

# Adding and Managing Item Alert Messages

Item alerts are messages attached to items for a specific circulation event to inform staff of a condition that requires their action. Alert messages must be acknowledged or, in the case of temporary ones, deleted by clearing in order for the event to proceed. Multiple alerts, both persistent and temporary can be added to a single item. In some cases, staff can add identical alerts to multiple items simultaneously. Some screens also have an Alerts column that provides a Manage button to quickly open the Alert manager an existing alert. Messages can be edited here and temporary ones cleared one at a time. Batch functions are not available in manage alerts.

Item alert messages are governed by local policy and practice. Local system and branch staff can add alert messages as defined by that local policy. Item alert messages are not required by broader PINES policy, but are considered best practice to guide staff in handling items with special requirements. Alert messages should not be used to violate PINES policy, however.

## Alert Message Types

Alert messages are assigned an alert event type when created. This type governs the kind of circulation event that controls when the alert message appears. Currently, PINES has only implemented three types: Normal checkout and checkin, Normal checkin, and Normal checkout. No other alert type should be used by PINES libraries.

Normal Check In alerts halt the check in process and Normal Checkout alerts halt the checkout process. NOrmal checkout and checkin alerts halt both checkin and checkout processes. Libraries with self-checkout devices that do not accommodate alert messages may wish to set alert messages for only check in so that staff can monitor the number of pieces returned, for example.

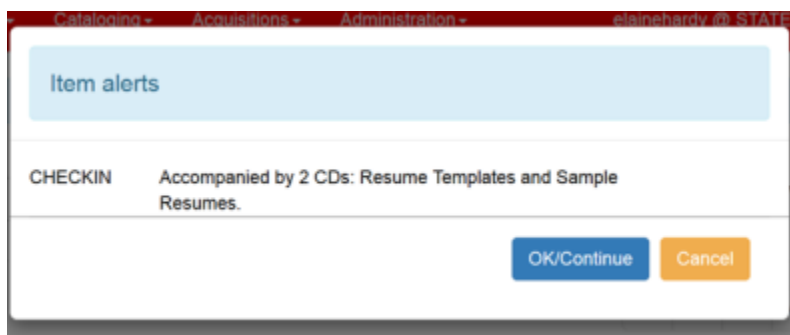
## Categories of Alert Messages

There are two kinds of alert messages: persistent and temporary.

### Persistent alert messages

Persistent alerts will display every time the alert event occurs and can only be removed by cataloging staff. They are typically added when the item is cataloged although they can be added retrospectively. A persistent alert message might indicate the number of pieces comprising the item, such as the number of CDs in an audiobook. The alert event can be just check in, just checkout, or both check in and checkout. Multiple persistent alert messages for events can be added to an item. The alert message must be acknowledged to complete the action.

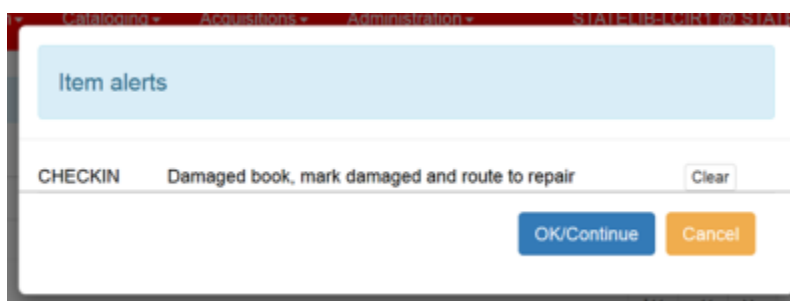
An example of a persistent item alert message at check in:



## Temporary alert messages

Temporary alert messages are designed for one alert event and are typically added by circulation staff. Temporary alerts are usually cleared at that event. They must be acknowledged or cleared for the event to proceed. Examples of temporary alert messages are those to indicate a damaged book checked out to a patron, an item needing a new spine label, or one to be routed to display. Temporary alerts can be added to items with persistent alerts and multiple temporary alerts can be added to an item.

An example of a temporary check in alert as displayed at item check in (note the presence of the Clear button):



## Adding and Managing Item Alerts at Circulation

Circulation staff can assign temporary alert messages to items as defined by local policy and procedures. They can be added to items in the checkout, check in, item status, or renew pages. Multiple items can be chosen from lists at these pages in order to add the same temporary alert message. Alerts cannot be managed in batch. Alert messages can be customized to the copy as needed to appear at check in or checkout. Temporary alert messages stop the check in or checkout process until acknowledged. A clear button displays in the message, allowing circulation staff to delete it, then click on the OK button to proceed. Circulation staff can elect not to clear the message and continue the action by clicking on OK. The action can also be cancelled if necessary.

