Table of Contents

1. UT ID Patron Records:
   Preliminary Steps
   Update
   Creation

2. Loans, Renewals, and Returns

3. Recalls and Searches

4. Financial Guidelines

5. Courtesy/TBR, Donor and Proxy Cards

6. Stand Alone Offline Circulation
1. UT ID Patron Records: Preliminary Steps, Update and Creation

UT ID Preliminary steps:

Log into Alma with your “Net ID and password”.

If you need to change your desk location, click on the symbol and select the proper desk location.

Next click on Manage Patron Services.
Then scan the patron ID barcode in the “Scan patron’s ID or search for patron” box.

Record found:

Checkout library material(s) to patron by scanning barcode(s) in the “Scan Item Barcode” box.
Record **NOT** found:
scan patron ID barcode again once or twice to be sure a barcode misread did not occur.

Record **NOT** found:
type patron’s Net ID, Student ID and/or Employee ID number in the “Scan patron’s ID or search for patron” box.

Record found:
follow directions for **UT ID Patron Record Update**.

Record **NOT** found:
follow directions for **UT ID Patron Record Creation**.

**UT ID Patron Record Update:**

1. Locate patron record using net ID, student ID number or employee ID number.

2. Make appropriate corrections to patron record by clicking on “Edit User Info” button.
3. Then select “Full Information” in the top left corner.

4. Then select “Open For Update” in the top right corner.

5. Next click on “No” in the message box.
6. Click on the three main tabs and update record or fill in any missing information.

7. First tab “General Information” should look something like this, if not update record or fill in any missing information.
8. Second tab “Contact Information” should look something like this, if not or if patron wants something changed update record.

<table>
<thead>
<tr>
<th>General Information</th>
<th>Contact Information</th>
<th>Identifiers</th>
<th>Notes</th>
<th>Blocks</th>
<th>Fines/Fees</th>
<th>Statistics</th>
<th>Attachment</th>
</tr>
</thead>
</table>

**Addresses**

1 - 1 of 1

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Address</th>
<th>Created By</th>
<th>Creation Date</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Art Department</td>
<td>mnodson</td>
<td>08/16/2016 12:15: PM, EDT</td>
<td>Work</td>
</tr>
</tbody>
</table>

**Phone Numbers**

1 - 1 of 1

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Phone Number</th>
<th>Created By</th>
<th>Creation Date</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>865-555-3254</td>
<td>mnodson</td>
<td>08/16/2016 12:15: PM, EDT</td>
<td>Mobile</td>
</tr>
</tbody>
</table>

**Email Addresses**

1 - 1 of 1

<table>
<thead>
<tr>
<th>Preferred</th>
<th>Email Address</th>
<th>Created By</th>
<th>Creation Date</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td><a href="mailto:sjim@utk.edu">sjim@utk.edu</a></td>
<td>mnodson</td>
<td>08/16/2016 12:15: PM, EDT</td>
<td>School</td>
</tr>
</tbody>
</table>

9. Anything external cannot be changed so you will have to add new information by clicking on the “Add button”. 

[Image of Add Email Address button]
10. When the “Add box” comes up:
   Do not select “Add as external,” because external information will be changed on next update.
   Fill in the appropriate information
   Select “Yes” for preferred address
   Then select “Add and Close”

![Add Email Address](image)

11. Third tab “Identifiers” should look something like this, if not update record or fill in any missing information. (Note: new Alma patrons will not have “Aleph Patron ID” number.)

![Identifiers](image)
12. If any identifiers are missing click on “Add Identifier” to add correct information. You should add this as external because the next update should have the correct up to date information.

