

# **V-smart version 2.5**

## **Release notes/Impact statement**

**March 2011**

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## Changes at a glance:

111	Ability to copy multiple records to another database from the search result screen
111	Analytical cataloguing for MARC21
111	Edit authority with "deep link" from within record editor search
111/151/157	New restriction index on record status - new statuses for background indexes
111 (and any AFO with bib search option)	Option to retain search term and modify for next search
111 (and any AFO with access to item/shelfmark summary screens)	Title and author info displayed in header of item/shelfmark summary screens
111	Search for related records
	Option to browse through resulting records
	Show title information in menu bar of record editor
	Use of simple template
	Sorting by year of publication on numeric part only
113	There is now a new field when copying records to specify the input profile
117/651	Add possibility to retrieve performance data from other namespace
124	Barcode and title displayed on input form
126	Spine Label Printing - enhancement: a flag as to whether to print the code or description for the application data fields.
133	Enhanced handling of ALA <=> Unicode conversions
134	creation of a new action to export the number of actual reservations
141	Manual adding of deleted objects to save list
151	The normalization mechanisms should remove composing diacritics

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152	AFO152 Index set up to display smart database only but results show for workfile as well AFO152 indexes has a list of bib databases. This is now checked before returning results when doing the bibliographic searches.
ACQ	Ability to add separate default shelfmark for acquisitions
211	there should be a link to the supplier record from AFO 211 - Was there in Vubis for Windows
211/216/217/272	add a new field to order - Binding type - Limit suppliers list to that of matching binding type
211/216/217/272	add new fields to the order record
217	ability to load price field from a specified set of tags into potentials records loaded from a savelist new column on ordering process overview screen
217/278	create multi-title orders and set a minimum number of selections required before ordering a title
22X	ability to change fund code at receipt (only if order has not been invoiced yet)
241	new field in supplier record: binding type (see above)
242	ISO2417 currency codes
243	Tree view for budget structure
271	Layouts - add ability to print Total copies received
272	New parameter added to AFO272-Miscellaneous-Default tax assigned to invoices (amount or percentage).
277	Various new options for outputting (budget) report group lists

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279/ SER gen	new AFO - Serials subscription review/renewals process also new option on order detail screen in 211
367	new option / wording on form for issue status codes
Circulation module	Display of uniform title information in various instances
Circulation module	Last return date for item not on loan & last activity date field
411/413/469/481/451/141	When an item is issued or renewed, the loan period should be reduced, if a defined ratio of reservations to copies is exceeded
423/481	ability to display loan counts by owner - display last date that owner changed
413/431/482	Family renewal and address change
431	enhancement of Reservation option
431/481	Add the option to remove the borrower picture link from the borrower record after the borrower label is printed
441	Borrower Import modify to handle UTF-8 records
451	Courtesy notices generated before the due date to take closed days into consideration.
461	Eligible for reservations Items at administrative managers governed by reserve items on shelf checkbox
469/481	Newly received items need In Cataloguing status applied automatically, to prevent the system from trapping newly created items for reservations
481/418	Option to define columns and width for printed output of picklists
481/421	add new parameter to Refuse WebOpac reservations when on shelf items are found
481/484	special fine rules
481	New RFID parameter for web services

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481	New column for Reservations – reservation areas
483	new variable that would print the borrower's email address, \$\$EMAIL
483	Automatic notice production for courtesy notices
494	more columns on screen for Cash desk list descriptions
494	ERP tax code- Summary screen displays 1 or 0 instead of Yes / No for In use column
495	Overview of outstanding loan fees: this option is now operational
Circulation module	Age content restrictions
613	Sublocation wording is not by language
616	the Fax and Mail merge output removed from the form for the definition of physical method outputs because these methods are not used/implemented
618	Improve matching algorithm for matching shelfmarks
618/431/421/415/481/815/816/ASRgen	Mise de cote (Stack request enhancements)
625	allow posting of multiple statistics with new command
651	There is no interface to be able to set up and modify the automatic item barcode formats / numbers per location
765	New AFO: BIOS2 statistics, export to spreadsheet
821, 822 etc.	new ILL module
general	CP command: now uses the user settings instead of the system ones when they are both set
general	More information on browser settings for printed output
general	More information on multiple V-smart sessions in different tabs of the same browser session
general	save settings box can remain ON
general	Option to bookmark V-smart url

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general	More information on how to retrieve files from a server with Browse button
general	Option to display V-smart menu on the other side has been removed from Preferences
WebOpac - prof/texts	add a new Add selection button on the Full record display that takes you to the Add selection form in AFO217 for the current bib record (under Full description)
WebOpac	ability to reserve all titles in a savelist
WebOpac	Allow for new Index for WebOpac Reviews
WebOpac	It should be possible to place a direct link to the GuestRegister.csp page
WebOpac	Public availability display - add the possibility to define specific wordings/icon definitions for available, unavailable, on order that will be used on the record list.
WebOpac	items with the Hide from WebOpac flag set are not included in WebOpac reservations anymore
WebOpac	Ability to specify contact preferences when registering as guest in WebOpac
WebOpac	New parameters to configure Reserve button
WebOpac	New option under Rate & Review
WebOpac	New option under Forgot Password, for SMS.
WebOpac	New option to use authority indexes for Facet searching.
WebOpac	More configuration of Loan History details
WebOpac	Option to display Syndetics covers

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## **1. Introduction**

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The objectives of the V-smart 2.5 are the following:

- ✓ Introduce a selection of functional enhancements; including a new Interlibrary Loan module
- ✓ Resolve a number of known outstanding server defects that existed in prior versions of V-smart;
- ✓ Resolve known outstanding defects that existed in prior versions of the V-smart browser;
- ✓ Deliver updates to the On-line user documentation.