## Permissions

In consultation with the system director and other local staff, local administrators can assign permissions governing alert messages to circulation staff. Permissions are:

CREATE\_COPY\_ALERT  
DELETE\_COPY\_ALERT  
UPDATE\_COPY\_ALERT

## Column configuration for alert messages

Options to display alert messages and the Manage alert button can be set in several pages. Where available, choose the alert message and/or alerts options from the column picker. Be sure to save columns after selection.

|                                     |                  |   |   |   |   |       |
|-------------------------------------|------------------|---|---|---|---|-------|
| <input checked="" type="checkbox"/> | Title            | ↑ | ↓ | ⬆ | ⬇ | 0 : 5 |
| <input checked="" type="checkbox"/> | Alerts           | ↑ | ↓ | ⬆ | ⬇ | 0 : 5 |
| <input checked="" type="checkbox"/> | Alert Message    | ↑ | ↓ | ⬆ | ⬇ | 0 : 5 |
| <input checked="" type="checkbox"/> | Acquisition Cost | ↑ | ↓ | ⬆ | ⬇ | 0 : 5 |

Choosing “Alerts” where available puts access to the item alert manager in lists. The number of alert messages on the item is displayed next to the Manage button. If there are no alerts, the manage button is grayed out and not active. Existing temporary alert messages can be edited or cleared by clicking on the alert manager. Messages cannot be added from the Manage alerts interface.

| Item Status |                                     |               |                |                 |                  |          |             |
|-------------|-------------------------------------|---------------|----------------|-----------------|------------------|----------|-------------|
| #           | <input type="checkbox"/>            | Alert Message | Barcode        | Call Number     | Due Date         | Location | Item Status |
| 1           | <input checked="" type="checkbox"/> |               | 50723000001384 | 686 M           | 02/22/2019 23:59 | STACKS   | Checked out |
| 2           | <input type="checkbox"/>            |               | 50723000314126 | 659.2 P         |                  | STACKS   | Available   |
| 3           | <input type="checkbox"/>            |               | 50723000122453 | 686 O           |                  | STACKS   | Available   |
| 4           | <input type="checkbox"/>            |               | 50723000052031 | 686 K           |                  | STACKS   | Available   |
| 5           | <input type="checkbox"/>            |               | 50723000024139 | 658.809070573 G | 02/22/2019 23:59 | STACKS   | Reshelving  |
| 6           | <input type="checkbox"/>            |               | 50723000001384 | 686 M           | 02/19/2019 23:59 | STACKS   | Available   |

## Adding Temporary Alert Messages at Circulation



You can only manage (clear, edit, or add) temporary alert message to items owned by your library system.

Temporary alert messages can be added in the checkout, check in, and renew pages by circulation staff. Staff might need to add a temporary alert when a damaged item is brought to checkout so that it can be properly routed on check in. Or a DVD might need a new case, or a book a new spine label. Local practice

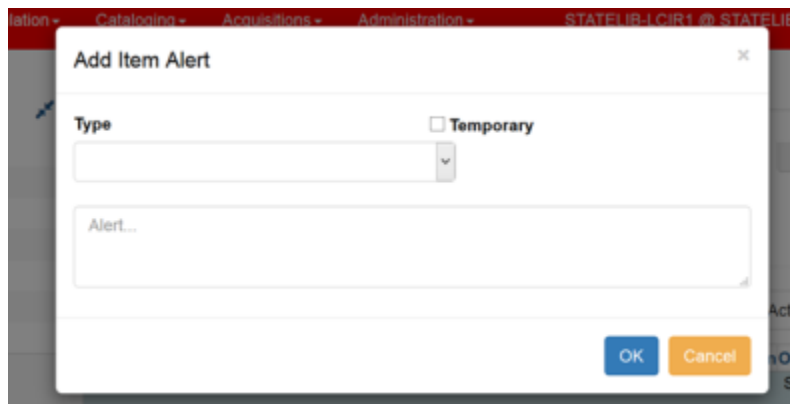
should guide circulation staff on when to add alert messages and their wording.

