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1 Set Up

1. All PCs with direct till attached (no master/slave situation)

1.1 The following step needs to be completed by all staff using a PC with a till drawer directly attached:
1.1.1 From the Spydus Circulation screen, click on Settings and then Cash Drawer.
1.1.2 On this screen the Payment Assembly directory needs to be updated to link to the directory where the ‘SpyPayment.dll’ file was placed. Also it is important to put a tick next to all the methods of payment that should trigger the cash drawer to open.

1.1.3 If Payment assembly directory file path is empty, click on the search button at end of the text box and the following window opens:
1.1.3 Access file path for C:\Program Files\Spydus8\CC – click on OK and the file path will be filled in.

1.1.4 If the application has been setup correctly, then the following message will appear after a payment has been completed:

2. Setting up Master/Slave PCs for Cash Drawer
   (only applies to Beccles, Bury, Chantry, Eye, Hadleigh, Ipswich, Kegrave, Lowestoft, Mildenhall, Rosehill, Stowmarket, Sudbury, Westbourne)

2.1 The following setting needs to be made to all master and slave PCs:
2.1.1 The following screen can be accessed from the Spydus Circulation menu. Select Settings and then Cash Drawer.
2.1.2 Tick Use cash drawer.
2.1.3 Click on the browse button beside the Payment assembly Directory and drill down through C:, Program Files, Spydus8, CC, master_slave.
2.1.4 Click on OK.
2.1.5 Under Payment modes, tick all the methods of payment that will trigger the cash drawer to open.
2.1.6 Click on OK to close Cash Drawer Parameters.
3. Using Slave Desktop

If the application has been setup correctly then the following message will appear after a payment has been completed.

![Payment accepted]

4. Using Master Desktop to open till

The Spydus Cash Till Control application is located in `C:\Program Files\Spydus8\` folder. Navigate to this folder and right click the “Spydus Till Control.exe” file, and select “Send to”, then “Desktop (create shortcut). You will then be able to access this on the Master Desktop PC by selecting the following Icon:

![Spydus Till Control]

When the Icon is selected the application will be launched, there will be a 1-2 second delay before the following screen is displayed as the application is retrieving any cash receipts that are in the queue ready to open the cash drawer. The following screen will then appear:
Double-clicking on a particular line in the above list of receipts will trigger the cash drawer to open. The receipt will then be deleted from the list.

The “Refresh” button will refresh the list of receipts.

Note that for Suffolk, the Terminal name will be the PC reference for both master and slave PCs.

5. Update Registry

From Start button click on Run and enter `regedit` in text box

Then open HKEY_LOCAL_MACHINE > SOFTWARE then click on Spydus Till Control
This should be the Slip Printer name as shown on the PC Printers list. If no printer is showing in the data column, double click on the word PRINTER and then enter the printer name in the box that appears.

This process needs to be completed on all PCs.

6. Spydus slip printers

6.1 Set up instructions:

6.1.1 Go into Spydus from the Spydus launch pad on the desktop.

6.1.2 Log in as yourself or use the training log in. Remember to change the location to the location of your library.

6.1.3 Double click on Circulation and OK any message (should come up with your location and your location staff e.g. Knowledge Centre Endeavour House, Knowledge Centre staff).
6.1.4 Once you are in Circulation, you get a big window. Go to Settings near the top and choose Select Printer.

6.1.5 Smaller pop up box will appear, you need to change to Text Mode Printer.

6.1.6 Go down to Printer Driver, click on the drop down arrow and choose CBM 1000 Partial Cut

6.1.7 Go down to Printer, click on drop down arrow and choose Citizen CBM 1000

6.1.8 Click on OK.

You can now test whether the printer is connected. Load a borrower, go to loans and click on print. The loans should print through the slip printer. If these instructions do not work, try picking up your slip printer to check what model it is. There should be a number on the underneath of the model. Go back to Printer, and choose the corresponding model.

7. Workflow

For the initial set up of Workflow:

7.1 Click on the Start button.
7.2 Go to Programs and Spydus8.
7.3 Select Spydus Workflow from the menu:

7.4 Enter your normal system username, but not your password.
7.5 Change the server address to: http://suffolk.spydus.co.uk.
7.6 Tick the box next to Secure.
7.7 Select your library from the drop down menu.

8. Working Offline

8.1 In preparation for using Spydus offline, the parameters need to be downloaded whilst you are online for all the computers that will be used when the internet and/or the system are not available:

8.1.1 In Circulation, click on File and then Offline control and Download.
8.1.2 Make sure that the Http server is selected.
8.1.3 All the tick boxes should be ticked except Postcodes.
8.1.4 Click on Run download – it will take some time to complete.

**N.B. It is extremely unlikely that you should need to do this as we started operating the system offline, so all the relevant computers should be set up.**

8.2 Launching Offline
8.2.1 Click on Start, then Programs and Spydus8.
8.2.2 Select Circulation from the list.
8.2.3 Make sure that the Start offline box is ticked.
8.2.4 Click OK.

8.2.5 Enter your system username.
8.2.6 The password is ‘offline’.
8.2.7 Click OK.
2 Circulation

1. Adding new adult borrower

1.1 In Circulation, click on Register (F3); this opens a new window:

1.2 Check that the new borrower has not had a library card previously, by putting their name into the Search box.

1.3 If you are still not sure, then in Enquiry, select Circulation, and then Borrower and search other fields such as date of birth, address, or email address:
1.4 If you match the details to a WEBnnn (nnn = a running number that is allocated automatically) card number, then the borrower has recently registered online using Register Direct:

1.4.1 Before issuing them with a new card, check that they do not already have a library card.
1.4.2 To issue a library card, type the WEBnnn into the search box on the Borrower Registration screen and search.
1.4.3 Click on the New button in the Barcode field under Borrower details and scan the new card.
1.4.4 Click on Apply and in the pop up, select No to charging for a replacement library card.

1.5 Once you are satisfied, return to the Borrower Registration screen, click on the New icon on the toolbar and scan the new borrower card.

1.6 Fill in the appropriate fields on the first tab (Personal):

1.6.1 Complete the Title, Surname, Given name, DOB (if necessary), and Sex fields.
1.6.2 DO NOT tick in the Surname first box.
1.6.3 DO NOT enter anything into the Secondary ID field.
1.6.4 Generate a PIN and change it if the borrower would like their own.
1.6.5 Select the correct library and borrower category.
1.6.6 Leave the Status field empty.
1.6.7 Enter the post code into the post code field and click on Search.
1.6.8 Select the correct house number/name from the results.
   N.B. it is only on very rare occasions that anything else needs to be completed in any of the address fields.
1.6.9 Enter contact details.
1.6.10 Select the appropriate Notice delivery fields:
1.6.10.1 If the borrower only requires postal notifications, select Borrower’s address in the Mail address to use field – this field should be chosen for all notifications.
1.6.10.2 If the borrower requires an email notification, tick the email field and the Borrower’s address, but leave everything else blank.
1.6.10.3 If the borrower requires SMS (messages sent to their mobile phone), select Yes and the Borrower’s address, but leave everything else blank.

1.7 Move to the second tab (Personal 2). In Additional details, the Ethnicity question does need to be asked of new borrowers, they have the choice not to answer it though.

1.8 Once all the details are correct, click on OK.

2. Adding a new adult borrower with a child (Method 1)

2.1 Follow the instructions as above, but do not click on OK.
2.2 Click on the Family tab and take the ticks out of the boxes in ‘fields inherited by children’ as in the screen shot below:

2.3 When all details are complete click on OK.
2.4 Click on Register (F3), click on Copy at the top of the screen and a new registration screen will appear with the relevant information filled in.
2.5 Click on New next to the Barcode field, and scan a new card for the child.

