Creating and using

Ephemeral items

that need to be shadowed in the catalog

The Ephemeral checkout is used when you have items that you do not want to be officially checked out or returned, but you do want to keep track of how often these items are being used or taken. An example of this would be a free magazine section - patrons can grab magazines and never return them but you want to try to track how many times the magazines are going out.

> ### How the system treats this:
>
> When you check out an ephemeral item to a patron, the item is being checked out and then checked right back in. The circulations are counted in the system but the patron is not held responsible for returning the items. Some libraries using this feature also create a generic patron card because you often do not know the person using/taking the ephemeral item.

Best Practices: A Quick Overview

You can use the Ephemeral checkout wizard for any items, whether they are your intended ephemeral collection or part of your normal collection. The wizard is what dictates the ephemeral nature of the checkout, not the item type.

The **MSC Best Practices** for ephemeral checkouts are as follows (in brief with an in-depth walkthrough on the following pages):

1. Search for the EPHEMERAL record using the title control number: a2222222
2. Add a call number to that record that describes your collection (ex. PAPERBACK or MAGAZINE).
3. Use the item type, home location, and item cats to describe the item as needed for accurate statistics.
4. Add any other details that you need in the Staff Notes.
5. Place the barcode for the ephemeral item near your circulation desk for quick scanning.
6. Create a generic patron card to use if the patron does not have or show you their library card; also place this barcode near your circulation desk for quick scanning.
7. USE THE EPHEMERAL WIZARD to check out the item.

NOTE: If you use the regular Checkout wizard for your MAGAZINE (for example),
it will check out for the normal circulation period and likely go into LOST or
DISCARD if no one catches the mistake.

Example uses for Ephemeral collections:

- Donated/extra paperbacks that you want patron to take as they like.
- Magazine collections that you don't want to fully catalog and track individually, but you want circulation statistics for them (in this case, you can even print a due date slip that indicates that the patron should return the item, but nothing happens if they don't return it).
- Donated magazines left on a free shelf within view of the circulation desk.
- Tracking items used in house that are not barcoded and cataloged individually.

Should you use Ephemeral checkout instead of Mark Item Used for books used in house?

Ephemeral Checkout:

- Will count as a "circ" in your statistics.
- Is a little slower than Mark Item Used as you have to enter a patron (likely your generic patron), and the number of items (which would be one for a book that was found on a table).

Mark Item Used:

- Will NOT count as a "circ" in your statistics.
- Quicker to use if all the items have barcodes.

Adding your Ephemeral Item(s):

1. Open the Call Number and Item Maintenance wizard (Cataloging > Common Tasks > Call Number and Item Maintenance).
2. Do a **Title Control #** search for "a2222222". The record title is EPHEMERAL.
3. Highlight the record with the title EPHEMERAL and click **Modify** at the bottom of the screen.

- NOTE - You'll see that the Call Number that comes up in this search likely does not describe the item you want to create. You will be creating your own call number under this Title, so do not worry about that.
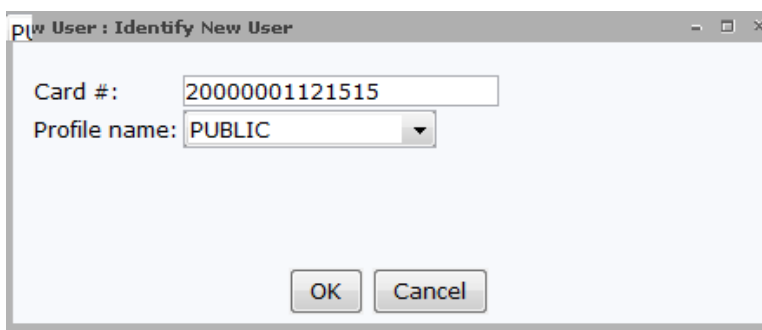
4. In the Call Number/Item tab, click Add Call Number. [Add Call Number]
5. In the popup box, choose your library.
6. Now you can fill out the Item Cats, Home Location, and Call Number how you would like it. The Call Number should describe the item. Examples: MAGAZINE, NEWSPAPER, PAPERBACK, BOARD BOOK.
7. Scan a regular item barcode for the Item ID.
7. Click **Save** to finish adding your new item.
8. Make the barcode accessible to your checkout staff, or put instructions for looking up the item by the circulation desk if you do not use a barcode scanner. Some larger libraries photocopy the item barcode and put it on index cards by each circulation computer for quick scanning.

