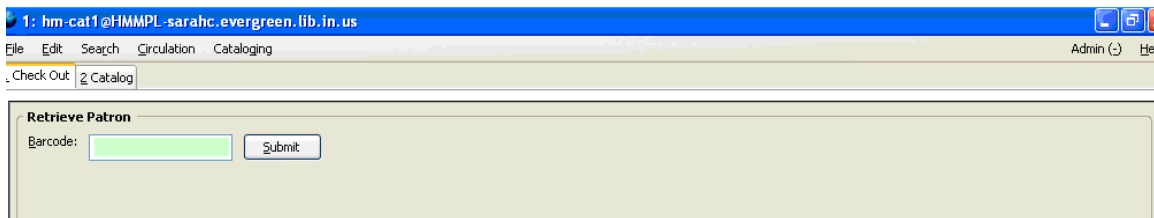# Chapter 22 -- Pre-Cats and ILL
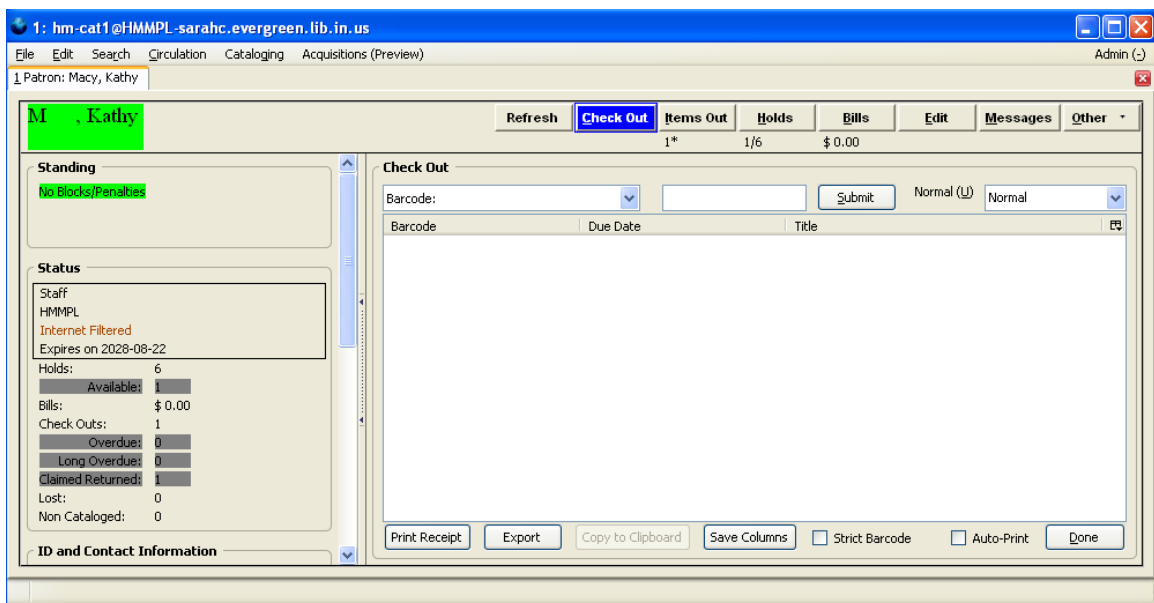
The pre-cat function, also referred to as "circ-on-the fly" allows you to circulate items that have not been cataloged. In Evergreen Indiana, interlibrary loans should be entered into the system as pre-cataloged or "pre-cat" items. Using the pre-cat function gives them an item record at the time of circulation that serves as a place holder. These items are not attached to a bibliographic record, so they are not truly cataloged. In addition to ILL this function can be used to circulate other items that are not in the catalog, for instance an item that has been lost and withdrawn, but then discovered on the shelf, items which have not yet been cataloged as part of an automation project, or a book belonging to a staff member being loaned to a patron as a courtesy.

Checking Out Pre-Cat Items

Adding pre-cats is done at the time of circulation. Go to the Check Out function by hitting **F2**, or go the **Circulation (Alt + C)** menu and select **Check Out Items (Alt + O)**

Enter the patron's barcode in the barcode box to bring up the screen below:

At this point if you want a different circulation period than 21 days, select the option you want from the drop down list labeled Due Date.