2.6 Fill in the rest of the details, leaving the Contact details and Notice delivery fields blank.

2.7 Click on Family tab and click on Find.

2.8 This will take you into Enquiry:
2.9 Scan the adult card in the barcode field and following screen will appear:

2.10 Click on Retrieve Record in the bottom right corner and the borrower details will then be attached to the child’s card:
2.11 Go back to the Personal tab and in the Notice delivery section, tick the 'Send notices to parent' box (towards bottom of screen).
2.12 Click on OK to save record.

N.B. There is no need to fill in any details in the Guarantor tab – this tab only needs to be used when registering a child and the appropriate adult does not have a library card.

3. Adding a new adult borrower with a child (Method 2)

3.1 Follow the instructions above for adding an adult borrower, but do not click on OK.
3.2 Go to the Family tab and in the Fields inherited by children box, leave in the relevant ticks, usually (but not always) Surname, Residential Address, Mailing Address:

3.3 Click on OK.
3.4 Click on Reset (F2) and then on Register (F3).
3.5 Click on New and scan the child’s card.
3.6 Complete as much of the Borrower details and Library details fields as necessary and following the guidelines in instruction 1.6:
3.7 Click on the Family tab and on Find.
3.8 In the Borrower search screen, scan the adult card in the Barcode field.
3.9 Click on Retrieve record in the bottom right hand corner of the screen.
3.10 The parent’s name will appear in the first box:

3.11 Return to the Personal tab. The remaining details will have come across:
3.12 Under Notice delivery, tick in the box beside Send notices to parent.
3.13 Click on OK.

N.B. There is no need to fill in any details in the Guarantor tab – this tab only needs to be used when registering a child and the appropriate adult does not have a library card.

4. Removing the Family link

When a child turns 16, the family link needs to be removed from their card and their category changed from Child to Adult.

4.1 In Circulation, scan the child’s card and click on Register (F3).
4.2 Select the Family tab and on Remove:

4.3 This will remove the link to the parent and any siblings.
4.4 Return to the Personal tab and change the category from Children and Young People 0-15 to Adult.
4.5 Update their contact details and Notice delivery fields.
5. Searching for borrowers without a card

5.1 In Circulation, make sure that radio button next to Keyword is selected.
5.2 Enter borrower’s name in box next to ‘Borrower’ (this can be first name
followed by surname or vice versa) and click on Search.
5.3 This will take you into Enquiry and enable you to find the borrower.
5.4 If you have a large number of hits, click on Refine Set on the blue bar at
the top of the screen which will allow you to narrow down options by
choosing a second search term such as postcode, date of birth etc.
5.5 Once you have located the correct borrower, click on the borrower name
to be taken to the detailed view.
5.6 At the bottom of the screen, in the grey window frame, the ‘OK’ button
will become available. Click on it and you will retrieve the borrower’s
details and them over into circulation, ready to issue items and check
their account.

6. Transfer borrower to new card

6.1 Follow the procedure as outlined for finding a borrower without a library
card.
6.2 When you return Circulation with the borrower’s details, click on the
Register icon (F3) on the tool bar so that the Borrower Registration
screen appears:
6.3 Click on the New button next to the Barcode on the Personal tab.
6.4 Scan the new borrower card in box that appears, click OK and then you will have the option to charge borrower for new card.

7. Renewing Items

7.1 In Circulation, scan the borrower card (or search for borrower by entering name in borrower field and clicking on search).
7.2 The borrower details will appear as below showing loans, reservations, any overdue loans, charges etc.

7.3 To bring up current loans, click on blue writing showing the number of loans and screen will change to show all loans with overdue loans in red:
7.4 Items can be renewed individually by highlighting the row and clicking on Renew or all items can be renewed by clicking on Renew All.

7.5 Any overdue charges will appear as each loan is renewed. Click on Proceed after each transaction. Overdue charges will appear in the top right of window.

7.6 Clicking on the amount of the charge will invoke the charges screen where amounts can be paid, waived etc:
8. Returning overdue items from multiple borrowers

8.1 Return all items by scanning the barcodes in the usual manner. All the items will appear in a list as shown below:
8.2 If all the charges are to be paid together, highlight all the rows (hold down Ctrl on the keyboard and click on each row), then click on Charges.

8.3 OR if only one borrower's charges to be paid, select those charges by holding down Ctrl and clicking on each relevant row and then click on Charges.

8.4 This will invoke the Charges screen which gives the opportunity to pay or waive all or select individual payments:

<table>
<thead>
<tr>
<th>Description</th>
<th>Am't due</th>
<th>Date</th>
<th>Title</th>
<th>Borrowers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overdue Item</td>
<td>£1.28</td>
<td>27 Apr 2012</td>
<td>A low down dirty shame</td>
<td>03-64-72-38-99</td>
</tr>
<tr>
<td>Overdue Item</td>
<td>£1.28</td>
<td>27 Apr 2012</td>
<td>Let's Western world [Paperback]</td>
<td>04-65-73-00-89</td>
</tr>
<tr>
<td>Overdue Item</td>
<td>£1.82</td>
<td>27 Apr 2012</td>
<td>Big round eyes</td>
<td>05-66-74-11-23</td>
</tr>
<tr>
<td>Overdue Item</td>
<td>£1.82</td>
<td>27 Apr 2012</td>
<td>Buying secret [Paperback]</td>
<td>06-67-75-32-41</td>
</tr>
<tr>
<td>Overdue Item</td>
<td>£1.82</td>
<td>27 Apr 2012</td>
<td>Daily [Paperback]</td>
<td>08-69-77-74-83</td>
</tr>
<tr>
<td>Hire/Pental</td>
<td>£1.00</td>
<td>28 Mar 2012</td>
<td>A low down dirty shame [Paperback]</td>
<td>09-70-78-95-04</td>
</tr>
</tbody>
</table>

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9. Searching the catalogue using Enquiry
(for a more detailed description on using the catalogue, click here)

Whichever search method you use, it is advisable to keep your search terms to a minimum. If you are not sure how to spell a word, then miss it out and use other terms. You can then use the options on the left side bar to filter your search. A good illustration of this is The Time Traveler's Wife by Audrey Niffenegger:
1. "The Adventures of Nifflenger, Audrey"
   J. Cape, 2004...
   2. "The Time Traveler's Wife"
   Nifflenger, Audrey

Locations
Collection
Call Number
Accession No.
Status/Date

Halesworth Library
adult fiction paperback
90270064789774
Missing at shelf check (out: 03 May 2012)
10 Placing Reservations

10.1 From catalogue search:

10.1.1 When you have found a title on the catalogue, you can either:

10.1.1.1 reserve a number of items from the results pages by inserting ticks into the boxes beside each title and then clicking on Reserve Selections in the blue bar that appears at the top and bottom of the page:

10.1.1.2 or click on the title of an item and from the full details page, and click on Place Reservation in the blue bar at the top and bottom of the page:
10.1.2 The Place Reservations screen will appear:

![Diagram of Place Reservations screen]

10.1.3 Scan the borrower's card.
10.1.4 Select the appropriate pickup location.
10.1.5 Click on the Submit button unless you need to change any of the settings:
   10.1.5.1 Titles required: It is still possible for the borrower to change their mind and reduce the number of titles selected by clicking on the down arrow; the numbers refer to the list at the top of the Titles to reserve box.
   10.1.5.2 Not required until: if the borrower is unable to collect their reserved items in the near future, then you can set a date and the borrower will be inserted into the reservation queue after the specified date.
   10.1.5.3 Not required after: if the borrower is not interested in receiving a book beyond a certain date, then either use the drop down menu for months or the calendar.
   10.1.5.4 The Notes field will be visible to staff processing the reservation.
10.1.6 After clicking on Submit, a confirmation message will appear.
10.1.7 If there is an error, then you will be told the reason and may be asked for confirmation to proceed with the reservation.