13. It is important to click on “Save” at the top right before you exit the patron’s User Details screen, If you do not your changes will not be saved.
UT ID Patron Record Creation:

1. Click on "Register New User" button located in upper right corner of the Alma screen.

2. Fill in "First and Last name".

3. Put in Net ID as the "Primary identifier".

4. Select the appropriate "User group".
5. Select “Yes” patron has institutional record.

6. Select “Email type” and fill in “Email address”.

7. Select “Address type” and fill in “Address”.

8. Select “Phone type” and fill in “Phone number”.

9. The last thing to do is to select “Barcode” from the drop down menu in the “Identifier Type” box and wand the patron barcode in the “Value” box. (Note: If you wand the patron barcode before the rest of the mandatory fields are filled in you will get error messages.)
2. Loans, Renewals, and Returns

Loans:

1. Click on the “Alma” tab and select “Manage Patron Services”.

   ![Alma tab selection](image)

   *Welcome, Dodson, Michael*  Wednesday, July 26,

2. In the “Patron Identification” screen that comes up, wand the patron's barcode or search for the patron with another patron identifier in the “Scan patron’s ID or search for patron” box.

   ![Patron identification interface](image)
3. If the patron has blocks, they will appear in a pop up box. If you need to checkout items to the patron even though they have blocks, click "Override". (When in doubt, ask a supervisor.)

4. Once you bring up the patrons record in the “Patron Services” screen, wand each item barcode in the “Scan item barcode” box in order to check out items to the patron.

5. If the item is a book and does not have a barcode or Alma cannot find it, follow the procedure below for Create Item Record for Checkout.

6. If the item is a current periodical without a barcode then follow the procedure below for Barcoding a Periodical for Checkout.
7. In the “Loans” tab below the patron information, you will see all the items checked out during this session. Tell the patron their due date(s) and/or time(s).

8. If the patron wants loan receipt by email select the “Send Loan Receipt” link after all the items have been checked out.

9. If the patron wants a print out of what they checked out then either type “Ctrl P” on the keyboard and click “OK” or select “Print” from the web browser and click on “Print” to print the “Patron Services Loans” screen.
10. If you want to see all of the items a patron has checked out, select “All loans” for the “Loan Display”.

11. Click the “Done” button to exit the patron’s record.
**Note:** If loaning to a “Proxy Borrower” please use this section titled “Loans to Proxy”.

---

**Loans to Proxy:**

1. Select “Manage Patron Services” from the top menu.

2. In the “Patron Identification” screen that comes up:
   FIRST: Select the “Use proxy” box.
   SECOND: Scan the proxy barcode in the “Scan patron’s ID” box.

3. When the Professors name appears in the “Proxy for” box click on the “Go” button.

4. Continue regular checkout procedures from here.
Create Item Record for Checkout:

1. Pull an orange or manila temp card from the top drawer at C1 or C2 at the main desk.

2. Use temp tape (thin less sticky tape) to affix card to inside front cover of book.

3. Bring up the patron’s record in the “Patron Services” screen and click on the “Create Item” button.

4. Then a box entitled “Choose Holding Type” will open up. Select “Holding Type New” and Citation Type Book” and click on “Choose”.

[Image of Patron Services screen]

[Image of Choose Holding Type screen]
6. In the next screen entitled “Quick Cataloging” put in “Title and Author” in all CAPITAL LETTERS.

7. At the bottom of this screen, select the correct library and collection where this item belongs.

8. Next, from the pull down menus select the right “Material Type” and “Item Policy”, and then scan in the temp card “Barcode”. Most items will look like the example below. (Note: If you wand the barcode before all of the fields are filled in you will get error messages.)
9. After you wand the item it will automatically be checked out to the patron for the correct due date.

10. Tell the patron their “due date(s)” and click the “Done” button to exit the patron’s record.
Barcoding a Periodical for Checkout:

1. In the search bar at the top of the page, select “Permanent call number” from the second pull down menu.

4. Then put in the periodical call number and click or hit “Enter” on your keyboard.

5. When the actual physical journal record comes up click on “Items”.

Time. Journal (Chicago, etc., Time Inc Vol. 1 (Mar. 3, 1923)-)
Language: English
Record number: (OCoLC)01767509
6. In the “Sort routine” pull down menu select “Receiving Date”.

