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**ALT0 - General Information**

**Alto Log in**

**Pcs**
Switch on 4 PCs at the desk

**PC Login**  issuedsk

**Password**  leabhar

Click on OK or press return at Guest prompt

Use above user name and password when the PC hibernates due to being unused for a time

**Alto Login-Issuedesk**

Double click on Alto icon

At User ID, scan the Issue Desk quick login card or login with user name and password below

**Alto**  issuedesk

**Password:**  Alt0_IPS_KsE (Please note that the 0 is the number zero)

**Location**  DCU

**F9**  Continue

Use above user name and password when the PC hibernates due to being unused for a time

**Bibliotheca RFID**

Click on the Bibliotheca RFID icon to enable the desktop RFID pads, a pop-up box may appear-click yes

---

*Figure 1* Bibliotheca Icon

**Alto-Log Off**

Go to File and select EXIT or click x in top right hand corner of Alto

A Dialogue Box will ask if you want to disconnect Alto - Select YES

**Switch Off PCs**

Go to Start Icon

Shut Down

Do not turn off the monitors
Alto's Issue, Discharge and Renew screens are split into consistent sections to allow easy switching between loan handling functions.

Use the Circulation menu, to select the required transaction-Borrower, Issue, Renew or Discharge

The borrower ID card can be scanned or borrower number typed into required field

The main grid area is updated each time you issue, discharge, or renew books, indicating details such as

- The Barcode and Description of the item
- The Item Type, which is used to determine the loan length for the particular category of borrower
- The Action performed e.g. 'Issued', 'Discharged', 'Not issued', 'renewed' etc.
- The Due Date/time when the item must be returned. For discharge screens, this will be the date the item is discharged

The following shortcuts are available from many screens to navigate instantly to other screens. Click required field or appropriate F button

F3- Go to Issue
F4 - Go to Renew
F5 - Go to Discharge
F2 - Borrower search
F9 - To accept all transactions/Continue
F12 - To Clear
F1 - Help

Please Note!

It is important to always clear the screen once you have finished any transactions

Figure 2 Alto Screen Example
Print from ALT0

To screen print from Alto, press SHIFT (\) & F11, then select Ok
Different printers can be selected from the name drop down box
See Figure 3 below

Figure 3 Print from Alto
Library Users

Staff & Students

All DCU staff and students have ID cards which also serve as library cards with full library membership conferred on all registered staff and students of Glasnevin Campus, St. Patrick’s Campus and All Hallows Campus.

The student/staff ID card also serves as a library access card and full library membership is conferred on all registered staff and students of

- DCU- Glasnevin Campus-The O’Reilly Library
- St. Patrick’s College-The Cregan Library
- All Hallows Campus-no library

Membership types

- Undergraduate –Fulltime/ Part-time
- Postgraduate Taught –Fulltime/ Part-time
- Postgraduate Research –Fulltime/ Part-time
- Open Education Student (Part-Time)
- Staff
- Sconul Access/Borrowing
- Alumni –Access or Borrowing
- Visitor – Access or borrowing
- DCU Language Services – Access only, no Borrowing allowed

Student ID cards

DCU ID cards are issued by Registry for all students. The main registry office is in the Henry Grattan building and there is also an office on St Patrick’s campus. Alto is updated frequently throughout the day from the registry system with new card details such as barcode numbers or any other details changed. This ensures that if a new card is issued to a student, Alto is generally already updated with the new details by the time the student gets to the library.

Staff ID Cards

Staff ID cards are issued by HR and must be registered in the Library by completing the pink staff registration form and having the back of the form signed and stamped in their department for the 1st ID card as there is no automatic update from HR for staff cards.

Alto will be updated by the designated Issue Desk staff members who co-ordinate membership applications-Julie/Mary
Other ID cards

There are many other types of ID cards used to enter the library that are set up on Alto by library staff but some cards have no borrowing rights such as DCU Language services cards, visitor access cards or alumni access cards. If a card with no borrowing rights is used at the Self-service, items will not be issued. Alto will indicate that there are no borrowing rights for the ID card.

Please Note!

See the reception desk manual for full details of all library users
Radio-Frequency Identification (RFID) is the use of radio waves to read and capture library information stored on a tag attached to a book such as item barcode number, title etc. and whether the item has been borrowed or returned.

The RFID tag is used to issue, discharge and renew library books at the Self-Service or at the Issue Desk.

All DCU Library items - books, dictionaries, DVDs are RFID tagged with security tags placed on the inside back cover of books or centre of DVDs and the glass detection panels at the exit gates alerts Library staff immediately when un-borrowed items pass through them by beeping and lighting up in red. The exit gate also locks for a brief time.

Reference items, Journals, magazines and newspapers may not leave the Library and are also alarmed and will trigger the exit alarms.

When an item is borrowed at the Self-Service machines, the RFID alarm is deactivated and will not activate the exit alarm. It is reactivated when the item is returned. The RFID alarm can also be activated/reactivated using the desktop pads at the Issue Desk.

3 PCs at the Issue Desk have an RFID bibliotheca pad attached to issue/discharge books and to unsecure RFID tags which are on the inside of the back cover of all books or on the centre of DVDs.

The Bibliotheca RFID should be open but if not, click on the ‘Bibliotheca RFID’ icon from PC desktop or shortcut menu.

See Figure 4 below

Please Note!

Check Out= Issue/ Borrow
Check In = Discharge/ Return

Figure 4 Bibliotheca from Alto
RFID Tag- Unsecure (Take Alarm Off)

All DCU Library loanable items—books, dictionaries, DVDs are RFID tagged with security tags placed on the inside back cover of books or centre of DVDs and the glass detection panels at the exit gates alert Library staff immediately when un-borrowed items pass through them by beeping and lighting up in red. The exit gate also locks with a message re gate alarm.

The RFID tag is unsecured when an item is issued to a borrower and all books/DVDs can also have their RFID tag unsecured using the Bibliotheca pads on the 3 PCs at the Issue Desk.

Occasionally items are issued on the Self-service but the RFID tag still sets off the security gate on exiting the library such as when a student only puts part of the item on the glass plate.

If you are satisfied that the book has been issued by checking the borrower’s account on Alto, the RFID tag can be unsecured manually.

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the Bibliotheca icon
- Select check-out option (bottom) - highlighted in green (open door image) when selected
- Place item on the pad
- (Click on ‘cancel’ in the target application frame if error pops up)
- RFID tag on book changes to unsecured as indicated by an open padlock

See Figure 5 below

![Select bottom(green) to issue](image)

Padlock will open when item is issued

Figure 5 Unsecure RFID
RFID Tag – Secure (Put Alarm on)

The RFID tag is secured when an item is discarded at Self-Service or Issue Desk. All books/DVDs can also have their RFID tag secured using the Bibliotheca pads on the 3 PCs at the Issue Desk.

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the Bibliotheca icon.
- Select ‘Check-in’ option (top) - highlighted in blue – Bookshelf.
- Place the item on the pad (1 book at a time)- this will discharge the item and secure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- The RFID tag changes to secured as indicated by a red closed padlock.

See Figure 6 below.

*Figure 6 Secure RFID*
RFID Tag – Programming

All DCU Library items—books, dictionaries, DVDs are RFID tagged with security tags placed on the inside back cover of books or centre of DVDs and the glass detection panels at the exit gates alert Library staff immediately when un-borrowed items pass through them by beeping and lighting up in red. The exit gate also locks.

Occasionally, RFID tags stop working or a book that has been on long term loan has no RFID tag. The RFID tag may need to be reprogrammed, replaced or a new tag is required. Replacement tags are held on a roll at the Issue Desk or in the large stationary press.

How to Programme a new RFID Tag

- Close the ‘Bibliotheca RFID’ check in/check out tool
- Open the ‘Bibliotheca Conversion’ tool (both cannot be open at the same time)
- Scan the item barcode into the item ID field
- A yellow box opens
- Present a single tag or the book with an existing tag to the pad
- Message ‘tag complete’ in green box indicates the tag has been programmed to match the barcode. The tag is set to secured (note the red padlock to the right on the screen)
- If using a new tag, stick on back inside cover of the book
- Click ‘Shut Down’ when finished and reopen the bibliotheca RFID tool

See Figure 8 for screen shots

- After using the ‘Bibliotheca Conversion’ tool, a box ‘select target application’ as below Figure 7 pops up. Make sure that the tick box is checked and double click on the message to clear it.

See Figure 7 for example of error message

Figure 7 Error box
Figure 8 Programme RFID tag

Scan item

Present tag to Bibliotheca pad

Present single tag.

Green box indicates RFID tag programmed

Tag secured

Place tag on the inside of the back cover of book
Self Service

All loanable items have RFID tags which are used to issue, discharge and renew library books at the Self service or at the Issue Desk

All DCU students/staff and alumni/visitors with borrowing rights can use the Self service in either O’Reilly or Cregan Library

Cregan library items cannot be returned using the Self service in the O’Reilly Library and must be returned to the Issue Desk in the O’Reilly library.

