

## Adding a Note about Item Damage

The Receipt of Damaged Material Policy includes the following instructions:

“Any time an item is received with any damage, create a CIRCNOTE in the item record in Workflows and attach a post-it note to the item including the following information:

- a. Item was received damaged
- b. Description of damage
- c. Date
- d. Staff member initials
- e. Library name”

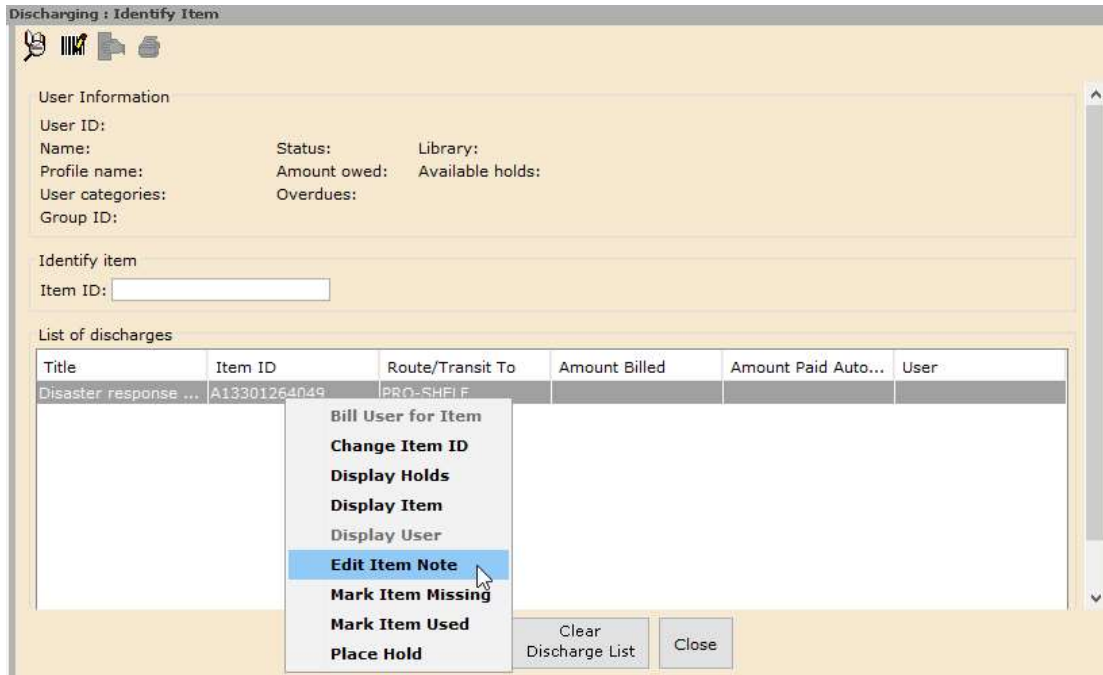
This cheat sheet provides instructions on using the Right Click functions in Workflows to add or edit a CIRCNOTE.

CIRCNOTES can be created using the “right click” functions in Workflows. These functions are available in many of the Workflows Wizards. If the damage has been noticed when an item arrives in delivery, it is simple to create the CIRCNOTE from the DISCHARGE Wizard.

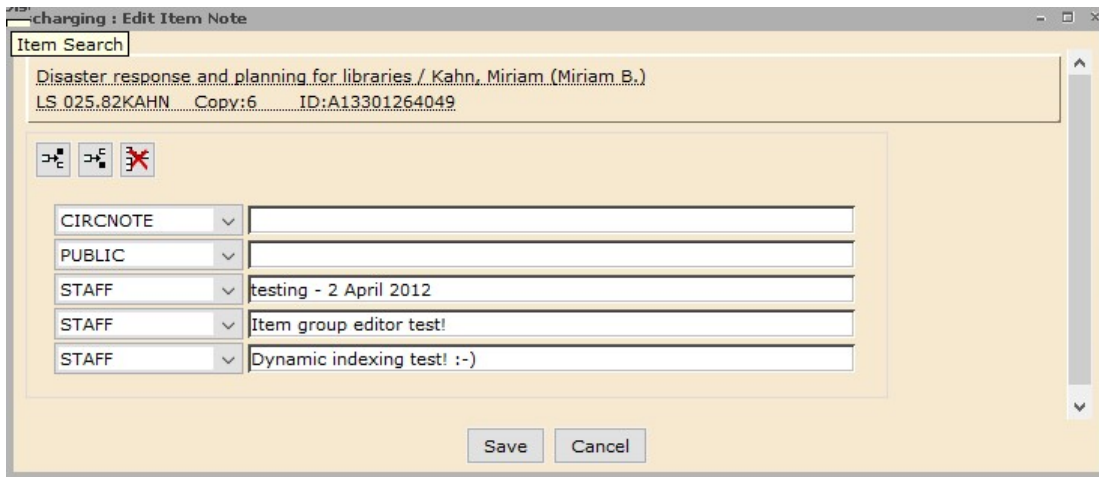
Scan the item to receive it:

| Title                 | Item ID      | Route/Transit To | Amount Billed | Amount Paid Auto... | User |
|-----------------------|--------------|------------------|---------------|---------------------|------|
| Disaster response ... | A13301264049 | PRO-SHELF        |               |                     |      |

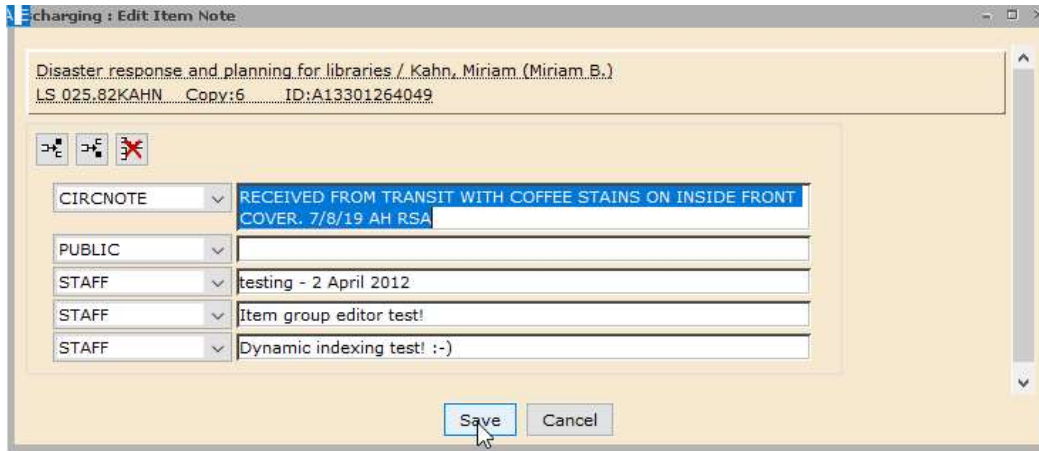
Place the cursor over the item’s Title or Item ID and click the RIGHT mouse button to view the menu of Right Click functions. Select “Edit Item Note.”



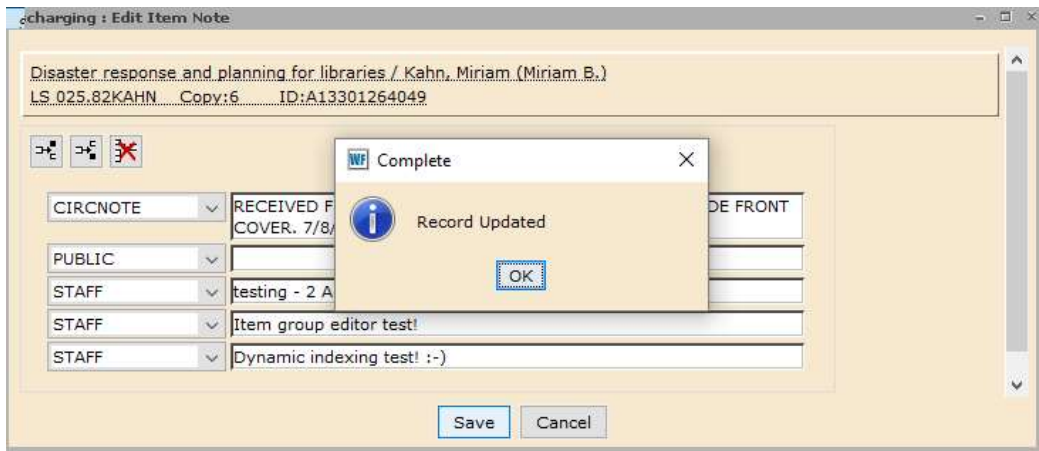
This will open the “Edit Item Note” options. You will also see any notes that have been added to the item previously.



