Starting the Year in Circ Plus/Cat Plus for Windows (PHD+ Laser), 6.30

1. Import Student Download

Patron Maintenance | File menu | Import Patrons | Merge with existing record

Note: If you did not globally delete last year's graduating class, please do so using the instructions is the inventory/year-end guide from the spring ***before*** you import this year's student data file/download.

1. Open **Patron Maintenance** (modpatron).
2. From the **File menu**, select **Import Patrons**. The **Import Patrons window** appears.
3. In the bottom half of the window under the bottom option ***When a duplicate record is found***, select the option to **Merge with existing record**.

Choosing to **Merge** rather than Replace will preserve more student information. For example, if the data arrives without address or parent's last name, that information will appear if it was entered in a previous year.

Note: The Merge option will leave the existing patron records in your database but will update the fields of information that have changed (Homeroom, Teacher, Grade, address, etc.). **Important:** If your district has ***<u>not</u>*** entered homeroom, teacher or other information that you have had in your records in the past, the import will ***leave the information from previous years***—the merge process ***will not*** replace a ***<u>filled patron field</u>*** with a ***<u>blank field</u>*** coming in from the student download file. If you notice that you have ***incorrect <u>or</u> old information*** in your patron records, there are global editing options that will help clean up these errors (see **Process *#2 below***).

4. Click the **Import button**. The **Import Patrons disk selection window** appears. Find your student data file. If you ***detached*** the student data file from an ***e-mail***, the file may be in the C: (local disk/hard drive) or on the desktop. If the student data file is on **disk**: Insert your student download disk. If the disk you inserted does not automatically appear in the window, browse to open My Computer to open the disk.
5. Click once on the filename and click the **Open button**. The **Import Patrons progress window** appears.
6. When the process is complete, the message ***Do you want to import another file?*** appears. Click the **No button**.
7. The **Import Patrons progress window** reappears. Look in the **Skipped** and **Errors** fields to see if there were any problems during the import. Click the **Close button**.
8. The message ***An exception report has been generated. Would you like to view it?*** appears. If you noticed any skips or errors, click the **Yes button**. Otherwise, click the **No button** as the report lists ***every*** patron that was updated (merged) or added.

   - If you clicked the **Yes button**, the exception report opens in WordPad (or Notepad). Review the report (and print only the sections you need since it can be a lengthy report). Once you have reviewed the report, exit it. **Tip:** An easy way to find any skipped records or errors in the exception report is to go to **the Edit menu** to the **Find option**. Enter the word *skip* or *error* to find the first of any problem records. Click the **Find Next button** to find the next problem record. **Note:** In many files, the last field in the file is blank and is seen by the Follett program as an error. It is not truly an error—ignore it.

9. The message ***Delete the exception report?*** appears. Click the **Yes button** to delete the report. If you choose to save the report, it is automatically saved in the **Exception Reports folder** in your Follett Applications folder.

2. Globally Edit Patron Information as Needed

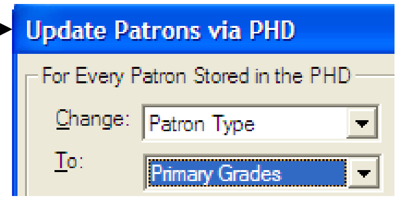
Patron Maintenance | Edit menu | Global Update

When to globally edit your patron records:

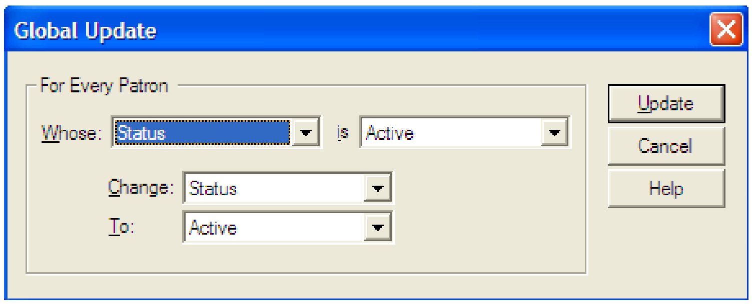
- If you created custom student patron types such as one for primary grades, for Seniors, etc., you will need to globally change the **Patron Type** of the students in these grades from the default Student patron type to the custom patron type(s) you have created.