If you enter the barcode without selecting a due date, you will get the default loan period of 21 days.   Enter the barcode you are going to use for the pre-cat item. This must be a barcode which is not already attached to something in the system. It could be a new barcode, a barcode you recycle for Pre-Cat or ILL items, or in the case of ILLs, you might be able to use the barcode of the lending library. If you type or paste the barcode number into the box, you will need to hit **Enter**, or click **Submit.**

Since the barcode is not attached to an item in the system, the following window will open:
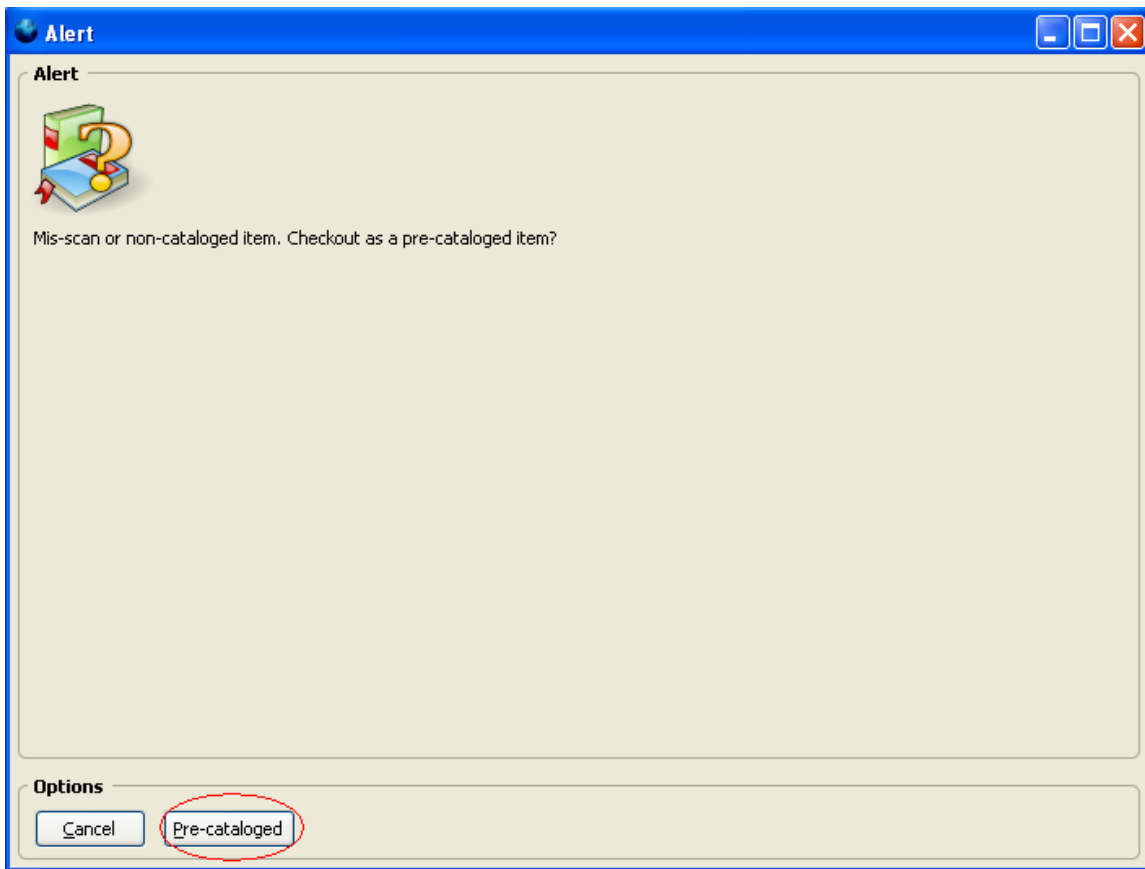

Click the **Pre-Cat (Alt + P)** button. The following box will open in the upper left hand corner of your screen:
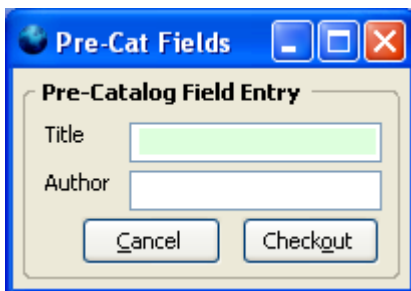

Here you can enter the title and author of your item.

NOTE: If the item you are circulating is an ILL, in the title line, enter "ILL--No Renewals" along with the title in the Title box. This ensures that library staff can see that the item is an ILL when viewing the item listed in a patron's account so they will know not to do an override to renew the item.

