NUGM 1995
LMS Release 6.2
Circulation Workshop

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Overview:

This year's workshop was less a revelation of new features and changes in the 6.2 circulation module than a realization of what had been promised in last year's workshop. Last year's vaporware has achieved solid form and promised features are up and running. Major features of this release include an almost completely menu driven interface, the elimination of the need for many "pseudopatrons", and the display of course reserves and item conditions in the catalog.

Introduction:

The workshop briefings this year were given by the now familiar team of Ken Victorson and Ben Schapiro. Each man alternated in roughly one hour sessions.

The session began with Ken giving an overview of some of the new features, including the new sign on procedure. Once the operator has entered the name and password they have the option of entering the LCRC transaction code which will give them access to staff functions. From this point forward, choices are largely made from menus to move through the system. For example, when logging on an operator is asked to choose amongst: "CIRC Processing", "PATRON Processing" and "COURSE RESERVE Processing". If the operator should choose "PATRON Processing" a second menu is activated which has "Add New Patron" and "Select Current Patron" as the choices. This process would continue until the operator reached a point at which they would enter a new patron by filling out a patron record or would choose a patron from a list of current patrons.

Only a few actions, such as placing recalls and holds would still require the use of the command line. One design change of the display screen is that the command line is now at the bottom of the screen rather than the top. Another, more important change is the addition of an informational line at the absolute bottom of the screen that outlines the purposes of some of the Function keys that can be used to move through the screens. These keys include the addition of a F1 "help" key that is used to access online help files.

LSYS changes:

Ben Schapiro then came on to discuss some new features and controls that can be added to Reports and Billing functions. These include a greater range of control over the text of bills and the option of doing away with the current creation of "pseudo bills". With the new release, the system can be optionally set so that a feature called "Autobill" will automatically charge an item to a new condition called "Not Returned" (NOTR) and create a bill to be mailed. This eliminates a cumbersome step from the current process.

Ben also explained the system's new ability to perform a real time check of transaction limits. This allows the system to track the number of items a patron has checked out and place an immediate block if a threshold is exceeded. This is an improvement over the current system that checks a patron's thresholds only at the beginning of the transactions and can allow a patron to check out books beyond the threshold if the first item they check out is below their limit.

Patron Processing:

Ken returned at this point to explain the changes that had taken place in the processing of patron records. The largest change is, of course, the "fill in the blank" method of searching for patron records. If "Select Current Patron" is chosen from the menu, the operator has the option of searching for the patron by Name, Local ID (social security number), or Charge ID (library card number), Patron Key number or Organization ID. In any of these fields, a partial (or fuzzy) match will display an index screen that allows the operator to browse for the correct match.

Selecting a specific patron will then bring up a menu of fourteen different choices that allows the operator to access the patron's basic information as well as their "billing" and "has" (holdings) screen. This provides much easier navigation amongst the patron information sources and does away with the current systems inability to easily move from the patron information screens to the billing screens to the item record screens. This would, for example, allow a user to credit a patron for paid fines, change their address file and provide them with a listing of what they have out with only a few keystrokes instead of the dozens that would be required under the current system.

Another major change, (and one of the few that was not promised at last year's meeting) is the changes in the handling of Recalls and Holds. Recalls and Holds are one of the few processes still activated through the command line. However, a listing of those items a patron has placed on Recall/Hold can be accessed through the patron record and they can be canceled when accessed in this manner. More importantly, the "Not needed after" portion of the Recall screen will actually have an effect on the Hold. Once the "Not needed after" date has passed the Hold will automatically be released. Currently all Holds and Recalls must be released manually by accessing the item record.

Circulation Processing:

After lunch, Ben went into details of changes in the "Check Out" and "Check In" processes. The most obvious change is the abandonment of the terms "Charge In" and "Charge Out" for the more commonly understood terms. This also eliminates the most frequently misunderstood message "Blocked for Charges" which new students invariably interpret as meaning a patron is blocked for excessive fines when they are actually blocked because they have reached the maximum number of items that they may have checked out.

At this time he also demonstrated the new "Blanket Renewal" that allows the renewal of all of the items checked out by a patron with a single command. However, this feature is of limited use in a consortium environment such as WSU because it gives individual notification for any item that cannot be renewed. In single library systems this would commonly only be for those items on Recall/Hold or items that have reached their renewal limit. But in a consortium environment an exception notice screen would be generated for any item checked out by the patron in another library. This means that a patron with ten books checked out from WSU and thirty from DPL would generate thirty individual exception notice screens if the operator attempted to use the Blanket Renewal option. Another option does allow for renewal items to be chosen from a list and this may be of greater value at WSU.

The new ability to display "Item Conditions" in the public catalog will cause another major change in the way items are handled. Many (but not all) of the "pseudopatrons" such as "Lost" and "Missing" will no longer be necessary. Since "Item Conditions" many of which are assigned to an item automatically, will now display in the catalog, it will no longer be necessary to charge these items to a patron number. Some conditions such as "Sent to Bindery" will still require the use of pseudopatrons in order to display a "date of expected return" in the catalog.

Bill and Fine:

Ben explained that the major changes in the Bill and Fine processing are the ability to make changes to the patron accounts while within the actual patron records. The difficult and complicated "abil" and "cbil" commands are no longer necessary. Like other portions of the patron record, the Patron Charges screen appears as a menu and the operator can either choose from pre-set fine/fees amounts in a menu or enter custom amounts that override the pre-set fines. This frees the operator from having to remember the fee structures for numerous different materials or functions.

The second major change was the ability for individuals or organizations to set up deposit accounts that can be drawn upon as fines accrue. This feature will be more useful for organizational accounts where they may wish to prepay to cover potential fines. I am doubtful that individual students will ever wish to deposit money with the library to cover *potential* fines.

Course Reserve Processing:

The changes in Course Reserve processing are some of the most eagerly awaited promised features of release 6.2. With this release, Course Reserves will be able to be searched at both the circulation terminals and at the OPAC. Searches will be able to be performed by Course, Instructor, Title, Call Number and a Library Defined field. Any two of these fields (except for call number) can be "anded" together to produce a search. This will allow a student to search for everything on reserve for a specific instructor, a specific class, a specific subject, or a combination. In the OPAC the record will display whether the item is currently available and what day (or even what time) an item is due back.

Conclusion:

As I said before, the features for NOTIS Circulation Release 6.2 discussed at this workshop were less new developments than the realization of previously promised features. But unlike last year, the product shown seemed to be in the very late stages of development rather than the early stages we were shown last year. It was obvious that NOTIS/Ameritech had heeded the outcry from last year, taken the criticisms of the original (5.2) version to heart and come out with a well conceived product. If it delivers in practice as it was demonstrated at the workshop, it should, in the long run, be a vast improvement over the current circulation module. This is not to say that the changeover will not be difficult and painful. But the features of the new product would seem to make it much more useful and powerful in the long run.

In that this was a six hour workshop, I have not tried to touch upon every point that was covered in the various discussion and question and answer sessions. Instead I have concentrated on those features and changes that can be expected to have the greatest effect upon WSU circulation procedures and functions. Copious handouts were provided at the workshop that covered the topic far more thoroughly than I have. Simply contact me if you would like to examine and/or copy this information