- If you notice that your student records do not include **teacher** or **grade** information or include incorrect information, you can use this global update feature to add (or edit) teacher names (or blanks if your district will no longer be including this information in your yearly downloads) or a grade to student records.

> **IMPORTANT:** If there are multiage classrooms in your school for which only **1/2** of the class needs to have their patron types changed, choose the option to **Update via PHD+ *instead*** of Global Update. Use the students' barcodes to scan the students in each room that need their patron types changed.

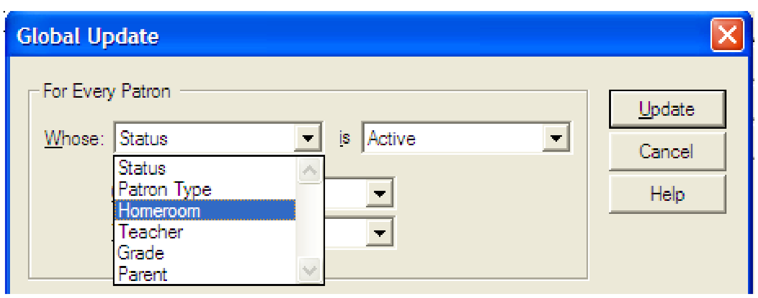


1. Open **Patron Maintenance**.
2. From the **Edit menu**, select **Global Update…** The **Global Update window** appears displaying Follett's default settings.

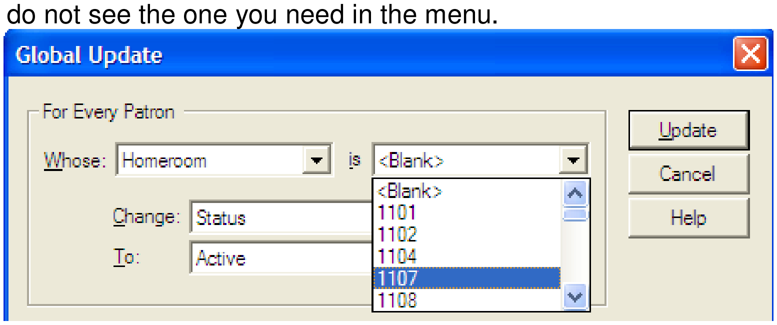


3. In the Global Update window, edit the settings to create a sentence that reflects the change you want to make in the group of student records--in this case, changing a the Patron Type for a group of students in the same homeroom, in the same grade or with the same teacher from the default Student patron type to the custom patron type you have created for them. Edit the global update "sentence" by changing the options in each of the menus: **Whose**, **is**, **Change** and **To**. **For example:** For Every Patron Whose ***Grade*** is ***K*** Change ***Patron Type*** To ***Primary Grades*** or for Every Patron Whose ***Homeroom*** is ***1107*** Change ***Patron Type*** To ***Primary Grades***.

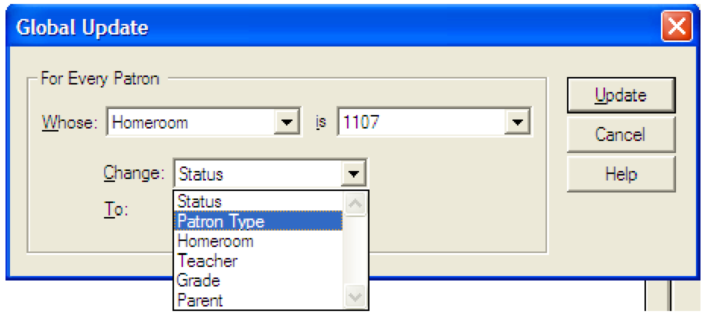
   a. **Whose:** field: Select the field that is common to the group of students records that you need to change. Click on the word Status or on the arrows to the right of it to open the **Whose menu** of choices. Select the field, such as Homeroom, that the patron records share in common. **Note:** Not all student records may contain ***Teacher*** or ***Grade*** information, so ***Homeroom*** may be the most reliable choice for globally editing student records.