Enter the information in the title and author fields. Then click **Checkout (Alt + O).**
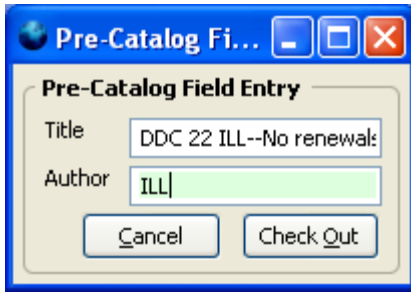
The item is now checked out, and will display as seen below. Note that if you selected a choice from the list, the due date will reflect it.
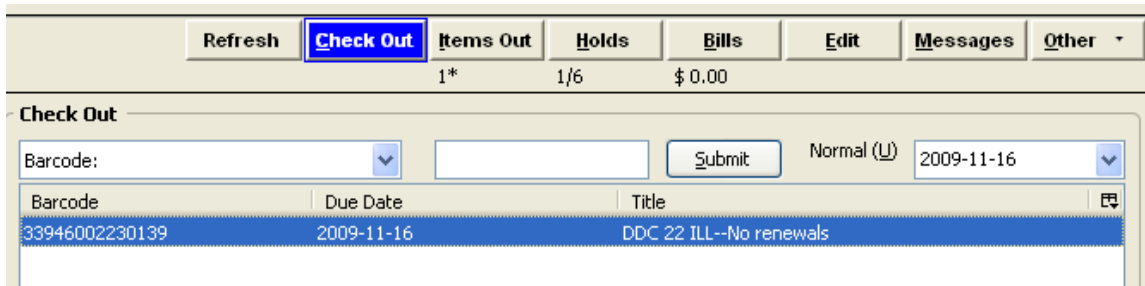
NOTE: If pre-cats are checked out with a circulation period other than three weeks, it's possible for them to be renewed for one week. If they are checked out for three weeks, they cannot be renewed, but it appears that they can. Pre-cats will display with one renewal remaining in their account, and the system will tell patrons they've successfully renewed the item, even though the due date will not change.

In order to prevent patron confusion and renewed ILL items, renew ILL items when they are added to the system.

Click the **Items Out (Alt + C)** button. The items out screen will display:

Highlight the ILL item, and right click or click **Actions for Selected Items (Alt +S)** and select **Renew**.

A dialog box will open asking if you are sure you want to renew the item:

Click **OK** or press **Enter**.

Note that there are no longer any remaining renewals for this item:
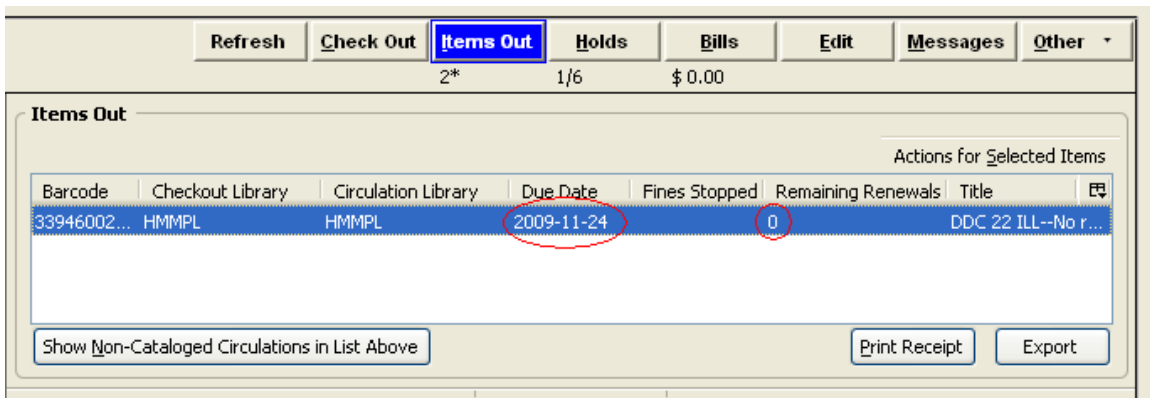
In this case, the item had been checked out for two weeks, and renewing the item extended the due date for one week.

At this point you can change the due date back to two weeks if needed. If the item had been checked out for three weeks, the due date would not change, but the remaining renewals would still change to 0.

