Circulation

Table of Contents

The circulation module is the heart of the OpenBiblio system.

1. Checking out materials

To check out materials, you must first open a member's account.

1.1. Retrieving a member's account.

1. Click on Circulation on the left side of the screen.

2. If you have member barcodes turned on, you may scan their barcode.

3. Otherwise, enter a portion of the member's last name.

4. Click on the patron you wish to retrieve. If a patron goes by a name other than their legal name, both forms of their name will display in the list.

   Tip

   Anybody with administrator privileges can turn member barcodes on using Tools $\rightarrow$ System Settings $\rightarrow$ Use Member Barcodes.

1.2. Checking out an item

1. Type or scan the item barcode into the Check Out field.

2. Any items you have checked out will appear on the screen, provided there are no errors in the patron or copy records.

3. If there are errors (often a mis-scanned barcode), they will appear at the bottom of the screen.

2. Checking in materials

1. Click on Circulation on the left side of the screen.

2. Click Check In.

3. Type or scan the barcode number.

4. If the book was checked out, it will be added to the shelving cart, which is represented by a list at the bottom of the screen.

   Note

   Check in only works on items that are checked out. It will not remove other statuses, such as "lost".

After you check in your materials, you will probably want to empty the shelving cart as well.

Does the screen display fines if the item being checked in is overdue?

3. Showing a member's circulation history

OpenBiblio stores information about copies that a member has checked out previously. You can access this list after you retrieve a member account.

3.1. Retrieving a member's account.

1. Click on Circulation on the left side of the screen.

2. If you have member barcodes turned on, you may scan their barcode.

3. Otherwise, enter a portion of the member's last name.

4. Click on the patron you wish to retrieve. If a patron goes by a name other than their legal name, both forms of their name will display in the list.

3.2. Viewing the history

Click on the History button, near the top of the screen.

   Note

   Unlike some ILSs, OpenBiblio does not anonymize circulations after a certain period of time has elapsed. Please know that this can be considered a member confidentiality issue in some jurisdictions.

4. Creating a new member

1. Click on Members, under the circulation menu.

2. Click "Add new member".

3. Enter the desired information.

4. Some people may use a name other than their legal name. If this is the case, enter the name they prefer in the "First name" and "Last name" fields, and if it is necessary, enter their legal name into the "Legal first name" and/or "Legal last name" fields. This will allow your library to retrieve information about this member using both versions of their name.

5. Holds

You can place holds on items so you can check them out at a later time.

6. Bookings

You can also book certain items