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Published June 2009
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How to Use this Manual
Parentheses contain page numbers from the Innovative Guide & Reference, which is accessible from http://yourcatalogIP/manual or from the Millennium toolbar under Help | Manual. For details on editing records, please refer to the Basic Millennium tutorial on CSDirect at http://csdirect.iii.com/tutorials/basic/. For details on basic circulation functions, please refer to the Millennium Circulation Basic Functions tutorial on CSDirect at http://csdirect.iii.com/tutorials/circul/intro2.html.

Introduction
Millennium Circulation allows staff to do the following: check out items, check in items, place holds, maintain hold queues, maintain course reserves lists, manage fines and bills, and perform other Circulation-related functions. Other optional features are available for purchase.

Log In

- Double click on the Millennium icon on your computer’s desktop.
- When the Login and Password dialog box appears, enter a Millennium Circulation login name and password.

  ![Login and Password Dialog Box](image)

  ▪ Click the OK button or press the <Enter> key twice.
  ▪ This connects you to the server and loads the Millennium Circulation software.
  ▪ When loading is complete, the Initials and Password box displays.
- Type in your initials and password; click on the OK button or press the <Enter> key twice.
- The initials and password authorize you for specific functions within Millennium Circulation.
- If your system has multiple Accounting and/or Serials Units, your initials and password will associate you with a specific unit.

Custom Settings and Preferences

Many Millennium functions are customizable (for example: screen and text colors, font and font size, new record template creation and maintenance, print templates, and a number of other Millennium functions.) Please refer to the Millennium Login Manager Tutorial at http://csdirect.iii.com/tutorials/login/ for a detailed discussion and instructions on how to optimize the use of the Millennium Circulation module.

Record Fields

The Millennium system uses new record templates to create new records. A new record template can be configured by the library to prompt the user to fill in specific fields. A new record template can also be configured by the library to contain default data in certain fields which is automatically inserted into the record during the new record creation process. The library may configure an unlimited number of new record templates in the Millennium System. Please refer to the Millennium Login Manager Tutorial at http://csdirect.iii.com/tutorials/login/ for instructions on creating and maintaining new record templates. Additional information is contained in the Innovative Guide and Reference.

New Record Templates

The Millennium system uses new record templates to create new records. A new record template can be configured by the library to prompt the user to fill in specific fields. A new record template can also be configured by the library to contain default data in certain fields which is automatically inserted into the record during the new record creation process. The library may configure an unlimited number of new record templates in the Millennium System. Please refer to the Millennium Login Manager Tutorial at http://csdirect.iii.com/tutorials/login/ for instructions on creating and maintaining new record templates. Additional information is contained in the Innovative Guide and Reference.
System Options (101838)

There are a number of system options that control certain behaviors within the Millennium modules. These options are used to customize functions such as purchase order and claim form configurations, whether the library is subject to certain taxes, whether to combine receiving and invoicing processes, WebPAC behavior, etc. Access these options from the Millennium telnet software via the following menu path:

A > ADDITIONAL system functions
A > ALTER system parameters
S > SYSTEM codes
O > Set system OPTIONS
C > Circulation options

To control numerous circulation options affecting Check out, Check in, Renewals, Holds, Fine/Bill policy, Notices, etc.

See the Circulation Parameters Training Manual for information on selected Circulation Options.

Millennium Circulation Modes

Circulation Desk Mode

Millennium Circulation opens in the Circulation Desk mode. This is where most of the daily circulation functions take place, using an individual Patron record.

Create Patron Records (100272)

1. Click the New button or use the dropdown menu File | New Patron
2. Select a new record template from the preferred list or use the default new record template, if that is the appropriate template. Record templates can be selected as preferred templates in the dropdown menu Admin | Settings | Record Template.
3. Insert values in the fixed- and variable-length fields as prompted by the new record template.
Create Patron on the fly (100273)

- Scan or type in a new, unused patron barcode. The system should present a special window for on-the-fly record creation.
- Select an appropriate new Patron record template or use the default new Patron record template, according to library policy.
- Insert values in the fixed-length and variable-length fields as prompted by the new record template

Edit Fixed-length Fields (100686)

- Use the <Tab> key or click with the mouse to place the cursor inside the white area of the desired fixed-length field and type in the desired code, if you know the code you wish to enter

  Or, alternatively

- Double-click with the mouse in the white part of the desired field to display a list of valid codes and/or meanings for that specific field, and click on the appropriate line for the chosen field to select it.