10.2 From circulation:
10.2.1 Scan the borrower’s card to bring up their account.
10.2.2 Click on Reserve (F7).
10.2.3 Find the required title(s) using the Enquiry window.
10.2.4 Click on either Place Reservation or Reserve Selections.
10.2.5 The Place Reservation box will appear with the borrower's number pulled across from Circulation.
10.2.6 Follow the procedures above from 9.1.4.
10.3 Placing more than one reservation on a page

10.3.1 If your search results are over more than one page and you want to place several reservations for your borrower, Spydus will only allow you to do this page by page. However, you can change the number of records shown on a page and reduce the number of pages for your search results.

10.3.2 An example of this, is a search for the author, Ann Cleeves.

10.3.2.1 Using Quickfind, select All Authors or Personal Author from the drop down menu and enter ‘Ann Cleeves’ in the search box.

10.3.2.2 There are 52 results over three pages:

10.3.2.3 Use the back button to return to the Quickfind page.

10.3.2.4 Under Options, change the number of Records per page to 100:

10.3.2.5 Click on OK or hit Enter.
10.3.2.6 This time all 52 records will be on the same page and you will only have to go through reserving multiple titles once.

10.4 What Spydus does with reservations:

10.4.1 Once the reservation is placed, Spydus checks the system to find a library that has copies of the title and is open. It will then submit a request for shelf check to that library.

10.4.2 If the staff are unable to find the title and mark the shelf check as complete, or take more than one day to find it, then Spydus will move the shelf check on to the next library that has an available copy and is open.

10.4.3 When the title is found and return it via Circulation, Spydus ‘allocates’ that title to the borrower and assigns it a ‘Hold Date two weeks into the future:

10.4.3.1 If the reservation is to be picked up from a different library, the title is placed in transit.

10.4.3.2 If not, then the title should be placed on the hold shelf.

10.4.4 Once the title arrives at the correct pick up location and is returned via Circulation, Spydus removes the in transit status, and refreshes the hold date, so that the borrower has a further two weeks to collect the item.

10.5 Cancelling or modifying reservations

10.5.1 Scan the borrower’s card in Circulation.

10.5.2 Click on the Reservations link in the account information pane on the right.

10.5.3 Select the reservation to cancel; if there are several, click on the first and then hold down the CTRL key and click on the remainder.
10.5.4 Click on Edit in the bottom right of the screen.
10.5.5 Tick the Cancel checkbox.
10.5.6 The Edit Reservation screen can also be used to edit the hold date, change the pickup location or add further notes:

10.5.7 If the reservation is part of a multi-title reservation, you will be able to click on the Edit Parent button to open the same window dealing with the entire reservation, rather than just one title.
10.5.8 Click OK to confirm your changes.

10.6 Moving borrowers in a waiting list
10.6.1 In Circulation, select the borrower’s reservations.
10.6.2 Highlight the appropriate reservation.
10.6.3 Click on Queue.
10.6.4 Highlight the borrower and use the arrows to move them up or down the waiting list.

Please note that this facility should only be used with good reason, such as a copy of the item going missing in transit.

11. Changing Due Dates

11.1 If you need to extend loan periods for allow for holidays, etc, scan the borrower card in Circulation.
11.2 Click on Settings on the menu bar and then Local Settings.
11.3 In Loan Policy at the top left of the window, use the drop down arrow next to Date Due Back to choose a date from the calendar OR type the length of the loan, e.g. 28 days, in the box next to Day Loan Period (days).

11.4 Click on OK.

11.5 An orange bar appears at the top right of the issue screen: Check: Override settings are active.

11.6 Issue the items.

11.7 Click on OLP Clear to return to normal settings

12. **Lost and damaged titles (reported by a borrower)**

12.1 When a borrower reports that an item is damaged, or when a borrower returns an item and it is clearly damaged, we may want to charge either the present or the previous borrower.

12.1.1 Scan the current borrower’s card in Circulation.

12.1.2 Click on the Loans link.

12.1.3 Select the title that is damaged.
12.1.4 Click on Item Status (F12) on the toolbar:

![Image of Item Status toolbar]

12.1.5 Click on the Damaged status and Add:

![Image of Damage codes pop up]

12.1.6 A warning will appear: Setting this status will cancel any reservations for this item. Do you want to continue? Click on Yes.

12.1.7 The Damage codes pop up will appear:

12.1.7.1 select the Damage Type,

12.1.7.2 add remarks if you wish (these are item rather than borrower remarks),

12.1.7.3 in Borrower details, select NONE, Current or Previous:
12.1.7.4 the borrower details will appear below:

![Image of borrower details]

12.1.7.5 amend the replacement charge if necessary and click on OK.
12.1.7.6 the status will now have been added. Click on OK.
12.1.7.7 you can now return the title; the status will be preserved and no-one will be able to issue or reserve the title unless the damaged status is removed.

12.2 When a borrower reports a lost item and they are certain that it will not be found, we can manually set an item status to ‘lost’. The system will charge the borrower (if desired), cancel reservations (if any), remove the title from their account and take it out of circulation:

12.2.1 Scan the borrower’s card in Circulation.
12.2.2 Click on the Loans link.
12.2.3 Select the title that is lost.
12.2.4 Click on Item Status (F12) on the toolbar:

12.2.5 Click on the Lost (on loan) status and Add
12.2.6 A warning will appear: Setting this status will cancel any reservations for this item. Do you want to continue? Click on Yes.
12.2.7 The Lost item charges pop up will appear:
12.2.7.1 you will see the details of the borrower who will be charged.
12.2.7.2 you can manually adjust the charges if required.
12.2.7.3 Click on OK twice.

12.2.7.4 the book will automatically be taken off the borrower account and will no longer be available for reservations or loan.
12.2.8 If the title is found and returned, it will be put back into circulation automatically.

12.3 When a borrower reports that they think they might have lost a title, we can set the item to 'reported lost (on loan)'. This means no more fines will accrue on the loan, but the title will still be attached to the borrower. It gives them a chance to look for the title. The item will automatically be marked lost and a replacement charge applied to the borrower account a few days after the item was marked as 'reported lost':
12.3.1 Scan the borrower's card in Circulation.
12.3.2 Click on the Loans link.
12.3.3 Select the title that is reported lost.
12.3.4 Click on Item Status (F12) on the toolbar.
12.3.5 Click on the Reported Lost (on loan) status:

12.3.5.1 The title will be removed from their active loans, but will still be accessible via the Reported Lost link:

12.3.5.2 If the borrower returns the title before it is automatically recorded as lost, the status will be removed.

12.4 With Spydus we still send 3 notices for overdue titles. The second notice marks a title as 'long overdue', the third notice marks it as 'lost' (i.e. BFR). This is automatic and requires no intervention.

A note on ‘Lost titles’:
When a lost title is returned a message dialog will appear to say that this title is marked lost and that charges of £x were added to a borrower’s account. You can simply click on proceed here, but the charges will be left on the account. Next to the proceed/cancel buttons there is a checkbox labelled 'Cancel/Refund lost book charges'. Checking this and then proceeding will automatically remove the 'BFR' charges from the borrower account and will even automatically refund the borrower after payment. Next time they come to the desk you will see a message that the borrower is owed money for a refund.
13. Shelf Checks

When a reservation is placed, Spydus will request a shelf check from a library that has copies and is open. If the title cannot be found, or if the library takes more than 1 day to process the shelf check then Spydus moves the request to a different library.