O’Reilly library items cannot be returned using the Self service in the Cregan Library and must be returned to Issue Desk in the Cregan library.

Borrowers should be encouraged to use the Self service. Always ask if assistance is required and show borrower how to use the Self service if necessary. However, if a borrower prefers not use the Self service, they can return/issue/renew items at the Issue Desk.

See Figure 9 for the main Self Service screen

Self Service Points

Figure 9 Self Issue main screen
There are 3 Self service points with touch screens on the ground floor that can be used for

- Borrow items - Check Out
- Return items - Check In
- Renew items
- Check library account

Self service can only be used to borrow if there are no overdue items, no fines greater than €10 or no fines more than 1 month old. If the Self service cannot be used due to a problem with the borrower’s account and an exception is being made, items can be dealt with at the Issue Desk.

Main lending items can be renewed using the Self Service points or can be renewed online using the borrower number and library PIN.

48 hour items cannot be renewed and if returned, cannot be borrowed by the same person for 20 minutes

Reserved items or Cregan items cannot be returned to the Self-Service points. An error message, highlighted in red appears for users advising them to go to the Issue Desk.

Overdue items cannot be renewed at the Self service but can be returned and reborrowed straightaway so long as fines are not greater than €10

DVDs can be issued and discharged but not renewed at the Self service points.

The Self services times out very quickly with an option to select finished. If not selected, it reverts back to the main menu.

Account Information provides a summary of loans, due dates, fines etc

**Receipts**

Paper receipts are issued on request by the Self service. When the receipt roll is running out, the colour on the glass changes to pink and when all paper is gone it changes to red. Please replace the rolls as required as the items may not issue if there is no paper left. The key is held in the key box and the receipt rolls are held in the large stationary press.

Use key to open here
**Borrow/Check Out/ - Self Service**

Follow the instructions on screen

- Select Borrow
- Scan the ID card under red line, with picture facing upwards for borrower’s account
- Place all items on the glass plate, ensuring that they are fully on the plate
- All items will be listed on the screen and will be highlighted in green, with each box ticked as they issue
- The options ‘Print a receipt’, ‘E-mail a receipt’ or ‘no receipt’ indicates that the transaction has been successful
- Select an option to complete the transaction
- Follow on screen instructions and see the pictures of Self-Service screens in *figure 10*.

**Check In/Return - Self Service**

Follow the instructions on screen

- Select ‘Return’ on the screen
- There is no need to scan ID card for returning books
- Place all items on the glass plate, ensuring that they are fully on the plate
- All items will be listed on the screen and will be highlighted in green, with each box ticked as they are returned
- The options ‘Print a receipt’, ‘E-mail a receipt’ or ‘no receipt’ indicates that the transaction has been successful
- Select an option to complete the transaction
- Items should be left on trolleys beside the Self-Service points
- Issue desk staff should regularly clear the items from these trolleys: 48 hour books should be placed on the 48 trolley near the Self-service, main lending items should be returned to the trolleys behind the issue desk (split between 1st and 2nd floors)

Follow on screen instructions and see the pictures of issue screens in *figure 10*. Return screen is very similar except the ID card is not scanned when returning items
Step 1

Scan ID under red line for
- Borrow
- Renew

Figure 10 Self Issue steps

Step 2

Follow on screen instructions

Step 3

Place all books on glass plate

Items turn green as issued

Step 4

Select one of these option to finish and close account
Renew Items - Self Service

- Select **Renew**
- Scan ID card under red line, with picture facing upwards
- All items on the account are listed
- Select items to be renewed by touching required tick box on screen or select all if all items are to be renewed
- Select from options - ‘Print receipt’, ‘E-mail a receipt’ or ‘no receipt’

See *Figure 11* for example

*Figure 11* Self service renew
Alto-Issue, Discharge, Renew

All DCU students and staff from Glasnevin, St Patrick’s and All Hallows campuses can borrow, return and renew items in both campus libraries - O’Reilly and Cregan. Borrowing entitlements for each campus library have been harmonised but the Cregan library has some items which may have different loan durations than O’Reilly material.

Items can be returned to either campus library even if not borrowed there

Please Note!

An exception box will pop up for all Cregan library items in Alto if discharged, issued, and reserved or item status checked. An error message appears at Self-Service

An ID card is necessary to borrow items and items cannot be borrowed with a daily access card or a ‘library access only’ card. Items can only be issued to the holder of the id card and not to someone else unless a request is made by email or phone and a message is placed on the borrower’s account to allow someone else borrow on their behalf in special circumstances.

Main lending books are either issued for 3 weeks or 1 week while short loan books issue for 48 hours on a rollover basis (due same time as issued)

The library has 3 self-service Self points on the ground floor. Borrowers should be encouraged to use these to borrow/return/renew all items. Always ask if assistance is required and show the borrower how to use it if necessary. However, if a borrower prefers not use the Self-Sservice, they can borrow/return/renew items at the Issue Desk.

3 PCs at the Issue Desk have an RFID bibliotheca pad attached to read, issue, discharge or renew library items. If a book is placed on the pad and nothing happens, there may be no RFID on the book. Check the inside of the back cover. If the book has not been tagged previously in error or had been on long term loan, add a tag as per instructions on pg 9.

See Figure 12 for an example of an Alto record. The layout is similar for Issue, Renew and Discharge screens.
Issue -Alto

Issue -Alto –Main Lending

3 PCs at the Issue Desk have an RFID bibliotheca pad attached to issue books and to unsecure RFID tags which are on inside of the back cover of all books or on the centre of DVDs.

To Issue an item

- The Bibliotheca RFID tool should be open but if not, click on the ‘Bibliotheca RFID’ icon from PC desktop
- Select check-out option (bottom) - highlighted in green for issue(open door image)
- On Alto, select **Circulation menu → Issue**
- Scan the Borrower ID card,
- The borrower’s details are displayed- Name, Type…
- Place the item on the pad (1 book at a time)-this will issue the item and unsecure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- An exception pop-up box may be displayed for a number of reasons (fine owed, overdue book, account message). Read the message and deal with as required, continue **F9** to proceed.
- The book is issued and the RFID status changes to unsecured-an open padlock at bottom of the Bibliotheca box indicates that the book is unsecured (alarm will not go off)
- The main grid area on Alto is updated to show details of the item issued and the due date
- Repeat above to continue issuing other items to the selected borrower
- The total number of loans issued and the type of loans that they are allowed
- Stamp with the appropriate date stamp
- Verify that screen dates match the date on label

**Total Loans** -Number of items currently on loan measured against the maximum number of loans that the borrower is permitted

**Type Loans**- shows how many items (of the current loan type) the borrower has on loan and the number of loans of this type that they are allowed

To issue items to a different borrower, clear the screen and scan the new borrower’s barcode or click on the button **F3** and proceed as above

See **Figure 12** for an example of an Alto record. The layout is similar for Issue, Renew and Discharge screens.
The borrower’s loan and other details can be accessed from these tabs.

Any items issued, renewed or discharged are shown here.

Information about the borrower & loan details is displayed here.

Padlock will open when item is issued/unsecured.

Select bottom (green) to issue item.

Manual due dates date can be specified here.

Navigation buttons provide shortcuts to Issue, Renew and discharge forms.

Figure 12 Alto Issue Screen
**Manual Issue Due Date**

If an item needs to be issued to a specific due date such as an inter-library loan, a manual due date can be set up to override the system date:

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the Bibliotheca icon.
- Select check-out option (bottom) - highlighted in green for issue(open door image).
- Select **Circulation menu → Issue**
- Scan the Borrower barcode.
- Click on the button **Due Date** or press the **F12** function key on the keyboard.
- Input required date and time
- **F9** or click the Continue button.
- Place the item on the pad (1 book at a time) **or** scan the item barcode in the Item field.
- An exception box warns ‘Please confirm that you wish to issue to manual due date…’ (see figure 13) - select Yes.
- The main grid area is now updated to show details of the item issued to the borrower, including the manual due date.
- The date supplied in the manual due date field will apply to all items issued for this borrower until this field is cleared.
- To revert to system due date, click on Due Date button again and then click the clear button.

*See Figure 13 for screen details.*

**Figure 13 Manual Date Screen**
Exception Box/Errors

Exception boxes may arise when an item is being issued to a borrower

**Borrower is blocked** - unable to borrow due to fines or overdue items

**Banned from Borrowing** - unable to borrow due to fines, overdue loans or Finance office block-fees not paid

**Overdue loan** - Overdue items block a borrower’s account. Do not issue further items to account until overdue item is brought back or else renew the item if there are no reservations on it. Items can be held on the daily hold shelf for 1 day until overdue item is returned. These items must be dated and staff initial put on slip.