## Adding messages at Checkout

After the item is checked out to the patron, staff can add a new message or manage an existing one. You can add the same alert message to multiple items on the list by choosing them:



A dialog box opens where you can choose the type of alert message, check for it to be temporary, and type the message. The temporary box must be checked so that the alert message can be cleared by circulation staff:



Most of the types listed in the drop down box have not been implemented by PINES. When creating a message at checkout, staff will typically want to stop the check in action so the type "Normal check in" is chosen:

**Add Item Alert**

Type ☒ Temporary

Checkin of claims-never-checked-out copy  
 Checkin of claims-returned copy  
 Checkin of damaged copy  
 Checkin of long overdue copy  
 Checkin of lost copy  
 Checkin of lost-and-paid copy  
 Checkin of missing copy  
 Checkout of claims-never-checked-out copy  
 Checkout of claims-returned copy  
 Checkout of damaged copy  
 Checkout of long overdue copy  
 Checkout of lost copy  
 Checkout of lost-and-paid copy  
 Checkout of missing copy  
**Normal checkin**  
 Normal checkout

OK Cancel

Once the message is completed, click on OK to save it:

**Add Item Alert**

Type ☒ Temporary

Normal checkin

Damaged book, mark damaged and route to repair

OK Cancel

Opening the item in Item Status (F5), shows the presence of the alert message and allows you to manage the message. Click on the manage button to open the alert message:

## Scan Item

Submit OR  No file selected.

**Item Status**

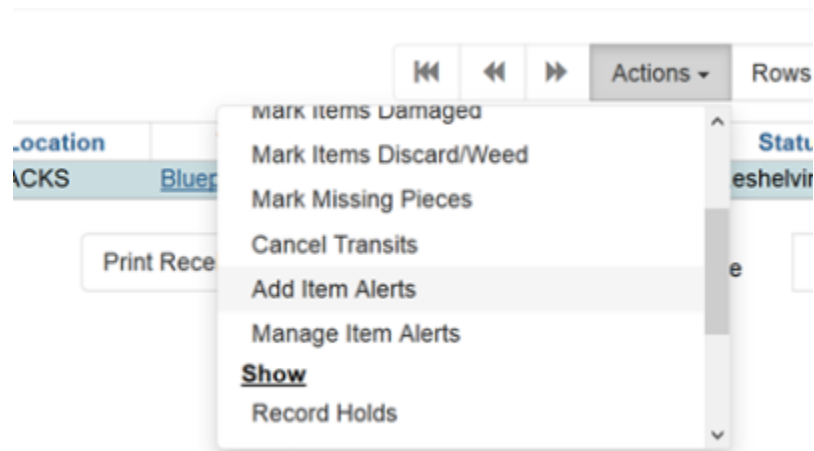
| # | <input type="checkbox"/>            | Barcode        | Call Number      | Due Date         | Location | Item Status | Title                  | Alerts | Alerts |
|---|-------------------------------------|----------------|------------------|------------------|----------|-------------|------------------------|--------|--------|
| 1 | <input checked="" type="checkbox"/> | 50723010138275 | 813.0099283 C322 | 02/25/2019 23:59 | Stacks   | Checked out | Young adult literat... | 1      | Manage |



Alert messages are not displaying in lists due to a reported bug.

## Adding messages at Check In

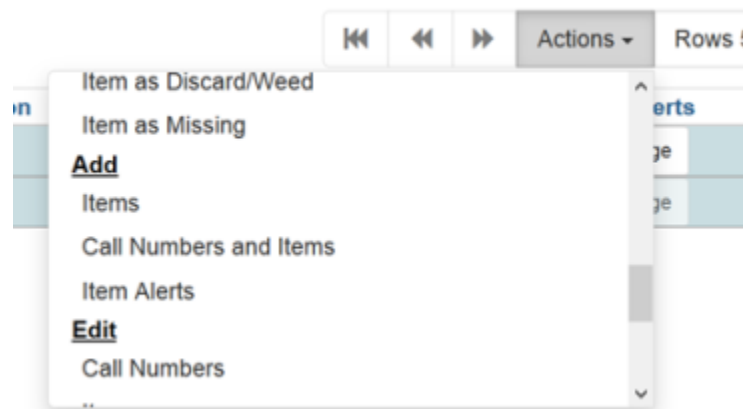
If needed, temporary alert messages can be added at check in:



## Adding messages in Item Status

Temporary alert messages can be added in Item status from list and detail view. In list view, multiple items can be selected to add the same temporary alert message to all items.