13.1 Printing Shelf Checks:

13.1.1 To print a Shelf Check Report from Enquiry:
13.1.1.1 Click on Circulation from the menu at the top of the page.
13.1.1.2 Select Item and then Shelf Check Assigned from the drop down menus.
13.1.1.3 From Shelf Check Assigned Items, use the drop down menu to select your location and click on OK:

13.1.1.4 On the next screen, click on Instant Report in the blue action bar:

13.1.1.5 A new window will open, asking you for your user name and password.
13.1.1.6 The report will start being generated and Started will be displayed in the Status line. This window will refresh every 10 seconds and can be refreshed manually by hitting F5.
13.1.1.7 The report will be ready when Finished shows in the Status line:

13.1.1.8 Click on the HTML page link to open the report.

13.1.1.9 Click on File and Print.

13.1.2 To print a Shelf Check report from Workflow:
13.1.2.1 Launch Workflow.
13.1.2.2 In the left hand panel, click on any shelf check to select it.
13.1.2.3 It will be loaded into the right hand panel.
13.1.2.4 Right click on the same shelf check in the left hand panel and click on View Report:
13.1.2.5 Make sure that the View All Items Report box is checked.
13.1.2.6 Click OK.
13.1.2.7 The report will be generated and opened.
13.1.2.8 Right click on the report and click on Print in the menu.

13.2 Processing Your Shelf Checks

Once the report is printed, you look for the requested books. Depending on the outcome of your search, you will want to either satisfy the request, or tell Spydus that the book could not be found in your library.

13.2.1 Satisfied Shelf Checks: scan the item to return it and either send it to another library or place on your hold shelf. If there is another copy of the same item on the shelf, it will satisfy the request as long as it is the same edition.

13.2.2 Missing Shelf Checks:

13.2.2.1 For items that cannot be found but you do not want to mark as missing:
13.2.2.1.1 In either Enquiry or Workflow, click on the relevant shelf check.
13.2.2.1.2 In the detailed item view, click on Complete Shelf Check in the blue action bar.
13.2.2.1.3 Click on Continue.
13.2.2.1.4 You will be taken back to the detailed item view and an orange field with a warning message ‘Shelf check completed’ will be displayed in the top left.
13.2.2.1.5 The shelf check request will be forwarded to the next possible library.

Please note: do not click on Cancel Reservation, as this will cancel the entire reservation, preventing Spydus from requesting further shelf checks.

13.2.2.2 For items that are definitely missing:
13.2.2.2.1 In either Enquiry or Workflow, click on the relevant shelf check.
13.2.2.2.2 In the detailed item view, click on Change Item Status in the blue action bar.
13.2.2.2.3 Select the status Missing at shelf check.
13.2.2.2.4 Click on Set Status.
13.2.2.2.5 You will be taken back to the shelf check detailed item view, and can then mark the shelf check as complete.

13.2.3 No items to satisfy a reservation:

An automatic message is not generated to let you know when a reservation has not been fulfilled because the last available copy is missing, the item is still on order or is supposedly sitting on a shelf somewhere. You can, however, generate a list to deal with these:
13.2.3.1 In Enquiry, select Circulation from the bar at the top.
13.2.3.2 Click on Reservation.
13.2.3.3 Select your library from the drop down list in Pick up location.
13.2.3.4 Change Complete Type to Not complete.
13.2.3.5 Set Allocated and SC Assigned to No.
13.2.3.6 The first time you do this, leave the Date Placed blank.

13.2.3.7 Once you are checking regularly, set the date. For example, >31/7/12 to check reservations placed after that date.
13.2.3.8 At the bottom of the screen under Options, change Sort by to Date Placed and click on OK.

14. Critical error messages

Critical error messages usually appear when the item has been either returned or issued in the future. This is caused by a staff member setting a date in the future in Local Settings, and has used Date/Time instead of Loan Policy:

To rectify this:

14.1 If there is a reservation on the item, cancel it, ensuring that you have recorded the relevant details.
14.2 In return, set the Local Settings Date/Time to a date just beyond the
date in the future.
14.3 Scan the item.
14.4 Reset to clear the local settings
14.5 Issue the item to yourself or a workroom card (in the present).
14.6 Replace the reservation.
14.7 Return the item again.
14.8 All date should have returned to normal.
3 Searching the catalogue (Search Holdings)

1 Quickfind

1.1 This search is ideal for the following:

- a general subject search
- an ISBN search
- using the barcode of an item (Accession Number)
- a keyword search for an author and/or title

1.2 General Subject Search

1.2.1 Enter the subject keywords and click on OK:

![Quickfind search interface](image)

1.2.2 The search for 'interior design' results in 342 records:

![Search results](image)
1.2.3 To reduce the number of results, use the side menu to refine the search. For example, does your enquirer want recent publications; is there a particular aspect of interior design that they are looking for?

1.2.3.1 Click on 2010 – 2019 under the Publication Date heading.
1.2.3.2 Click on Interior decoration under the Topic heading.

1.2.4 In this example search, the original 342 results are now down to 15.

1.2.5 To remove or change any of your current search strategy, click on the relevant white cross and, if necessary, make another choice from that heading.

1.2.5.1 Remove the Publication Date: 2010 – 2019 and change it to 2000 – 2009.
1.2.5.2 This increases the number of search results to 119, but you can still refine further by year and/or by another Topic, for example, Children’s rooms:
1.3 ISBN search

1.3.1 Either key in or copy and paste an ISBN from another source such as Amazon.

1.3.2 Use the drop down menu and select ISBN.

1.3.3 Click on OK or hit Enter.
1.4 Accession number search
1.4.1 Either key in or scan the item’s barcode
1.4.2 Use the drop down menu and select Accession number.

1.4.3 Click on OK or hit Enter.

1.5 Keyword search for an author and/or title
1.5.1 Enter the keywords. Keep them brief. For example, if you are looking for ‘Time of my life’ by Cecelia Ahern, the only keywords needed are ‘Ahern time life’

1.5.2 Click on OK or hit Enter.
1.5.3 The relevant results will appear:

1.5.4 A more difficult example is ‘Who was who’ (the companion to Who’s Who). A title search produces no results, because it’s only part of the title. However, clicking on the radio button for a phrase search does produce the required results:
1.5.5 This is also a good example of producing unexpected results:

1.5.6 Why would these two books appear in the results of a search for who was who? If you look at the details of both, the phrase ‘who was who’ appears in the summary:
1.5.7 This example also shows the inconsistencies in cataloguing in the past. There are very few copies of the search results showing in the side bar because so many fields were not completed:

Your Current Search:

- Anywhere: WHO WAS WHO (Phrase)

Refine Results By:

- and
- not

Format

- Books, Manuscripts (11)

Audience

- Adult (11)

Language

- English (11)

Publication Date

- 2000 - 2005 (1)
- 1990 - 1999 (1)
- 1980 - 1989 (1)
- 1970 - 1979 (4)
- 1980 - 1944 (1)

Personal Author

- HATHORNTHWAITE, PHILIP J. (1)
- JAMES, Clare, 1959- (1)
- Muirwood, W. A. (1)

Personal Name

- History, Modern (1)
- Civilization, Modern (1)

Topic

- Biography (1)
- Napoleonic Wars, 1800-1815 (1)

2 Title search

Title search is very adaptable as long as you select the right radio button for your search.