**Reserved Item** - The item is reserved by another user and was shelved in error instead of being held on the Reservation shelf. In this case, advise that the item cannot be borrowed at this time as it is reserved by someone else. The book can be reserved for this person so that it will pass on when the item is returned to the Library or if it is not collected from the reservation shelf after 3 days.

**Dates don’t match** - Issue date does not correspond to the expected date for the type of book. Go to circulation then, item and check that the shelf mark and item type match. If they do not match, check label and tag on book to check what type it should be and amend either field if you are sure what it should be. If system shows that item should be a particular type but label shows a different type, just change label. If unsure, check with someone from the CSA

**Item Not Loanable** - Check status of item, if on display, lost, item paid, mending, store room or withdrawn (see instructions for changing status)

**Error re RFID tag** - The RFID tag may not read or have an error and may need to be reprogrammed using the Bibliotheca Conversion tool (see instruction on pg 9)

![Figure 14 Borrower Exception messages]

Various exception examples
Discharge-Alto

Borrowers should use the Self-Service points for returning items unless an item is reserved. Request borrowers to use the Self-Service points if they come to the Issue Desk. Always ask if assistance is required and show the borrower how to use the Self-Service if necessary. However, if a borrower prefers not to use the Self-Service, they can return items to the Issue Desk.

Cregan Items

Cregan items can be returned to the O’Reilly library and vice versa but cannot be returned using the Self-Service and must be returned to the Issue Desk. This is because items need to be changed on Alto to ‘In Transit’ to ensure that they are returned to the correct home site. Once this is done, the ‘In Transit’ status will be displayed as an exception box on the item record in Alto and also on the public library catalogue. Upon return to the home site, the ‘In Transit’ status must be removed by library staff.

Reservations

A reserved item cannot be discharged at the Self-Service points. An error message will pop up in red exception box advising that book must be brought to the Issue Desk.

Item Discharged in Error

If an item is discharged in error, it can be undischarged by using the Issue Desk Supervisor’s login which restores the item to the borrower if necessary as in the case of reservation errors. (See details in the reservation section further on).
Discharge Items-(O’Reilly Items)

3 PCs at the Issue Desk have an RFID bibliotheca pad attached to return books and to secure RFID tags which are on inside of the back cover of all books or on the centre of DVDs.

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the ‘Bibliotheca RFID’ icon on the PC desktop
- Select ‘Check-in’ option (top) - highlighted in blue –Bookshelf
- An ID card is not required for discharging items
- On Alto, select Circulation menu → Discharge
- Place the item on the pad (1 book at a time)-this will discharge the item and secure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- The borrower’s details are displayed in the Borrower information section of the form
- An exception pop-up box may be displayed for a number of reasons (E.g. fine owed, overdue book, account message etc.). Read message and deal with as required, continue F9 to accept this and proceed with discharge.
- Alto is updated to show details of discharged item
- Continue to discharge further items as above.
- Put the item on relevant trolley for shelving- separate trolley for 1st and 2nd floor

See Figure 15 below for Discharge screen example

Please Note!

Borrowers should be encouraged to use the Self service points for returning books except for reservations

![Figure 15](image.png)

**Figure 15** Discharge screen
Discharge Reservation- (O’Reilly Items)

A reserved item cannot be discharged at the Self-Service and must be brought to the Issue Desk. An error message will pop up at the Self service advising user to bring reserved items to the Issue Desk

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the ‘Bibliotheca RFID’ icon on the PC desktop
- Select ‘Check-in’ option (top) - highlighted in blue – Bookshelf
- On Alto, select Circulation → Discharge or F5
- Place the item on the pad (1 book at a time)-this will discharge the item and secure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- Click on the Queue-F5 button to see the list of reserves – write the top name – waiting collection on a blue reservation slip (Surname, First name), along with the date and your initials, and place inside book.
- Click the Continue button-F9 twice to confirm the reservation.
- Shelve the book alphabetically by surname on the Reservation Shelf behind the Issue Desk

See Figure 16 below for reservation screen details
Discharge - Cregan Items

Cregan library items can be returned to the O’Reilly library and vice versa but cannot be returned using the Self service and must be returned to the Issue Desk. This is because items need to be changed on Alto to ‘In Transit’ to ensure that they are returned to the correct home site. Once this is done, the ‘In Transit’ status will be displayed as an exception box on the item record in Alto and also on the public library catalogue. Upon return to the home site, the ‘In Transit’ status must be removed by library staff.

To discharge and change an item’s status to “In Transit”, complete the following steps:

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the ‘Bibliotheca RFID’ icon on the PC desktop
- Select ‘Check-in’ option (top) - highlighted in blue – Bookshelf
- On Alto, select **Circulation → Discharge** or **F5**
- Place the item on the pad (1 book at a time) - this will discharge the item and secure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- An exception box will display ‘Home Site is Cregan’ if the item is not from O’Reilly library
- Select Transit **F2** to put ‘In Transit’, Exception box changes to Action= ‘In Transit’
- Select Continue **F9** to discharge for normal books or Quit **F12** for books with reservations (see reservation instructions on pg 25). (If **F12** is selected, the item is not discharged).
- Leave the item in the transit service crate at the back of the reservation shelf. ‘In Transit’ books will be collected between 6pm and 8pm Monday to Thursday, no collection on Friday and collected around 12 noon on Saturday for return to their home library.
- Take payment for fines owed if required

See **Figure 16** below for screen details
Discharge - Reservations - Cregan Items

For Cregan library items returned to the Issue Desk with reservations, change status to ‘In Transit’ and **F12** to quit but **do not F9 to discharge**. (If a reservation is discharged using **F9**, an email will be sent overnight to collect the book but the book may be missing for the borrower from the reservation shelf due to the delay with books being returned from the Cregan library. The item will also be missing for the person dealing with the reservation notices in the morning). Place the orange reservation bookmark in the book with a date included in case fines need to be waived, to identify it as a reservation and leave in the transit crate. If a reserved item is fully discharged in error, it can be **un-discharged using the Issue Desk supervisor’s login**.

- On Alto, select **Circulation → Discharge or F5**
- Scan the item barcode into the discharge field
- An exception box will display ‘Home Site is Cregan’ if the book is not from the O’Reilly library
- Select Transit **F2**, Exception box changes to Action= ‘In Transit’
- Select Quit **F12** to finish (**do not discharge-F9**)
- Place the orange reservation bookmark inside the book
- Leave the item in the transit service crate at the back of the reservation shelf. ‘In Transit’ books will be collected between 6pm and 8pm Monday to Thursday, no collection on Friday and collected around 12 noon on Saturday for return to their home library.

See **Figure 17** below for screen details

![Figure 17 Reservation in Transit](image)
Discharge- Brief Instructions Cregan Items

- On Alto, select **Circulation → Discharge** or **F5** and discharge item as normal
- Select Transit **F2** to put ‘In Transit’
- **F9** to discharge for normal books or Quit **F12** for books with reservations
- Put orange coloured slip with date in the book if reserved
- Leave the item in the transit crate at the back of the reservation shelf
- See instructions above with screen shots etc. for full details
**‘In Transit’-Remove**

When an O’Reilly library item is returned to the Cregan library, it is discharged and changed to ‘In Transit’ except for reservations which are not discharged but are changed to ‘In Transit’ only. When the item is received back at its home site, the ‘In Transit’ status must be removed.

- On Alto, select **Circulation → Item**
- Select ‘Check-in’ option (top) on the ‘Biblotheca RFID’ tool - highlighted in blue – Bookshelf
- Place the item on the pad (1 book at a time)-this will secure the RFID tag and open the item record. Alternatively, scan the item barcode in the Item field.
- Select **F2 ‘Untransit’**
- **F9** to save for all items including reservations

**If an item is reserved**, discharge and satisfy the reservation as normal upon return to home site. Reservations will have a coloured reservation slip with date returned and will be highlighted ‘Item is reserved’ when removing the ‘In Transit’ status. Waive fines on reserved items if due to a delay in the item being returned from the Cregan library (see date on slip).

See **Figure 18** for removing ‘in transit’

If an item in transit is returned to it’s home site and the ‘In Transit’ status is not taken off in error, a message ‘item is in transit to this site, do you wish to check in and issue’ pops up when the item is being issued. Select “yes” to issue if you are satisfied that this is an O’Reilly library item.

See **(Figure 19)** for error message

![Exception box indicates ‘In Transit’ and home site- Cregan]

*Figure 18* Remove In transit
Figure 19  In Transit error

Select yes to issue if ‘in transit not removed’
‘In Transit’-Item Record

When a library item is ‘In Transit’, an exception box pops up indicating ‘In Transit’ and the home site of the item – Cregan and the item record indicates ‘In Transit’. (See figure 20 below.) The home library catalogue shows the item as ‘In Transit’. (See figure 21 below).

