item has Notes: In Transit Checkin Item."

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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).

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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.

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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.*

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.

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