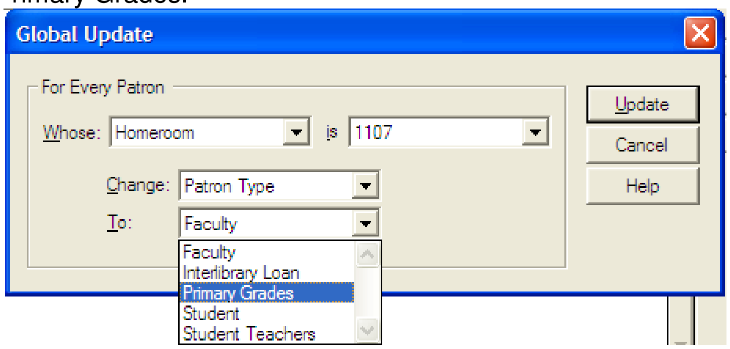
   b. **is:** field: Select the common homeroom number (teacher name or grade) that needs to have patron types changed. **Note: <Blank>** appears in the **is:** field that allows you to type in a homeroom, teacher name or grade if you do not see the one you need in the menu.



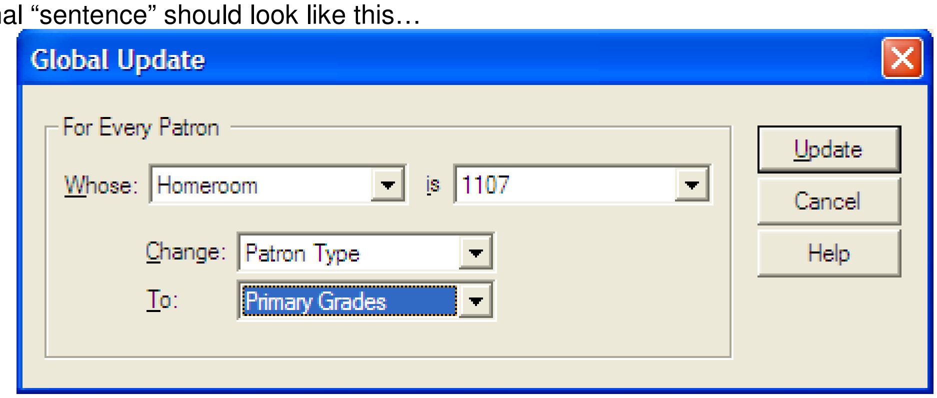
   c. **Change:** field: Select which field you want to change in the student records--in this case, the **Patron Type** field.



d. **To:** field: Select the information that you want to change in the student records--in this example, select the patron type of Primary Grades.



The final "sentence" should look like this…



4. Click the **Update button** to globally change the Patron Type of the students in the first Homeroom (Teacher or Grade) you have selected to the Patron Type that you have chosen.
5. The message ***Update these patrons?*** appears. Click the **Yes button**.
6. The **Global Update progress window** appear. When the process is complete, click the **Close button**.
7. The **Global Update window** reappears. To change the patron types for students in the remaining homerooms (teachers or grades), leave the sentence as it is, ***except*** for the **room number** (teacher name or grade) listed in the **is:** field. Change the room number to the next room number that needs the custom Patron Type assigned.
8. Repeat steps 4-7 for each homeroom (teacher or grade) whose students' patron types need to be changed.

Note: To add teacher names or grade levels to your records, leave the sentence the same except for the **Change:** and **To:** fields.

-- To add **teachers**, create the following sentence: For Every Patron **Whose:** *Homeroom* **is:** *1107* **Change**: *Teacher* **To:** *Costello*. **Important:** Enter only the ***last name*** of the teacher or last name, first initial or name if there is more than one teacher with the same last name. Do not enter Mr., Miss, Ms., etc. first--otherwise all reports sorted by teacher name will be sorted by Ms!

-- To add **grade levels** to your student records, create the following sentence: For Every Patron **Whose:** *Homeroom* **is:** *116* **Change:** *Grade* **to** *01*. Be sure to be consistent (01 not 1 or vice versa) to have reports sort as they should.

