

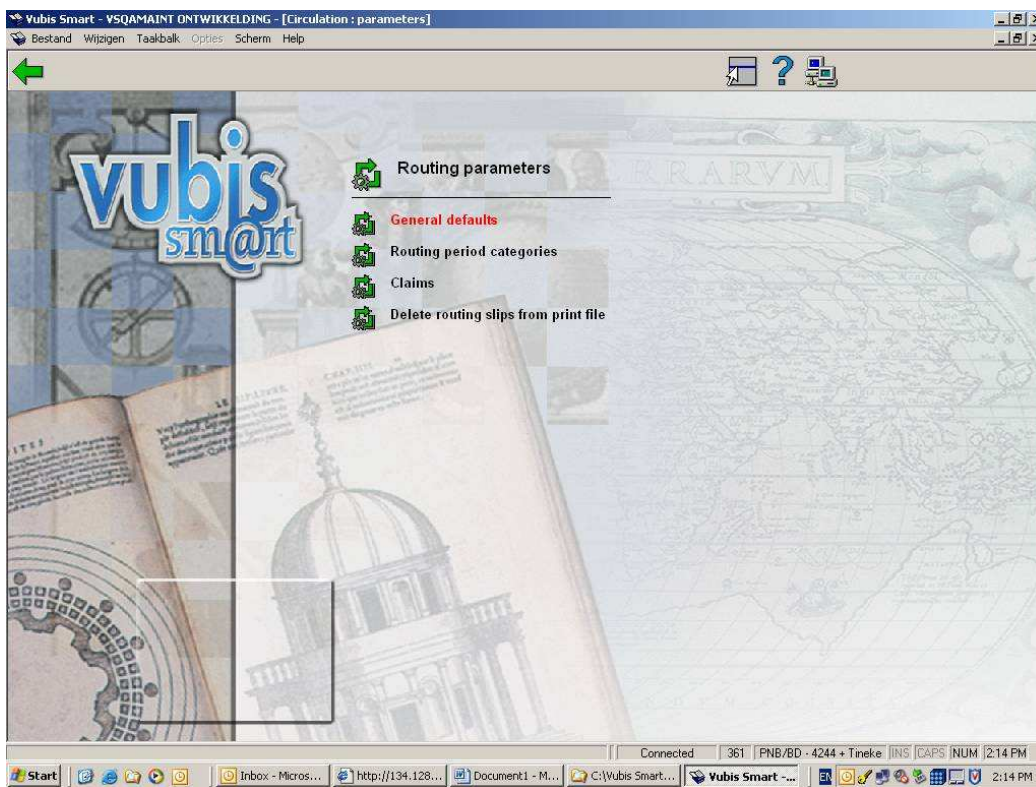
AFO 361 – Routing parameters

361.1 Introduction

AFO 361 allows you to define a number of parameters that influence the operation of the routing module. The following parameters are involved:

- general defaults;
- period categories;
- reminders.

After you start AFO 361, a menu screen appears:



The menu options are discussed in the following paragraphs.

361.2 General defaults

If you select this menu option, an input screen appears:

Routing parameters

Display routing list borrower details: 3

Circulation:

Routing type:

- Combined
- Line routing
- Star routing

Warning when routing slip not printed from receiving:

Line routing is default:

Default routing period: 2DAYS

Route new subscriptions by default:

Maximum number of borrowers per line: 12

Register receipt after routing completes:

Type of claim mechanism [not in use]: 0

Exclude borrowers that are temporarily out of routing:

Number of days to keep routing slip (0=indefinitely): 0

Buttons: OK, Cancel, Help

Fields on the screen

Display routing list borrower details: Enter the data to be displayed when a routing list member is displayed (in AFO 342 ('Routing lists control'), among others). Your options are:

- 1 The system shows the name of the routing list member and his patron number
- 2 The system shows the name of the routing list member and his first address
- 3 The system shows the name of the routing list member and his work address

Circulation: Here you specify whether you are using the routing module.