7. Then click on the “down arrow” which will put the most recent periodicals at the top.
8. Next search for the correct volume, issue number and year in the list below or use the page arrow located at the bottom of the screen until you find the correct issue.

9. Once you find the correct issue click on the button and select “Edit”.

10. This will open up the “Physical Item Editor” screen in order to put in the new barcode. Wand in the “new barcode”.

11. Click on the “Save” button when you are done.
12. You will get a pop up box click on “Confirm”.

Confirmation Message

Please note the following:

- The description may need to be updated as well (using the generate button)

Are you sure you want to perform this action?

[Cancel] [Confirm]

13. The journal is now ready to be checked out to the patron. Check the item(s) out, let the patron know their due date(s) and click the “Done” button to exit the patron’s record.
Renewals:

To Renew Specific Items

1. Select “All loans” from the “Loan Display” pull down menu.

   ![Loan Display: All loans]

2. All of the items that the patron has checked out should show in the “Loans” tab below.
3. Select which items the patron wants to renew and click on “Renew Selected”.

4. If the items are renewable the new due date will be reflected and the items will say renewed.

5. Tell the patron their “due date(s)” and click the “Done” button to exit the patron’s record.
To Renew All Items

1. Select “All loans” from the “Loan Display” pull down menu.

2. All of the items that the patron has checked out should show in the “Loans” tab below. To renew all of the items on a patron’s record that can be renewed click on the “Renew All” button.
3. Alma will give you information on what was renewed.

4. Alma will also tell you what was not renewed.

6. Tell the patron if anything was not renewed and why, as well as their “due date(s)” and click the “Done” button to exit the patron’s record.
Returns:

At Check-In

1. Select “Return Items” from the top menu.

2. Scan in each item(s) in the “Scan item barcode” box.

3. Each of the items returned will show in the screen below.

<table>
<thead>
<tr>
<th>Title</th>
<th>Return Date</th>
<th>Due Date</th>
<th>Barcode</th>
<th>LC Class</th>
<th>Patron</th>
<th>Next Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private eyes / Jonathan Kellerman.</td>
<td>08/04/2017 11:59 PM, EDT</td>
<td></td>
<td>39029023454498</td>
<td></td>
<td>Jim, Slim (Training Patron)</td>
<td>Reshelve to Stacks</td>
</tr>
<tr>
<td>Understanding voltammetry / Richard G. Compton, Craig E. Banks.</td>
<td>08/04/2017 11:59 PM, EDT</td>
<td></td>
<td>39029033636261</td>
<td></td>
<td>Jim, Slim (Training Patron)</td>
<td>Reshelve to Stacks</td>
</tr>
</tbody>
</table>
At Main Desk

1. Ask the patron if they want a “return receipt” before you check in their items.

   If the patron does not want a “return receipt,” follow the procedures above for “Returns: At Check-In”.

   If the patron does want a “return receipt,” follow the procedures below.

2. If you do not already have “Manage Patron Services” open, select it from the top menu.

   \[
   \text{Libraries} \quad \text{Alma} \quad \text{Manage Patron Services}
   \]

   \[
   \text{Physical titles} \downarrow \quad \text{Permanent call number} \downarrow
   \]

   \[
   \text{Patron Identification}
   \]

   \[
   \begin{align*}
   \text{Scan patron's ID or search for patron}^* \\
   \text{Use proxy}
   \end{align*}
   \]

3. Then in the “Patron Identification” screen that comes up, wand the patron's barcode or search for the patron.
4. When the patron record comes up select the “Returns” tab. Then scan in each of the items that the patron is returning in the “Scan item barcode” box.