Edit Variable-length Fields (100689)

- Click the Insert icon in the upper toolbar, or use <Ctrl>-I, or the dropdown menu Edit | Insert Field to display a rectangle on the upper part of the screen in which there is a menu of variable-length field choices. Select from the presented dropdown menu by
clicking on the first displayed field choices. Other values will be displayed on the screen. After selecting the appropriate field to insert, type the necessary data into the white area of the variable-length field display box.

Or, alternatively

- Press the `<Enter>` key and type the proper Millennium field tag in the correct position. The “?” indicates that you must insert a valid field tag which is appropriate for the field to be inserted.

- To move a field within the same field group (i.e.: rearrange the displayed order of several NOTE fields), position the cursor inside the field to move, right-click on the mouse, and select” Move Up”, “Move Down”, or “Move to Top”, or “Move to Bottom of Group” from the pop-up menu.
Copy a Patron Record (106076)

- It is possible to create a new Patron record by copying an existing record. This is useful for entering multiple patrons from a group (for example: a classroom or a family).

- The Library can ask Innovative to specify the fields which are to be copied from existing records into new records using this “Copy a Patron record “function. Contact the Innovative implementation team for the library if the library is a new customer, or the Help Desk if the library is an existing customer to specify the fields to copy.

- Retrieve a Patron record by searching by name or any other appropriate field. If a browse list is presented, select the appropriate line by double-clicking on the line or by clicking in the “Select” button. Then, click on the Edit icon on the toolbar button. With the selected Patron record open, use the dropdown menu Edit | Copy Record to copy the selected record and simultaneously create a new Patron record from the selected record.

- The data from the original record will be copied into a new record according to the fields you have selected in point number two of this section. It is necessary to edit the new Patron record as needed for changes as appropriate. When all changes have been completed, click on the Save icon on the toolbar.

Retrieve a Patron record (100032)

Patron records may be searched by any indexed field in the Patron record.

1. Type or Scan the patron barcode into the query box in the upper left-hand portion of the screen.

2. Type the letter “n” (to designate the name index) and search by the patron’s last name, first name. Do not insert a space after the letter “n”. This searching option informs the system that it should search the Name Index instead of the Barcode Index.

3. After typing the name, press the <Enter> key and click the Search button. If necessary, select the appropriate index from the drop down list of Name, Barcode, or Record number. Type the appropriate data into the query box and press the <Enter> key (or click the Search button)

4. From a browse screen of a list of Patron records, double click on the line for the selected patron name or highlight the line for the patron name and click the Select button.

Check Out Tab (100042)

1. To check out an item, retrieve the Patron record using any of the methods above.

2. A brief version of the Patron record displays in the upper right part of the display screen: The information which displays in the brief version can be configured by the library in the dropdown menu Admin | Login Manager | Patron Display. The library may select the fields which display in the brief display by selecting the option for Custom Display and moving selected fields from side to side using the provided arrow buttons on the Patron Display tab.
3. Scan or type the item barcode in the blank field in the upper left-hand corner of the screen. If the individual scanner software is configured to send an <Enter> after a specified number of characters, the system will automatically display brief information concerning the item in the summary display below. If the scanner is not configured to send an <Enter> command after a specified number of characters, it will be necessary to click on the Submit button.

4. After checking an item out to a patron, it is possible to override the system-selected Due Date. To override the system-selected Due Date, click on the Change Due Date button. (The user must be authorized to override due date via configuration of the initials.) Select an appropriate due date from the calendar box presented and click the OK button. It is possible to retain the changed due date by selecting the checkbox at the bottom of the calendar display.

5. If the Print slip box is checked, a Date Due slip will be printed when the Patron record is closed. Some functionality of printing slips is configured in the Circulation Options. See the Circulation Parameters Training Manual for more information.