Routing type: Specify what type of routing must be used. Your options are:

- mixed routing;
- line routing;

star routing

Warning when routing slip not printed from receiving: Specify whether the system should display a warning if an issue is received that is routed, and routing slips are not printed from within receiving (but via AFO 344).

Line routing is default: Specify whether line routing applies as the default routing when entering a new routing list member to a routing list (AFO 342 ('Routing lists control')).

Default routing period: Enter the default routing period. That is the period that a routing list member may keep an issue. Enter the number of days (greater than 0) for the valid period category. This period category must be defined in the period categories management (AFO 361, menu-option 'Routing period categories').

Route new subscriptions by default: Specify whether new subscriptions are routed by default.

Maximum number of borrowers per line: Enter the maximum number of routing list members (more than 0) that may be printed on a routing slip.

This parameter is only relevant for a line routing (or for the line part of a mixed routing), since this is the only routing type for which multiple routing list members are printed on one routing slip. This implies that one routing list can consist of multiple routing slips.

Register receipt after routing completes: Specify whether receipt registration must take place after the routing is complete. In other words, do you want to register the receipt (return to the library) after the routing for a subscription is completed.

Type of claim mechanism: [This option is not in use.]

Exclude borrowers that are temporarily out of routing: Using AFO 343 ('Overview of subscriptions per borrower') you can temporarily remove a routing list member from routing. Specify whether the routing list member must not be included in the routing (and thus not appear on the routing slips). The routing list member retains his 'old' position on the routing list and can be re-included in the routing cycle if he is 'reinstated' on the list.

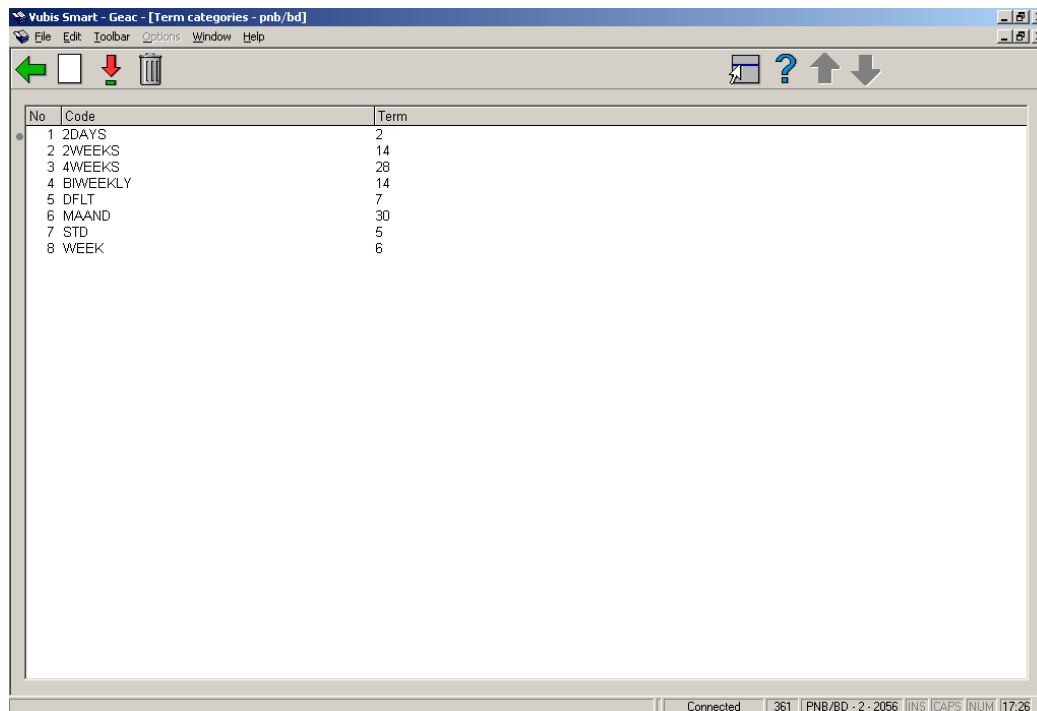
If you do not check this field, the routing list member is added to the bottom of the list. As such he continues to be included in the routing; he is added to the end of the list and therefore, receives the routed issue later).