**From the Actions menu in list view:**

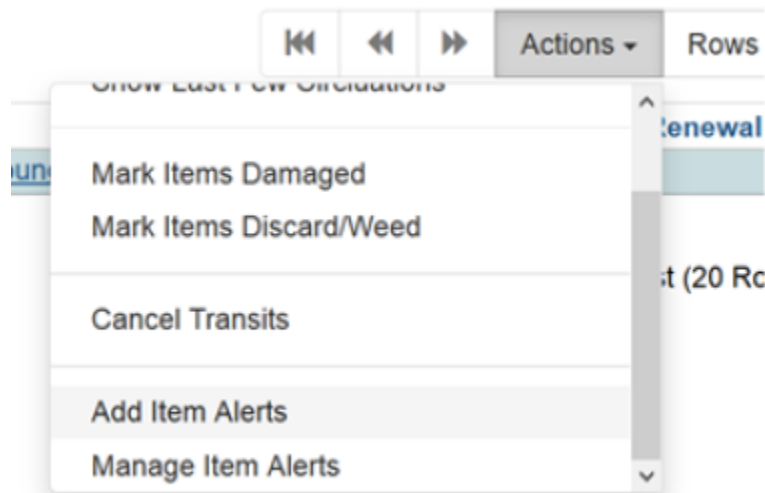


And the Add Item Alerts button in Detail view, on the bottom left of the screen:

|                |  |                       |   |
|----------------|--|-----------------------|---|
| Circulate      | <input type="text" value="true"/>  | Renewal Workstation   | <input type="text"/>                      |
| Floating       | <input type="text"/>   | Circ Modifier         | <input type="text" value="book"/>         |
| Inventory Date | <input type="text" value="01/16/2019 11:21"/>                            | Inventory Workstation | <input type="text" value="STATE L-jehn"/> |
| Item Alerts    | <input type="button" value="Add"/> <input type="button" value="Manage"/> |                       |   |

## Adding messages at Renew items

Temporary alert messages can be added when renewing items in Renew items:



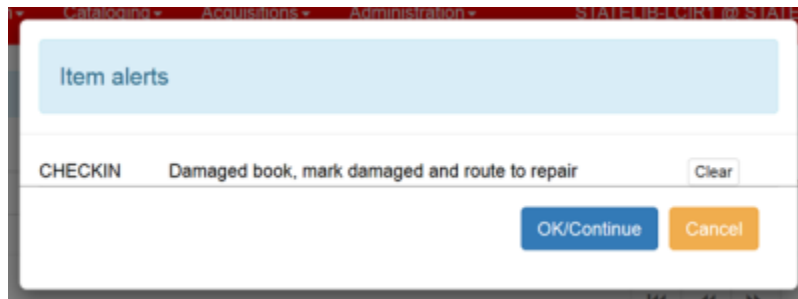
## Managing Temporary Alert Messages

Temporary alert messages can be managed at check in, in item status, at checkout, and in renew items. Managing includes clearing and editing messages and includes making a message temporary that was not at creation. Management functions cannot be done in batch.

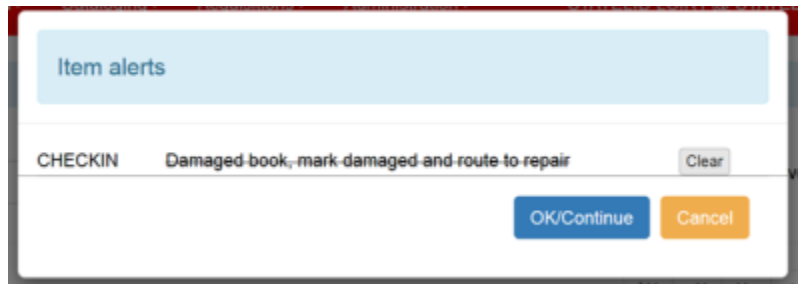
Circulation staff can manage persistent alert messages from Manage alerts. However, this should be in accordance with local policy.