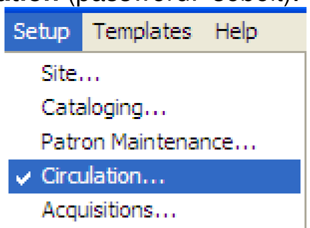
❑ 3. Set the Library Calendar for the new year

System Setup | Circulation (sobeit) | Calendar tab

Even if you do ***not*** close individual holidays during the year (primarily elementary schools on fixed schedules), you need to create the new year's calendar. Click through each month of the year to June and close days as needed. **IMPORTANT:** Some library staffs, particularly those with fixed schedules, choose to keep all days open because closing individual holidays moves a

Monday class' due date to the ***next open day*** **rather than to the *next open Monday***. They instead use the **Special Due Date** option within the Circulation Desk to skip over holidays, staff development days, etc.

1. Open **System Setup**. Click the **Cancel button** at the Site Setup password box that appears.
2. From the **Setup menu**, select **Circulation** (password: sobeit).



3. Click once on the **Calendar tab**. The calendar displays the current month.

Note: If the current month is not displaying, click the appropriate **Month button** to move forward or back through the months of the year.

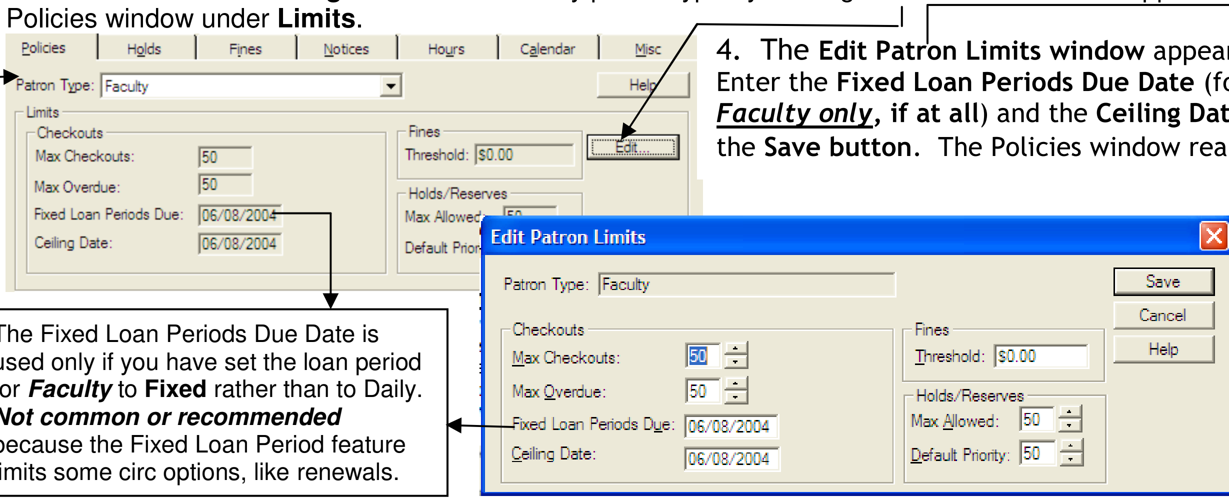
4. Click once on a day to close it.
5. Click the **Month >> button** to move to the next month and close any days for the entire school year as needed.
6. Once you reach January of the new year, System Setup generates the alert message: ***Unable to locate 2010 calendar. Create using defaults?*** Click the **Yes button** to create the rest of the school year's calendar. Once you have finished closing days, move on to the next Setup option…

❑ 4. Change the Fixed Due Date AND the Ceiling Date for *EACH* Patron Type

System Setup | Setup Menu | Circulation (sobeit) | Policies tab | Select Patron Type | Limits… (Edit)

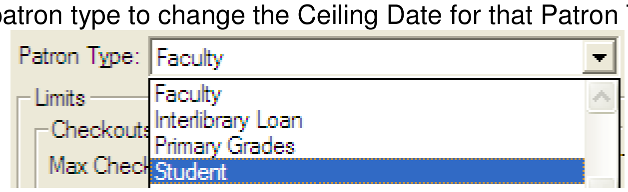
1. Open **System Setup** if it is not already open.
2. From the **Setup menu**, select **Circulation** (password: sobeit).
3. Click once on the **Policies tab**. The policies for ***Faculty*** may display by default. Set the **Fixed Loan Periods Due date** *and/or* the **Ceiling Date** for the Faculty patron type by clicking the **Edit button** in the upper half of the Policies window under **Limits**.