6. It is essential to close the Patron record to complete the checkout transaction and to move checked out items into the Checked-Out Items tab. Use <Alt> +Q or click the Close icon in the toolbar to close the patron’s record. Closing a Patron record assures that the Patron record does not unnecessarily remain “in use” and also protects the privacy of patron information.
**Item on the fly (100276)**

It is possible to create Bibliographic and Item records “on-the-fly” at the time of Check-out for items which are not in the database. Most libraries create default new record templates specifically for “on-the-fly” Bibliographic records, and sometimes for “on-the-fly” new Patron records if appropriate. The method of creating an “on-the-fly” Bibliographic and Item record is as follows:

- Retrieve a Patron record using any method.
- Scan or type a new, unused item barcode in the query box.
- The system then displays an “Item-on-fly” search screen. It is possible at this point to either search for a Bibliographic record to which the new Item record will be attached, or to create a brief Bibliographic and Item record “on-the-fly”.

To create a new Bibliographic record “on-the-fly”, click the **New** icon on the toolbar:

- Select a new Bibliographic record template, or use the default new Bibliographic record template if it has been previously set in the dropdown menu **Admin | Settings | New Records**. Default or preferred templates may be set by moving the appropriate templates (by name) from side to side, using the arrow icons in the New Records tab of the Settings.
- Type in or select data for the fixed- and variable-length fields as prompted by the selected Bibliographic record template.
- Upon completing the last prompt, the system will automatically continue with the prompts to create a new “on-the-fly” Item record associated the new “on-the-fly” Bibliographic record. It is essential to have both a Bibliographic and an Item record in order to check out the item.
- Select a new Item record template, or use the default “on-the-fly” template if it is already established in the Settings.
- Type in or select data for the fixed-and variable-length fields as prompted by the selected item template.
- Upon completing the last prompt, click the **Save** icon on the toolbar.
- The system will then automatically return to the Patron record and the item will be reflected in the check out tab.
- Close the Patron record as usual.

**Alternative Method:**

To search for an existing Bibliographic record and attach a new record for an item “on-the-fly”, start by opening the Patron record with one of the usual methods:

- Retrieve the desired Bibliographic record by performing a search by author, title, or whatever is appropriate after selecting the index from the dropdown box.
- Select a new record template, or use the default template if a default “on-the-fly” item template is established in the system.
- Type in or select data for the fixed- and variable-length fields as prompted by the item template.
- Upon completing the last prompt, click the Save icon on the toolbar.
- The system will then automatically return to the Patron record and the item will be reflected in the check out tab.
- Close the Patron record as usual.

Checked-Out Items Tab

Several functions may be performed using the Checked-out Items tab. The following functions may be applicable.

Renew (100062)

To renew an item from within the Patron’s record:

- Retrieve the Patron record and click on the Checked Out Items tab.
- Select the Item record to be renewed from the list of items checked out by clicking on and highlighting the appropriate line and then click the Renew button.

Claim Items Returned (100067)

If a patron claims to have returned an item but the item has not been checked in, it is possible to mark the item as “claim returned”.

1. Retrieve the Patron record and click on the Checked Out Items tab
2. Select the appropriate line from the list of items checked out and click the Claim Returned button
3. When the calendar screen appears, select the date the patron claims to have returned the item by clicking in the appropriate day. Months may move backward and forward by clicking on the single arrow. Years may move backward and forward by clicking on the double arrows. If the patron does not indicate a specific date, click the Blank Date button.
4. Choose from the following options. All three options place the item into the ONSEARCH FILE (a file of missing items that can be used in a search for the items at a later date) and an explanatory note is added to the Patron and Item records indicating that the item has been claimed returned by the patron. A field in the Patron record will also keep a tally of the number of claimed return activities associated with the Patron record for historical information. It is not possible to automatically select or display only one of the three choices presented when the Claim Returned button is selected. An appropriate choice must be made in order to continue with the claims returned process. It will be the responsibility of the library to determine library
policy and appropriate selections when items are claimed returned. The ability to claim returned is controlled by an authorization in the list.

- **Choice 1** – item is declared MISSING and removed from the Patron record, no fines are assessed. The patron is no longer responsible for the item. However, the Claims Returned field in the Patron record is incremented by 1. The library will need to create a list of items with a status of “missing”, and determine the disposition of the missing item.

- **Choice 2** – item is declared CLAIMS RTRND and is removed from the Patron record, no fines are assessed. The patron is no longer responsible for the item. However, the Claims Returned field in the Patron record is incremented by 1. The library will need to create a list of items with a status of “claims returned” periodically, and determine the disposition of the missing item.

