

NOTIS USERS GROUP MEETING CIRCULATION 5.2 PRE-CONFERENCE

Ben Schapiro and Ken Victorson (both from Ameritech Library Services) presented a day-long overview of Release 5.2 Circulation on the day prior to the 1994 NOTIS Users Group Meeting. Not all of the coding is finished; plans are for it to go to Beta test sites in December. Early release sites should receive it in March; general release is currently scheduled for late Spring.

B. Schapiro will be writing articles in NOTISES and on the NOTIS Gopher server on Release 5.2 during the next six months.

Circulation functions, files and screens in Release 5.2 will be vastly different than in earlier releases -- the Release is really is a "rewrite" rather than merely enhancements to the existing Circulation Module. Even navigational methods will be changed; menus and function keys will be used instead of transactions. Course Reserve will be available in the OPAC as well as in staff mode. Training will be a major task.

Major features and changes include:

1. Charge/discharge features/changes;

- .Ability to back date or use date in future (lsys value controls number of days in either direction that a staff member can put in when back/foward dating)
- .During charge session, alerts staff to number of items patron can still charge out; decremented in real time -- will "block" in middle of session
- .Staff alerted to "number of pieces" at point of discharge without completely discharging the item
- .Easy movement to item and patron record during charge/discharge session
- .Staff can be authorized to change the "due date" after charge is completed (id of person doing this is reported on daily operations report); policies associated with first due date are in effect
- .At time of charge, staff can view/alert patrons to items being held for them, items recalled from them, and (total) amount owed
- .During charge session, staff can view all items charged out during that session (three at a time)
- .Text from two patron record note fields (now called "main message" and "sub-message") will display at point of charge to staff

1. Charge/discharge features/changes (continued)

- . "One time supervisor override" enabling supervisor to enter id/password and perform override while staff member with inability to do override is signed on.
- . At point of discharge, overdue fines will be displayed to staff even if that staff member is not authorized to collect monies (this didn't function properly with 5.1; did work properly with earlier releases)
- . At point of discharge, will display up to 6 messages (without "over-writing") to staff
- . Staff can create an unlinked item record during charge session without totally getting out of charge session
- . Global/selected renewals can be done off of a list of all items charged to a patron. The system then responds on an item by item basis for items that cannot be renewed by that operator -- with the reason for the non-renewal.

2. Patron records (totally redesigned):

- . Patron index screen includes barcode number(s) for patron and whether the id is active or expired
- . Use of universal id permitted (with all groups/categories sharing the same barcode number)
- . Social security number is now called "local id"
- . There can be up to 5 addresses and one e-mail address per patron record; one address (permanent) is not purged during patron purges
- . "Has" screen information can be limited to a specific patron group or category, and within that due date, author, or title, and within that by overdue, recalled, claimed, return, service unit, processing unit, billed or lost
- . When new ID added for particular group/category, the old ID is automatically blocked
- . A "group" patron record can be created for proxy borrowers
- . "Delete" date is no longer on the patron record; parameters are set up in the lsys file
- . Patron phone number will include 6 extra characters for an extension number

3. Patron Accounting (formerly Bill and Fine)

- .Bill and Fine now called "Patron Accounting"
- .Easy movement to look at previous and next bill off a summary screen
- .Cash management feature: where authorized staff can inquire regarding monies collected, refunded, etc. by operator or service unit regarding monies collected for particular time period.

4. Recall/hold (redesigned workflow and processing)

- .Easy to remove hold/recall and reorder queue
- .Two ways of placing hold/recall
- .Ability to set "not needed after" default date
- .Ability to specify at which service unit patron would like to pick up recalled/held item

5. Course Reserve

- .Course reserve indexes, item status, etc. will be available in the OPAC! If item is charged out it will indicate the date and time due back. [It sounds like time will still not show in the normal indexes for items due back at a particular time.]
- .Course reserve indexes will provide author, title, and call number access for all unlinked item records -- even if they are not on reserve
- .Beginning/ending dates work and control display in the OPAC!
- .Action date now works for course reserve record.
- .There is an additional course reserve index term ("other") that can be used/searched. It could be used to index items by another category such as library science materials, mathematics materials, etc. [Perhaps this could be used to search all reserves for a particular DALNET site ... see next point below]
- .Two course reserve indexes searches can be "anded" together (call number cannot be combined with any other searches).

6. Item Conditions

Conditions are used to indicate "lost", "stolen", "bindery", etc. status rather than pseudo-patrons. (The usual "Lost" and "missing" processing, e.g. bills created, search requests produced, still takes place based on "condition".) An item can have up to 50 conditions at one time. Conditions can be set at the discharge screen, e.g. damaged

A list can be run of all items with a particular condition, e.g. a list of all lost items; it can be run by service unit. Items can be added to/deleted from a condition in a batch. Barcodes are not needed to set conditions. After indicating the condition you want items to have, you either wand in barcodes or do a mhi search to call up the appropriate item. [The presenters believed that staff would be alerted to the "lost" condition at point of discharge.]

Staff need to be authorized to set conditions; if they can set any condition, they can set all conditions.

7. Other

.Terminals and printers are no longer associated with service units; staff members are. At the beginning of a session, the system will indicate all service units for which the staff member is authorized; the staff member then indicates which service unit they want their terminal to be for that session.

.No changes need to be made to circulation situations or loan policies. A conversion will be done of circulation related lsys tables.

.NOTIS is still working on batch products and the Patron Interface Format (PIF); they plan to have the PIF available for libraries prior to the general 5.2 release.

.Item security will no longer be split between processing unit security and service unit security. All abilities will be in both place.

.Staff can tell patrons all items they have requested to be held or recalled from another patron.

.The title field will be mandatory for unlinked records.

.QuikReports will be modified for Circulation 5.2.

.Dates will now require the century, i.e. 03/02/1995.