**Please read the version 2.5 upgrade instructions and documentation carefully prior to starting an upgrade to the V-smart version 2.5 .**

### **Note**

**The authority indexes need rebuilding, and before doing so the settings of those that should also be used for bibliographical searches should be modified. See the chapter on changes to AFO 152 below.**

### **Documentation**

For most of the changes mentioned in this document, the online help has been updated accordingly. They are listed as build 2.0.06 updates under document control – change history. Some online help still needs to be updated and will be delivered at a later stage.

## **2. Migration path to V-smart 2.5**

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Customers will obtain version 2.5 through the usual upgrade process, including a test upgrade and, if required, data migration or manipulation, prior to implementation in a production environment. For more information about the upgrade schedule and training, please contact your local account representative.

The following migration paths are possible for upgrades to 2.5 :

- From 2.0
- From 2.0 service pack 1

Any other and earlier V-smart version must first be upgraded to 2.0, before you can upgrade to 2.5 .

### **3. Browser compatibility**

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The minimal browser versions for this release are:

- Microsoft Internet Explorer version 6.0, 7.0, 8.0
- Mozilla Firefox 3.5, 3.6

Your web browser must be configured to accept cookies for V-smart to be able to save personal settings locally.

For locally attached devices (i.e. ticket printers) a Java applet or application must be allowed. The V-smart Printer Java Applet requires Java 1.5 or higher. Recommended is Java version 1.6 (build 1.6.0\_12-b04).

See V-smart documentation for any further special considerations, and browser configurations.

Please note these are the requirements at the time of initial delivery of this release. These requirements may change over the lifetime of a release. For latest information on technical requirements one should look for the STE (Supported Technical Environments document) on Infor365 or consult Infor support.



## **4. Enhancements cataloguing module**

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This section describes various smaller enhancements within the cataloguing module.

### **4.1. AFO 111 - Copying multiple records to another database**

The search result screen of AFO 111 has been enhanced with an option to copy multiple records to another database.

You can select a number of lines (by using either SHIFT or CTRL keys) and then this new option to copy the selected records to another database on your system. All selected records must belong to the same database. The system displays the Copy record(s) form.

When the two databases are not of the same format, you **MUST** specify an input profile in order to convert the records to the other format. Fields on this form follow the same rules and restrictions as the Copy record form that is used to Copy one record.

After clicking OK, the system copies each selected record into the specified database. When the process is complete, the system displays a form summarizing the results of the copy.

The summary display shows the record number (in the new database) assigned to each copied title.

### **4.2. AFO 111 – Modifying search term**

The overview screen of a record had an option “Return to search screen”. This has been renamed “Modify search query” and works slightly differently now.

When you return to the search screen using this option, the last search term you entered will be retained and you can modify it to adjust your search.

Note this only works if the user has a default setting defined for the initial search screen. E.g. you have entered “star trek” as search string and checked the ‘Save settings’ box. Every time you access an AFO with a bibliographic search form, this search term will appear.

Enter another search term, e.g. “christie”. If you select a record from the result list and then use the “Modify search query” option, the search form will still contain the string “christie”. You can now change this to e.g. “agatha christie” and perform a new search. When you leave the record in another way or when you leave the AFO, the search form will revert to the original search string (“star trek” in our example).

### 4.3. Enhancements for searching

#### 4.3.1. *Modify search*

The result screen of a bibliographic search had an option “Return to search screen”. This has been renamed “Modify search query” and works slightly differently now. When you return to the search screen using this option, the last search term you entered will be retained and you can modify it to adjust your search.

See above for more information.

This option is available on search result screens of both Find and Browse search.

#### 4.3.2. *Re-execute search without restrictions*

The result screen of a bibliographic search has a new option “Repeat search without restrictions”. This launches a new search for the same search term(s), but without using any previously selected restrictions.

This option is only available on search result screens of Find searches.

#### *Note*

*Both these options are available in any AFO where you can do a bibliographic search.*

#### **4.4. AFO 111 - Search for related records**

It is possible to launch so-called "related searches" for a record in AFO 111. A list of searches will be proposed, based upon the record contents. Setup parameters determine which indexes are included in the list. If

1. The current record contains a field/subfield used for an index, and
2. This field/subfield is in the list of fields and subfields in use, and
3. The search gives 1 or more results

then the search will be proposed as an entry in the list.

For authority controlled fields a link to the related authority is proposed.

In AFO 651 - Settings for related search you can specify the fields/subfields that you want to use for the index searches, as well as the default namespace for the execution of the related searches.

It is possible to do the related search in another namespace (which can be useful when for instance a potentials database is part of another namespace than the production database).