- **Choice 3** – the system leaves the Item record checked out to the patron and the system will continue to send overdue notices, generate a bill, accrue fines, etc., and the status of the item changes to CLAIMS RTRND. The patron remains responsible for the item, although the library will have noted that the patron reported this item as a claimed returned item. The Claims Returned field in the Patron record is incremented by 1.

If, in the future, an item with a claims returned status is checked in (or out), using any normal check-in or check-out function the system prompts the staff member:

The library policy will determine which staff members are authorized to check in a claims returned item. If the selection is “No”, the item remains checked out to the patron. The only way to clear the item status of claims returned is to answer “Yes” to the prompt. These decisions are controlled by the library according to library policy.

**Lost Items (100069)**

When a patron reports a checked-out item as lost, it is possible to use this function to do the following:

- Remove the item from the list of items checked out to a patron.
- Change the item's status to BILLED.
- Insert a note into the item record reflecting the status of “Lost”.
- Prepare a bill for the lost item to send to the patron.
- Collect all or part of a bill at that moment, or add the bill to the charges assessed against a patron to be retained in the Patron record.
- Change or adjust the billed amount, depending on library policy and authorizations associated with staff who are performing this function.

To indicate that one or more items has been reported lost by a patron:

1. Retrieve the Patron record and click the Checked Out Items tab.
2. Select the appropriate item by double-clicking on the appropriate line. After selecting the item (or items), click the Mark Lost Items button.
3. The full Item record may be viewed by clicking the View Item button.
4. The bill amount may be adjusted by clicking the Update Bill button. It is possible to adjust the Item Cost, Processing Fee, and/or Billing Fee if a staff member is authorized to do so.

There are three elements of a bill:

- **Item Cost:** The item cost will be chosen from Item record if the Item record contains a value in the fixed-field for Price. If there is no price in the fixed field for Price in the item record, the system will consult the “Default Item Cost” element from the Loan Rule under which the item has been checked out. Details on Loan Rule configuration may be consulted in the Circulation Parameters Training Manual.

- **Processing Fee:** This amount is selected from the “Replace Process Fee” element in the Loan Rule under which the item has been checked out. Details on Loan Rule configuration may be consulted in the Circulation Parameters Training Manual. The Processing Fee is an optional field.

- **Billing Fee:** This amount is selected from the “Replace Bill Service Charge” element in the Loan Rule under which the item has been checked out. Details on Loan Rule configuration may be consulted in the Circulation Parameters Training Manual. The Billing Fee is an optional field.
NOTE: You must **Update Bill** if there are any changes or adjustments before clicking the **Add Bills** button. Clicking the Add Bills button adds the bill directly to the Patron record of assessed charges.

- Appropriate charges and fees are added to the Patron record.
- The status fixed-field of the lost item is changed to: BILLED, not yet paid when a bill is calculated by the system.
- A note is added to the Item record by the system indicating that the item is billed.
- The **Fines** tab is used to collect money for the lost item.

### Holds Tab

Holds may be added to a Patron record from this tab. It is also possible to cancel or modify existing holds. See more information below under **Staff Placed Holds**.

### Fines Tab

Within a Patron record, it is possible to view current fines, view a history of fines paid, manually add a charge, waive charges or collect money. The **Fines** tab displays in a warning color if a patron’s fines exceed a library-defined limit.

#### Collect money (100071)

- To collect money for an unpaid fine, retrieve the Patron record using any method and click the **Fines** tab
- Select the appropriate fine(s) by clicking on and highlighting the appropriate line(s). Then click the **Collect Money** button. The checkbox at the left side may also be used to select the appropriate fine or fines.
- The system will display as a default the total amount owed for that particular fine but it is possible to accept partial payment of a fine or bill. This is determined by library policy.
There are no special settings to accept partial payments. If a patron chooses to pay a partial amount of a specific fine, the system will ask if the remaining amount of the fine or bill should be waived. Only staff who are authorized via their initials and password will be permitted to waive fines.

- If the Payment Types table has been enabled, the system will propose the option to enter the type of payment received (for example: cash, credit card, check, etc.). If this is not already enabled on your system, this can be enabled via the Innovative Help Desk. The library can modify the values for Payment Types in Circulation Parameters. Consult the Circulation Parameters Training Manual for details.

- Printing a receipt for the patron is an optional feature. During the fine collection process, if a receipt is desired by the patron, click on the print button at the bottom of the payment display box. This is an option, and may be performed as needed.