Figure 20  Item Record-In Transit

Figure 21  Item Record-Library catalogue
Un-Discharge Item

Items that were discharged in error can be un-discharged, for instance when a reserved book is discharged by mistake. This can only be done using the Issue Desk Supervisor’s login and not under the general login.

- Login to Alto using the Issue Desk supervisor’s login
- Click the Go to Un-discharge button
- Enter the barcode of the item to un-discharge
- The main grid area is updated with the details of the un-discharged item
- The discharged item will return to its previous ‘on loan’ condition
- The Action column is updated to read 'Un-discharged'

Discharge ‘Query Items’

Items with status ‘query item’ can only be discharged under the Issue Desk supervisor’s login

If an item is discharged with an associated item query, the following message will be displayed:

‘Undischarged – loan and item query have been reinstated’

If the loan was reserved the following message is displayed:

‘Undischarged – loan to reservation shelf and item query has been reinstated’

Login to Alto using the Issue Desk supervisor’s login and discharge the item.

There will always be messages on the Query items from a library staff member so please pass the items to the person concerned.

Set Discharge Date

A different discharge date can be set but this feature is not usually used at the Issue Desk and this procedure should only be carried out after discussion with the Issue Desk Supervisor

- From the Circulation → Discharge
- Click the Due Date button or press the F12 function key on your keyboard
- The Discharge Date pop-up form is displayed.
- Select the required discharge date and if required, amend the Due Time.
- Click Continue to return to the Discharge form.
- Discharge as normal by placing the item on the pad or scanning the item barcode.
- The main grid area is updated to show details of the discharged item.
- The borrower's details are displayed in the Borrower Information section of the form.
- If a fine is payable by a borrower for the item being returned, details are displayed automatically in the Accumulator fields at the bottom of the screen.
- Continue to discharge items by scanning valid item barcodes
- This date is applied to all items discharged until the field is cleared
- To revert to the automatic discharge date, clear the Manual Discharge Date field
Renewals

Main lending books can be renewed 3 times if

- There are no overdue items on the account
- The renewal limit of 3 times has not been reached on an item
- There are no reservations on the item

**Short loan items** cannot be renewed and there is a 20 minute delay to ensure that the same student cannot return a short loan item and then borrow it again straight away. Another copy of the same item can be borrowed straight away if available.

**DVDs** cannot be renewed but can be returned and reborrowed straight away.

**Reserved Items**- If an item is reserved by another patron, it will not renew with an error message being displayed indicating that item is not renewable due to an active reservation

**Renewal Methods**

Books can be renewed by borrowers in a number of ways

- Using Borrower ID and Pin through ‘My Account’ on the Library web page. Log in with student/ staff number and library PIN. Then click on the “Renew” button beside the books to be renewed
- Use the Self-service points
- At the Issue Desk, items renewed on Alto
- Telephone the Issue Desk at 01 7005041 , items renewed on Alto
- Email renewal request to issuedesk@dcu.ie

**Item renewed 3 times**

If an item has been renewed 3 times already, it cannot be renewed online or at the Self service. However, the borrower can return main lending items using the Self service and issue back to themselves straightaway.

**Overdue Books**

If loans are overdue, they can be returned at the Self Service points in the library and they can then be re-borrowed straightaway provided there is not a fine on the account more than €10.

**Please Note!**

Borrowers should always be encouraged to use the Self-Service points or online renewals for renewing items. Library Pin and information leaflet should be given to the borrower and the process explained.
Renew – Alto

- From **Circulation** menu → **Borrower** and loans
  
  Or

- From **Circulation** menu → **Renew**, Scan ID card or type in barcode number (The full 13 digit barcode is required in the renew screen and not just the 8 digit student number)

- Item loan listing and borrower information are displayed

- If all items are to be renewed, click **Select all F2** or if specified items only are to be renewed, click in tick box to left of each relevant title

- A tick mark now indicates which items have been selected for renewal.

- Click **Renew F7** for renewal where items are present or Click **Unseen F8** for telephone renewals

- A warning box will be shown where an item cannot be renewed – reservation, short loan item etc.

- Overdue items are highlighted in exception box- click on **Continue F9** to continue with renewal or **Quit F12** if renewal is to be abandoned

- The due date for each item renewed changes and may be different for each item(1 week/3 week)

- Inform the borrower if this renewal is their 3rd as it cannot be renewed again and the item will need to be returned by this new due date. However, it can be returned and re-borrowed at the Self-service and then renewed 3 times again.

**Please Note!**

For renewals at the Issue Desk, use the renew function, do not discharge and reissue as the system shows item being borrowed for the 1st time instead of it being 2nd/3rd renewal.

**Figure 21** Renewal screen
Renew using the item barcode

A single item can be renewed by scanning or typing the item barcode into the renew field.

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the ‘Bibliotheca RFID’ icon on the PC desktop
- Select check-out option (bottom) - highlighted in green for issue(open door image)
- An ID card is not required to renew using item
- From **Circulation → Renew or F4**
- Place the item on the pad (1 book at a time)-this will renew the item and unsecure the RFID tag. (Alternatively, scan or type in item barcode in the Item field and then place item on the pad).
- Item will be renewed and new due date is shown
- Click **F9 = Accept**.

If an item is reserved by another patron, it will not renew with an error message being displayed indicating that item is not renewable due to an active reservation

Inform the borrower if this renewal is their 3rd as it cannot be renewed again and will need to be returned by this new due date. However, it can be returned and re-borrowed at the Self service and then renewed 3 times again.
Renew – Library Catalogue

Students/staff/alumni or visitor borrowers can renew through ‘My Account’ on the library website.

- Click on ‘My Account’
- Enter Borrower and library PIN
- Select ‘Renew All’ if all items are to be renewed or select individual items if only some items are being renewed
- Status of renewed items changes to ‘renewed’ with new due date

See Figure 22 for renewal on-line.

![Renew Online through My Account](image)

Figure 22 Renew OnLine through My Account
Borrower Details

Key information is displayed in the borrower record- the Surname, Forenames, Title, Barcode, Type, Expiry date, PIN, address

Finance details, reservation details, messages, loan history and finance history are also accessible here

Borrower Record-Scan ID card
- In Alto, click Circulation → Borrower
- Scan ID card or key student/staff number into the field

Borrower Record-Search by Name
- In Alto, click Circulation → Borrower
- Click on Borrower Search F2 to open the Borrower search box
- In name field, type in surname, first name, and then press enter or F9
- This gives a listing of all matching entries for that name
- Check address details and double click on required record to select it

Borrower Record Tabs

Click on any of the tabs in the Borrower record to display related information regarding loans, finance, messages and loan/finance history of the selected borrower

Record – all borrowers’ personal details

Loans - Click the tab to display all items currently on loan to the borrower. Double click on an item to display the loan details, due dates etc. as well as to renew items

Loan Count - number of loans and limits that the borrower is allowed for each Loan Type

Finance - borrower’s unpaid fines. From this tab, you can record the payment, part payment, or waiving of charges, and view charge details.

Reservations - list of the borrower's current and previous reservations, organised by Status including details of each reservation, date due back, no. in queue etc. Double click on a reservation to display the details.

Interloans - list of the borrower’s current inter-Library loan requests, including a brief description of the inter-Library loan Work, the current inter-Library loan status, the delivery site, and the date the inter-Library loan request was first placed (or when the status last changed). Double click on a row to display the inter-Lib loan details.

Messages - view, add or delete borrower messages

Loans History - list of returned loans

Finance History - view a history of fines paid/waived. Double click on amount to display the charge details

Record History- History of date of creation and last modification of Alto record
Pin

All library borrowers have a 4 digit library PIN which is generated by Alto when the account is created. PIN’s are used for reserving, renewing books, paying fines and checking borrower’s ‘My Account’ PIN’s may be given out in person, by email or by telephone. Pins are also emailed to all students a few times during the Academic year.

**Locate PIN on Alto**

Scan/Input Borrower Barcode in Borrower screen OR type name in Name field
Left Click on the Magnifier Icon(****) and Pin number will be shown

*Figure 23 Locate Pin*

**Change PIN**

The PIN can be changed by the borrower by logging on to ‘My Account’ through the Library webpage, using their borrower number and pin. Select settings to change PIN or

Alternatively, staff at the Issue Desk can overwrite the existing Pin in Alto and F9 to save

*Figure 24 Change Pin*
Details of current fines/charges are available from the Finance tab in the borrower’s record or will appear in an exception box on Alto whenever the borrower account is accessed.

Payments can be made at the Issue Desk with cash or if fine is greater than €5, it can be paid by debit/credit card through the library webpage using ‘Pay Fine’ or ‘My account’ with a borrower number and PIN.

Fines must be paid if they are more than 1 month old or greater than €10. If not, the library account is blocked and borrower is unable to borrow at the Self-Service points.