Finally, when the related search is done, it is possible to see the record details of the results (but no editing of the records is possible here), and you can also obtain statistics about the records that were found, grouped by record status, record type and year of publication.

#### **4.5. AFO 111 - Sorting by year**

Sorting is now only on numeric part of the publication year information.

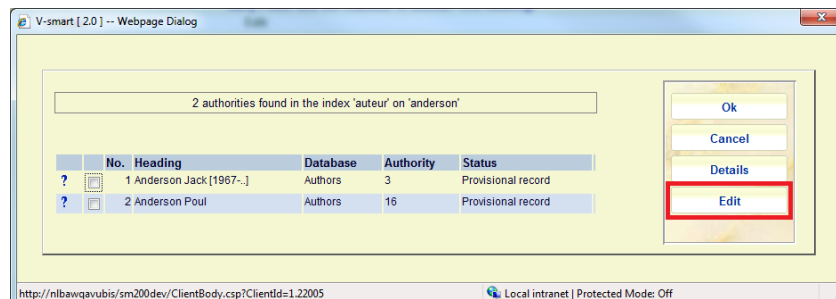
Series: open series sort as most recent year - closed series sort as last year of series (1982-1996 sorts as 1996) - X as last digit sorts after 9 (e.g. 198X sorts between 1989 and 1990) Common "philosophy" is that when in doubt we take the most recent year that is covered by the year-expression.

#### **4.6. AFO 111 - Previous / next record buttons**

When your initial search resulted in more than one record and you selected a record from the result list, you can use the Previous and Next options on the individual record screen to browse through the results on a record by record basis (instead of having to go back to the result list to select another record).

#### 4.7. AFO 111 - Editing authority in second session

There is a new “Edit” option on the authority list screen when you search for an authority in the record editor. If you press this button a new V-smart session will be opened that goes directly to a record editor session for the selected authority record.



#### 4.8. AFO 111 - Show title information in menu bar of record editor

In the record editor you can optionally display information between the toolbar and the menu.



This header may contain anything the library likes to display (as long as it fits) and depends on settings in AFO 151 – Format – details of a format – Element/group Profiles. The system will first look for a (site-specific) group/element with id “!EditorTitle”. If that is not present the !TitleProper group/element will be used.

#### 4.9. AFO 111 - Using a simple template

A new option “Add/update field(s) using template” has been added to the overview screen of a record.

You can use this option for minor modifications to the bibliographic record. This is done via a simple template that only displays labels and data entry fields for its subfields. Indicators are hidden.

This feature is typically useful for non-cataloguing staff (e.g. acquisitions department) who need to add their own specific information to the record without knowledge of the bibliographic format or other technical details - the data entry form only contains the fields that they need.

In AFO 153 one or more templates may be defined for this purpose.

#### **4.10. AFO 113 - Option to specify input profile for copying**

*Problem description:*

Need ability to copy Z3950 authority record (or any record) with an import profile.

The standard record copy function is not really suited for authorities, as it does not let you override and merge with existing authorities. We need an import profile like for the bibliographical copy function.

*Solution*

There is now a new field when copying records to specify the input profile (where the standard target database needs to match the selected profile).

#### **4.11. AFO 117 – Performance data from another namespace**

The so called performance data give you an overview of the "performance" of a document and its related elements (like author, subject, etc.). It is a tool to help decide about acquisitions of new material and evaluation of existing material that can be accessed through AFO 117 (or an option in AFO 111).

This feature has now been extended with the following:

- Execution of the performance search in another namespace – this is meant for sites that have their acquisition candidates database in another database than their production database
- Use of multiple profiles for the retrieval of related records for the performance calculation

*Implementation*

The application will switch the namespace if appropriate before doing the performance data calculation.

Multiple profiles are taken into account for the retrieval of the performance data.

*Setup*

In AFO 651 the performance data setup form has now a button to change the namespace where the performance calculation should be executed. Only namespaces can be selected that have a database with the same database number and characteristics (it does not need to contain any records, it just needs to exist) as the database from which the setup is done.

On the same form one or more profiles can be selected – the profiles available are those defined in the namespace where the performance data retrieval is executed.

#### **4.12. AFO 126 – Enhancement to spine label printing**

##### *Requirement*

To allow for option to print description of sublocation instead of code and allow for wrapping of text.

##### *Solution*

There is a new field in AFO126 for the definition of the labels which activates this feature: “Print the description for the sublocation and wrap text”.

#### **4.13. AFO 133 - Enhanced handling of ALA <=> Unicode conversions**

This enhancement provides for the conversion and management of Marc21 records in the ALA character set when imported into a Unicode Marc record.

There were three potential problems with the import of Marc21 records.

- The character conversion for ALA to Unicode is incomplete
- If converted to Unicode, then the Leader position SHOULD be set to “Unicode” to match.
- Incoming records in theory have a setting in the Leader position 9 to indicate the encoding scheme for the characters – ALA or Unicode

For incoming records in the ALA character set, these may now be fully converted to Unicode, based on the conversion rules described by Library of Congress at <http://www.loc.gov/marc/specifications/specchartables.html>

This enhancement allows fully for the Latin and Extended Latin characters, for Hebrew, Cyrillic, Arabic, Greek and East Asian character repertoires.