**History of Fines Paid (100078)**

- To view a history of the fines paid by the patron, click the **Fines Paid** button within the Fines Tab.

  To view details about the item pertinent to a fine paid, highlight the appropriate line and click the **View Item** button. The **View Item** option is not available for manual charges since such charges are normally not associated with a specific item. It is possible to print the resulting screen with the **Print** button.
Click the **View Fine** button to view the details of a fine or to reinstate a fine.

![Payment Details](image)

- To reinstate a fine, click the **Reinstate Fine** button. The prompt below will appear for confirmation:

  **Reinstate Fine**

  ![Confirm/Cancel](image)

- To complete the reinstatement, click the **Confirm** button.

- To enable the Reinstated Fine option, consult Circulation Options. Circulation Options are discussed in the Circulation Parameters Training Manual. This option must be set to yes if the library desires to use the Reinstated Fine option. Only staff authorized to reinstate fines may perform this function. This is controlled by an authorization.

**View Patron Notes (100079)**

- Click the **Patron Notes** button to view all notes in the Patron record.

**Adding a Fine (Manual Charge) (100076)**

This function is used to assess miscellaneous charges to a patron (anything not automatically generated from an overdue item). Examples are: copying costs, damage to library property, ILL services, overdue fine for CL RTRND/MISSING item that is found later, lost library card costs, etc.

- In the Fines Tab, click the **Add Charge** button.

- Type in the Reason for the charge. A reason is required to assess a manual charge.

- Type in the amount charged to the patron.
If the Predefined Charges table has enabled, click the Predefined drop-down menu and choose the desired charge. The reason and amount will be automatically entered. If this function has not been enabled on the library system, contact the library implementation team if the library is still in implementation, or contact the Innovative Help Desk if the library is an existing customer.

Adjusting fine amounts (100077)

- In the Fines Tab, select from the summary list of fines. Right-click with the mouse the line pertinent to the desired fine.
- Choose the View this fine option from the popup menu. The fine detail is displayed.
- Click on the Adjust button.
- Adjust the fine amount accordingly.
- Click the OK button to save, or click the Cancel button to exit without saving.
- Only users authorized to adjust fine amounts will be permitted to complete this function.

Waive Fines (100073)

- To waive a fine, select the appropriate fine or fines and click the Waive Charges button.
- Only users authorized to waive fines will be permitted to complete this function.

Check In Tab

When an item is checked in using Circulation Desk mode, Millennium Circulation retrieves and displays the associated Patron record. This mode enables you to perform patron-specific circulation functions (such as collecting fines and viewing the history of fines paid by a patron) for the patron who has just returned an item.

- Retrieve the Patron record and click on the Check In tab
- Scan the item barcode. It is possible to backdate the check-in date by using the Backdate button. It is essential to click the Backdate button before scanning the item barcode to check it in. Only users authorized to backdate return dates may perform this function. The backdate function may be useful if the library is unexpectedly closed on a day when it would
normally be open. This assures that patrons are not penalized for overdue fines if the library is unexpectedly closed.

- It is possible to waive charges or to collect money immediately by selecting the checked in item and clicking the Collect Money or Waive Charges button, which will become active if the user is authorized to perform this function.

- If printing a receipt acknowledging the return of an item, the system will print the date & time, title, barcode, patron name, and record number on the receipt. The routine printing of a receipt acknowledging a checked in items (not to be confused with receipts for payment of fines), is configurable for routine function in the Circulation Options. A receipt may also be created by checking in the “Print Receipt” box for the individual check-in before the item is checked in.

- It is also possible to check in items from different patrons using this same tab without closing the previous Patron record.

**Linked Patrons Tab (100281)**

This is used to link family Patron records or academic assistants, among other uses.