Create a generic patron:

- You probably won't always have a card to assign to each checkout, especially if your ephemeral collection is just a grab and go rack that staff are watching. If a patron comes and grabs that free item and walks out, you can use the generic patron card for that transaction.

- Generic patron cards must still have a complete barcode that follows the rules of your patron barcodes. **NO spaces, all numbers, 14 digits.** The best way is to use an actual library card and photocopy the barcode if you need it at multiple desks.

- Put this patron barcode somewhere easily accessible for your checkout staff as well, or make the name easily searchable if you do not use barcode scanners.

Steps for creating a generic patron card:

1. Open the New User wizard (Circulation module > Users group)

2. Scan a library card or create a card number that follows the standard patron card number convention. The card has to be 14-digits, only numbers, no spaces and should start with your library prefix (ex. x9550).
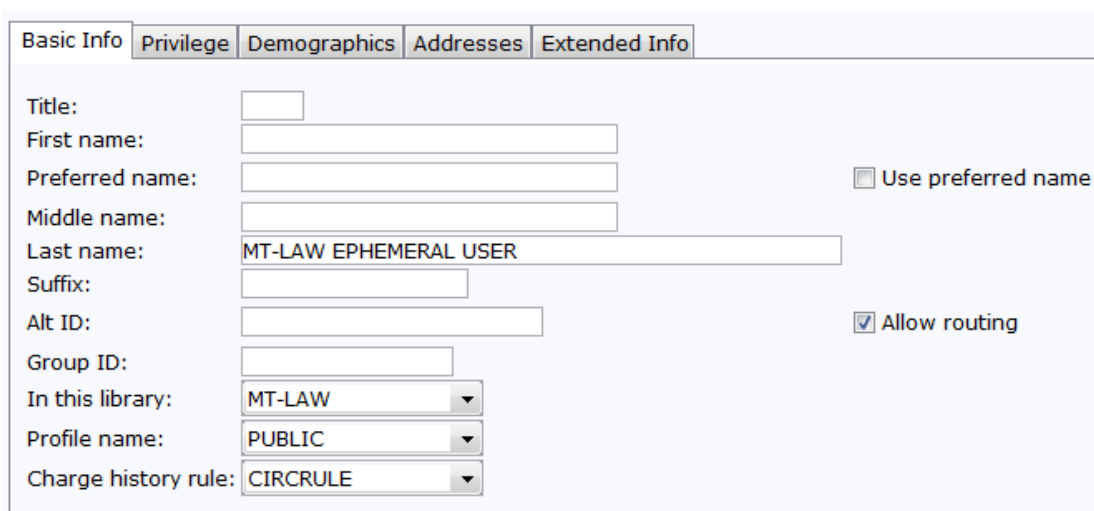

3. In the Last Name field, name the card LIBRARYCODE EPHEMERAL USER. You can add ADULT or JUV to the card name if you need different statistics for each user group. Please name the card LIBRARYCODE EPHEMERAL ADULT or JUV if you need these user distinctions.

4. Click **Save.**

Using the Ephemeral wizard:

> REMEMBER - You MUST use the Ephemeral wizard to check these items out. Even though the item is called "EPHEMERAL", it will check out like a normal item if you use the regular CheckOut wizard, and then go into LOST if the mistake is not corrected.