5. For an email receipt Select the “Send Return Receipt” option.
6. For a print receipt either type “Ctrl P” on the keyboard and click “OK” or select “Print” from the web browser and click on “Print” to print the “Patron Services Returns” screen. (see example of how it will look below)

7. When finished Click the “Done” button to exit the patron’s record.
3. Recalls and Searches

Recalls: (Alma default for Request-Holds)

1. If “Physical titles” is not already selected in the top search bar, select it from the first pull down menu.

2. If “Permanent call number” is not already selected in the top search bar, select it from the second pull down list or search by keyword if the patron does not have the call number.
3. Then put in the call number or keyword/title if you do not have the call number and hit enter or click on the search button.

4. Then click on the button and select request.
5. When the “Create Request” screen appears select “Patron physical item request”.

6. Then scan the requestor’s barcode or enter another unique identifier to bring up the patron.
7. In the “Pickup At” pull down menu, select the library where the patron wants to pick up the item or select “Personal Delivery” if they want the item delivered.

8. You should get a message that “The request was successfully submitted”.

9. Let the patron know that they will get an email when the item is ready to be delivered or picked up.
Searches: Regular and Returned Book Search

Regular (Patron can’t find book on shelf)

Do the above procedure for recall and let the patron know that we will send them an email if the item is found.

Returned Book Search (Patron claims returned book(s))

1. Select “Manage Patron Services” from the top menu bar if it is not already selected.

2. Then scan the patron’s barcode on their UT ID or bring up their record another unique identifier.
3. Once their record comes up click on the “All loans” in the “Loan Display” box.

4. When the patron loan(s) appear, find the item(s) the patron says that they have already returned, click on the “…” button and select “Claimed Return”.

- Private eyes / Jonathan Kellerman,
  08/14/2017, 11:59 PM, EDT
  39029023404498
  - 08/04/2017, Recalled
  Hodges Library
  
- Understanding voltammetry / Richard G. Compton, Cindy E. Banks
  08/04/2018, 11:59 PM, EDT
  39029036363201
  - 08/04/2017, Normal
  Hodges Library
  
Claimed Return

User Notes
No notes or notifications

Send Activity Report
Send Requests Report
Send Return Receipt
Send Loan Receipt
5. An “Add Note” box will appear type in “RBS” or “returned book search” then click “OK”.

6. Next you will be back in the “All Loans” tab. Click on the title of the item that you “Claim Returned”.

7. The “Loan Audit Trail” screen that appears next is what you will print out.
8. To print this screen either type “Ctrl P” on the keyboard and click “OK” or select “Print” from the web browser and click on “Print” to print the “Loan Audit Trail” screen.

9. Put the “Loan Audit Trail” print over at the RBS Search box next to the laminator and let the patron know that the library will contact them if the item is found.
4. Financial Guidelines

General:

1. Select “Manage Patron Services” from the top menu.

2. Then bring up the patron’s record by scanning the “barcode” or using an “additional Identifier”.

3. Next, if the fine is over five dollars you will have to click on the “Override” or “OK” button to pay the fine.
4. Click on the “amount” and make sure the patron is aware of what they are paying for in Alma.

Important:

*Make sure payment goes through on the Vol-Card or credit card machine before the amount is paid in Alma!
*No partial item payments will be accepted!
*If you void a credit card transaction, get the patron’s original sales receipt and make sure the patron signs the voided receipt copy!

5. The “Fine/Fees” tab will come up and you can over the fines/fees with the patron.
6. If the patron is aware of the fine details and ready to pay, click on the “Pay” link from the “Patron Services” screen and “Payment Details” box will appear.

![Payment Details](image)

7. In the “Payment Details” box if the patron is ready to pay all of their fines: leave “All fines” option selected, select the “Payment method” from the pull down menu and click on the “Send” button.
8. A “Confirm Message” pop up box will appear that ask you to confirm that you want to pay the amount. Click on “Confirm” to pay the fine.

![Confirmation Message]

Are you sure you want to pay 10 USD?