- Retrieve the Patron record and click the Linked Patrons tab.
- Click the Link button and search for the Patron record to link to the original record.
- Highlight the Patron record to be linked to the original record and click the Select button. Repeat the process to link multiple patrons to one patron.
- To open a linked Patron record, go to the Linked Patrons tab and select the desired linked patron by highlighting the appropriate line. Click the Go To Patron button to retrieve a linked Patron record.
- Once the linked Patron record is selected, click the View Checkouts button to view a linked patron’s checked out materials.
- From the Linked Patrons tab, select a patron by highlighting the appropriate line. Then click the Unlink button to remove a link.
- Linked patrons may be used to link family groups, university graduate assistants, or for any other purpose deemed useful by the library. It is an optional feature. If a library chooses not to use Linked Patrons, this tab can be commented out of the display screen by using Login Manager | Manager Controlled Options | Tabs. Removing the checkmark from the checkbox will remove the tab from the display.
There are two types of holds:

- Bibliographic level holds, which are also called “Title level” or “Copy Returned Soonest” holds. The first copy checked back in will be selected to satisfy the hold.

- Item level holds is the second type. For item level holds, only a specific copy will satisfy the hold (for example, a particular volume, or particular autographed copy, etc.)

Holds can be placed on:

- A title or item that is checked out
- A title or item that is not checked out
- A Bibliographic record for which there are no attached records
- A Bibliographic record with an attached Order record
- The library will establish the rules for holds by establishing values in Admin | Login Manager | Holds tab

Holds cannot be placed on:

- An item currently checked out to this patron
- An item with status o (“library use only”)
- An item pointing to a Loan rule whose “Code” element is “N” (non-circulating)
- An item pointing to a Loan rule whose HOLDABLE element is set to “N” (no)
- Consult the Circulation Parameters Training Manual for information on configuration of hold elements of Loan Rules.

Bibliographic (Title) level holds - Copy returned soonest (100098, 100107)

It is possible to place a bibliographic-level hold from Circulation Desk mode or from Search/Holds mode on the navigation bar.

To place a hold from Circulation Desk mode:

1. Select Circulation Desk mode by clicking on the navigation bar
2. Retrieve the Patron record using any method.
3. Click the **Holds tab**
4. Click the **Add Holds** button
5. Retrieve the desired Bibliographic record by performing a search, using an appropriate index for searching.
6. Select the record on which to place a hold by highlighting the appropriate line of the results in a browse screen. If the search results in a direct hit for a specific title, the Bibliographic record will be displayed on the screen).
7. From the **Summary** tab list of attached Item records, click the **Hold Copy Returned Soonest** button.
8. Type in or select the desired hold parameters and click **OK**. Hold parameters are configured in Circulation Parameters. Consult the Circulation Parameters Training Manual for details regarding these hold parameters.

To place a bibliographic level hold from **Search/Holds** mode on the navigation bar:

1. Go to **Search/Holds** mode on the navigation bar on the left side of the screen.
2. Retrieve the Bibliographic record by searching an appropriate index.
3. If the search results in a browse list, select the Bibliographic record on which the hold will be placed by highlighting the line of the appropriate title. If the search results in a direct hit for only one Bibliographic record, the Bibliographic record will be displayed on the screen).
4. From the **Summary** tab list of attached Item records, click the **Hold Copy Returned Soonest** button.
5. Retrieve the desired Patron record by using the **Add Patron** button and searching, using the appropriate index.
6. Type in the desired hold values and click **OK**

- The number of holds already on a particular title displays from the Holds/Bookings summary column, in the last column to the right on the tab.
- If the patron already has a hold on a copy returned soonest, the system will not accept the hold.
If no Item records for this title are eligible for hold placement (for example, they all contain a status of “Library Use Only”), the system will display a “REQUEST BLOCKED” message. The system will place, instead, a bibliographic-level hold. By using the bibliographic level hold option, if the library later changes the status of any attached item record or acquires new items for that title for which holds may be placed, the HOLD will be fulfilled. If item level holds are placed, only that particular item may satisfy the hold and if that item becomes unavailable, the hold will never be satisfied.

**The Hold Note appears on paging slips printed for items requested from other locations and displays when staff view holds in Millennium. The Hold Note may also optionally be printed on Hold Pickup notices.**

If the copy being held has a Status of AVAILABLE (meaning on the shelf and available to be checked-out), the system can print a paging slip so that staff may retrieve the hold and place it on the hold shelf for the patron. The item must be scanned at the desk, using “Check-In” mode, after which the system will generate a hold pickup notice.

If the desired item cannot be located on the shelf, it is possible to change the item status to missing, and to place another bibliographic level hold for the patron. Changing the item status to missing places the item in the On Search File. The library will need to periodically create a list of missing items to determine disposition of missing items in the collection.

