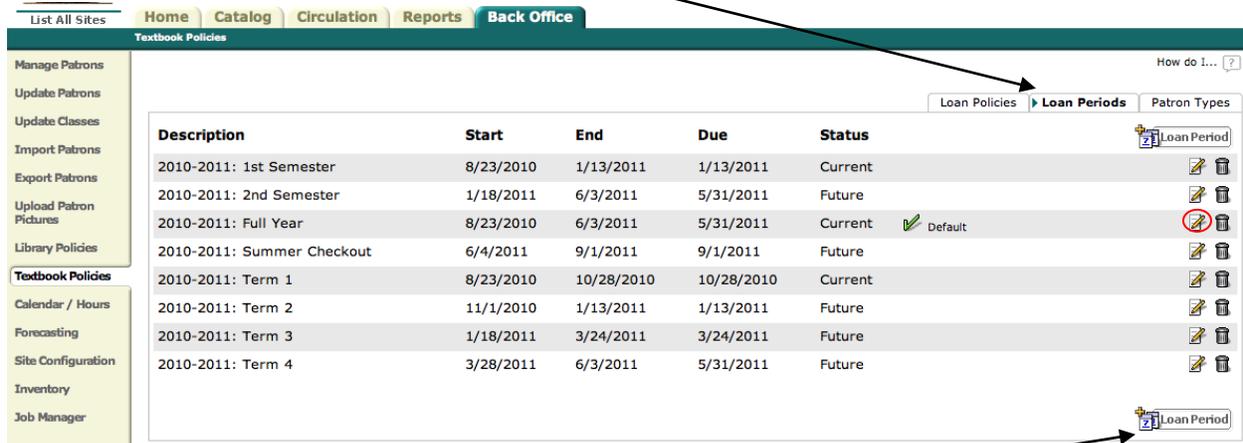


Setting Textbook Loan Periods and Due Dates

Setting Loan Periods

Generally, you will want to set up loan periods that coincide with the school year, semesters, and terms. You can set or change the starting, ending and due dates for each period to match your school schedule.

1. Go to the **Back Office** tab and choose the **Textbook Policies** option from the left menu. On the subsequent screen choose the **Loan Periods** sub-tab.



2. To create a new loan period, click on the **Add Loan Period** button. To edit an existing loan period, click on the paper and pencil icon to the right of that period on the list.

* **Description** Save

Make this the default Cancel

* **Checkouts Start** **days before class starts**

* **Class Starts**

* **Class Ends**

* **Textbooks Due**

* = Required Field

3. Set the loan period that you will use the most as the default loan period. When a textbook is checked out its due date will be auto-determined by the loan period that is set as the default.

Changing the Loan Period at Check Out

For each check out the due date can be individually changed to one of the other loan periods, or to a custom date. The starting and ending dates set in the loan periods determine which loan periods are active and available at any given time.

To change the loan period for a check out:

1. Check out the item to the patron and click on the calendar icon to the right of the due date: **Due** 9/30/2010 .
2. Choose the desired due date from the drop-down menu below the calendar and click **Save**.



Custom Textbook Due Dates

If you wish to check out a textbook to a patron for a short period of time, such as an overnight checkout, you can easily change the due date at check out.

1. Check out the item to the patron.
2. Click on the small calendar icon to the right of the due date.

Checked Out

Elements of Language {Third Course} Grade 9 (Copy: 4061000005) Due 5/31/2011

3. Type in the desired due date in the **Selected date:** field or click on the date in the calendar.

Change the due date for checkout to patron...

Selected date: 9/2/2010

Default date: 5/31/2011

<< September 2010 >>						
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

-- Select Due Date --

4. Click **Save**. The due date will now appear as a **Special Date** 9/2/2010 .

Charging Overdue Textbook Fines

1. If a textbook is returned after the due date, an overdue fine may be assessed at check in by clicking **Create Fine**.

Most Recently Checked In

Elements of Language {Third Course} Grade 9 (Copy: 4061000005) **Past Due** 8/10/2010

Checked out 8/11/2010 to Whiting, Joshua (Faculty: WHITING)
Textbook copies still checked out: 0

Condition

Whiting, Joshua (Faculty: WHITING)

Reason

Elements of Language {Third Course} Grade 9 (Copy: 4061000005) **Judith L. Irvin ... [et al.]**

Replacement Price \$70.00

Amount
Waive
Pay

Fine Note

1 day overdue.

Print Receipt

4. Click **Save**. The fine will be added to the patron's record and will show up in future fine notice reports until it is paid.

Creating Custom Textbook Loan Periods at Check Out

Some textbooks, such as novels used in English classes, require shorter check out periods than an entire semester or term. To easily facilitate these types of 2-4 week loans you can create and apply a custom loan period specific to that particular set of textbooks.

1. Check out one copy of the textbook to a student or teacher.
2. Click on the small calendar icon to the right of the due date.

Checked Out

Elements of Language (Third Course) Grade 9 (Copy: 4061000005) Due 5/31/2011

3. Click the **Other...** button next to the **Select Due Date** drop-down menu.

Change the due date for checkout to patron...

Save
Cancel

Selected date: 9/2/2010 for this item
Default date: 5/31/2011

September 2010						
Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

-- Select Due Date -- Other...

4. The **Add Loan Period** screen will appear.
5. Enter a detailed **Description** so that you can easily find and edit or delete this loan period when it is finished. In the example at left, the Description ("Smith 9/30/10 Catcher in the Rye") includes the English teacher's last name, the due date, and the title of the textbook.

* **Description** Smith 9/30/10 Catcher in the Rye
 Make this the default
 * **Checkouts Start** 0 days before class starts
 * **Class Starts** 9/1/2010
 * **Class Ends** 9/30/2010
 * **Textbooks Due** 9/30/2010
 * = Required Field

Save
Cancel

6. Check the box to **"Make this the default."**
7. Enter the desired due date in the **Textbooks Due** field. (In this case the exact starting and ending dates are not very important but still must be filled in.)
8. Click **Save** to close the **Add Loan Period** screen, and then click **Save** again to close the **Change the Due Date** screen. The **Check Out** screen should now be visible, and the **Special date** of the item just checked out should now be the date set in the new loan policy.
9. Now check out the novel or textbook to the rest of the students in the class. If you made your new loan policy the default, you will not need to adjust due dates on any other check outs.
10. When you have finished checking out the set of books, be sure to set your regular loan period as the default loan period again. Go to the **Back Office** tab, choose the **Textbook Policies** option, and open the **Loan Policies** sub-tab.

Description	Start	End	Due	Status	Loan Period
2010-2011: 1st Semester	8/23/2010	1/13/2011	1/13/2011	Current	
2010-2011: 2nd Semester	1/18/2011	6/3/2011	5/31/2011	Future	
2010-2011: Full Year	8/23/2010	6/3/2011	5/31/2011	Current	
2010-2011: Summer Checkout	6/4/2011	9/1/2011	9/1/2011	Future	
2010-2011: Term 1	8/23/2010	10/28/2010	10/28/2010	Current	
2010-2011: Term 2	11/1/2010	1/13/2011	1/13/2011	Future	
2010-2011: Term 3	1/18/2011	3/24/2011	3/24/2011	Future	
2010-2011: Term 4	3/28/2011	6/3/2011	5/31/2011	Future	
Smith 9/30/10 Catcher in the Rye	9/1/2010	9/30/2010	9/30/2010	Future	Default

11. Edit the year-long loan policy or whichever loan policy you most commonly use, checking the box that makes that loan policy the default again.