Changing Due Dates for Pre-Cat items

If you need to change the due date, for instance you forgot to make a selection from the list, you want to choose a different date than the options from the list allow, or you have renewed the item and need to edit the due date for a shorter circulation period, you can edit the due date once the item is checked out.
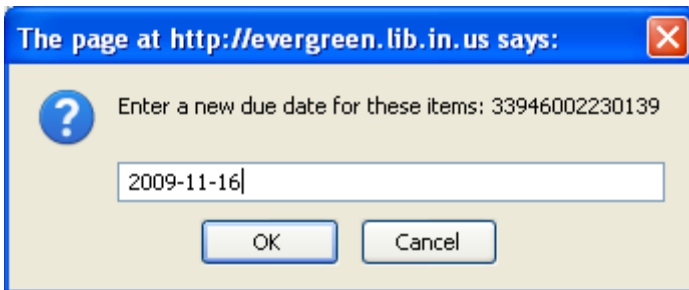
From the **Items Out** screen, click on the item you just checked out to highlight it.
Then click on **Actions for Selected Items (Alt+ S)** or right click and select **Edit
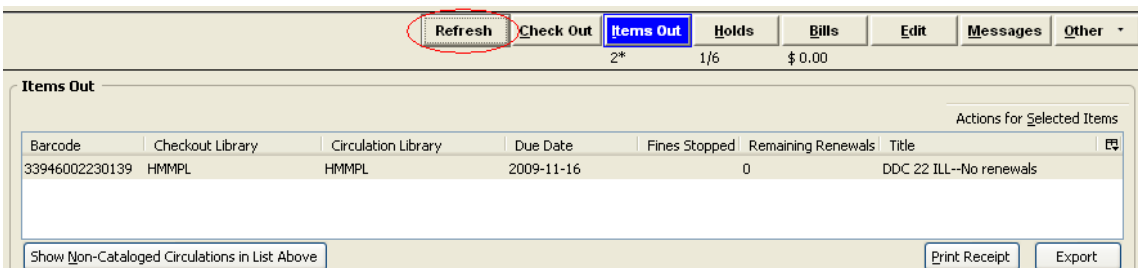Due Date.**
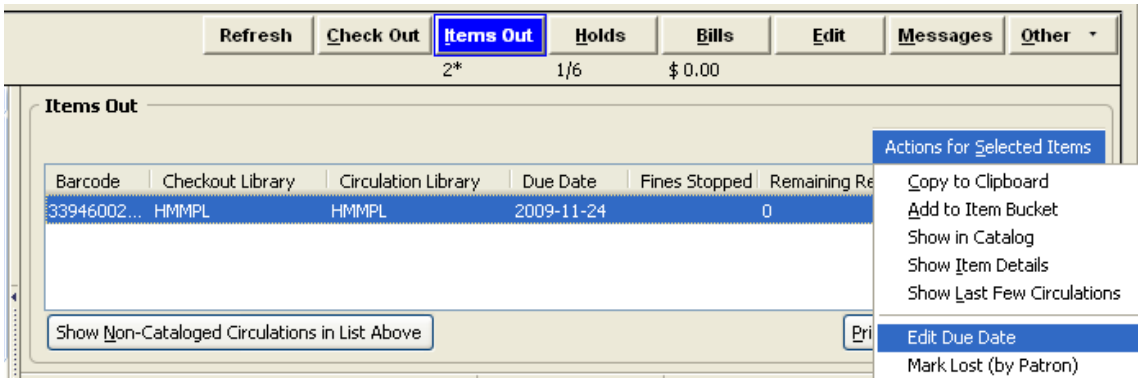
The following dialog box will open:
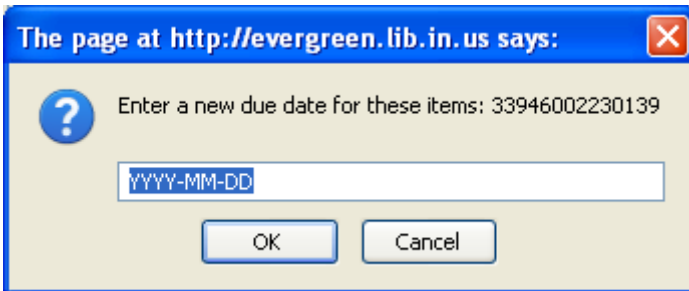
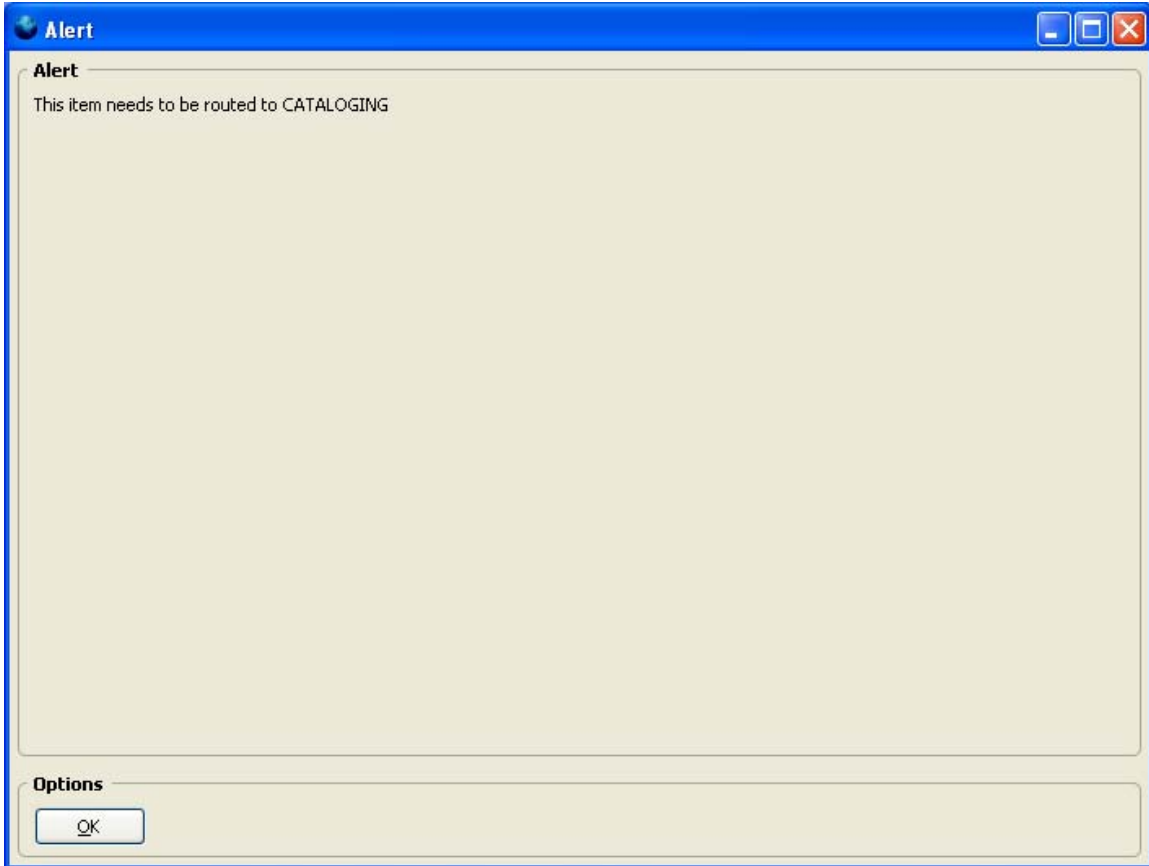Enter the desired due date in the format shown:

Then click **OK** or hit **Enter**. Click the **Refresh** button to display the new due date:
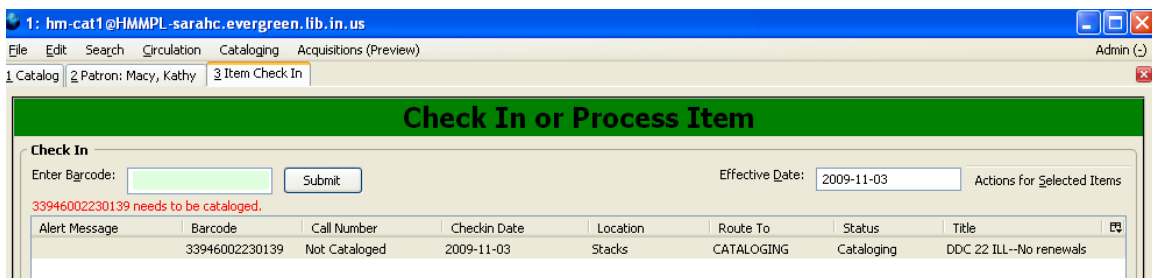
Deleting Pre-Cat Items

When a pre-cat item gets checked back in, the following window will open:

The person doing check-in will Click **OK** or press **Enter**, and it will display on the screen as follows:


If the item is not an ILL, it should be sent to cataloging to be cataloged. ILLs should be sent to cataloging or the ILL person to be withdrawn from the system.