A new “format test” is added to this field in the Marc21 tables.

When this is defined records imported to a Unicode based database will have this field in the leader set to “a” to indicate that this is a Unicode representation. This ensures that the Marc records conform to the standard.

This setting will be set automatically in the upgrade for the “MARC21/B” and “MARC21/A” formats – it may be set manually for any other Marc21 based formats.

#### **Incoming records**

A new setting in the import loader tells the system to use the incoming character set of the Marc record to determine its character set.

If this is set then the system will convert from ALA to Unicode or leave the data as Unicode as appropriate.

Libraries using this powerful feature are warned to test their incoming data, as obviously the system cannot cross check the integrity of data supplied by some other supplier.

**4.14. AFO 134 – creation of new ACTION**

A new field has been added called CURRENTHOLDS, to export the number of actual reservations. This creates a field \$r in the 852 tag for the current number of reservations.

**4.15. AFO 141 – allow manual adding of deleted objects to save list**

*Problem description*

In AFO 141 most of the applications have the function to add to a savelist with the function “Add record to list”. This function is not active when the savelist has been created in the "Deleted items - Title data" application.

*Request*

To have the ability to create/update a savelist in "Deleted items - Title data" application by scanning barcodes.

*Implementation*

The Add item to savelist option will be turned on for the Deleted items – Title data application.

#### 4.16. Enhanced display of item details (additional information)

The item summary screen (accessible from AFO 111 – full record screen – option Add/Display items and any other AFO where you can display the full record) has been enhanced to also show Title and Author information in the header:

Record type: monograph [type 1]  
 Title: Star child / James P Hogan  
 Author: Hogan, James P.  
 Item info for all shelfmarks

Record '2.1672' - item summary

No	Barcode	Shelfmark	Material type	Impression	Item Data	EH Flag	Availability	Loan Info	Owner
----	---------	-----------	---------------	------------	-----------	---------	--------------	-----------	-------

This display information has also been added to the shelfmark summary screen:

Record type : monograph [type 1]  
 Title : Star child / James P Hogan  
 Author : Hogan, James P.  
 List of shelfmarks (for institution/location PNB/BD)

Record '2.1672' - list of shelfmarks

No.	Type	Shelfmark	Copies
-----	------	-----------	--------

And the input form for updating holdings information in AFO 124 now shows item barcode and title:

**Modify shelfmark**

Copy number / barcode: 321211  
 Title: Star child  
 Material type: Books (BO)  
 Location code: CEN - CENTRAL LIBRARY  
 Sublocation code: MAG  
 Shelfmark classification: 321  
 Shelfmark Suffix:  
 Statistical category: 1 - Volw non-fictie

Save settings

OK  
 Cancel  
 Help



#### **4.17. New restriction index on record status**

You can now define a new restriction based upon Technical record status of the bibliographic record. The current possible values of the bibliographic record status are:

- No special status
- Incomplete record
- Complete record
- Provisional record
- Approved record
- C-Fly record

Four new statuses which may be applied for Acquisition purposes are:

- Under analysis
- Ordered
- Selected
- Proposal list

Note there is no direct link to the Acquisition processing. Record status codes are manually processed and maintained.

#### *Implementation*

The new restriction and its values are now available for use in AFO 111 search screen (when activated). The record status codes are available in AFO111 / Change technical information / Record status. Record status may be reported on via SSP or manipulated via the standard record loaders or global change facilities.

Note that this restriction is not available for WebOpac searches as it is expected to be used by staff members only, especially for acquisitions purposes.

#### *Setup*

To use the new restriction index in AFO 111 (and similar) searches:

1. Create the new restriction index (use the record status restriction mechanism) in AFO151 / Indexes
2. Build the new restriction index in AFO 157 (create a new profile if necessary)
3. Set the restriction to "in use" in AFO 151 / Indexes / Restrictions

**4.18. UniMARC/B format**

Some changes have been made to cater for the 5<sup>th</sup> edition of the UniMARC/B format:

<b>Unimarc/B</b>	
Modified fields / subfields	010 121 123 125 128 141 206 3XX\$u 321 325 327 4XX\$a 500 501 503 531 540 600 605 686 70X 712 716 856
Added fields	036 145
<b>Authority lists</b>	
Added Authority lists	930 for 210 Ind 1 931 for 325 Ind 1 932 for 123 \$p 933 for 123 \$p 935 for 128 \$a 934 for 128 \$d 935 for 141 \$b 936 for 141 \$b 937 for 141 \$b 938 for 141 \$b 939 for 141 \$b 940 for 141 \$b 300 for 141 \$c 945 for 145 Ind 1 946 for 145 Ind 2 947 for 145 \$a 948 for 145 List A 949 for 145 List B 950 for 145 List C 951 for 145 List D
Modified Authority lists	102 109 110 111 112 126 132 143 145 163 167 168 169 170 213 215 218 219 227 246 920

## **5. Analytical cataloguing for MARC21**

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### **5.1. Background**

The application did not have enough flexibility in copying information from a record into a related record:

- The system needs to be capable of merging multiple subfields from a linked record into a single subfield in the related record.
- It must be possible to define how the linked field is recreated from the linked record in a comparable way to the way that bibliographic headings are rebuilt from an authority heading

This feature is needed everywhere the linked data appear:

- Display in AFO 111
- Display in WebOpac/Iguana
- Indexing
- Import/Export via AFO 13X

Essentially this development concerns the traditional master <=> analytic relationship, which is already available in a slightly different form for Smart and UniMARC formats.