If an exception is to be made where a student is allowed to borrow outside these rules such as giving an extra month to pay a fine, place a message on their account with date fine must be paid by and advise that items cannot be borrowed on the Self service points so they must come to the Issue Desk to borrow.

Fines can be paid in either the O’Reilly or Cregan library and it does not matter where the fine was incurred.

**Fines-Payment at Issue Desk**

- **Circulation** → Scan ID card at borrower or issue screen
- A finance exception box indicates the fine amount
- Click on ‘Transaction Detail’ **F3**
- All charges are automatically selected (box ticked) so if not all fines being paid, untick the fines not being paid and **F6**
- To pay the **full amount**, leave the Pay field unaltered and click **F9** to save
- To **pay part** of fine, enter the required amount in the pay field and click **F9** to save
- The charge details are cleared and all details are now held in Finance History tab
- Any amount unpaid is held for future payment
- If a daily access card is being paid for and there are other fines on account, ensure that the access card tick box is selected and not a fine otherwise a dispute may arise as the student may be requested to pay for access card again.

See Screen Shots in Figure 25 below

**Step 1 Click on Detail F3**
Step 2 Pay Fine

All charges are automatically selected (all boxes ticked) so if not all fines being paid, untick the fines not being paid and **F6** to pay as normal.

**Figure 25 Fine Payments**
Fines- Online Payment

Fines greater than €5 can be paid online using a bank card through ‘Pay fine’ or ‘My Account’ feature on the library homepage with a borrower number and library PIN. Fines less than €5 must be paid in cash in the library where the fine was incurred.

- On the library webpage, select ‘Pay Fine’
- Enter 8-digit borrower and Library PIN into the login box
- Details of fines are shown
- Payment can be made using debit/credit cards by inserting bank details
- Click ‘Pay Now’

See *Figure 26* for screen shots for on-line payment

*Figure 26* Online Payment
Fine Waiver

A fine can be waived due to illness on production of a medical certificate, library error or at the discretion of the Issue Desk Supervisor

Waive Fine

- Scan Borrower ID card or enter ID number
- Click F9 to accept finance exception box
- Click the Finance Tab which will display a list of fines
- All check boxes for fines are automatically checked so if not all being waived currently, please uncheck fines not being waived, otherwise all charges may be cleared in error
- Select F8
- The pay/waive form is displayed
- To waive the amount in full, leave the Pay field unaltered
- A reason must be specified from the drop-down list e.g. illness or library error
- Click Save F9
- If a fine is waived, print out details, note reason for waiver and leave for Sharon who records all fine waivers

Medical Certificate

- Waive fine or amount that is covered by a medical certificate
- Print borrower details, note amount waived and reason, date and initial and leave for the person who deals with fine waivers
- Do not copy Cert or put message on account

Figure 27 Fine waiver
Add Miscellaneous Charge

A charge can be manually added to a borrower’s account such as when a fine is cleared in error or for a daily access card

- In Alto borrower tab, scan ID card or enter borrower ID number
- Click the Finance Tab
- Select F4-Add New
- Enter Amount, € sign not required.
- Enter Reason, initial and date. If for a daily access card, type your initials and scan the access card barcode. Do not scan the barcode before initials as this will close down the screen
- F9 to Save

[Figure 28] Add Miscellaneous Charge
Finance History

This is a complete list of a Borrower’s cleared fines/miscellaneous charges etc. Transactions are listed by date with the most recent at the top of list. Charges are not transferred to history until paid/waived. This facility can be used where a query arises regarding fines.

- In Alto, select borrower tab, scan ID card or enter borrower ID number
- Select Finance History Tab
- Click on the required charge
- Select F3 - Transaction Detail to get full details re fine–issue/discharge/due date and time, title, author
- Select F5 - Charge detail to get details of amount paid or waived and date/time fine paid

See Figure 29 for Finance history

Figure 29  Finance History
Messages/Exception Boxes

When an ID card is scanned or borrower number keyed in, an Exception Box may be displayed. This indicates that the borrower has messages re overdue loans, fines, reservations, home site of an item etc.

Please Note!

Always be careful to read exception boxes and deal with appropriately if required

- Messages are automatically displayed when ID card is scanned / entered from any tab
- Or Go to Circulation’ → Borrower
- Scan ID card or enter ID number
- Select Messages
- Click F3 detail to display full message
- Please read the message and take appropriate action e.g. reservations, ID card at reception desk
- F8 or remove the message if no longer relevant unless it is a Finance office message
- Press F9 or Continue to accept/ignore message

Figure 30 Message/exception Box

Message Types

Finance Office - Strictly no borrowing. Student must contact Finance Office immediately re payment of fees. Do not delete a Finance Office message unless payment can be proved

Security Breach - Student gave ID card to another student/person to gain entry to the library

Unissued Books - Student triggered the alarm with unissued book/ periodical/ 3 hour loan

Lost Student ID card - Student’s ID card is at reception

Wallet - Student’s wallet is in the safe

Miscellaneous – Message can be put on account about any issue such as cancelled reservations etc
Message- Add

- Go to Circulation → Borrower
- Scan Borrower ID card or enter ID number
- Select ‘Message’ tab
- Click F4 or Add New
- Type in message, keeping short and clear
- Initial and date message
- Inform the student that you are putting a message on their account if it relates to a security breach or if the student triggers the alarm with unissued material
- Select Save or F9

Message- Delete

- Go to Circulation → Borrower
- Scan Borrower ID card or enter ID number
- Select ‘Message’ tab or messages should appear as an exception box
- Select tick box beside the message to be removed
- Select F8 or Remove box
- F9 to save
- Security messages about leaving library with unissued books should not be deleted
- Finance Office messages should not be deleted unless you are sure that problem has been resolved. These are removed by the Finance but it can take up to 2 days for Alto to be updated when finance messages are removed from their system.
Reservations

Reservations - General Information

Reservations can be placed on any main lending item where all copies of the item are on loan. Reservations cannot be placed on Short Loan books or DVD’s.

All library users should place their own reservations through the Library catalogue with their borrower number and pin. Encourage library users to reserve books themselves by giving out PIN’s and information leaflets, and explaining the process when a reservation is requested at the desk.

The status of a reservation can be checked by the borrower on their ‘MyAccount’ option through the library website

Staff members and Research Postgraduates may place 5 reservations. All other users may place 2 but extra reservations can be placed at Issue Desk desk at the discretion of Issue Desk staff.

When a reserved item is returned, an email is automatically sent overnight to the 1st borrower on reservation queue at 3am approximately and the item shows as available on a borrower’s ‘My Account’

Reservations are held for 3 working days not including Saturdays/Sundays and Bank Holidays

If there is more than 1 reservation on a main lending book, it is issued it for 1 week only automatically

The system reserves the title of the book, and not a particular barcode so if there is more than one copy of that title, the first book to be returned will satisfy the reservation and it is not possible to specify 1 week or 3 week items specifically

Please Note!

If there is more than one reservation on a main lending book, it will issue for 1 week only automatically

Reservation- Discharge (O’Reilly Items)

A reserved item cannot be returned at the Self-Service and must be brought to the Issue Desk. An error message will pop up at the Self service advising user to bring reserved items to the Issue Desk

- The ‘Bibliotheca RFID’ tool should be open but if not, click on the ‘Bibliotheca RFID’ icon on the PC desktop
- Select ‘Check-in’ option (top) - highlighted in blue –Bookshelf
- On Alto, select Circulation → Discharge or F5
- Place the item on the pad (1 book at a time)-this will discharge the item and secure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- Click on the Queue-F5 button to see the list of reserves – write the top name –waiting collection on a blue reservation slip (Surname, First name), along with the date and your initials, and place inside book.
- Click the Continue button-F9 twice to confirm the reservation.
- Shelve the book alphabetically by surname on the Reservation Shelf at the Issue Desk

See Figure 31a below for screen details
For Cregan library items returned to the Issue Desk with reservations, change status to ‘In Transit’ and F12 to quit but **do not F9 to discharge**. (If a reservation is discharged using F9, an email will be sent overnight to collect the book but the book may be missing for the borrower from the reservation shelf due to the delay with books being returned from the Cregan library. The item will also be missing for the person dealing with the reservation notices in the morning). Place the orange reservation bookmark in the book with a date included in case fines need to be waived, to identify it as a reservation and leave in the transit crate. If a reserved item is fully discharged in error, it can be undischarged using the Issue Desk supervisor’s login.

- On Alto, select **Circulation → Discharge** or F5
- Scan the item barcode into the discharge field
- An exception box will display ‘Home Site is Cregan if not from the O’Reilly library
- Select Transit F2, Exception box changes to Action= ‘In Transit’
- Select Quit F12 to finish (**do not discharge-F9**)  
- Place the orange reservation bookmark inside the book
- Leave the item in the transit service crate at the back of the reservation shelf. ‘In Transit’ books will be collected between 6pm and 8pm Monday to Thursday, no collection on Friday and collected around 12 noon on Saturday for return to their home library.