## Managing messages at Check In

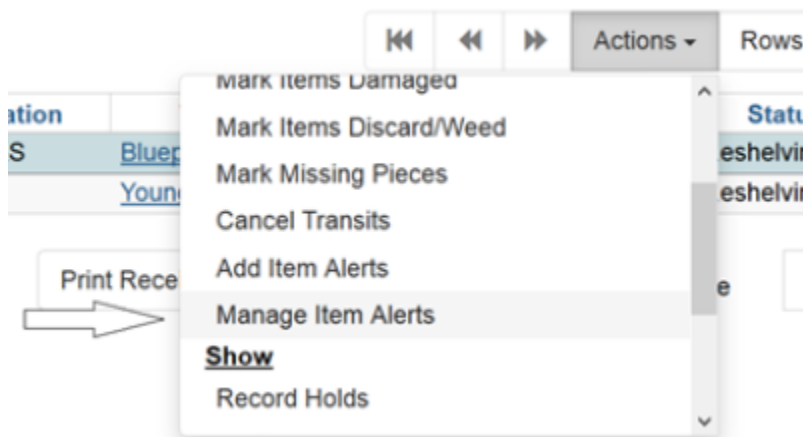
When an item with a temporary alert message set for display at check in is checked in, a dialog box appears. Staff have the option of clearing the message, or clicking on OK to proceed with check in without clearing the message. Whichever course is taken, the instructions in the alert message should be followed.



Clearing the alert message removes it from the item; click OK to continue:



The alert message can also be cleared or edited while still at the Check in page in the Action menu, Manage Item Alerts (there is no Manage button for alerts in the check in column choices):

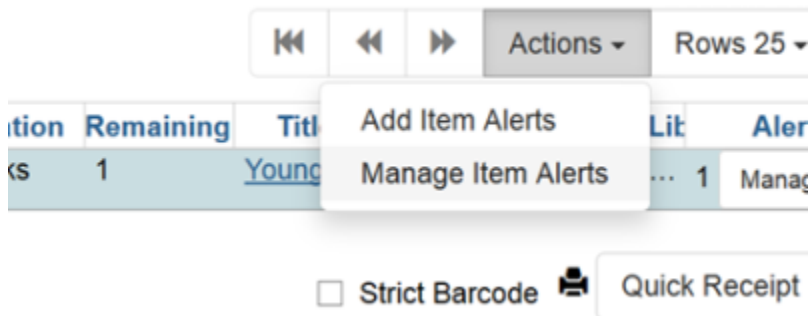


A dialog box opens where staff can edit or clear the item alert:



## Managing alert messages at Checkout

A temporary alert message can also be cleared or edited at checkout, whether set to display then or if for another action. If the message is for the checkout item, it can be cleared from the dialog box that stops the checkout. Clearing the message once the item is checked out is done from the Action menu:



Or from the Manage button in the checkout list:

| Remaining | Title      | Circulation | Owning Lit | Alerts | Alerts |
|-----------|------------|-------------|------------|--------|--------|
| 1         | Young a... | book        | STATEL...  | 1      | Manage |

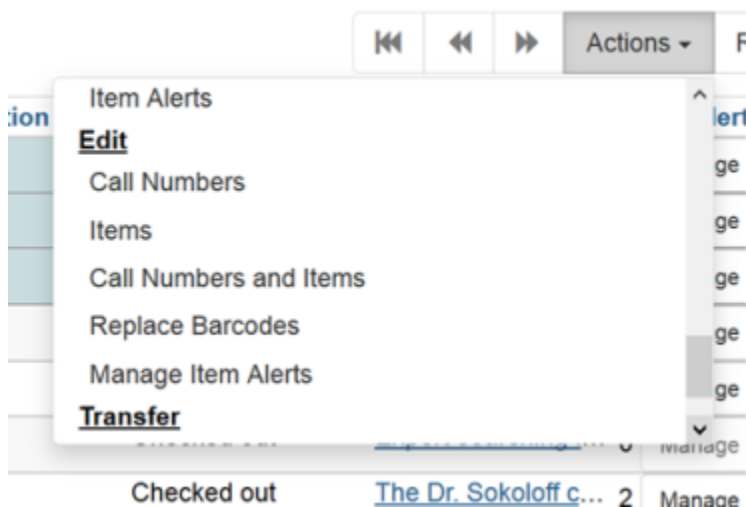
## Managing alert messages in Item Status

There are several places on the item status (F5) page where you can manage item alerts.