To delete Pre-Cat items, you must use the Item Status screen. Pre-Cat items will not display in a catalog search, even if you search by barcode. When you do a barcode search, the catalog will display a blank record summary as shown below:
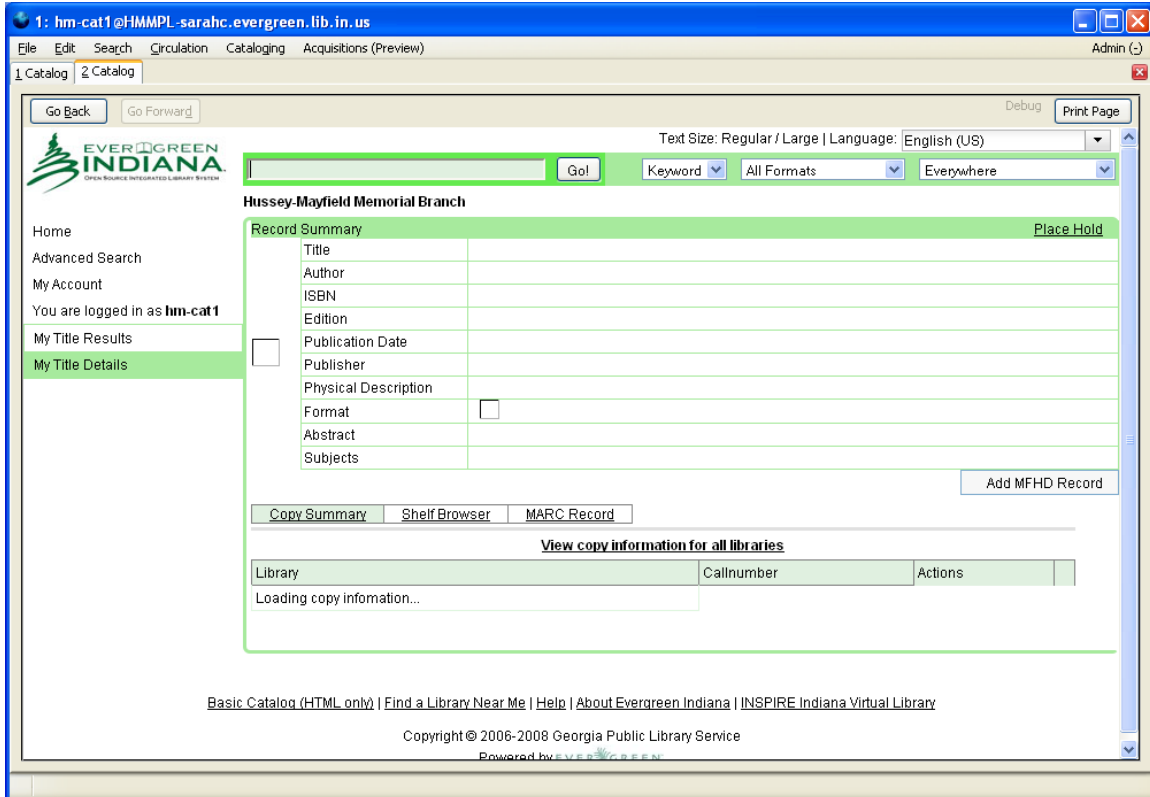
Access the Item Status screen by pressing **F5**, or see *Chapter 15 – The Item Status Screen* for other ways to access the screen.