**See Figure 31b** below for screen details
Exception box indicates ‘In Transit’ and home site - Cregan

*Figure 31b* Reservation Return - Cregan
Reservation-Issue

To Issue a Reservation

- The Bibliotheca RFID tool should be open but if not, click on the ‘Bibliotheca RFID’ icon from PC desktop
- Select check-out option (bottom) - highlighted in green for issue(open door image)
- On Alto, select **Circulation menu → Issue**
- Scan the Borrower ID card,
- The borrower's details are displayed- Name, Type…
- Accept or F9 reservation alert
- (If you click on List, a separate window opens up with full reservation history details. Details of current reservation waiting collection will be at the top of this list. To go back to previous message alert, simply close the “list” window-it is not necessary to do this)
- Get the book from the reservation shelf and place the item on the pad (1 book at a time)-this will issue the item and unsecure the RFID tag. (Alternatively, scan the item barcode in the Item field and then place item on the pad).
- Check that it is the correct item for that borrower and press **yes** to confirm
- If a 3 week book has a subsequent reservation, it will issue for 1 week only. Advise the borrower that the 3 week book is only being issued for 1 week due a subsequent reservation.
- An exception pop-up box may be displayed for a number of reasons (fine owed, overdue book, account message). Read message and deal with as required, continue F9 to proceed.
- The book is issued and the RFID status changes to unsecured-an open padlock at bottom of Bibliotheca box indicates that the book is unsecured (alarm will not go off
- An error message will be displayed if the incorrect reservation is used and it will not issue

**Please Note**

3 week books with a subsequent reservation will issue for 1 week only, so make sure to notify the borrower about this
Reservation – Place on Alto

Encourage library users to reserve books themselves by giving out pin’s and information leaflets, and explain the process when a reservation is requested. However, reservations can be placed on Alto at the Issue Desk if the borrower wishes.

If there are 3 week and 1 week copies of an item, it is not possible to specify a specific copy as the 1st copy available will be reserved.

- **Circulation → Reservation**
  - Scan borrower ID and then click on **Bib search** button
  - Search for required book by author (surname, 1st name)/title/keyword and click search-F9
  - Select on the required title and then click the Select button-F9, located at the bottom right corner of the screen. If you cannot find the correct title, click on the search button at the top of the screen to go back and refine the search
  - After selecting an item, Alto reverts to the original reservations screen. The control number of the item has been automatically entered on screen, above the borrower number field.
  - Click the Add New F4 button to create the reservation
  - Click on the Save button F9 (located at the bottom right hand corner of the screen)
  - Finally, to check that the reservation was created correctly, refresh the reservation screen. The reserved item should be listed as ‘Active’
  - When a reserved item is returned, an email is automatically sent overnight and it will be held for 3 working days on the reservation shelf at the Issue Desk. The item shows as available on the borrower’s ‘My Account’

See **Figure 32** for reservation screen details

Reservation-Place on Alto with an Individual Barcode

An individual item barcode can be reserved on Alto if required eg if an error occurs with items on the reservation shelf

- **Circulation → Reservation**
  - Scan/type in borrowers ID number
  - Scan/type barcode of item
  - Accept-F9 any message boxes and then click F4-add new button to create reservation
  - Finally, click on F9 - Save button to confirm reservation.
  - Only this particular barcode will be reserved and not all copies of the item
  - When a reserved item is returned, an email is automatically sent overnight and it will be held for 3 working days on the reservation shelf at the Issue Desk. The item also shows as available on the borrower’s ‘My Account’

See **Figure 32** for reservation screen details

**Please Note!**

Only this particular barcode will be reserved and not all copies of the item
Figure 32  Reservation Screen Details

- Scan id or type borrower number
- Type title, author or keyword
- Select title, author etc from dropdown arrow
- Click Bib search F8 to search by title/author etc
- Click search or F9
Reservation-Place Using the Library Catalogue

- Go to http://capitadiscovery.co.uk/dcu/ or library home site
- Type in the required details in the search box-title, author (surname, first name)/keyword and enter
- Select the required item and click on Reserve this item
- Enter the 8 digit borrower number and pin (available at the Issue Desk, by phone or email)
- Click Reserve. The screen then indicates that the reservations has been successfully placed
- Borrowers can follow the status of their reservations through ‘My Account’ on the library web page
- When a reserved item is returned, an email is automatically sent overnight and it will be held for 3 working days on the reservation shelf at the issue desk. The item also shows as available on the borrower’s ‘My Account’

Figure 33 Reservation through catalogue
Reservation Queries

To view a list of a borrower’s reservations or query reservation details, always use the Reservation menu from Circulation rather than Reservation from the Borrower record. Both look very similar but not all reservation details are available from the Borrower record.

Reservation- Check Status

If the status of a reservation needs to be checked

- Circulation → Reservation (not Borrower tab and reservation)
- Scan/key in borrower number or click Borrower search to locate student by name
- Borrower’s reservation (including all previous reservation details) are listed and status of the reservation is shown –active, waiting collection, cancelled, collected, uncollected

Figure 34 Reservation Status

Reservation Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>Item is reserved but is still on loan to another borrower</td>
</tr>
<tr>
<td>Waiting Collection</td>
<td>Reserved item has been returned and is waiting collection at the Issue Desk on the Reservation Shelf where it will be held for 3 working days (not including Saturday/Sunday or Bank Holiday)</td>
</tr>
<tr>
<td>Collected</td>
<td>Item is no longer on the reservation shelf as it was collected by reserver and issued to their account</td>
</tr>
<tr>
<td>Uncollected</td>
<td>The 3 day period has elapsed and the book has either moved on to the next reserver, or has been re-shelved</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Reservation was cancelled</td>
</tr>
</tbody>
</table>
Reservation Screen Example

Figure 35 Reservation Screen Details

- Click magnifying glass to check position in queue
- Click magnifying glass to check due date/copies
- Change to 1 to move to top of queue
- Click F6 to cancel reservation
Reservation-Cancellations

Encourage library users to cancel reservations themselves by logging into their ‘My Account’ with their borrower and PIN and cancelling the reservation online.

Reservations can also be cancelled on Alto as follows

For Active Reservations (item not yet returned)

- **Circulation → Reservation**
- Scan/type in ID number or click Borrower Search button to locate reserver by name
- Borrower’s reservation screen appears with a complete list of current/previous reservations
- Double click on the active reservation you wish to cancel
- A new screen will be shown with borrower and book details
- To cancel the reservation, click on F6-cancel button, located at bottom right hand corner
- F9- Save to ensure that the status will now change to ‘Cancelled’
- When you exit this screen, the status of this reservation on the reservation list will still show up as ‘Active’. The screen needs to be refreshed or if you exit and then go back in, the status will have been updated to “cancelled.”
- Cancelled reservations are always found at the bottom of the reservation list on Alto

See **Figure 35** above for screen details

For Reservations ‘waiting collection’, item on reservation shelf

If a borrower says the item is no longer required in person or through the Issue Desk email account, issue the item to the borrower’s account and then discharge it straightaway. Do not take the book off the reservation shelf and discharge it.

Reservation -Query Due Date

- **Circulation → Reservation**
- Scan/key in borrower number or click Borrower search to locate student by name
- Borrower’s reservation are listed
- Double click on the required reservation
- Click on the magnifying glass symbol at right of the ‘**items reserved**’ screen.
- This shows item barcodes and due dates of active reservations

See **Figure 35** above for screen details
Reservation-Query Position in Queue

- **Circulation → Reservation**
- Scan/key in Borrower’s ID number or click Borrower search to locate student by name
- Borrower’s reservations are listed
- Double click on the required reservation
- Click on the magnifying glass symbol at right of the ‘**works reserved**’ field.
- Click on the view queue button or **F5**
  - A list of all borrowers who have reserved this item is shown, with the top name getting the next available copy

See *Figure 35* above for screen details

Reservation-Change to Top in Queue

- **Circulation → Reservation**
- Scan/key in Borrower’s ID number or click Borrower search to locate student by name
- Borrower’s reservation screen appears
- Double click on the required reservation
- At the priority field (bottom right hand corner), overwrite the number 5 with 1 to change this reserver to top of the reservation queue
- Alternatively, change the number in this field to 5, to move the reserver to the bottom of the queue
- Click **F9** - save to confirm the change
- To check the new updated queue list, click on ‘work reservations’

See *Figure 35* above for screen details

Reservation – Discharged in Error

If a reserved item is discharged from the reservation shelf in error, it can be undischarged by using the Issue Desk Supervisor’s login which restores the item to the reservation shelf.

If this does not work or the Issue Desk supervisor is not available

- Issue the book temporarily to the Issue Desk borrower account (or any staff member’s account)
- Reserve it for the required borrower
- Change this reserver to the top of the queue if required (see previous instructions)
- Discharge the book and satisfy the reservation as normal.
Reservation Error Messages

Reservations may only be placed on main lending items of which all copies are on loan. The following are some error messages that may occur.