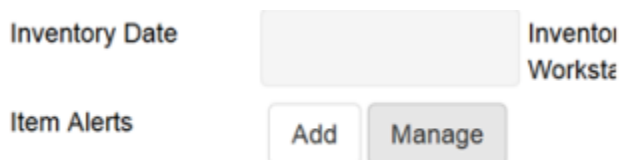
From the list view itself:

| <div> <div> <div>⏮</div> <div>⏪</div> <div>⏩</div> <div>Actions ▾</div> <div>Rows 500 ▾</div> </div> </div> |  |        |        |
|---|--|--------|--------|
| Item Status   | Title                                  | Alerts |        |
| Reshelving  | <a href="#">Blueprint reading f...</a> | 1      | Manage |
| Reshelving  | <a href="#">Blueprint reading f...</a> | 0      | Manage |

From the list view action menu:

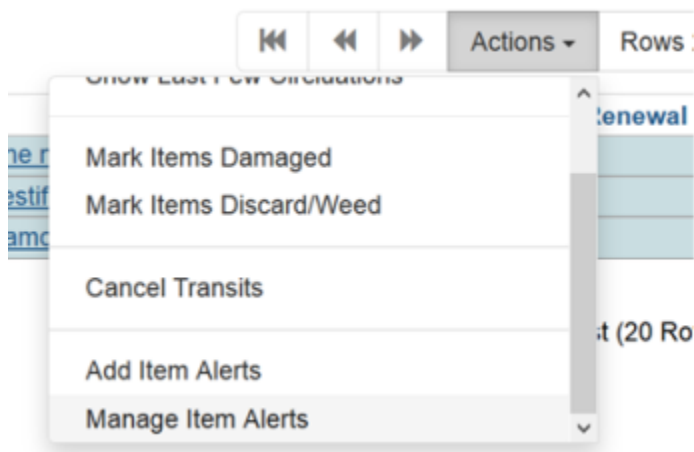


From the detail view, lower left side of the screen:



## Managing alert messages in Renew Items

Temporary alert messages can be managed in Renew Items from the Actions Menu:



## Adding and managing alert messages in Cataloging

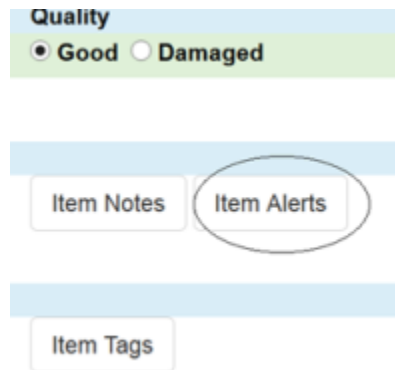
Alert messages, either temporary or persistent, can be added or managed either in item editor or in holdings view. Within the item editor, you cannot add alert messages to multiple items but you can add multiple alerts to multiple call numbers with only one item attached. You can add to multiple items simultaneously in Holdings View and Item status. Alert messages can be edited in Alerts management across multiple items at one time but cannot be removed in batch. Several messages can be added to one item.

### Adding alert messages in the Item Editor

Alert messages can be added for just check in, just checkout, or for both. They can be temporary or persistent. Some libraries add alert messages to remind staff to verify accompanying material or multiple pieces are present for check out and were returned at check in. Alert messages for both check in and checkout should use the alert type "Normal checkout and checkin". You can only add one message at a time in the item editor; however, you can immediately add subsequent alert messages from holdings view.

If you are adding multiple call numbers to either the same or several libraries, you can add the same alert message to each one simultaneously from the item editor. However, you cannot add alert messages simultaneously while adding multiple items to a bibliographic record.

Within the item editor, scroll to the bottom and Click on the Item Alerts button:



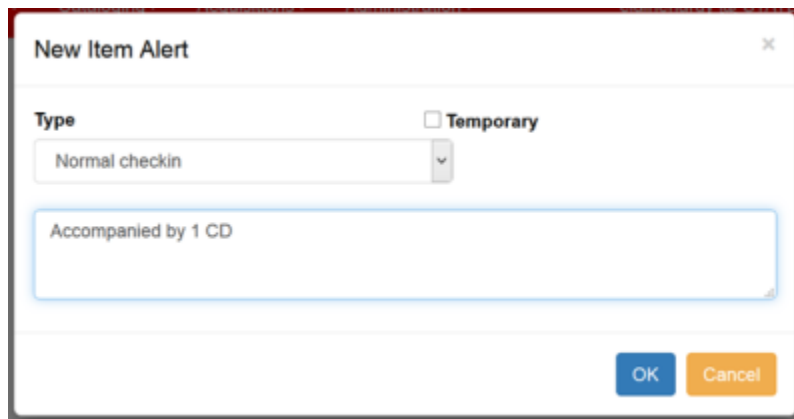
Quality

☒ Good ☐ Damaged

Item Notes Item Alerts

Item Tags

The New Item Alert box opens. Choose the type, either “Normal checkout and Checkin,” “Normal Checkin,” or “Normal Checkout” and add text for the message. If the alert message is temporary, check the temporary box. When finished, click on the OK button.