This development also covers the requirement to link a single authority to two bibliographic fields, each using part of the authority heading.

### **5.2. Requirements**

The new feature is primarily intended for a database of catalogued music, songs, sheet music and bibliographic information about music.

The main requirements:-

1. As much as possible, data should be authority controlled
2. There should be no, or at the very least minimal, duplication of data
3. The searchable catalogue should be accessible both by the complete (CD) entity and by individual songs or music tracks
4. Maintaining the catalogued records use a template driven cross linked mechanism. An individual track, created as a discrete record is linked in to all the discrete CD master records on which it could be found. Conversely, starting by creating a new complete CD master record all its constituent tracks could either be linked to existing individual track records or new ones created as individual records and linked in to the master work.

### **5.3. Implementation**

Starting point:

- Each CD work is a single discrete record
- Each individually catalogued track is a single discrete non duplicated record, irrespective of on how many CDs it may occur

The backbone is a pair of reciprocal linkage tags: at least one in the master record and at least one in the sub-record. Two arbitrary tag numbers (for example 971 and 972) are chosen for this purpose.

971 tags exist in the sub-record and link to all appropriate master records.

972 tags exist in the master record and link to all appropriate sub-records.

This new feature enables linkage to and retrieval of data from an authority record. Previous implementations of linkages between records have only been able to pull data from non-authorized tags.

## 5.4. Brief explanation with examples

We will use the Beatles' album *Let it be* to illustrate this new feature:

### 5.4.1. WebOpac

Let's start by searching for *Let it be* in the WebOpac:

The screenshot shows the WebOpac search interface. The search term 'let it be' is entered in the search box, and the database is set to 'Marc21 database'. The search results are displayed in a table with columns for Title, Author, Year, Shelfmarks, and Availability. The second entry, 'Let it be ; [compact disc]', is highlighted in blue, indicating it is the selected record.

Title	Author	Year	Shelfmarks	Availability
<input type="checkbox"/> Let it be : thoughts on the life of John Lennon	Anonymous.		BD : NONF	✗ ✗
<input type="checkbox"/> Let it be ; [compact disc]		1970	BD : CD BEA	✓ ✓
<input type="checkbox"/> Let it be (Song)	Lennon, John.			✓

Display the full record of the second entry to see all the links to the individual analytical records.

The screenshot shows the full record for the selected entry. The record is displayed in a table format with fields for Title, Place of publication, Personal name, Corporate name, Shelfmark, Availability, Location, and Material Type. The record is titled 'Let it be ; [compact disc]' and is published by EMI in London in 1970. The producer is George Martin, and the corporate name is The Beatles. The shelfmark is 'BD : CD BEA' and there is '1 or more copies available'. The location is 'PNB/BD' and the material type is 'CD'. Below the record, there is a 'Related works' section with a 'Details' button.

<b>Title</b>	Let it be ; [compact disc]
<b>Place of publication, distribution, etc.</b>	London : EMI , 1970
<b>Personal name</b>	Martin, George (producer)
<b>Corporate name</b>	The Beatles.
<b>Shelfmark</b>	BD : CD BEA      1 or more copies available
<b>Availability</b>	1 or more copies available
<b>Location</b>	PNB/BD
<b>Material Type</b>	CD

**Related works**

- Dig a pony (Song)
- Let it be (Song)
- Two of us (Song)

Conversely, when looking at the full record of *Dig a pony*, you can see at a glance that it occurs

**In:** The Beatles greatest hits and also

**In:** Let it be

**Full description**  Page 1 / 2

Main Author	<a href="#">Lennon, John. McCartney, Paul.</a>
Title	<a href="#">Dig a pony (Song)</a>

[Related works](#)

**Relations**

Link to Master record	<a href="#">Beatles - Greatest hits vol 1</a>
	<a href="#">Let it be</a>

### 5.4.2. Staff interface

First let's look at the records viewed from the WebOpac seen above from the staff viewpoint. Here is the *Let it be* master record.

The screenshot shows a web browser window with the V-smart interface. The title bar reads 'V-smart [ 2.0 ] - Windows Internet Explorer'. The address bar shows 'Id: 1.24002/5220 User: Tineke Location: PNB/BD AFO: 111'. The main content area displays the record details for 'Record 6.1305 - full record'.