2.1 Keyword search

2.1.1 This means keywords from the title only. For example, if you are searching for 'The curious incident of the dog in the night time' by Mark Haddon, then make sure you have the keyword radio button selected and enter the keywords 'curious dog'.
2.1.2 Click on OK or hit enter.
2.1.3 The following screen will appear:

![Staff Interface: Search Holdings, Acquisitions, Cataloguing, Circulation, LJ Requests, Core, Display Selections, Clear]

2.1.4 Use the tick box beside the correct result and click on Display Selections or click on the title.

2.2 Browse

Using the Browse title search has limitations as the subject has to appear in the title. It can be used, however, for a series search.

2.2.1 Enter your keyword(s), for example ‘Second world war’:

![Title Search: Search Holdings, Acquisitions, Cataloguing, Circulation, LJ Requests, Core, Browse, Exact Match]

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2.2.2 The following results page will appear:

2.2.3 Select as many tick boxes as you need and click on Display Selections.

2.3 Phrase

2.3.1 This does mean a phrase within the title of an item. If you are searching for ‘The Curious Incident of the Dog in the Night-time’, then ‘curious incident’ or ‘dog in the night-time’ are phrases:
2.4 **Exact match**

2.4.1 Exact match means just that. For example, a search for ‘Who’s Who 2012’ (with or without the apostrophe) will produce a result:

![Search result for Who's Who 2012](image)

Holdings:

2.4.2 However, a search for ‘Who’s Who’ produces something quite different:

![Search result for Who's Who](image)
2.4.3 Another example is searching for the Harry Potter books. Just entering ‘Harry Potter’ as an exact match produces the following:

The first result has a piece of music called ‘Harry Potter’; the second and third, have series titles of ‘Harry Potter’.

2.4.4 Generally, it is recommended that either keyword search or phrase search is used, unless you are absolutely sure of the title – and it is short.

2.5 Series title search

2.5.1 This is available on the Title search page by using the drop down menu and selecting Series title.

2.5.2 It has limited use as a title keyword search will result in the same matches.

2.5.3 Be warned that the standards for cataloguing series titles is very inconsistent; some cataloguers have just added the series title, others put the volume number as well.

3 Author search

3.1 With a keyword search, it is possible to search using natural language i.e. you can enter Alexander McCall Smith, without having to decide whether McCall Smith, Alexander or Smith, Alexander McCall is the correct way round:
3.2 If you select exact match, you must enter the author’s name with the surname first. For example, if you are searching for Alexander McCall Smith, and enter Smith, Alexander McCall, you will get two matches:

Searching for McCall Smith, Alexander will produce the right result:

N.B. Unless you are absolutely sure of the author, use the default keyword search.

4 Subject search

4.1 Subject searching can start very general and can be filtered down to something more specific.

4.2 As an example, you are in Felixstowe library and have a borrower who would like current books on astronomy:

4.2.1 Enter ‘astronomy’ in Subject Search:
4.2.2 Either hit the Enter key or click on OK.
4.2.3 A list of subject headings will appear:

4.2.4 Select as many headings as necessary:

4.2.5 Click on Display Selections.
4.2.6 There are still a large number of titles to go through, so you can refine your search.
4.2.7 Click on items published between 2000 and 2009.
4.2.8 Having reduced the number of results, your borrower would like to know if there is anything on the shelf in Felixstowe library.
4.2.9  Click on ‘Refine Set’ on the blue bar at the top of the page:

![Image of the 'Refine Set' button on the page]

4.2.10 This takes you to the Advanced search page, but is headed Refine Set and has your search strategy at the top:

![Image of the Refine Set page]

4.2.11 Select Felixstowe Library from the list under the Location heading (type in ‘f’ to move quickly through the list).

4.2.12 Click on OK.

4.2.13 You will then get a list of books that are in stock in Felixstowe.

4.2.14 Your search strategy appears in the top left of the screen and you can broaden it again at any time by clicking on one of the crosses.
5 Advanced search

5.1 Advanced search means that you can be very specific in your search and is most useful for defining material types such as DVDs, CDs and spoken word.

5.2 There are some general rules about using Advanced Search:

5.2.1 The search fields can be changed to suit your search by using the drop down menus.

5.2.2 Boolean operators can be used

<table>
<thead>
<tr>
<th>Boolean operators:</th>
<th>AND</th>
<th>OR</th>
<th>NOT</th>
</tr>
</thead>
</table>

AND – search results will contain all the search terms. For example, if you are looking for Cats AND Dogs, the results will contain both words.

OR – search results will contain at least one of the search terms. For example, a search for Cats OR Dogs will contain at least one of the words.

NOT – search results will contain one of the search terms, but will exclude any results with the other word(s). For example, a search for Cats NOT Dogs will contain only the word Cats.

5.2.3 It is possible to combine types of searches.

5.3 Searching for material types:

5.3.1 Search under the Collection heading, not the Material heading.

5.3.2 If you are looking for Harry Potter spoken word, but are not sure whether it is available in CD or cassette format, or whether it is adult or children’s stock, you can search for ‘Adult spoken word CD’, click on that to select it, then hold down the Ctrl key and click on ‘Adult spoken word CD set’, followed by ‘Adult spoken word cassette’ and ‘Adult spoken word cassette set’:

You can then scroll down and select the Children’s spoken word options – not forgetting to hold down the Ctrl key again.
5.3.3 The same principles apply if you are searching for CDs, DVDs, computer games or language courses.

5.3.4 Advanced search can be used to look for books in a particular language. If you are looking for children’s story books in Polish, select Junior fiction hardback and Junior fiction paperback under the Collection heading, then Polish under the Language heading:

Remember to hold down the Ctrl key when making more than one selection from one group and that instead of scrolling through a long
list, such as the list of languages, you can type ‘p’ and ‘o’ and you will be taken straight to Polish.

6 Wildcard searching

If you are searching for a word, but are not sure whether it should end with ‘s’, ‘ing’, then you can use the wildcard character ‘*’. For example, the word campaign could be just that, or campaigns, campaigning or campaigner:
4  Cash Management

1  Opening and closing till sessions

1.1 At the start of each day or however often you normally start a new till session, you will need to connect to a cash drawer each time.

1.2 In Circulation, click on File > Cash Drawer > Connect to …:

1.3 The following dialog box will appear which will show the Cash Drawers available in your library:

1.4 Choose the appropriate cash drawer and enter the float amount in the 'Opening balance' box.

1.5 Click on OK and, if prompted, enter your User ID and password.

1.6 At the end of each day, or when you normally end a till session, click on File in Circulation, then Cash Drawer and Close. Again, you may be prompted for your User ID and password.
1.7 Fill in the appropriate details and click on OK.

2 Taking payments
2.1 From the menu bar in Circulation, click on Transactions > Cash Management. The following window opens:
2.2 This brings up the list of the most common payments.
2.3 If you put a tick in the ‘Show all charges’ a full list of payment types will appear.
2.4 Select the item being paid for and a box will appear at the bottom left of the screen:

![Payment window](image)

2.5 Select the number of items, for example, three black and white printouts, and click on Apply. The charges will appear on the right of the screen. More items can be added if necessary.
2.6 Once all the payments have been added, click on End Transaction. The payment window will appear:

![Payment window](image)

2.7 Choose the appropriate payment method, put in the Amount tendered, and click on OK.
2.8 The ‘payment accepted’ pop up box will appear and the till drawer will open. Click on OK.
2.9 Another pop up box will appear to ask if a receipt should be printed. Select yes or no.