There are no reservable items for this works – no items can be reserved e.g. there are some items not on loan, or item is short loan.

Invalid barcode if a barcode has been entered for reservation, there is no such barcode.

It is not possible to reserve periodicals by Title – title selected is a periodical and can’t be reserved.

Already has loan - Borrower already has this item on loan. If a student has a 48 hour copy of reservation, the student cannot reserve book themselves so reservation needs to be placed at Issue Desk. Click on the continue button to ignore this warning and proceed with reservation.

Work(s) already reserved by borrower - 2nd or subsequent reservation of same item.

Reservation Limit Reserved limit count - Borrower has already reached their reservation limit - 2 reservations for students and 5 for staff. This can be overridden by clicking continue if a further reservation is required.
Loan History

Alto
Details of all items ever borrowed are listed in the Loan History of the borrower but not current loans. This can be used to check if a student ever borrowed a particular item or borrower may need to reference these details in their assignments and may not have kept full details at the time.

- **Circulation → Borrower**
- Scan Borrower ID/key Student number
- Select Loan History-This lists all discharged items sorted by latest date at the top
- Double click on required item for loan details –full title, author, issue/discharge/due date and time, item type, shelf mark, fines
- Click the navigation buttons at top of screen to go to next record without having to revert back to main list
  - Click ► for next record
  - Click ◄ for previous record
  - Click ► for to go to the last record
  - Click ◄ to go to the first record

My Account
Students can also access this information by logging on to ‘My Account’ through the Library webpage using their borrower number and pin and selecting ‘loan history’

Borrower Information Screen

![Figure 36 Loan History]
Recalls

Please Note!

These procedures should normally only be carried out by Julie Whyte but can be done in her absence in an urgent case.

For all recall requests, ensure that the borrower has placed a reservation on the item and print out details of the required item, initial and date and leave details for Julie to recall.

An item can be recalled if:

- there is only 1 copy of the item and it is issued to the semester due date
- If there is more than one copy of the item but all copies are issued to the semester due date
- When a library staff member requests that an item is recalled for library purposes (e.g. collection change in response to a lecturer’s request or a large reservation queue).

Before an item can be recalled, the person who has borrowed it must have it on loan for at least 3 weeks.

The person who requires the item must place a reservation on it.

Items cannot be recalled if there is one week or short loan copies available.

An overdue item will not be recalled, as the borrower will have received an overdue notice requesting return of the item.

Please Note!

Ensure that the borrower has placed a reservation on the item.

Procedures for Recalling Items

- **Circulation → Item**
  - Type in the item number
  - Check History to see how long it has been borrowed for by the present borrower. If it has been on loan for more than three weeks, recall it immediately giving 7 more working days not including Saturdays, Sundays and Bank Holidays. If it has been on loan for 2 weeks, a new due date should be set for another 7 working days (not counting Saturdays, Sundays or Bank Holidays).
  - **Circulation → Reservation → Insert Barcode → Return button**
  - The name of the person who has it reserved should come up
  - Double click and details of the reservation placed will appear
  - Go to Items Reserved and click on the magnifying glass
  - Reserved Items and Barcode will appear
  - Click on the box to the left of the barcode and click on Recall Item F7 (Recalled Yes will appear on the extreme right hand corner)
  - Click on X and then click on Save F9 button
- **Circulation → Renew → Due Date** (for existing borrower) and insert a new due date, 7 working days (not including Saturdays Sundays or Bank Holidays) from the next day after the day you are recalling item

- Insert Barcode

- Hit Return Button

- A message appears ‘Please confirm that you wish to renew this item to a manual due date: (eg.03/06/2016) 23:59:00

- Click **Yes**

- A message appears ‘? Item is normally not available for loan. Do you wish to Renew?

- Click **Yes**

- Exception Box appears

- Item is reserved 1

- Recalled Loans 1

- Click Continue **F9**

- Item barcode and description and new due date appears and Action is Renewed

- If you click on Loans you will see YES under Recalled

- The person who has borrowed the item will now get an email advising that it has been recalled and asking them to return it by this new due date.

*See Figure 37 below for Screen shots for Recall*
Figure 37 Recall screen shots and messages
The item record indicates information such as:

- Home site of the item O’Reilly library or Cregan library
- Item type - short loan, main lending etc.,
- Shelf Mark
- Status - in stock, mending, store room, lost etc.
- Wants note - at bottom of screen. Messages re mending/binding etc. can be inserted here
- Record Tabs

**Record** - displays shelf mark, item type, status etc of the item

**Loan History** - displays all transactions in the item's history

**Reservations** - indicates current reservations and status

**Messages** - to view, add and delete item messages regarding the item

**Work Bookings** - not used

**History** - details about when record created

**Satisfied Reservations** - previous reservations

---

**To View Item Record**

- **Circulation → Item**
- Scan/key barcode of item into the item barcode box
- Click on any of the record tabs to display related information

**See Figure 38 for Screen Shot of Item Record**

---

**Figure 38** Item Record History
‘In Transit’-Item Record

When a library item is ‘In Transit’-being transported between libraries, an exception box pops up indicating ‘In Transit’ and the home site of item –Cregan or OReilly. The status on the item record indicates ‘In Transit’. The library catalogue also shows the item as ‘In Transit’.

See Figure 39.

Screen Shot Item Record

Screen Shot -Catalogue in Transit

Figure 39 In Transit
Item Status

The status of all items available for loan should be ‘In stock’. There are occasions when the item status of a book needs to be changed such as changing an item into ‘mending’ when it is damaged, or if an item is lost, cancelled, withdrawn, paid for or when changing back to ‘in stock’ when a problem with an item is rectified.

Items which do not have a status of ‘In Stock’ cannot be issued.

There are different procedures that must be used for changing different categories of status. See below for full details.

Mending

Items that have to go to CSA for mending no longer have their status changed. CSA have introduced new procedures for items that require mending - they have now set up a mending borrower account (66661259) and this should make things simpler as no item changes are required.

When an item requires mending:

- Place yellow mending slip inside the book indicating the problem
- Please fill in the yellow mending slip as normal
- Issue the item to the ‘Mending’ account (66661259) on Alto (no item changes are required on the item record).
- If the barcode of the item is missing, it can still be issued using the RFID pad
- All mending items should be left on the mending shelf at the Issue Desk where CSA staff will collect as required
- A label with the mending borrower number is attached to the pamphlet holder containing the yellow mending slips at the Issue Desk for convenience

Lost/Withdrawn/Item Paid /Cancelled/Deleted

Sometimes an item whose status was previously changed to lost, withdrawn, item paid, cancelled or deleted turns up in the library. These items cannot be issued straight away. Ask Mary McDonnell/Julie Whyte to change the status. If Mary/Julie are not available, bring the item to David Power/ Mary Kiely/Claire Mason to have status changed.

If it is not possible to have the item status changed immediately

- Apologise to the student for the inconvenience and advise them that they will be notified by email when the item can be collected
- Printout out the item record and leave it along with the book for Mary McDonnell or Julie Whyte who will change the status and its relevant catalogue record. If Mary/Julie are not available, bring the item to David Power/ Mary Kiely/Claire Mason to have status changed.
- Note the students number and name on printout
- The student will be notified when the item status has been changed
- The item will be left on the daily hold shelf for collection for 1 week in the student’s name
Query

Items with status of query-QUER should be dealt with by the Issue Desk Supervisor. This usually regers to missing items.

Short Loan Items- Change Status

Short loan items with collection maintenance (attached to reading lists) cannot have their status changed using the Circulation menu. An error message will appear at the drop down box. Please pass the item to Mary McDonnell/ Julie Whyte to change status with details of change required. If Mary or Julie are not available, the status can be changed by David Power or Mary Kiely/Claire Mason.

If there is no collection maintenance, short loan items can be changed as normal through the circulation, item menus.
The library catalogue contains details of availability of all material held in DCU- books, periodicals, reference items, DVDs, thesis etc.

It also indicates Shelf Mark, location, item type (main lending, short loan, reference), the number of copies of each type, and due date for return of items on loan.

Students can search for items on the catalogue on dedicated terminals in the library or via the library homepage from laptops, phones etc or they can use the search box from the Library home page. If they have queries about searching for items, they should be encouraged to search the Catalogue themselves or directed to the Information Desk.

Use this link to access the DCU library catalogue [http://capitadiscovery.co.uk/dcu/](http://capitadiscovery.co.uk/dcu/)

*Figure 40* Search for books
A bibliographic search can also be done which provides details of all items on the DCU catalogue from Alto:

- From Alto, select **Other → Bibliographic Search**
- In ‘Search Criteria’ enter details such as title, author or keyword
- Select from drop down arrow as required. e.g. author (surname, first name)
- Select F9 search or enter
- Scroll down to required title and enter for full details

*Figure 41* Bibliographic search-Alto
The Library provides electronic access to over 8,000 e-books (access via library catalogue). They are accessible from the library catalogue.