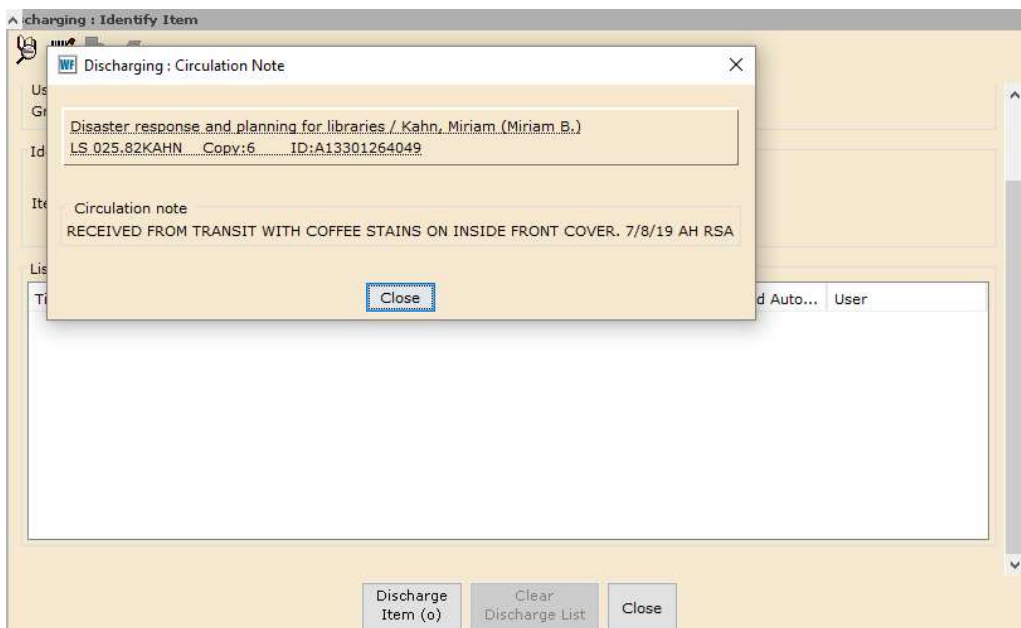
Type your note into the appropriate field and click “Save”.



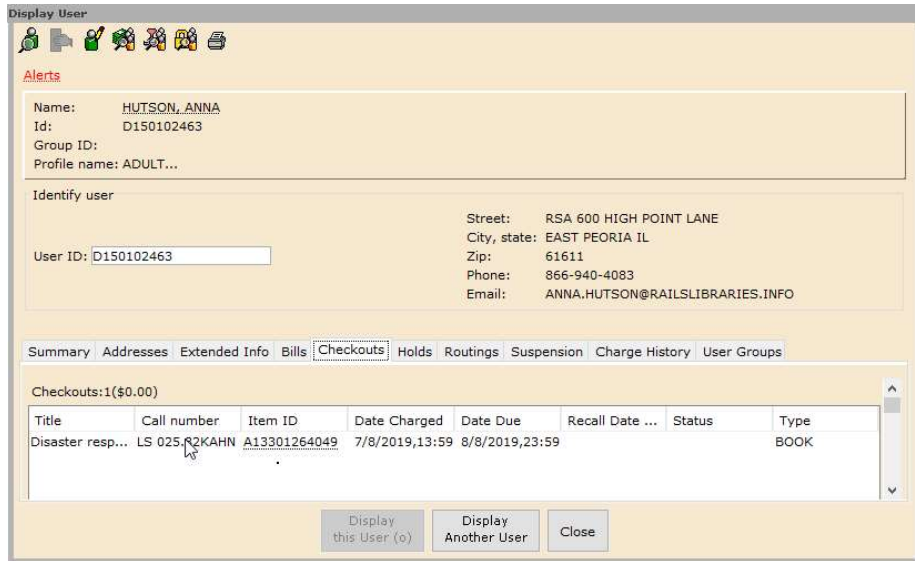
A confirmation will appear. Click "OK."



This CIRCNOTE will now display as a pop-up whenever the item is charged or discharged:



If damage to an item is noted when it is returned by a patron or removed from the bookdrop, staff may wish to create an item note without discharging the item. CIRCNOTEs can also be created in the DISPLAY USER wizard.



Use the Display User Wizard to access the patron record. Select the Checkouts tabs, then use the right mouse button to click on the item information. This will display the Right Click menu. The rest of the procedure remains the same.