1 Description		3 Shelfmark(s)	
Author	The Beatles.	BD O 771	[1 copy]
Author	McCartney, Paul.	4 Order(s)	
Author	Lennon, John.	< none >	
Author	Harrison, George.	5 Subscription(s)	
Author	Starr, Ringo.	< none >	
Author	Martin, George.	Technical information	
1Title	Let it be	Record identification	no. 1305 from database 'Bibliographic (Marc21 format)'
Subjects	Songs--Compact discs--1950-2050--England.	Record status	-
Imprint	Hayes : EMI Records, 19972009	Record type	monograph [type 1]
General Note	Booklet included	Check status	Incorrect record on 01 April/2011 (10:13)
2 Relationship(s)		Miscellaneous	format of record 'MARC21/B'; last used template 'CD-Multiple'
Link to Analytical record	3 relationships	Created on	01 April/2011 (10:12) by 'Tineke' on location PNB/BD
Previous version(s)	< none >	Last modified on	01 April/2011 (10:13) by 'Tineke' on location PNB/BD
		Visible in WebOpac	Yes

With the option “Link analytical entries” you can display the screen with the analytical entries:

The screenshot shows the V-smart interface displaying the master record with analytical entries. The title bar reads 'V-smart [ 2.0 ] - Windows Internet Explorer'. The address bar shows 'Id: 1.24002/5220 User: Tineke Location: PNB/BD AFO: 111'. The main content area displays the record details for 'Master record with analytical entries'.

No.	Volume number	Title	Database	Record
<b>Master record</b>				
		<b>Let it be</b>		<b>6 1305</b>
<b>Analytical entries</b>				
<input type="checkbox"/>	1	Let it be (Song)		6 1306
<input type="checkbox"/>	2	Two of us (Song)		6 1307
<input type="checkbox"/>	3	Dig a pony (Song)		6 1308

The details of the *"Dig a pony"* song are as follows

The screenshot shows the V-smart 2.0 interface in a Windows Internet Explorer browser window. The page title is "Record '6.1308' - full record". The interface is divided into several sections:

- 1 Description:**
  - Author: Lennon, John.
  - Author: McCartney, Paul.
  - 1Title: Dig a pony (Song)
- 2 Relationship(s):**
  - Link to Master record: 2 relationships
- 3 Previous version(s):**
  - 2 copies of the record
- 4 Shelfmark(s):** < none >
- 5 Order(s):** < none >
- 6 Subscription(s):** < none >
- Technical information:**
  - Record identification: no. 1308 from database 'Bibliographic (Marc21 format)'
  - Record status: -
  - Record type: monograph [type 1]
  - Check status: Incorrect record on 01 April/2011 (10:22)
  - Miscellaneous: format of record 'MARC21/B'; last used template 'Music-Multiple'
  - Created on: 01 April/2011 (10:16) by 'Tineke' on location PNB/BD
  - Last modified on: 01 April/2011 (10:22) by 'Tineke' on location PNB/BD
  - Visible in WebOpac: Yes

With the option "Link analytical entries" you can display the screen with the analytical entries:

The screenshot shows the V-smart 2.0 interface displaying a table of analytical entries. The table is titled "Master record with analytical entries" and has the following columns: No., Volume number, Title, Database, and Record.

No.	Volume number	Title	Database	Record
<b>Master record</b>				
		<b>Dig a pony (Song)</b>		<b>6 1308</b>
<b>Analytical entries</b>				
<input type="checkbox"/>	1	Beatles - Greatest hits vol 1		6 1298
<input type="checkbox"/>	2	Let it be		6 1305



## 6. AFO 151 – Composing diacritics

In MARC21, the preferred way of handling diacritics is to record these as “composing diacritics” (see for example [http://en.wikipedia.org/wiki/Combining\\_character](http://en.wikipedia.org/wiki/Combining_character) )

Thus for example the character Å is recorded as A followed by a separate breve diacritic.

The current normalizations do NOT remove these diacritics, with the result that (unless someone enters a search string in that form, which isn’t easy to do) then the terms cannot be found.

A new normalization “Normalize Unicode composing diacritics” removes these diacritics from a search term (or index entry of course).

The characters removed are in the following ranges

- Combining Diacritical Marks (0300–036F), since version 1.0, with modifications in subsequent versions down to 4.1
- Combining Diacritical Marks Supplement (1DC0–1DFF), versions 4.1 to 5.2
- Combining Diacritical Marks for Symbols (20D0–20FF), since version 1.0, with modifications in subsequent versions down to 5.1
- Combining Half Marks (FE20–FE2F), versions 1.0, updates in 5.2

There is one further complication concerning the diaeresis (umlaut) e.g. Ö:

When entered as a single character, this files under both OE and O. Simply removing the diacritic would lose that functionality, and a search using either “OE” or the actual character will not find a match.

The new normalization therefore pre-processes A,O and U followed by umlaut to convert them to the single character representation ... such that subsequent normalization steps will handle it correctly.

When adding this “transformation” to a mechanism set, the transformation should be added prior to subsequent transformations (to ensure that the single character pre-processing is carried out first).

For example :

No.	Mechanism	Comments	Parameter	Parameter comments
1	RetrieveData	step 1 : collect fields and/or subfields		
2	Transformations	step 2 : replace punctuation	Remove punctuation (selective)	n.a.p.
3	Transformations	step 3 : remove leading, trailing and double blanks	Remove Leading & Trailing & Double blanks	n.a.p.
4	CutIntoPieces	step 4 : determine individual words		
5	Transformations		Normalize Unicode composing diacritics	Remove composing diacritic
6	Transformations	step 4 en een half	Transform diacrits to double non diacrit uppercase characters	
7	Transformations	step 4 en drie kwart	Transform diacrit to single non diacrit uppercase character	
8	Transformations	step 5 : transform to uppercase	Transform to uppercase	n.a.p.
9	RemoveStopWords	step 6 : remove stop words	For all words	n.a.p.
10	GetOriginalWord	step 7 : determine display form of index term		
11	CreateReferences	step 8 : create automatic references for filing terms		n.a.p.