Publishers and copyright owners determine how much of any particular document can be downloaded, copied or printed and download duration. These details are available when e-book is accessed.

**Figure 42 e-books**

1. Click on the book’s title from the search results page
2. Click on Access this title online here.
3. Enter the DCU login details when prompted. This is the network username / password for accessing Moodle, logging on to DCU PCs etc., not library login/PIN.
System Problems

If ANY issues occur with Alto, PCs or any other system problems at the Issue Desk, please do not contact the library systems department (LibSys) individually.

All issues must be reported to Marie Doyle who will contact the library systems department herself. In her absence, please report any issue to Julie Whyte.

On Saturdays and late nights, report any issues to Marie and Julie via email who will contact the library systems department on their return unless the problem is urgent

If it is an emergency (i.e. when the network is down) and no library systems are available (Saturday/late night), contact the ISS Helpdesk - 5187

Manual Issue - Alto Not Working

Issue Desk

If Alto stops working, items can be returned and borrowed at the Issue Desk

If the Self service is out of order, an out of order sign is displayed at the self Service points directing all borrowers to the Issue Desk

Record all items borrowed on manual issue sheets with details as per below and clearly note name, borrower number, item barcode number and due date on manual issue form. Forms are located on the shelves behind the Issue Desk and must be filled in clearly

For items to be discharged, set up trolleys for short loan and main lending returns (laminated signs for trolleys are in the manual issue box on Issue Desk shelves)

Sensitise all books returned by borrowers before placing them on trolleys

Items returned such as short loan books cannot be handed out from the trolleys

When Alto is restored, issue the items from the manual issue sheets first- all items on these sheets must be issued before items on the trolleys are discharged

Check that the return date on Alto is similar to that printed on the sheet. If not, set a manual due date on Alto to match the date on the sheet. (Short loan times do not have to be changed, as the borrower will have an earlier time than that on the system).

Where renewals have been requested, inform the borrower that if there is any problem when we renew on the System they will be emailed. (e.g. A book they want to renew may be on reserve

When all items have been issued, items on the trolleys should be discharged using Alto and not the Self service as fines may have to be waived.

Waive fines incurred due to any delay in return, usually mainly short loan fines

<table>
<thead>
<tr>
<th>First Name</th>
<th>Surname</th>
<th>ID Number</th>
<th>Item Barcode</th>
<th>Due date &amp; Time</th>
<th>Renew-Tick</th>
<th>Comment</th>
</tr>
</thead>
</table>

Please Note!

Do not discharge any material until everything has been issued onto the system from the manual sheets
Reception Desk- Alto Not Working

Check student photo on the classlist and buzz in

Do not charge for daily access cards

Close down member enquiries and system activity windows in Sentry if ID cards are being refused at the access gates until Alto is back up and running

See the reception desk manual for full details about Sentry
ALTO Assure

Please Note!

These procedures should only be carried out after discussion with Issue desk supervisor or when pre-arranged that system will be down for some time

Alto Assure is a backup system that allows items to be issued and discharged in the event of Alto becoming unavailable such as during upgrades or year end.

Once Assure is started, any issue and discharge transactions made at an individual PC are stored offline on that PC only.

Only Issue and Discharge transactions can be performed. There is no facility for renewals, fine payments or reservations.

Once the server is available again, Alto Assure will automatically prompt you to upload offline transactions to the main Alto server. Alternatively, you can manually upload the offline transactions.

If Alto stops working, you are automatically prompted to start Alto Assure.

From your Windows desktop, double click on the Alto Assure icon OR From the Windows Start menu select Programs | Alto | Assure | Assure.

Alto ASSURE- Issue Items

- The Alto Assure graphic is displayed and you are prompted to log on to Alto Assure.
- Log on by entering your User ID.
- Select your current site from the Location drop-down button.
- Click the OK button.
- All items will be issued with your pc’s defined due date and time so if this is incorrect, items may issue till incorrect date/time.
- From the main Alto Assure toolbar, click the Issue button.
- If the main toolbar is not displayed, you can access the Issue button from the Circulation menu.
- Scan or type Borrower barcodes the field
- If valid, the borrower's barcode is shown in the Current Borrower field.
- Note that the Details section of the screen now contains an Item field.
- Scan in an item barcode (or enter one in the Item field).
- A list of current issues appears in the main window, the latest item to be issued appearing at the top. The main Issue Transactions area is updated to show the details of the item issued. This includes the Borrower and Item barcodes, the Action performed (in this case Issue), and the Date/Time (which will act as the issue date).
- In addition, the Log screen is updated with the transaction details.
- To issuing items to the current borrower, enter another valid item barcode
- The issue details are added to the screen

Please Note!
The issue desk screen must be refreshed before issuing to a new borrower as otherwise, the next borrower barcode scanned may be treated as an item and issued to the first borrower, as well as subsequent items.

- To issue items to a different borrower, click the Issue button again.
- The Borrower field is re-displayed, ready for the next borrower to be inserted.
- Note that the list of issued items is cleared from the Issue Transactions area when you move from the Issue screen. However, issued items will remain in the Log screen (for the duration of the Alto Assure session).

![Image of Alto Assure interface](image)

Figure 43 Alto Assure
**ALTO Assure - Discharge Items**

In general, items are not discharged on Alto Assure but are held on a trolley till system returns.

You can use the discharge screen to discharge items returned by borrowers. The discharge date will be the actual date.

- From the main Alto Assure toolbar, click the Discharge button or you can also access the Discharge button from the Circulation menu.
  
  Scan in an item barcode (or enter one in the Item field).

- The main Discharge Transactions area is updated to show the details of the item discharged. This includes the Item barcodes, the Action performed (in this case Discharge), and the Date/Time (which will act as the discharge date). In addition, the Log screen is updated with the discharge details.

- To continue discharging items enter another valid item barcode.

- The discharge details are added to the screen.

- The list of discharged items is cleared from the Discharge Transactions area when you move from the Discharge screen. However, discharged items will remain in the log.

- If the connection to the database has been restored, then a dialog box asks if you want to upload offline transactions:

**Alto Assure – View the Transaction log**

- From the main Alto Assure toolbar, click the Log button.

- The log screen is divided into two areas. The top area displays statistics for the current Alto Assure session, which comprise:

  - A Transaction Summary, listing the number of issues, discharges and transactions (i.e. issues + discharges) made since the last upload.

  - An Upload Summary, listing the number of successfully restored issues, discharges and transactions (i.e. restored issues + transitions) for the current Alto Assure session.

  - An Error Summary, listing the number of issue errors, discharge errors and transaction errors (i.e. issue + discharge errors) for the current Alto Assure session.

- The lower area displays details about all the transactions, with each row representing either an issue or a discharge. Each row displays:

  - The Action (being either Discharge or Issue). If the row represents an Issue transaction, then the Borrower Barcode of the borrower that the item was issued to will also be given.

  - The upload Status of the transaction (being New, Done, Failed or Pending), the Reason (being an explanation of the transaction's current status), and the number of upload Retries.

  - The Item Barcode of the issued/discharged item.

  - The Date/Time of issue (or discharge), the User ID who carried out the transaction and their Location.

  - To obtain a printout of this log, go to the following file:

    - C:\program files\Alto\Alto\Assure\AltoAssure.log
This is a text file of all transactions on Assure made on that particular PC.
Use this log file to check for unusual transactions, checking dates and times etc.

Assure Log Transactions Messages

Discharged: Reservation at active status
26/07/06 14:18:21 26/07/06 14:50:35 Discharged: Reservation at active status. Borrower 75045770, item 050027239.

This indicates that a book was discharged that had an active reservation on it. Although the book is discharged, the reservation has not been satisfied and no notification was produced.

In Alto – Circulation – Reservation
Enter the item barcode. This will show the reservation queue for this item. Press F6 to satisfy this reservation and put the item on the reservation shelf for collection.

Issue Failed. Item does not exist
26/07/06 14:33:06 26/07/06 14:50:35 Issued: Borrower 91833906, item 030048915

This is a normal issue. The issue screen was refreshed before issuing to a new borrower.

Issue failed. Item does not exist X 2

The message repeats as Assure retries to upload the transaction in hope that other offline data has since uploaded which will validate the transaction.

If following ten attempts, the transaction cannot be processed, the status of the transaction is set to fail and no further retries to process the transaction will take place.

Discharge Failed. Item was not on loan
26/07/06 14:33:06 26/07/06 14:50:35 -Discharge failed. Item was not on loan item 050009583

This is an error message that occurs when a book that isn’t on loan, is discharged. Again, like other error messages, it is repeated 10 times as it waits to see if a corresponding offline loan transaction is uploaded from another PC.
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