**Item level Holds (100098, 100099)**

It is possible to place an item-level hold from Circulation Desk mode or Search/Holds mode.

To place an item-level hold from Circulation Desk mode:

1. Go to Circulation Desk mode on the navigation bar on the left side of the screen.
2. Retrieve the patron record using any method.
3. Click the Holds tab
4. Click the Add Holds button
5. Retrieve the desired Bibliographic and Item record using an appropriate search index.
6. From the Summary tab of attached Item records, select the desired Item record by highlighting the line, and click the Hold Selected Item button.
7. Type in the desired hold parameters and click OK.
If the item can be recalled (according to the loan rules), the system will present the following Recall menu options:

- RECALL item with due date of ______________. This can be interpreted as: Accept the system-calculated due date and issue a recall to the patron.
- RECALL item with new due date. (Override the system-calculated due date). A recall notice will be issued to patron with a new due date. If the item is already overdue, it is not possible to specify a new due date. Only users authorized to override the system-calculated due date will be permitted to complete this function.
- Place HOLD without recall. (Place the hold without issuing a recall notice. This does not alter the original due date.)
- Cancel. (This does not place the hold.)

The function of recalling items is a library policy decision, and if the library desired to recall items, it is essential to establish the appropriate recall elements of appropriate loan rules. Consult the Circulation Parameters Training Manual for details on Loan Rules.

To place an item-level hold from Search/Holds mode:

1. Go to Search/Holds mode on the navigation bar on the left side of the display.
2. Retrieve the Bibliographic and Item record, using any appropriate search index.
3. From the Summary tab of attached Item records, select the desired Item record by highlighting the appropriate summary line of the Item record and click the Hold Selected Item button.
4. Retrieve the desired Patron record using the Add Patron button
5. Type in the desired hold parameters and click OK

- The number of holds already on a title displays from the Holds/Bookings tab summary, in the last column to the right on the Holds/Bookings tab.
- If the patron already has a bibliographic-level hold on this title, the system will not accept the hold

**Cancel Holds (100118)**

Holds may be cancelled from Circulation Desk mode and Search/Holds mode on the navigation bar. The procedure is the same in both modes:

1. Retrieve the Patron record (Circulation Desk mode) or Bibliographic/Item record (Search/Holds mode)
2. Select the appropriate Holds tab.
3. Highlight the line or lines of the hold(s) to be cancelled.
4. Click the Cancel Holds button to cancel all of the selected holds and to generate hold cancellation notices (if you have chosen to send notices for cancelled holds). Consult the
Circulation Parameters Training manual for details on configuration of notice texts and text elements for notices in Loan Rules.

Modify Holds (100113)

The hold parameters (for example: not-wanted-before or after dates, hold note, pickup location, etc.) can be changed by authorized users. Holds can be modified from Circulation Desk mode and Search/Holds mode. The procedure is the same in both modes:

1. Retrieve the Patron record (Circulation Desk mode) or Bibliographic and Item record (Search/Holds mode)
2. Select the appropriate Holds tab.
3. Highlight the line or lines of the hold(s) to be modified.
4. Click the Modify Holds button to modify the required field of pickup location, the optional not-wanted-before date, the optional not-wanted-after date and the optional hold note. The Pickup Location is required. Other values are optional.

Check-in Mode (100080)

- This mode allows “Check in (patron not present)” functionality (for example: checking in materials at a terminal not located at the Circulation Desk)
- This mode is used for checking in materials left at the check-in desk or deposited in another book return location. The screen display for checked in materials displays differently here than when an item is checked in with the Patron record open.

To backdate checked in items (assign a return date earlier than the current date):

- Click the Backdate button before checking in the materials. Choose the desired date of return (checked in date) from the popup calendar. This is useful if the library is closed unexpectedly (for example: due to weather or other emergency) and the library does not want to assess fines for unexpected days closed. Select the Check In mode from the navigation bar.
- Scan the item barcode (or type in the item barcode)

Check IN overdue items (100087)

- If a patron returns an overdue item (i.e., the time of check-in is later than the Item record's DUE DATE field), Millennium Circulation generates a fine as established in the Loan Rules, and adds the fine to the charges assessed in the Patron record. Users must be authorized to check in overdue items in order to perform this function. Consult the Circulation Parameters Training Manual for details regarding fine structure in Loan Rules.
Check IN items with holds (100086)
If a patron returns an item which has a hold on it (for example, another patron has requested the item), Millennium Circulation will present a message alerting the staff that there is a hold on the item. It is possible to print a slip or wrapper to insert in the item before it is placed on the Hold Shelf. At the exact moment an item which satisfies a hold is returned, the system sets the item status to On Holdshelf for patron pickup. Depending on the library’s notice settings, a hold pickup notice may be generated that night to be printed the next morning. Consult the Circulation Parameters Training Manual for details regarding notice texts and Loan Rules.