4. The **Edit Patron Limits window** appears. Enter the **Fixed Loan Periods Due Date** (for ***Faculty only*, if at all**) and the **Ceiling Date**. Click the **Save button**. The Policies window reappears.



The Fixed Loan Periods Due Date is used only if you have set the loan period for ***Faculty*** to **Fixed** rather than to Daily. ***Not common or recommended*** because the Fixed Loan Period feature limits some circ options, like renewals.

5. Click on the **Patron Type menu** near the top of the Policies window to switch to next patron type in your system. Click the **Edit button** for the next patron type to change the Ceiling Date for that Patron Type.



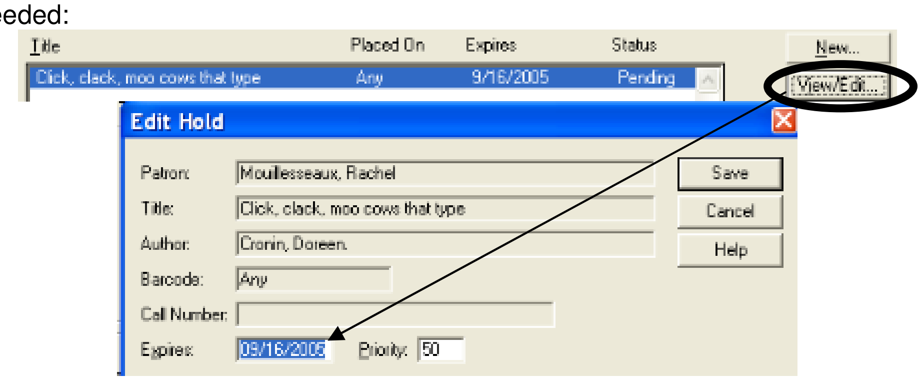
6. Repeat steps 3 to 5 for each patron type in your system.

❑ 5. Lengthen the Pending Holds Expire Duration (if had shortened it last spring)

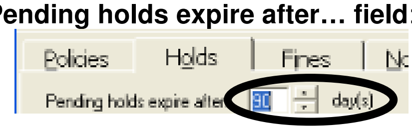
System Setup | Circulation (sobeit) | Holds tab | Pending holds expire… field

The Holds setup in System Setup does not offer any way to set a Ceiling Date (year-end date) as you can for checkouts. For a workaround, many library staffs set the **pending holds duration to 90 days until mid-year** and then **shorten it as the end of the school year approaches** (e.g., in January, they may set it to 60 days; in April, they may set it to 30; etc.). If, in the 2nd semester last year, you did shorten the number of days that a pending hold expires, you should increase the number of days as you start the year so that students and staff are not prematurely deleted from hold lists.

Tip: If you do not want to be bothered with changing the Pending holds duration in Circulation Setup at the start of each year and in the 2nd half of the year, start to keep an eye on the **Hold expiration date**, and edit it as you create a hold as needed:



1. Open **System Setup**. Click the **Cancel button** when the Site Setup password box appears.
2. From the **Setup menu**, select **Circulation** (password: sobeit).
3. Click the **Holds tab**.
4. Increase the number of days in the **Pending holds expire after… field**:



5. Click the **Save button**.

❑ 6. Create New Items Category for the New Year—still needed??

System Setup | Setup menu | Cataloging setup (modtitle) | Categories tab

There is a **Copies Added Report** (Reports | Cataloging Reports) that may preclude the need for a New Items Category. The **Copies Added report**:

- ...has a ***Summary view*** and a ***Detail view*** that both include the **number of Titles and Copies** added during the date range of your choosing. The **Detail view** also includes the **Total Cost** of the copies added for the chosen date range.
- ...offers a ***Bibliography view*** that is great for e-mailing or printing a new copies lists for teachers. **Note:** There is no way to disable the annotations (summaries, contents notes) so that they do not appear in the report., and the titles are in title, not call number, order. **Workaround:** Print the report to file; edit with WordPad, Microsoft Word...
- ...has some **advantages** over the new items category: no need to remember to create the category each year; no need to add new copies to a category throughout the year (the Copies Added report is automatic!); can limit by call number area; depending on the view, can see the total cost of all new items in your collection or in a specific call number area within a specific date range.
- ...has a few **disadvantages** when compared to the Category option: the Copies Added report ***cannot be viewed in the OPAC*** as a category can be; cannot disable the annotations in the Bibliography view of the Copies Added report (have to print to file and edit the report with WordPad, Microsoft Word, or...) as you can in a Bibliography report selected by Category; cannot easily limit the report to just books (can limit by call number range, but if book and non-book call numbers are interspersed alphabetically [CD-ROM, DVD, E, EQU, FIC, REF, SC, VIDEO, etc.], you would have to re-arrange your call number prefix order in ***System Setup*** | ***Cataloging Setup*** | ***Call Num Prefixes*** | ***Sorting button***); does not print in Call Number order.

After considering the addition of the **Copies Added Report**, if you would *still* like to create a New Items Category:

1. Open **System Setup**. Click the **Cancel button** at the Site Setup password box.
2. From the **Setup menu**, choose **Cataloging** (password: modtitle).
3. Click once on the **Categories tab**.
4. Click the **New button**.

5. The next available code number appears in the **Code field**. Leave the number as it is.
6. In the **Description field**, enter the name of the category (e.g, New Items, 2009-2010). ***Remember:*** The description will appear in reports, Cataloging and the OPAC.

Tip: While you are creating your new materials category for the year, you may want to delete previous years' new item categories. To ***delete categories*** that you no longer use or need (e.g., 2008-2009 new items list, etc.), highlight the category, click the **Delete button**, and click **Yes** at the alert message that the process is irreversible.

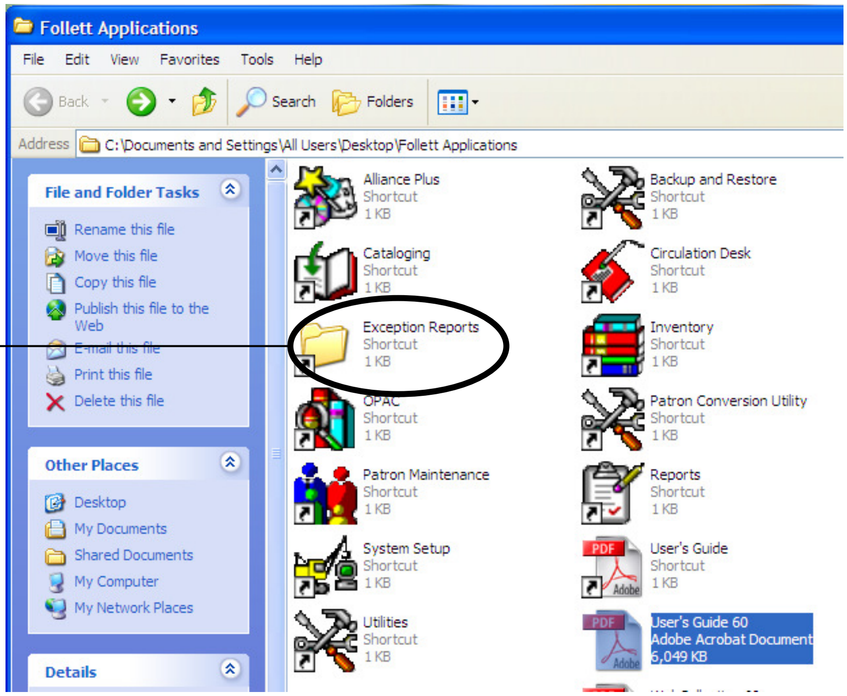
❑ 7. The Weeding Log (WEEDING.TXT)

Follett Applications folder | Exception Reports folder | WEEDING.TXT and WEEDING1.TXT