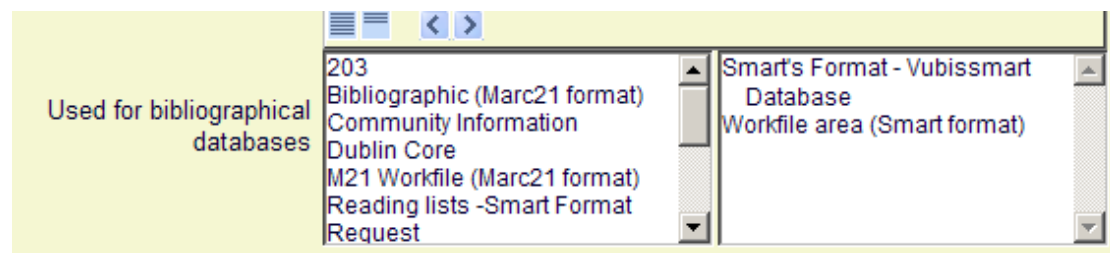
## 7. AFO 152 – change to index setup

### 7.1. Introduction

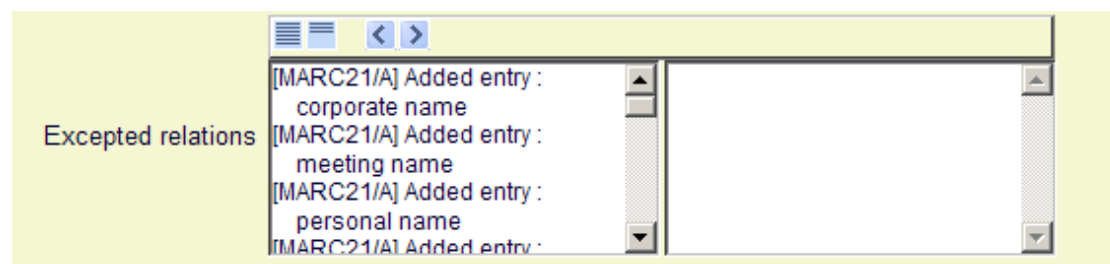
As of this release the BibAuth type indexes no longer exist. They are no longer needed and unnecessarily increase disk space and processing time for the index builds and updates.

Instead of those indexes the authority indexes are used: any authority index can – optionally – be used as a bibliographical index as well. In practice they will function as the BibAuth type index did, but no additional indexes have to be defined nor built.

The following setting in the authority index properties determines whether the index is also used for bibliographical searches:



You can further refine the bibliographical index definition by limiting the number of relation types that is used:



The relation types at the right side will not be considered for bibliographical index searches. That way it is possible, for instance, to have an authority index that contains authors both as author and subject, while in the bibliographical index only subject type authors are shown.

## **7.2. Implementation**

During the installation of this feature pack all BibAuth indexes will be automatically removed. This means that the following tasks need to be taken care of after the upgrade:

Staff module:

- The new parameter for the authority indexes that will be used for bibliographical searches must be set where appropriate
- Add / Update/ Remove indexing profiles in AFO 157 and 158
- Rebuild all authority indexes

WebOpac:

- Select the indexes that should be available in the general options of the preferences
- Add the indexes to the search options of the preferences where applicable

## **7.3. Functionality**

Under AFO 152 – Indexes – Indexes – General properties of an index, has a list of bib databases. This is now checked before returning results when doing the bibliographic searches.

Used for bibliographical databases: It is possible to select one or more bibliographical databases that use this index. Normally only bibliographical indexes are available for bibliographical databases. With this option you can make authority indexes also available.

## **8. Deleting bibliographic records with empty shelfmarks**

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### **8.1. Requirement**

AFO141 Global delete bibliographic records - option to allow deletion where empty shelfmarks exist.

At this time if there is a shelfmark (even if it is an empty shelfmark) it is considered not eligible for deletion. Could we either have an option which allows this restriction to be ignored OR at least create a SaveList of titles which were not deleted.

### **8.2. Implementation**

There is a new parameter in AFO469-Miscellaneous: Delete bib record containing shelfmark(s) with no holdings.

This parameter is set at the institution level.

If set, a bib record containing empty shelfmarks belonging to the current institution can be deleted. If a bib record has empty shelfmarks belonging to multiple institutions, this parameter must be set at each institution.

This parameter will affect the availability of the Delete record option from the Full record screen (AFO111,211,etc) as well as allowing deletion of bib records with empty shelfmarks using Global delete in AFO141

An empty shelfmark means a shelfmark which has no item information (monographs) or shelfmark sets (multiparts/serials) linked to it.

## 9. Enhancements acquisitions module

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This section describes various smaller enhancements within the acquisitions module.