Check IN billed items (100088)
When a patron returns an item which is billed, the system will change the amount assessed in the Patron record to the amount specified by the library. The library has the following options:
Reduce the billed amount to:

- the BILLING FEE
- the greater of the BILLING FEE or the overdue fine
- the lesser of the BILLING FEE or the overdue fine
- no charge; Millennium Circulation waives the fine automatically if this option is selected.

Note that it may be necessary to enter your initials and password to waive the fine. The ability to waive fines is controlled by authorizations associated with individual initials and password.

This option is set in the Circulation Options, “Check-In of Billed Item: Reduce bill to” option. The option may be set at one of the 4 above choices. Consult the Circulation Parameters Training Manual for details on Circulation Options.

Renew (No Patron) Mode (100060)
The Renew mode can be used to renew items without accessing a patron record:

1. Change the current mode to Renew (No Patron) in the navigation bar on the left of the screen.
2. Two methods of renewing an item are possible:
   o Search by Item record number, and then select the item to be renewed
   o Scan or type in the barcode of the item to be renewed
3. Click the Close button

Print and Send Notices (105213)
Notices of various types can be printed or sent in Millennium Circulation
Typical notices are overdue notices, fine notices, billing notices, hold pickup notices, recall notices, statements of charges, and an assortment of other types of notices. Please see the Innovative Guide and Reference #105213 for a complete list of notices and details on compiling, printing, and sending notices. It will also be necessary to consult Circulation Options, as well as Loan Rules to configure other notice parameters. Consult the Circulation Parameters Training Manual for details on notice texts, loan rules, and specific circulation options which must be completed before notices can be successfully prepared and printed or sent.

Manual notice preparation mode is the default setting. However the optional Auto Notices feature can be enabled by Innovative. Please consult the Innovative Guide and Reference for details on the “Auto Notices” feature. For libraries in the implementation process, consult with the library implementation team. For established Innovative customers, use the Service Commitment section on CSDirect to request that this feature be enabled.

Notices are prepared and delivered using Notices mode in the Millennium Circulation module.

- Select the notice parameters using the dropdown menu choices. Parameters include Location, Overdue Level, Overdue Status, and Type of Notice, among other options.
- Select a Notice Type from the dropdown menu.
- Select the Location based upon appropriate locations served associated with the user password or login. For details on Location Served, consult the System Administration Training Manual.
- Sort the notices as desired, using the Sort by button
- Select other options or choices in the Options section
- Select a printer from the File | Select Printer dropdown menu as necessary
- Prepare the notices
- Click on the Prepare icon, the Prepare button, or File | Prepare from the dropdown menu
- After the notices are prepared, the system is ready to either print on a printer, send via e-mail, or utilize other options if you have purchased other delivery methods, such as Teleforms or SMS. SMS is available only for European sites at this time. A dropdown menu will display the individual notices, by patron, available for each delivery option.
- After the notice method has been selected in the dropdown (print, email, etc.), it will be necessary to click on the Print or Send button to deliver the notices in the specified manner. The button may change wording, depending on the type of notice to be delivered. Printed options will use a Print button. E-mailed notices will use a Send button.
- A tab display will display “Items not sent”, “Items in use”, “Emails”, and a Summary statistical tab.

High Demand Holds
High Demand Holds titles may be viewed using the mode **High Demand Holds** in the navigation bar on the left side of the display screen. A statistical report may be calculated based upon system-wide holds, or the report may be generated using specific pickup locations. This report may be useful for libraries to determine items for which additional copies may need to be purchased. This replaces the “Purchase Alert” file. This report has the advantage of being available for export directly into an Excel or Word file. Hold Thresholds are configured in Circulation Options. For more details on configuration of these values, consult the Circulation Parameters Training Manual.