Learn how to view details of a copy record from the Circ. Desk screen.

Search from Circ. Desk

Details of a copy record can be viewed from the Circ. Desk screen:

1. Click on Copy > Search and search for the copy record using one of the search options, such as Copies of a Title.
2. Locate the correct Copy. To carry the record back to the Circ. Desk screen, click the check box in the list and click Insert.
3. Alternatively click on the Title to display details including:
   - Full copy details
   - Current loan status e.g. On Loan and to whom the copy is loan, with due date
   - Renewal and reservation details
   - Trap information

Note: Copies of a Title search can also be used to search by ISxNs only. In the ISBN, ISSN or other ISN search box enter any control number to retrieve all copies.

The History page provides details of the last transaction. In Transaction History you can toggle between all transactions for that user, or transactions at the current PC Location for that user. Tick one of the transaction records and in Actions select Switch between system-wide and local lists.

The Acquisitions page will be populated if the item has been bought through the Acquisitions module and price information is then recorded.

Filtered searches

In the Copies search screen click the Refine Search link to access these. A filtered search allows you to further refine your search by specific criteria. The following refinements in the Copies domain are noteworthy:

- Last issued on / Last returned on
- Copy Status
- Title. Note this search is case sensitive
- Count of Issues - for example use Allow Null? to find items never borrowed
• Transaction - filter copies records by Transaction Date, Transaction Source, Transaction Type and Recorded By. In the Refine Search window select Transactions under Related Domains and under Refinements select one of these. For example, Transaction Source can be one of NCIP, SIP, OLIB Web, WorldView, WebView; using Transaction Type you can search by e.g. Issue, Return, Renewal, Hold, Withdrawal, Issued in Transit and so on. OLIB displays the values you can choose from and refines the search.

• Users with items on loan - You can filter by Barcode so that the User is uniquely identified.
  1. Enter wildcard symbol but do not execute search.
  2. Click Refine Search and select the Linked Domain - Users With Items On Loan.
  3. When the Refinements display, select Barcode.
  4. Set the filter to Equals.
  5. Enter the user barcode to display all items currently on loan to this specific User.

Sales transactions

This feature allows you to resell copies in the OLIB database to a specified OLIB user and to record the sales transaction. To use this feature, the system manager first needs to add the following attributes to the Copies> Acquisitions sheet using Layout Manager:

• Price (Resell)
• Sales CR Account
• Sales Transaction

... and to a sheet in the Users domain:

• Sales Transaction

Record a sales transaction in the Copy record

1. Switch to modify and click on the Acquisitions tab.
2. Enter the cost in Price (Resell).
3. Use the Sales CR Account drop down to select the correct Account to credit the cost to.
4. In Sales Transactions click Search. Search for the User and link them back to the copy. In the link record you can enter a note if desired. Save the details to record the sales transaction in the Copy and the chosen Account instance.
5. Back on the copies Acquisitions sheet, save and close the details.

The amount will be credited to the relevant account instance, i.e. the account instance's Spent amount will be decremented by the amount that you sold the item for. (There is a Sales Transactions attribute in the Account Instances domain that lists all the sales transactions recorded against that account instance).

After the copy has been sold, you may want to set it to Withdrawn status in the copies Main Details sheet.