Number of days to keep routing slip (0=indefinitely): Enter a numeric value. If 0, routing slips are not deleted by the 'Delete routing slips from print file' job. If n, routing slips created today and up to n days prior to today will be kept and all others will be deleted. For example, enter 1 to keep routing slips created today and yesterday.

361.3 Routing period categories

For each patron on a routing list you can specify the maximum period during which he is allowed to keep the materials before they must be routed to the next routing list member or returned to the library. This period can be specified in two ways, by entering the number of days (1 or more) or by specifying a period category. This means that you enter a code, rather than a number of days. This code is included in a table of period categories and refers to a number of days in that table. The use of such codes is the preferred method, because it allows you to make global modifications. For example, if you define a code 'D' that specifies that a routing list member may keep a routed issue for one day, you can easily change this to two days. If you execute this in the table of period categories, this automatically changes all the routing lists that include the code 'D'.

If you select this menu option, an input screen appears. (If you have already defined period categories, an overview screen appears immediately.):



The screenshot shows a software window titled "Yubis Smart - Geac - [Term categories - pnb/bd]". The window contains a table with three columns: "No", "Code", and "Term". The table lists eight entries:

No	Code	Term
1	2DAYS	2
2	2WEEKS	14
3	4WEEKS	28
4	BIWEEKLY	14
5	DFLT	7
6	MAAND	30
7	STD	5
8	WEEK	6

The window also features a menu bar (File, Edit, Toolbar, Options, Window, Help), a toolbar with icons for navigation and help, and a status bar at the bottom showing "Connected", "361", "PNB/BD - 2 - 2056", "JINS", "CAPS", "NUM", and "17:26".

Options on the screen

New: Select this option to enter a new period category.

Modify (+): Select a code and then select this option to modify the period for that code.

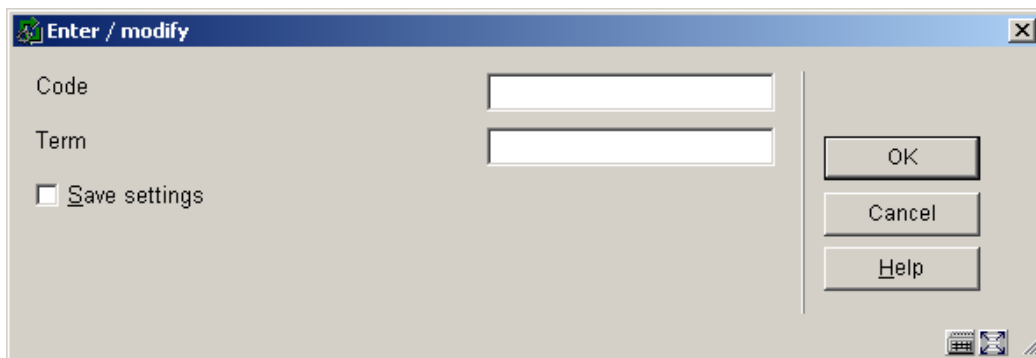
Note!

The code itself cannot be changed. If you wish, you can delete this code and enter a new one.

Delete (+):Select a code and then select this option to delete the code.

361.3.1 New routing period category

New: Select this option to enter a new period category. An input screen will be presented:



The screenshot shows a dialog box titled "Enter / modify". It contains two text input fields: "Code" and "Term". Below the "Code" field is a checkbox labeled "Save settings". On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

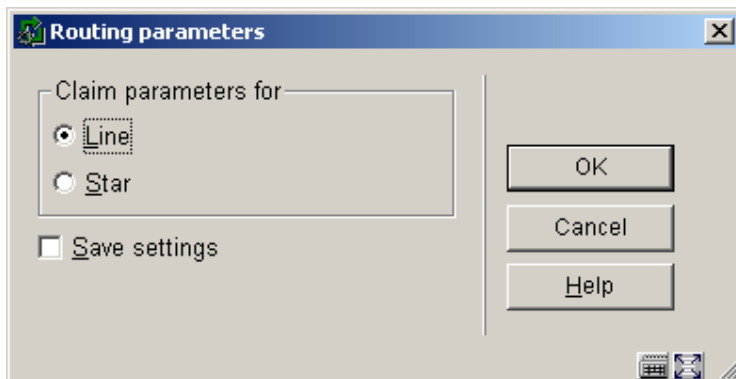
Fields on the screen

Code: Enter a code.