3 Giving a refund

There are two main ways of giving refunds: either a straightforward amount that was dealt with through Cash Management such as printouts, or for an overdue or lost item that is registered on the borrower’s account.

3.1 Giving a refund for printouts, DVD hire, etc:

3.1.1 In Circulation, click on Transactions and then Cash Management.
3.1.2 Click on Add Refund.
3.1.3 In the Add Refund window, select either General Refund or Hire/Rental as appropriate.

3.1.4 Enter the amount to be refunded.
3.1.5 Under Refund Note, chose an option from the drop down menu.
3.1.6 Click OK.
3.1.7 On the Cash Management screen, click on End Transaction.
3.1.8 In the Refund window, make sure the Amount returned is correct.
3.1.9 Click OK.
3.1.10 The cash drawer will open.

3.2 **Giving a refund for an amount logged onto a borrower's account:**

3.2.1 In Circulation, scan the borrower's card.
3.2.2 Select Transactions, then Refunds.
3.2.3 In the Add Refund window, click on Previous Charge.

3.2.4 Find the charge you are refunding.
3.2.5 Click on the heading.
3.2.6 Click on Retrieve Record.
3.2.7 You will be returned to the Add Refund window, with the amount to be refunded automatically completed.
3.2.8 Follow the instructions above from 3.1.5.

4 **Adding credit to a borrower card**

You can either:
4.1 In Circulation, scan the borrower's card.
4.2 Select the Payments (F8) function button.
4.3 A message will appear: 'There are no pending payments for this borrower. Click OK to proceed to Charges'.
4.4 Click OK.
4.5 In the charges window, click on Add Deposit.
4.6 Enter the amount of credit to be added to the card.
4.7 The amount will appear on the Charges window (see below).

Or:

3.1 In Circulation, scan the borrower's card.
3.2 Click on Transactions and then Charges in the drop down menu.
3.3 Enter the amount of credit to be added to the card.
3.4 The amount will appear on the Charges window:
5 Using credit on a borrower card

You can either:

5.1 In Circulation, scan the borrower’s card.
5.2 Select the Payments (F8) function button.
5.3 A message will appear ‘There are no pending payments for this borrower. Click OK to proceed to Charges’.
5.4 Click OK.
5.5 In the Charges window, click on Cash Management.
5.6 The Cash Management window will appear.
5.7 Enter the payment as you would normally.
5.8 Click OK.

- 65 -
5.9 You will be taken back to the Charges window with the details of the payment now entered.

5.10 Highlight the item to be charged and click on Pay:

5.11 Click on Apply to save and stay on the window or OK to save and close.

5.12 The amount will be deducted from the credit amount.

Or:

5.1 In Circulation, scan the borrower's card.
5.2 Click on Transactions, and then Charges in the drop down menu.
5.3 In the Charges window, click on Cash Management.
5.4 Enter the payment as you would normally.
5.5 The Cash Management window will appear.
5.6 Enter the payment as you would normally.
5.7 Click OK.
5.8 You will be taken back to the Charges window with the details of the payment now entered.
5.9 Highlight the item to be charged and click on Pay.
5.10 Click on Apply to save and stay on the window or OK to save and close.
5.11 The amount will be deducted from the credit amount.
6 Banking

Below is a workflow diagram for the banking processes. Click on a process to get more detailed instructions.

Close cash drawer session

Spydus Enquiry > Circulation > Cash Management > Reconcile Payments

Select appropriate Cash Drawer(s) and click Update

Complete Cash Drawer Reconciliation screen, click Update (please do not use back button after clicking Update as this will cause the Cash Report to have duplicated entries)

On receipt of Cash Report, add together all amounts which are mapped to the same code thereby removing any negative amounts.

Access Civica Icon and follow Entering Receipts instructions

On completion of this procedure, the Cash Up function needs to be performed

When Cash Up has been completed, another member of staff will then need to access Civica Icon and follow the Banking procedure
6.1 **Reconciling payments**

6.1.1 To Reconcile Payments all the appropriate cash drawer sessions need to be ended. [Click here](#) for instructions on how to do this.

6.1.2 Using Enquiry, select Circulation, Cash Management and Reconcile Payments as shown below:

6.1.3 Spydus will select all the closed till sessions that have not been reconciled:

6.1.4 From this screen, select the Cash Drawers to be reconciled; the system will allow multiple tills to be reconciled simultaneously from the same location.

6.1.5 Left-click on each entry whilst holding down the ‘CTRL’ button on the keyboard.

6.1.6 There is no need to select anything from RFID locations or OPAC locations.

6.1.7 Click on Update.

6.1.8 Once the drawers have been selected, the following screen will appear allowing for the takings to be reconciled:
The expected amount initially does NOT include cheques. Add them to the amount in the Expected Cash and Cheques box.

Add credit/debit card payments in the Expected Credit and debit cards box.

Breakdown of charges by income code.

Not Found – there is no mapping for the charge code.
The figure in the bottom right of the screen is the amount that Spydus has registered as being taken (in this example, £205.82, which includes £44.10 in cheques and £27.96 in credit/debit card payments).

Enter the total amount of credit/debit card payments into the Expected Credit and debit cards box.

This leaves a balance of £177.86 in cash and cheque payments.

Enter the cash amounts by denomination.

This will give the Total Reconciled Amount and the Actual money to be banked.

The total of money to be banked plus the credit/debit cards should agree with the total amount at [1]. If you have more or less than this, the difference will show in the Difference box and will be shown on the cash report as an Under or Over.

In the Cash Verified by and the Verifier’s Password fields, enter ‘cash’.

Click on Update and print the screen (Ctrl + P).
6.1.9 The following screen will appear:

![Banking Sheet](image)

6.1.10 Once the Reconciliation process has been completed, a Cash Report will be generated. This will be forwarded to your service point as soon as possible. It will give a breakdown of all the banking codes and amounts which need to be entered in your banking books. Print the cash report in landscape.

**Warning:** Please note that if you go back the amounts on the cash report will double up and will have to be adjusted manually.

6.2 *Preparation for entering cash receipts into Civica*

6.2.1 Unders/overs – it is very important that you ensure that unders/overs are adjusted against the code for ‘Services provided’. You will not be able to enter negative values in Civica. If you have negative values, these need to be adjusted from the ‘Services provided’ code 82501.

6.2.2 Cash – you must adjust your cash reconciliation to reflect the amount of cash you will be banking as this is the amount that will be entered into Civica and will appear on the bank statement.

6.2.3 Cheques - you must adjust your cash reconciliation to reflect the amount of cheques you will be banking as this is the amount that will be entered into Civica and will appear on the bank statement. You should also ensure that you have the coding details for each cheque as these will be entered individually in Civica.

6.2.4 Card payments – check that each end of day listing for card payments matches your cash reconciliation amounts. You may need to adjust the cash reconciliation report if monies have been entered incorrectly against the relevant cash or cheque code to balance.

Please double check all your figures before you start entering information into Civica Service templates as this will slow down your Civica process if you have to correct any incorrect cash categories.
It may not be apparent to you that there is a discrepancy with your cash categories until you go to the cash up process in Civica and your expected values against each cash-up type is incorrect, i.e. Civica expects £120 cash but you only have £80 to bank. This will cause delays when you have to go back to the cash reconciliation report and identify which cash groups are incorrect then process refunds to correct them before you can complete cash up.