- Cancel
- Confirm

9. When the “Confirm Message” box goes away, you will be back in the “Patron Services” screen and you should see that the “Active balance” is zero.

![Patron Services]

- Jim, Slim (Training Patron)
- Active balance: 0.00 USD
- ID: sjim
- User group: Faculty

10. If the patron has more than one fine, say for lost items, and can only afford to pay one fine at a time then select “Specific fines” in the “Payment Details” box.

![Payment Details]

- Operator name: Dodson, Michael
- All fines
- Specific fines
11. When you select the “Specific fines” option, you will get a search bar to select which fines that patron wants to pay. Click on the “•=” button to see possible fines to pay.

12. Select which item fines to pay and click on the “Select” button.

13. The “Payment Details” pop up box will appear with the “Fines to pay”, “User balance” and the “Payment Amount” filled in for you.
14. Fill in the “Payment method” and click on the “Send” button.

![Payment Details form]

15. You will get the “Confirmation Message” box. If everything is correct, click on the “Confirm” button.

![Confirmation Message]

16. Next, you will get a “Loan blocked” box. Click on the “Override” button.

![Loan blocked]

6
17. After this box disappears, you will see that the “Active balance” amount in the patrons record has dropped by the amount paid.

< Patron Services

Overdue item(s) return and fine payment in Alma:

1. Return the item(s) by one of the two possible return procedures.

2. Then if you are not already in the patron’s record, bring up the patron’s record in order to pay their fines.

Lost items and fine payment if the item is NOT marked lost:

1. Bring up the patron’s record and select “All loans” from the pull down menu in the “Loan Display” box.

2. Select the item that the patron needs to pay for on their record.
3. Click on the "···" button and select "Lost" from the pull down menu to mark the item lost.

4. A "Lost Item" pop up box will appear that states a replacement fee is being charged. Click on the "OK" button to assess this charge to the patron’s record.
5. After the “Lost Item” box goes away, you will see that the lost item charge has been added to the patron’s record.

6. Pay the lost item charge by one of the above mentioned payment procedures.
Add or Waive a Fine or Fee:

1. Click on the “Active balance”.

2. This will bring up the “Fines/Fees” tab where you can add or waive a fine or fee.

3. To add a fine or fee click on the “Add Fine or Fee” button.
4. An “Add Fine or Fee” pop up box will appear.

5. For “Fee Type” choose the appropriate description from the drop down menu.

6. Then put in the proper amount in the “Fee Amount” box.
7. If you need to put in information about which item the fee amount is for or other information, use the “Comment” box.

8. Then either select “Add” if you have more than one fee to add to this patron record or “Add and Close” if this is the only fee you need to add to this patron record.

9. To waive a fine or fee click on the “…” button and select “Waive” from the pull down menu.
10. You can also waive a fine or fee by selecting which one you want to waive and then click on the “Waive Selected”.

11. In either case a “Waiving Fine/Fee” screen will appear.

12. In this screen, you can either choose a reason from the “Waiving Reason” pull down menu or put your own note in the “Comment” box.
13. Then click on the “Waive” button to waive the fine or fee.

14. You will get a “Waive Confirmation” pop up box. Click the “Confirm” button to waive the amount.

15. You will then see in the “User Details” screen that the “Active balance” has decreased by the amount waived.
5. Courtesy/TBR, Donor, and Proxy

First check the Special Privileges List located within the Purple Circ Resources Folder on your desktop or toolbar.

This list contains important information such as:

1. What type of application form the various courtesy borrowers should bring to us.

2. What their privileges should be set up as in Aleph.

3. Which groups do not have borrowing privileges at UT.

Courtesy/TBR Cards:

Most of the people who ask for courtesy privileges are students at other public colleges and universities in Tennessee. Most of these schools are in the Tennessee Board of Regents (TBR) and the cards are called TBR cards.

Each person obtains a TBR card from his or her institutions library.