New Item Alert

Type ☐ Temporary

Normal checkin

Accompanied by 1 CD

OK Cancel

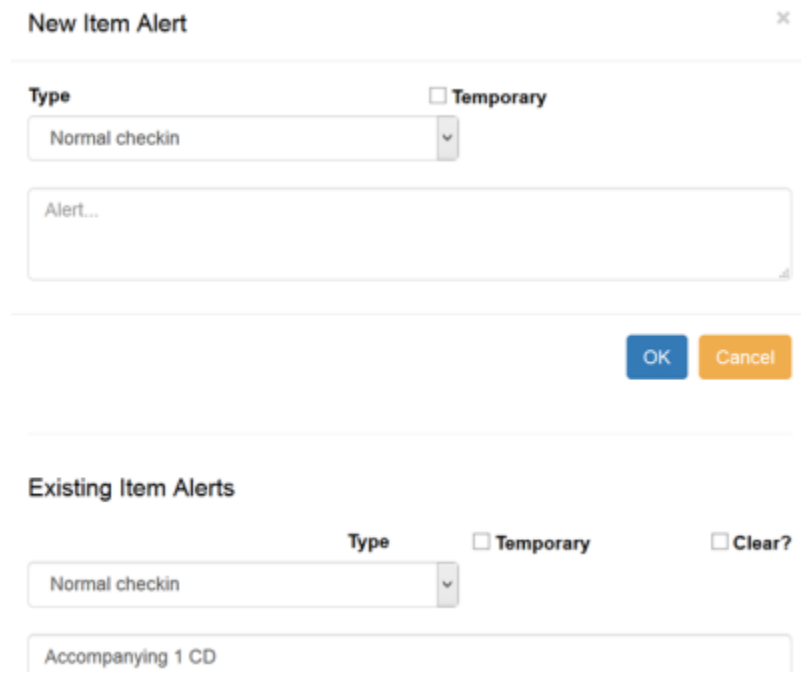
Remember to click on the Save & Exit button to add the item.

If you need to add additional alert messages, you can either reopen the item editor or add them from Holdings View.

## Managing item alert messages from the Item Editor

Existing item alert messages can be edited or cleared from within the item editor. You cannot manage alert messages on multiple items within the item editor.

In the item editor, click on the Item Alerts button. A box opens up where you can edit or clear (delete) the existing alert message or add a new one.

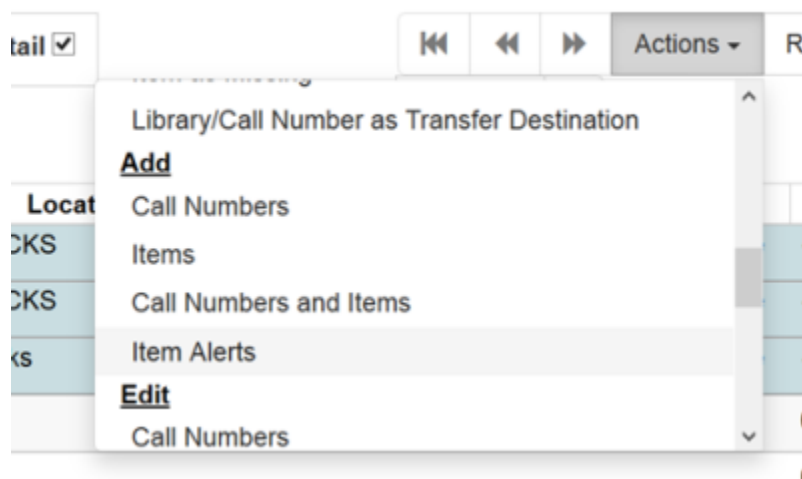


Make the changes you need to make and click on OK. Then click on Save & Exit to save your changes to the item.

## Adding alert messages in Holdings View

Alert messages can be added in Holdings view to existing items.