6.3  Entering receipts in Civica

6.3.1  Logging into Civica
6.3.1.1  Either click on the Civica Webpay icon on your desktop or navigate to Internet Explorer and enter the URL: www.civicaepay.co.uk/SUFFOLKPARTNERSHIP/webpay_staff/webpay/Login.aspx
6.3.1.2  Enter your username (this will be the same as your system login).
6.3.1.3  Enter your password (if this is your first time of login, you will be prompted to change your password).
6.3.1.4  The domain name should be CIVICAWS.
6.3.1.5  Click on Login.
6.3.2 Entering payments for Libraries PrePaid/Miscellaneous

6.3.2.1 Select payment type Libraries Misc ST.

6.3.2.2 Under ‘Please Select a service’ select each of the payment codes that appear on your cash report.

6.3.2.3 Click on Select after each one.

6.3.2.4 Enter the description of the payment in the specific instructions box. This should be the Spydus Cash reconciliation reference number from the top of the Cash Report:

6.3.2.5 Enter the payment amount.

6.3.2.6 Select ‘Add to list’ if you are entering more than one payment.
6.3.2.7 If you want to add another General Ledger code payment, select the relevant general ledger code from the drop down list and follow steps 6.3.2.3 to 6.3.2.6 for each code you wish to allocate payments to. (If you choose to add more than one item to the list, these will have one receipt number, but different transaction numbers).

6.3.2.8 Select ‘Pay Cash’ or ‘Pay Cheque’ and follow the process below for cash or cheque method. If you are processing card payments, use ‘Pay Cheque’ and then select ‘PDQ credit or debit card’ on the next screen. (This option is only available if you take credit card payments and have been set up as a card payment library).

6.3.3 Cash Payments
6.3.3.1 Enter the cash amount tendered.
6.3.3.2 Click on Calculate
6.3.3.3 Click on Continue.
6.3.3.4 Check the details.
6.3.3.5 Confirm transaction (this will take a while and another screen will appear).
6.3.3.6 Click Finish, unless you want to print a receipt (you are now ready to enter another payment. You will need to select the payment type from the left hand menu – Libraries Misc ST).

6.3.4 Cheque Payments
6.3.4.1 Enter the amount for each individual cheque (another screen will appear to enter cheque details).
6.3.4.2 Click Make payment.
6.3.4.3 Check the payment.
6.3.4.4 Confirm payment:

6.3.4.5 Click on Finish (you are now ready to enter another payment if required from step 6.3.2).
6.3.5 Card Payments

6.3.5.1 Select cheque payment method PDQ debit or PDQ card payments from the drop down menu if this option is available to you.

6.3.5.2 Enter a in payee name field.
6.3.5.3 Enter 111111 in the cheque number field.
6.3.5.4 Enter 111111 in the sort code field.
6.3.5.5 Enter 11111111 in the account number field.
6.3.5.6 Click Make payment
6.3.5.7 Click Confirm
6.3.5.8 Click Finish.
6.4 Cashing Up

6.4.1 Logging into Civica

6.4.1.1 Either click on the Civica Webpay icon on your desktop or navigate to Internet Explorer and enter the URL: www.civicaepay.co.uk/SUFFOLKPARTNERSHIP/webpay_staff/webpay/Login.aspx

6.4.1.2 Enter your username (this will be the same as your system login).

6.4.1.3 Enter your password (if this is your first time of login, you will be prompted to change your password).

6.4.1.4 The domain name should be CIVICAWS.

6.4.1.5 Click on Login.

6.4.2 Cash Up

6.4.2.1 Go to card mandates end of day.

6.4.2.2 Click on Cash up.

6.4.2.3 Click on + to expand the first selection (you will be prompted to enter cash, then cheques and other for card payments. You will need to go through each method before completing the cash up process).

6.4.2.4 Enter the value of notes without decimal places (i.e. £100.00 is entered as 100 in the correct denomination).

6.4.2.5 Enter the value of coins. Where any amounts need a decimal point, then it is used i.e. £12.40 is shown as 12.4.

6.4.2.6 Click Calculate. This will show you if you have a difference - check the amounts entered.
6.4.2.7 Click OK.
6.4.2.8 Click on + to enter the totals for the next payment group ‘Other’:

Click OK.
6.4.2.10 Check that the ‘Not in till balance’ is zero. If it is not, you will need to click on Modify to re-enter your amounts.
6.4.2.11 Click on Confirm.

6.5 **Banking cash and cheques**

6.5.1 Logging into Civica

6.5.1.1 Either click on the Civica Webpay icon on your desktop or navigate to Internet Explorer and enter the URL: www.civicaepay.co.uk/SUFFOLKPARTNERSHIP/webpay_staff/webpay/Login.aspx

6.5.1.2 Enter your username (this will be the same as your system login).

6.5.1.3 Enter your password (if this is your first time of login, you will be prompted to change your password).

6.5.1.4 The domain name should be CIVICAWS.

6.5.1.5 Click on Login.

6.5.2 Bank cash and cheques

6.5.2.1 Go to card mandates end of day.

6.5.2.2 Select Banking.

6.5.2.3 Select level ‘All’ from the drop down menu.

6.5.2.4 Select type ‘All’ from the drop down menu.

6.5.2.5 Select ‘Cashup User’. This is the person who has done the cash up.

6.5.2.6 Click ‘Search’. This will bring up a list of transactions for the selected user:

6.5.2.7 Click OK. A list of available cash ups will be displayed.

6.5.2.8 Select cash ups for banking – cash and cheques. PDQ credit/debit card payments are dealt with separately.
6.5.2.9  Click on OK.
6.5.2.10  Select Bank To: and Libraries – 68335636. You must ensure that the Libraries bank account is entered so that CSD know who to pay.

6.5.2.11  Enter the bank reconciliation reference in the correct format (name and date). This must be a unique reference for each banking when using more than one method.
6.5.2.12 Enter the Security Bag Reference – e.g. a bank paying in slip or G4S bag number or leave blank.
6.5.2.13 Enter the Security Receipt Reference – this is the Spydus cash reconciliation reference number.
6.5.2.14 Click on OK.
6.5.2.15 Click OK again to return to the main menu.
6.5.2.16 Log out at the bottom of the page.
6.5.2.17 If you have made an error, phone CSD Finance (Pat Wilkinson).

5 Stock and Item maintenance

1 Item maintenance
1.1 Item maintenance is used to make changes to individual copies of a title.
1.2 To open the item maintenance screen:
1.2.1 In Circulation, select ‘Items’ from the menu bar at the top of the screen:

   ![Image of Circulation menu]

1.2.2 Then select ‘Item maintenance’.
1.2.3 Instead of these two steps, you can press Shift and F10.
1.2.4 This will open the ‘Bibliographic Search’ window.
1.2.5 Scan or type the item barcode into the Accession No. field and click OK.
1.2.6 This will open the bibliographic record for the title.
1.2.7 Click on Retrieve Record:
1.2.8 This will open up an Item Maintenance screen for the title:
1.2.9 On the left side of the screen, there is a list of all items associated with this record.
1.2.10 Select the correct copy by clicking on the correct barcode number.
1.2.11 There are a number of changes that can be made from the screen on the right.

1.3 Changing a barcode:
1.3.1 In the box called 'Barcode No.', delete the current barcode number and scan or type in the new one.
1.3.2 Click on ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.4 Changing the Collection:
1.4.1 This is used for changing a Premier DVD to a standard DVD, for example.
1.4.2 In the box called ‘Collection’, select the new collection code from the drop down list.
1.4.3 Click on ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.5 Changing an Item Location:
1.5.1 In the box called ‘Location’, select the required location from the drop down list.
1.5.2 Click on ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.6 Removing a Status:
1.6.1 The table at the bottom of the screen shows all the statuses currently applied to the item:
1.6.2 Not all statuses can be removed using this screen; some cannot be removed if the item is on loan. Others, such as Missing Copy, can be removed by scanning the item in Return.