An authorized person at the institution writes on the card how long it is valid and signs it. The student brings this card and a picture ID to the Hodges Library.
If the person asking for courtesy privileges is "not a TBR person", check the instructions in the Special Privileges List for their institution. If their institution has privileges then go ahead and "turn on the laminator".

**Donor Cards:**

Creating a **Donor Card** is similar to making a TBR/Courtesy card except that the **patron donates money** for the card.

If the person at the desk says that they have already donated money and that they want to pick up their donor card, check the "Library Donor" file in the drawer at the main desk.

1. If their name is on the file, go ahead and make the person a donor card following the same steps as a **Courtesy Card**.
2. If their name is not on the file, consult a supervisor.

If a **Non-UT** person comes to the desk and wants to check out books or log onto the computers, but is not on the **Special Privileges List**, tell them that they can have check out privileges or temporary log on ability if they donate at least **$100.00** to the library. If they are interested:

1. Hand them a "**Friends of the Libraries**" brochure.
2. Tell them to fill out the information portion.
3. Tell them that they can pay by putting in their credit card information on the form or pay with a check.
4. Tear the information portion off, paperclip with check if necessary and put in the drawer with financial receipts.
5. Then follow the steps for creating a **Courtesy Card**.
Go to Alma

- If the person already has a record in Alma, update the record and put in a new patron barcode number. Then skip on down to "Creating the Courtesy / TBR Application and Card"

- If the person does not have a record in Alma, create a record with a new patron barcode as usual, but with these exceptions.

**Primary identifier:** For non-UTK patrons, primary ID should be the patrons FULL email address.

Example: johndoe23@gmail.com

**User group:** Select "Courtesy/Donor."

**User Management Information:** SKIP THIS SECTION FOR RIGHT NOW!

**Identifier Type:** Select "Barcode"

**Value:** Type in Patron Barcode

**NOTE:** If you scan the barcode, the form will try to automatically submit and give you some red errors at the top of the screen.

**Email types:** Select appropriate check box
Email address:
Type in the same email address that you used as their Primary identifier.

User Management Information:
Go back to this section and complete.

Patron has institutional record
Select "No"

Password:
Copy and Paste the patron’s barcode from the barcode field you scanned earlier. DO NOT scan patron barcode into the Password field.

Verify password:
Copy and Paste the patron’s barcode from the barcode field you scanned earlier. DO NOT scan patron barcode into the Verify password field.

Force password change on next login
Make sure this box is selected.

Update User:
Click on this button to save patron record.
1. Turn on the laminator if Courtesy/Donor card.
2. Click on the “Public Services Staff Area” icon on your desktop.
   Log in as:
   Username: mcirc
   Password: jumbo
3. Click on the “Generate Patron/Proxy Cards” link.
4. Enter your “Net ID” and the “Alma Primary ID” of the patron record to generate the forms that need to be printed.
5. Click on the “Generate Card” button.
6. Print out the card/application on blue paper located under the printer.
7. Ask the person to check the information, read the responsibility section and sign the card application.
8. If Courtesy/Donor Card cut the card portion out and fold in half.
9. Put a patron barcode, located in the drawer at the main desk, on the back of the Courtesy/Donor or TBR card.
10. Put the Courtesy/Donor card in the laminating card stock found in drawer under the laminator and run through the laminator.
11. Make sure the barcode works and give card and card regulations to the patron.
12. Put Application in the “Courtesy Form” box in drawer “V”.
Proxy Cards:

1. First, check to see if the faculty member has a record in Alma. If not, add a new record following the regular instructions for "Register New User".

2. Once you have located the faculty member’s record in Alma, write down the faculty members net ID and UTK email address.

3. Return to the Manage Patron Services screen and click Register New User.

4. First Name:

Type in the first initial of the Faculty Members first name, in lower case, followed by "(proxy)". If the Faculty Member has more than one proxy, add the appropriate number after "proxy".