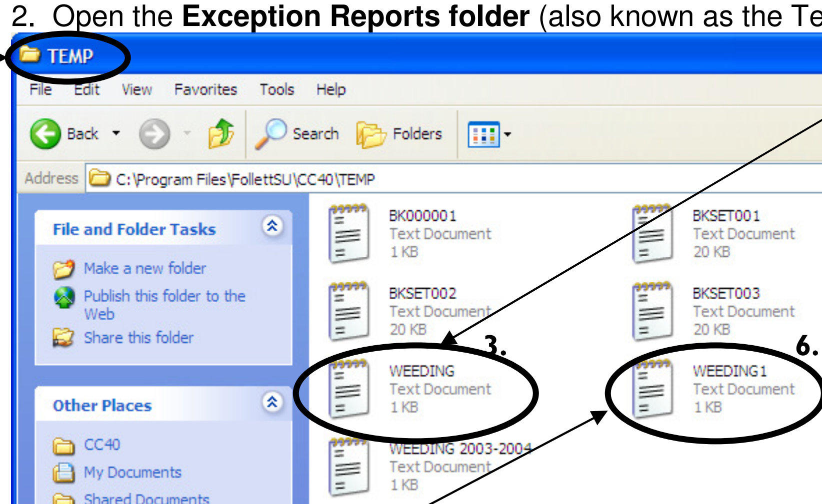
Throughout the school year, for each copy you have deleted from your catalog, whether manually or globally, Cataloging has added an entry to a cumulative weeding log named **WEEDING** (or **WEEDING.TXT**). If you want to have a new weeding log created at the start of the next school year, you will need to **move, rename or delete** the existing WEEDING report.

- **Where is the weeding log?** The WEEDING.TXT report is located in the **Exception Reports folder** (Follett Applications folder | Exception Reports folder; also known as the Temp folder). If there is no Exception Reports folder within your Follett Applications folder, call Beth or Patty for assistance.
- **What if I have no weeding log or it is empty?** If there is no weeding log, it could be that there have been no deletions from Cataloging at that workstation—check the other management station. If there is no weeding log or it is empty:
  - You do not have the **proper rights** to the weeding log and need to have your tech staff add rights to Follett's Temp folder. They can call us for assistance.
  - Have your aide log in, as the deletions may have occurred under her or his **username**. At times, network or workstation rights are assigned in such a way that only the person who deleted the items can view the log.
- **How is the weeding log arranged?** Copies listed in the weeding log are in order of date of deletion. **Each entry includes:** the date of deletion, the deleted copy's barcode, the title of the item, the author, the standard number (LCCN if it was available in the record), the copy's call number, the copy's acquisition date, and the copy's price.
- **Are all deleted copies included in the weeding log?** Cataloging writes an entry to the weeding log for any copies deleted manually, via global delete with your circulation desk scanner, via global delete with your PHD, via global delete of Missing or Lost copies, or via export and delete (e.g., if you removed copies from your catalog that you gave to another school). Copies deleted via a Utility (very rare) such as a rebuild after a bout of database corruption are ***not*** included in the log.
- **How might this weeding log be of use?** Use the log for ordering replacement materials, for tracking discards, for a year-end report of discards for you or your administrator, etc.
  Tip: You can open this simple text weeding report with Microsoft Excel to create a custom report that includes only the information that you would like. See pages 352-353 of your version 6.20 manual, or call Beth or Patty for assistance.
- **Does the report include the discard information that I need for the yearly BEDS report?** As of the 2004-2005 school year, the BEDS report no longer asks for a count of the discarded items for the year. It asks only for the numbers of books and non-books in the library.
- **Is there only one weeding log? Maybe, maybe not…**
  - Depending on how your software is installed (to the server only or on each library management station), you may have a **weeding report at *<u>each</u>* library management station** at which you have deleted copies. When in doubt, check the Exception Reports folder on *each* library management station. If the titles listed in the weeding log are different from station to station, your software is installed on each library management station with a separate weeding log created at each station where deletions occur.
  - **WEEDING1.TXT** – If Cataloging cannot write to the WEEDING.TXT report, it will write to the WEEDING1.TXT report that sits alongside the regular weeding log. This would happen only if your software is installed at the server and if both you and someone else are deleting copies at the same time from two different stations. The WEEDING1.TXT report is rarely written to, but when in doubt, open the **WEEDING1.TXT** report at ***<u>EACH</u>*** library management station just to be sure you have not missed any information.