From the Actions menu - Add - Item alerts:



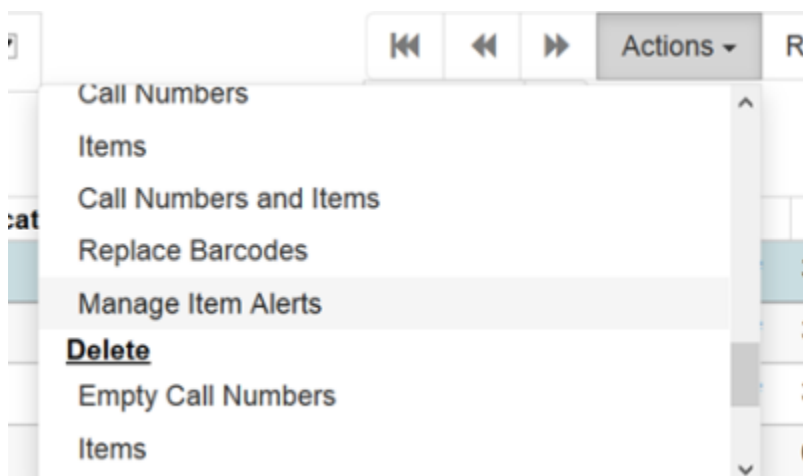
The New Alert message box will open. Add your message and click on OK. To see the new message reflected in the item count, refresh the page. You can add the same message to several items at the same time in Holdings View.

## Managing Item Alerts in Holdings View

You can manage existing item alert messages either from the Manage button in the Alerts column:

| Barcode        | Status    | Alerts   |
|----------------|-----------|----------|
| 012025         | Available | 3 Manage |
| 012925         | Available | 3 Manage |
| 50723010117949 | Available | 3 Manage |
|                | 0         | Manage   |
|                | 0         | Manage   |

Or from the Actions menu - Edit - Manage item Alerts:



If there are multiple messages on the item, you can edit them all or edit some and clear others. Click on OK when finished. Redisplay Holdings View to see the changes. While you can edit alert messages on multiple items from holdings view, you can only clear the messages one item at a time.

You can also add and manage item alerts from menus under Circulation and Item Status (F5).see *Adding and Managing Item Alerts at Circulation* in this page above for more information.

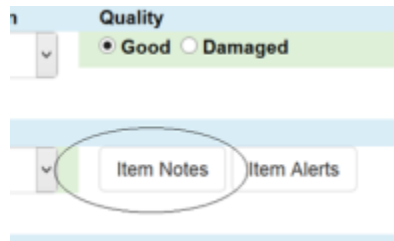
## Adding and maintaining Item Notes

Since information of a local nature cannot be added to a bibliographic record in the PINES database (see [Copy Cataloging Procedures](#)), item notes are attached to items to provide local information. Item notes are governed by local policy and procedures and their use is optional for libraries. While there is no PINES policy that governs their use, best practice is to use defined titles for the notes and similar language for notes using the same title.

Notes can be public and thus visible in the OPAC or just visible in the item editor. Typical public notes

might identify a donor, or that an item is missing accompanying material. Private notes might indicate which staff member has an Office copy. Multiple notes can be added to a single item; but must be added one at a time in the item editor. Identical item notes can be added to several items simultaneously in the item editor. To complete item note actions, always remember to click on Save & Exit.

To add, edit, or remove item notes, scroll to the bottom of the item editor and click on the Item Notes button:



Create a title for the note and click on the Public Note box if it is to be visible in the OPAC. Add your note and click on OK:

Click on Save & Exit to add the item.

A public note as it looks in the OPAC:

|  |        |   |   |      |            |   |             |
|--|--------|---|---|------|------------|---|-------------|
| <a href="#">Georgia Public Library Service: Georgia Public Library Service - Professional Collection</a> | Stacks | 658.314 Y548<br>( <a href="#">Send Call No. in Text Message</a> ) | 50723010117949<br><a href="#">view</a>   <a href="#">edit</a> | None | 10/24/2007 | <a href="#">Copy hold</a>               | Available - |
| Donation: Donated by Friends of the Library, January 2019  |        |   |   |      |            |   |             |
| <a href="#">Live Oak Public Libraries: Pooler Library</a>  | NONFIC | 658.3 YOKO<br>( <a href="#">Send Call No. in Text</a> )           | 10539000529524<br><a href="#">view</a>   <a href="#">edit</a> | None | 02/16/2018 | <a href="#">Copy hold / Volume hold</a> | Available - |

Item notes can be removed in the item editor. From Holdings View in the Actions menu - Edit - Items (you cannot remove Item notes from more than one item at a time):

**New Item Note**

Title...

☐ Public Note

Note...

OK

Cancel

**Existing Item Notes**

Donation

☒ Public Note

Remove

Donated by Friends of the Library, January 2019

01/20/2019

Click on OK and then Save & Exit.

You can also edit existing item notes in the item editor. You cannot edit more than one item at a time. After you complete any edits, click on OK and then Save & Exit.

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Last update: **2020/03/13 15:26**