Example:

j (proxy) or j (proxy 2)

5. Last Name:

Faculty members last name, in lower case.

Example: ferguson
6. **Primary id:**

Use the faculty members UTK Net ID followed by “proxy” and any additional numbers to signify that this is a 2\textsuperscript{nd} or 3\textsuperscript{rd} proxy (whatever number you used in the First Name field).

**Example:**
jfergus4proxy or jfergus4proxy2

7. **User group:**

Select “Proxy”.

8. **User Management Information:**

Skip this section

9. **Identifier Type:**

Select Barcode.

10. **Value:**

Type in New Proxy Card Barcode

**NOTE:** If you scan the barcode, the form will try to automatically submit and it will give you some red errors at the top of the screen.

11. **Email types:**

Select “Work”.

12. **Email address:**

Put in the Faculty Member’s email address.

13. **Address Type:**

Select “Work”.

14. **Street Address:**

Type in “proxy”.
15. **User Management Information:** Return to this section and complete.

Patron has institutional record  [ ] No  [ ] Yes

16. **Patron has institutional record:** Select No.

17. **Password:** Copy and Paste the patron’s barcode from the barcode field you typed in earlier. DO NOT scan patron barcode into the Password field.

18. **Verify Password:** Copy and Paste the patron’s barcode from the barcode field you typed in earlier. DO NOT scan patron barcode into the Verify password field.

19. **Force password change on next login:** DO NOT SELECT THIS BOX. Leave empty.

20. **Update User:** Click on this to save the Proxy record.

21. **Edit User Info:** Click on this button.

22. **Full information:** Select this next.

23. **Proxy For:** Select this tab.
24. **Add Proxy For:**

Select this and type the name or an identifier for the Faculty member associated with the proxy card.

25. **Add User:**

Once you bring up the correct Faculty member click on this button.

26. **Save:**

Select this button when done to save the information.
Proxy (Paperwork/Card Procedures) NEW

1. Go ahead and turn on the laminator.
2. Click on the “Public Services Staff Area” icon and log in as:
   username: mcirc
   password: jumbo
3. Click on the “Generate Patron/Proxy Cards” link.
4. Enter your “Net ID” and the “Alma Primary ID” of the proxy record to generate the forms that need to be printed.
5. Click on the “Generate Card” button.
6. Print out the card/application on yellow paper located under the printer.
7. Ask the Faculty member to check the information, read the responsibility section and sign the card application.
8. Cut the card portion out and fold in half.
9. Put a patron barcode, located in the drawer at the main desk, on the back of the Proxy card.
10. Put the Proxy card in the laminating card stock found in drawer under the laminator and run through the laminator.
11. Make sure the barcode works and give the card and the regulations section of the paperwork to the Faculty member.
12. Put Application in the “Courtesy Form” box in drawer “V”.

6. Stand Alone Offline Circulation

Click on the "Offline Circulation" icon and the offline circulation form will display.

To Loan/CKO an item:

1. Click "Loan" button under choose transaction.
2. Scan or type the "patron's barcode" in the Borrower box and scan the "book barcode" in the Item Barcode box. If you have to type in the barcode, you will need to press the "enter key" or click on the "Loan button". The loan will appear in the bottom pane.
3. Next, after scanning all of the books click "Save To File" (this will save the transactions). Then click "clear" (this will clear the screen before you check out to the next patron).
4. If you do not click "Save To File" the screen will time out after 60 seconds and you will lose your information.

Do not type in ID# as the Offline will not recognize it!

2. To Return/CKI an item:

1. Click on the "Return" button under choose transactions and scan the item’s barcode. If the barcode is typed in, you will need to press the "Enter" key or click on the "return" button.
2. Next, after scanning all of the books click "Save To File" (this will save the transactions).
3. If you do not click "Save To File" the screen will time out after 60 seconds and you will lose your information.