1. Open Follett Applications.

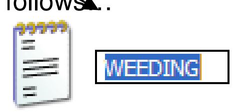


2. Open the **Exception Reports folder** (also known as the Temp folder):



3. Open the WEEDING (or WEEDING.TXT) report.
4. Use the report as needed -- Review, print (Warning! The report may be lengthy!), record copy information that you need for reordering items, etc.
5. To have a new weeding log each year:

- **<u>RENAME</u>** the weeding report: If you would like to save the report (for reordering items at a later time, etc.), **<u>rename</u>** the report by either:
  - clicking once on the icon for the WEEDING report, and then click again so that the name of the report is highlighted as in the graphic below… ***<u>OR</u>***
  - Right-click once on the WEEDING report. Choose the menu option to ***Rename*** the report. The name of the report will be highlighted as follows…



Type the new name that you would like to call the report. For example, ***WEEDING 2008-2009***.

<u>- OR -</u>

- **<u>DELETE</u>** the weeding report if you do not plan to use it for reorders, etc.

6. Open the **WEEDING1.TXT** report to see if any titles are listed. If so
   a. Review and use the report as needed (print, count entries, record copy information for reordering, or…).
   b. Rename or delete the report so that a new WEEDING1.TXT report will be created at the start of the new school year.
7. **Repeat steps 1 – 6** at ***each library management station*** as there may be more than one WEEDING report.

Note: If you have renamed the weeding report to save it for a time, remember to delete it when you are finished with it.

8. After the new year's first deletion, open the new weeding log to verify that it is recording this year's discards. If not, call Patty or Beth.

<u>Housecleaning tip:</u> If you notice **other reports** in your **Exception Reports folder**, chances are they are old exception reports noting deletions, cataloging import information, expired holds, etc. that were inadvertently saved. The exception reports have odd long names starting with RINV000…, IM000…, CC000…, UT000…, etc. Very likely there is no need to keep these exception reports. Open and review each report. If the exception report is no longer of any use, close and delete the report.

❑ 8. Check the PHD: Re-charge and/or reload PHD+ application as necessary

System Setup | Site (makeitso) | PHD+ tab

- Check the battery case for corrosion. If there is corrosion on the clips or cover, clean with a lint-free cloth and denatured alcohol.

- Is the battery pack charged? Place the battery pack back in the unit. Turn on the PHD+ LASER. One of the following will happen:
  - If ***nothing*** appears on screen, charge the battery pack overnight (for **8-16 hours**).
  - If the ***PHD menu*** appears, your PHD is ready to use. Rather than using it, especially if the unit has not been used for a number of months, follow the directions below for rebooting the PHD+ LASER. **Important:** Rebooting erases the software and any scans currently in the unit.
  - If the message, ***Ready to Update?***, appears, you will need to reload the PHD software from *System Setup | Setup menu | Site (makeitso) | PHD tab* into the PHD. Follow the directions below. If the unit has not been used in months, we recommend **rebooting** the PHD+ LASER using the directions below.

REBOOTING THE PHD+ LASER

a. Turn off the PHD+ LASER.
b. While holding down the **SP (No)** and **ENTER (Yes)** keys, press ***and*** release the **ON/OFF** key. Continue to hold the SP and ENTER keys for ***7 seconds***.
c. The unit will display the version of microchip being used by the PHD, usually 66>.
d. Hold down the **6** key (usually only have to press once) until the unit displays **TP_**.
e. Type **59**, and press **ENTER**.
f. At the ***DOWNLOAD.Y 001.2 message***, press the **3** key for **three beeps**.
g. Press the **1** key to select the option for Ready to Update. The message ***READY TO UPDATE?*** appears. You will now have to reload the PHD+ LASER software using the following directions:

RELOADING THE PHD+ LASER SOFTWARE

a. Open **System Setup**
b. From the **Setup menu**, select **Site** (makeitso).
c. From the **Site Setup window**, click once on the **PHD tab**. The **PHD Application Loader window** appears. Make sure that PHD+ Laser is the selected PHD model.
d. Attach the PHD to the computer. ***DO NOT*** click on the **Load button** until the PHD is ready to receive the software.
e. Turn on the PHD+. The message, *Ready to update?* should appear.
f. At the workstation, click the **Load button** and ***QUICKLY…***
g. At the PHD, press **Yes/Enter**.

The PHD and computer will attempt to connect and will load the software into the PHD. If the transfer fails, try the process again. If it still fails, call Patty or Beth.