⭐ The Ephemeral wizard is located in the Circulation module under the Special group. You can move it to the Common Tasks group by following the ToolBar Customization document or watching this video.
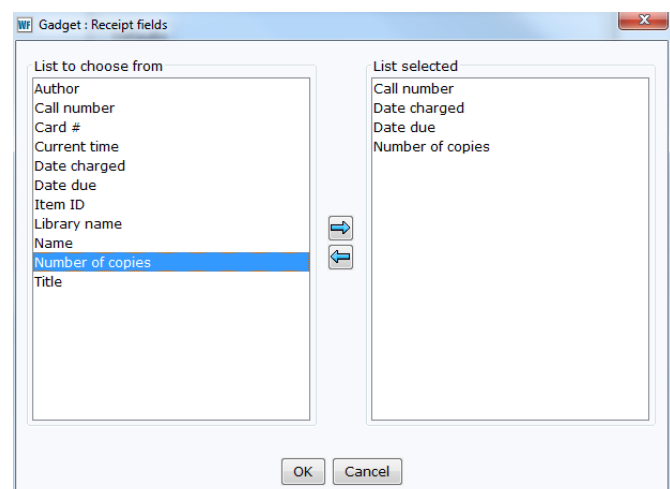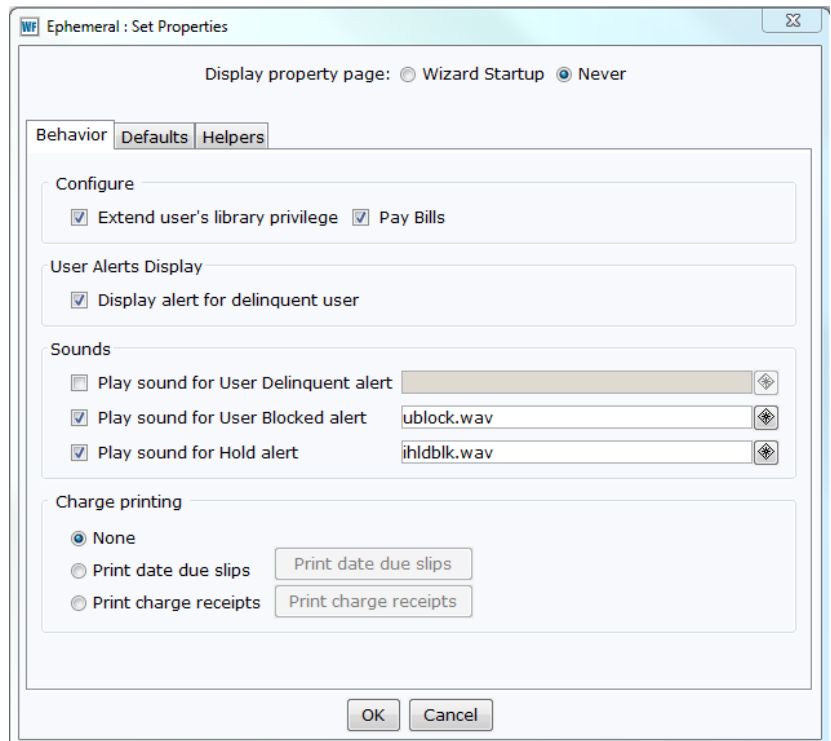
Ephemeral Wizard Properties:

Right click on Ephemeral to set the properties

There's not a lot of property adjustments in this wizard. The main one you might want to change is the Charge Printing section.

Some libraries use Ephemeral items to check out items that are part of their collection, but they do not want to catalog, barcode, and charge for loss or damage. They still want to encourage patrons to bring the items back even though it is not tracked in the system. They can do this by using the Ephemeral wizard and printing a charge receipt that says the item is due in the amount of time designated by the item type, but really, behind the scenes, it is checked back in immediately.

To do this:

1. Click the Print Due Date slips radio button.

2. Click on the big Print Due Date Slips button that is now active.

3. In the Receipt field box, click the gadget just to the right.

4. Add Call Number instead of Title (because the call number is what we are using describe the item).

5. Remember you have to highlight what you want from the list on the left and then use the middle arrow pointing right to move it to the "selected" side.

6. Set any other information you want on the receipts (see Set Up a Receipt Printer in WorkFlows for more detailed instructions).

Using the Ephemeral wizard (continued)

1. Open the Ephemeral wizard (Circulation module > Special group).
2. Scan your patron's card or use your generic patron card.

Pay special attention to steps 3 and 4. The number of copies should be entered **before** you scan the Item ID, even though that line is under the Item ID line. If you make this a habit, it will reduce the amount of accidental circulations.

3. Enter the number of copies the patron is checking out. DOUBLE CHECK that this is entered correctly. Accidental circulation counts cannot be removed from the system.
4. Scan the Item ID (or use the Item Search helper to find the EPHEMERAL Record).
5. Click Check Out Item to User.
6. The Due Date generated by this wizard will be determined by the Item Type, but actually the item is immediately checked back in.
7. That's it!

Identify User
Card #: MHSXX1

Enter item to checkout
Item ID: 2453736-2001
copies: 3

List of checkouts

Number of Copies »	Title	Date Due
3	EPHEMERAL	2/14/2018,23:59