Term: Enter the number of days for the period category.

361.4 Claims

If you select this menu option, an input screen appears:

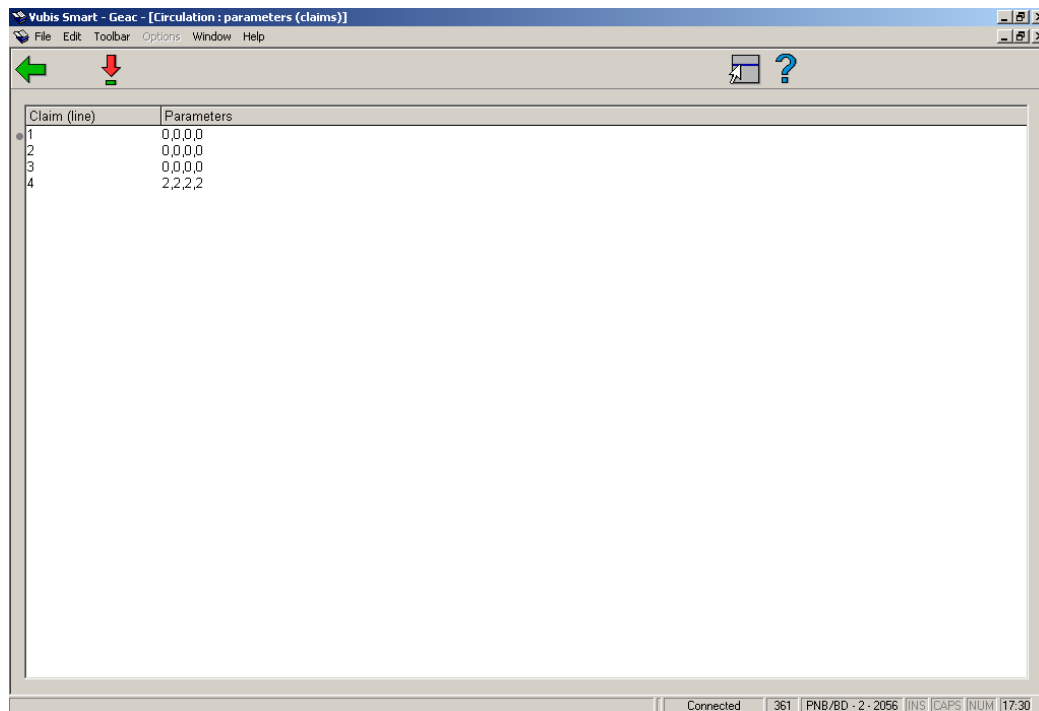


The screenshot shows a dialog box titled "Routing parameters". It contains a group box labeled "Claim parameters for" with two radio button options: "Line" (which is selected) and "Star". Below the group box is a checkbox labeled "Save settings". On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help". The dialog box has a standard Windows-style title bar with a close button (X) in the top right corner.

Fields on the screen

Claim parameters for: Specify if you want to manage the reminder parameters for the line or for the star routing.

Once you have entered your selection, an overview screen appears:



Claim (line)	Parameters
1	0,0,0,0
2	0,0,0,0
3	0,0,0,0
4	2,2,2,2

Columns on the screen

Claim [routing type]: This field contains the available reminders.

Parameters: This field contains the parameters for the reminder in question.

Options on the screen

Modify parameters (+): Select a claim and then select this option to change the parameters. An input screen appears. Enter the modified parameters.

361.5 Delete routing slips from print file

If you select this menu option, the standard screen for starting processes is displayed. The process looks for routing slips that are older than the number of days specified in the General defaults form and deletes them from the system.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	Creation Delivered as part of build 17 set	
2.0	March 2007	Updates for release 2.4.2: option to delete routing slips; rephrasing of general option	