Enter the barcode of the pre-cat item in the barcode box. The pre-cat item will display as seen below:
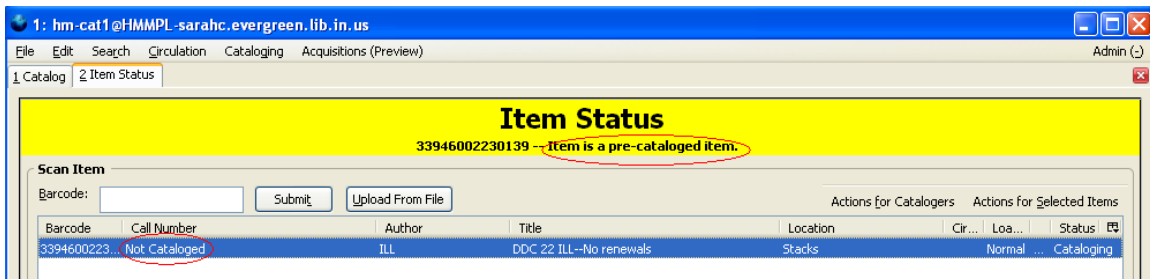
Note that it says the item is a Pre-Cat and it shows a call number of Not Cataloged. To delete the item from the system, click on the item line to high-light it. Then, under **Actions for Catalogers (Alt + F)** select **Delete Items**. If you have multiple pre-cat items, you can scan them all and highlight them all at once.
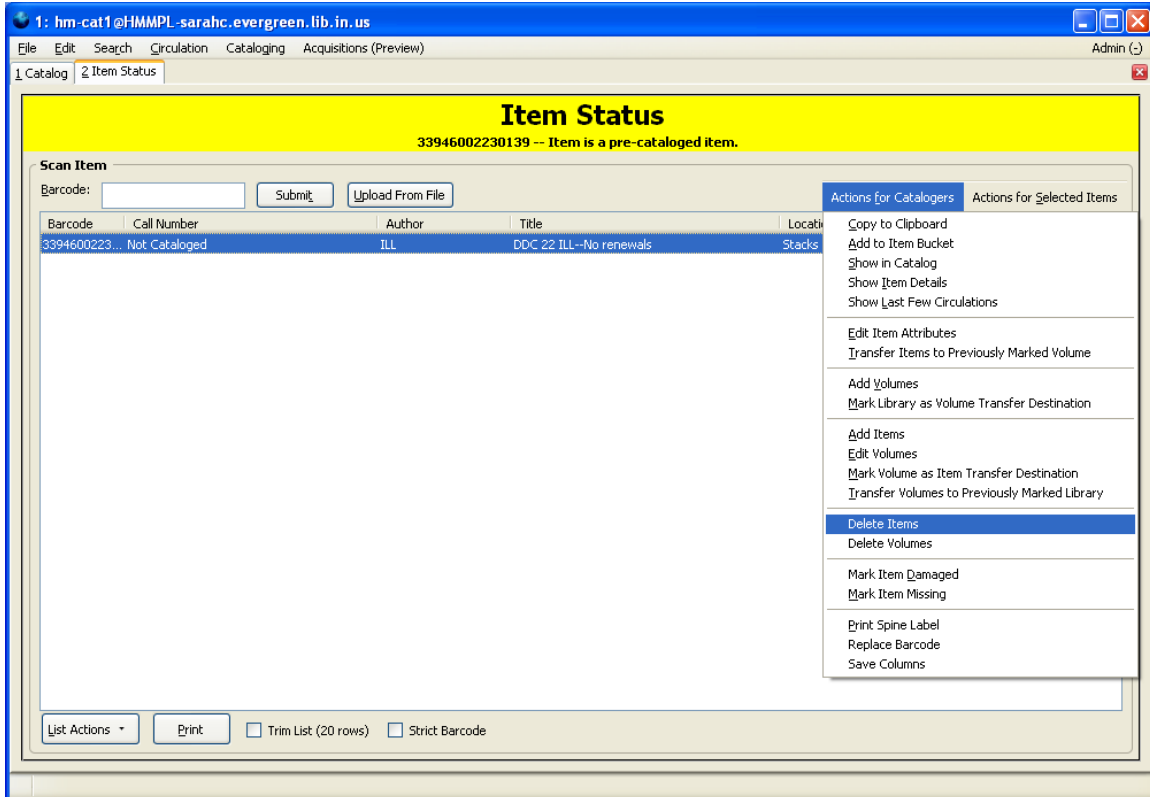
A dialog box will pop up, asking if you're sure you want to delete the item:
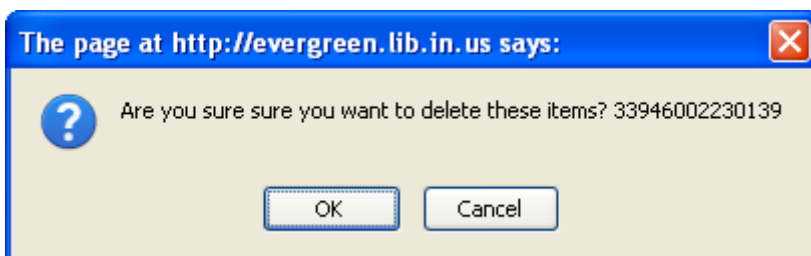
Click **OK** or press **Enter**.

Another dialog box will pop up telling you the item has been deleted.

Click **OK** or press **Enter**. The box will disappear. Nothing else will appear to happen, but the item will be deleted from the system.

Transferring Pre-Cat Items to Bibliographic Records

If a Pre-Cat item is not an ILL and needs to be cataloged, it can be transferred to a bibliographic record. When the item gets routed back to cataloging, treat the item as if it is a new item to be cataloged. Search for a matching record in Evergreen. If a matching record is not found import a new record. See *Chapter 12 – Adding New Records via Z39.50,* if needed. If a record to import is not found, create one in Evergreen, see **Chapter 16 – Creating New Records in Evergreen.**

Once you have found or added the correct bibliographic record, you will transfer the Pre-Cat item to appropriate record. If your record does not have a call number for your item attached to it, you will need to add one.

Highlight your branch name, and **right click** or go to **Actions for Selected Rows (Alt + F)** to select **Add Volumes (Alt + V).**

The Volume/Copy Editor will open. Enter 1 for the number of call numbers, or more if you have multiple volumes. Then enter your call number in the call number box. Since you will be transferring your call number to this item, enter 0 for number of copies. You are not adding any copies at this point.