1.6.3 To remove a status:

1.6.3.1 Click on Edit Item Status.
1.6.3.2 In the right hand column, select the status(es) you want to remove.
1.6.3.3 Click ‘Remove’ in the centre.

1.6.3.4 Click OK.
1.6.3.5 This will close the edit status window and take you back to the main item maintenance screen.
1.6.3.6 Click ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.7 Adding a Status:

1.7.1 The table at the bottom of the screen shows all the statuses currently applied to the item.

1.7.2 To add a status:

1.7.2.1 Click on Edit Item Status.
1.7.2.2 In the left hand column, select the status you want to add.
1.7.2.3 Click ‘Add’ in the centre.
1.7.2.4 Click OK.
1.7.2.5 This will close the edit status window and take you back to the main item maintenance screen.
1.7.2.6 Click ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.8 Adding an item:

1.8.1 An item can only be added on the Item Maintenance screen if there is an existing bibliographic record for it to be attached to.
1.8.2 If you have an item that has no bibliographic record, contact the Stock Team, but do not send the item.

1.8.3 To add the item:

1.8.3.1 From Circulation, select ‘Items’ and ‘Item Maintenance’.
1.8.3.2 Search for the record by ISBN or title.
1.8.3.3 Click on Retrieve Record.
1.8.3.4 The Item Maintenance window will open:

1.8.3.5 Right click on the title at the top of the list on the left hand side of the screen.
1.8.3.6 Select ‘Insert item’.
1.8.3.7 ‘New item’ will appear at the bottom of the list and a blank ‘Item Maintenance’ window will show.

1.8.3.8 Enter the details for the new copy in the relevant fields. You must include the following:

- Barcode
- Collection
- Location
- Category1 (if fiction, CD or DVD)
- Class number (if non-fiction)
- Leave all the other fields empty

1.8.3.9 Click ‘Apply’ to save and keep the window open, or ‘OK’ to save and close the window.

1.8.3.10 The item will now have a status of ‘Physical Processing’. Scan the item in Return to remove the status.

1.9 Changes to Catalogue/Bibliographical Records:
If the change required is at a bibliographical record level rather than individual copy level, please contact the Stock Unit (stock.unit@suffolklibraries.co.uk) with details of the title and the changes required.

2 Transferring stock

1 Single items:
1.1 In Circulation, click on Items and then Item Maintenance.
1.2 You will be taken to Bibliographic Search. Click in the Accession number field and either scan the barcode or type in the number.
1.3 Click on OK.
1.4 Click on Retrieve Record:

1.5 In the Item Maintenance screen, select the correct copy:

1.6 Select the new location from the drop down menu in the Location field.

1.7 Click on OK.

2 Multiple items

2.1 In Circulation, click on Items and then Bulk Item Maintenance.

2.2 In the Bulk Item Maintenance screen, select the new location from the drop down menu in the Location field.
2.3 Click in the Accession field and scan the item barcodes.
2.4 These will automatically relocate and save.
2.5 Send the items on to the new location without scanning them in Return (otherwise they will be relocated back to the sending library).
2.6 The receiving library must scan the items in Return as soon as possible to pick up any reservations and to ensure that items are located to the correct library.

6 Interlibrary loans

1 Placing an interlibrary loan request for a book
1.1 In Enquiry, check that the requested book is not in stock.
1.2 Select ILL/Requests from the menu bar at the top of the screen.
1.3 Select Item Request.
1.4 Scan or type the borrower’s card number.
1.5 Click OK.
1.6 Choose Inter-library loan under the Method of Procurement heading.
1.7 Complete as many fields as possible on the form.
1.8 Use the Request Notes field to indicate whether the borrower requires a Standard or Priority request.

※ This field must be completed or the request will be cancelled. ※

1.9 Use this field for any other information, for example, whether the borrower would like to upgrade the request if necessary.
1.10 Add the Last Date Required and the Pickup Location.
1.11 Click on Place Request.
1.12 An alert will appear advising you of the completion charges.
1.13 Click Continue.

The charge will not show on the borrower’s account until the book is received and should be collected when it is issued.

2 Issuing an interlibrary loan book
2.1 When the item arrives in the library:
2.1.1 In Circulation, enter the Accession number in the barcode field in Returns. The Accession number is the same as the Request number and will be clearly marked in the book.
2.1.2 Press Enter.
2.1.3 Confirm the reservation.
2.1.4 Press Proceed and then Close.
2.2 When the customer comes to collect the book:
2.2.1 In Circulation, select Issue.
2.2.2 Scan the borrower’s card.
2.2.3 Type the Accession number into the barcode field.
2.2.4 Press Enter.
2.2.5 An alert will appear saying that the book is an interlibrary loan and when it is due back.
2.2.6 Press Proceed.
2.2.7 The charge will have been added to the borrower’s account as soon as the book was allocated. Collect the charge in the normal way.

If the request has been upgraded to a priority request, there will be a purple bookmark in the book. You then need to collect the increased fee (currently £5.40), by adding an additional £4.25 using ILL British Library Search Fee in Cash Management.

3 Returning an interlibrary loan book
3.1 In Circulation, select Returns.
3.2 Type the Accession number into the barcode field.
3.3 Press Enter.
3.4 An alert will appear advising you that the book is an interlibrary loan.
3.5 Click Proceed.
3.6 An alert is displayed advising you that the book should be returned to your library.
3.7 Close.
3.8 Return the book, clearly marked, to Interlibrary Loans at the Stock Unit. Insert an ILL bookmark.

*Please do not remove any paperwork from the book*

4 Placing an interlibrary loan request for an article
4.1 Before you place the request, ensure that the article is not available on the Periodicals database on Suffolk Reference Direct.
4.2 The borrower will need to complete and sign a copyright declaration form. Click here for a copy.
4.3 In Enquiry, select ILL/Requests from the menu bar at the top of the screen.
4.4 Select Article Request from the drop down list.
4.5 Scan or type the borrower’s card number.
4.6 Click OK.
4.7 Complete as many fields on the form as possible:
4.8 Make sure that you actually state that a copyright declaration form has been completed in the Request Notes field.

4.9 Click on Place Request.

4.10 A message will appear saying ‘No charges currently apply to this request’. This is because the module is designed for internal use and we are adapting it for interlibrary loans.

4.11 Click on Continue.

4.12 The Request placed screen will appear.

4.13 The information will be sent to ILL at the Stock Unit.

4.14 In Circulation, select Transactions and Cash Management.

4.15 Select BL Article Request from the list.

4.16 Proceed with the payment as usual.

The article will be sent to the library selected under Pickup Location. Please notify the borrower when it arrives; it does not need to be issued.
7. **Reports**

(Managers and assistant managers only have access to Reports)

The Reports module can be used to get many types of Management Information, and it is worth exploring if you have the chance.

**To get the issue figures for your library:**

1. Click on Reports on the Spydus 8 LaunchPad.
2. Click on the + beside Circulation Reports.
3. Click on the + by Loans.
4. Click on the + by Issues Trend.
6. Set up the search strategy:
   6.1 Transaction Type: Total Day Issues (seems to be the best)
   6.2 Either:
      6.2.1 tick Breakdown under the Set Period heading and select how you want the data to appear; then select the current period or the previous one; or:
      6.2.2 tick Breakdown under the Ad-Hoc Period heading and set up time length and then the actual dates required.
   6.2.3 Change the Primary Sort field to Location Code.
   6.2.4 Select your library from the list below.
   6.2.5 You can select more than one library by holding down the Ctrl button and clicking again.
   6.2.6 Click on Report.