Your call number will display with no copies attached. Highlight the call number and either right click or under **Actions for Selected Rows (Alt + F)** select **Mark Volume as for Item Transfer Destination**.

A dialog box will open telling you the Volume has been marked:
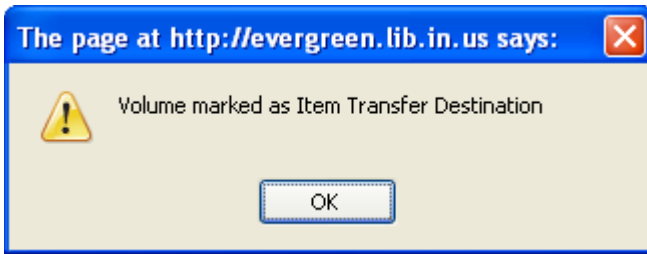
Open the Item Status screen by pressing **F5**, or see *Chapter 15 – The Item Status Screen.*

Scan or enter the barcode of the pre-cat item. Then click on the row to highlight it, and under **Actions For Catalogers** select **Transfer Items to Previously Marked Volume**.
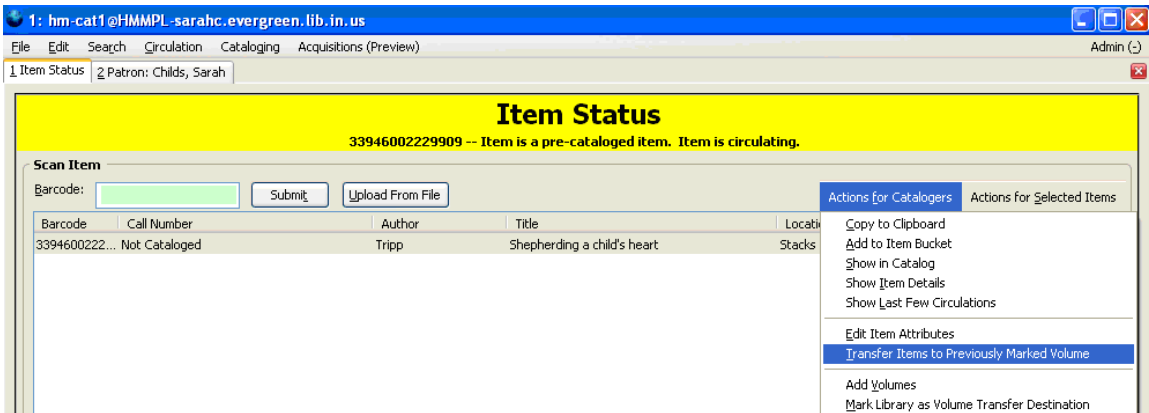
A window will open allowing you to verify that the correct volume has been marked. Once you have ensured that is correct, click the **Transfer** button:
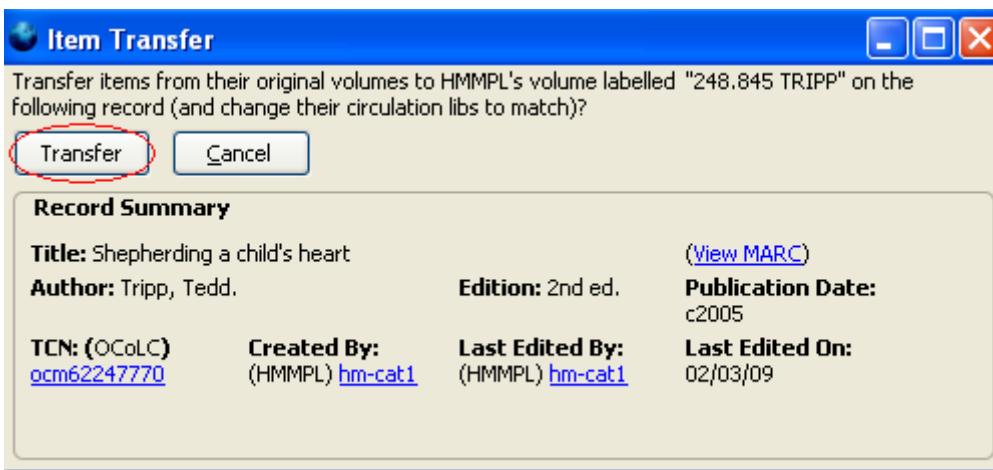
A dialog box will open telling you the item has been transferred:

Click **OK** or press **Enter.**

At this point, you will need to **Edit Item Attributes** for your item, in order to make sure the correct circ modifier, location, etc. are applied. See **Chapter 7.1, Using the Copy Editor** to make changes, if necessary.