### 9.1. AFO 211 – Link to supplier record

#### *Problem description*

In previous versions of Vubis (certainly in V4W) there was a link from an order to the supplier record. (a button on the order overview screen leading to the supplier screen - as in AFO 241) This option is not available any more in Vubis.

#### *Implementation*

New option CS - current supplier - on the Order detail screen. If you have permission for AFO241, you can update information in the supplier record.

### 9.2. AFO 22x – Change budget code on receipt

#### *Request*

Need ability to change budget code at receipt (only if order has not been invoiced yet).

#### *Implementation*

You can change the budget in the partial order up until the time that the order is invoiced.

### 9.3. AFO 22x – Option to reprint receipt slips

On the receiving screen, select which already received items you want a receipt slip to print for. You can make multiple selections from the list of displayed items on the Receiving screen. The system will display a message with the total number of receipts marked for reprint.

Printing of the receipt slips is done either by selecting the Print icon or exiting the Receiving screen.

### 9.4. AFO 217 – Default price in manually added potentials file from bib

#### *Request*

Add the ability to load price field from a specified set of tags into potentials records loaded from a savelist.

#### *Implementation*

In AFO217-Selections, choose the Add manually option.

New field: "Import price form tag/subfield(s) in bib record"

The tag/subfield combinations are entered in the order of preference. If there is price data in tag 020/\$c, get the price from tag 20/\$c. If no price in tag 020/\$c, check if there is a price in tag 930/\$z and so on. The default price for each title will be derived from the specified tag/subfield(s) in the bib record corresponding with each record in the savelist.

## 9.5. AFO 217 – Changes to potentials processing

### Requirements

1. Introduce a parameter to allow creation of multi-title orders
2. AFO 217 : Ordering Process – introduce parameter so that a title is not ordered if there is less than a minimum number of selections.

### Implementation

AFO278 – Import/Export - Potentials import profiles – there are two new parameters on tab General:

“Create multi-title orders”: if set, imported potentials files will be set to create multi-title orders when selections are turned into orders.

“Minimum selections required before creating order”: enter the minimum number of selections that a title must have before the title will be ordered. Imported potentials files will be set to this value.

AFO217 – Selection process - The two new parameters can be set for each potentials file (both imported and manually created files). The header information for each potential file contains this information. These parameters can be changed for each file using the Update header option.

AFO217 – Ordering process - When selections are turned into orders, the system will normally create one purchase order for each processed title. If the Create multi-title orders parameter is set for a potentials file, the system will create one multi-title order for each supplier found in the titles in the potentials file.

Example when *Create multi-order orders* is turned on:

```
200800146/0001 - After development : - 0878406395 (clo - BD(1) ; BD(1) ; BD(1) ;
200800146/0002 - Assessing mental health- 0761911073 (clo - BD(1) ; BD(1) ; BD(1) ;
200800146/0003 - Harry Potter and the chamber of secrets - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
200800146/0004 - Harry Potter and the chamber mice again - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
200800146/0005 - Harry Potter and the chamber of secret s - 0747538484 - BD(1) ;
200800146/0006 - Harry Potter and the chamber of dumb mic - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
Potentials selections into orders load finished
```

Example when *Create multi-order orders* is turned off:

```
200800146/0001 - After development : - 0878406395 (clo - BD(1) ; BD(1) ; BD(1) ;
200800147/0001 - Assessing mental health- 0761911073 (clo - BD(1) ; BD(1) ; BD(1) ;
200800148/0001 - Harry Potter and the chamber of secrets - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
200800149/0001 - Harry Potter and the chamber mice again - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
200800150/0001 - Harry Potter and the chamber of secret s - 0747538484 - BD(1) ;
200800151/0001 - Harry Potter and the chamber of dumb mic - 0747538484 - BD(1) ; BD(1) ; BD(1) ;
Potentials selections into orders load finished
```

When selections are turned into orders, the system will check the *Minimum selections required before creating orders* value and will not process titles that have a number of selections less than this value.

## 9.6. AFO 217 – New column on overview screen ordering process

A column showing the brief description of the file has been added to the overview screen of the option Ordering process:

Potentials - ordering summary											
	No	Id	Description	Date loaded	Titles - no selections	Titles to process	Type	Default supplier	Process	Loc. - no selections	Selectors - no selections
⚠	<input type="checkbox"/>	1	IBLCentral20101014 ILL suggestions file	14/10/2010 11:36	1/1	0	Import	ILLCEN	No	*ALL*	*ALL*
⚠	<input type="checkbox"/>	2	IBLCentral20100908 ILL suggestions file	08/09/2010 14:18	2/2	0	Import	ILLCEN	No	*ALL*	*ALL*
⚠	<input type="checkbox"/>	3	P00000052 ILL request suggestions	16/08/2010 12:16	3/3	0	Manual		No	*ALL*	*ALL*
⚠	<input type="checkbox"/>	4	IBLCentral20100816 ILL suggestions file	16/08/2010 11:43	3/3	0	Import	ILLCEN	No	*ALL*	*ALL*
⚠	<input type="checkbox"/>	5	IBLCentral20100813 ACME Import Profile	13/08/2010 16:46	2/2	0	Import	ACME	No	*ALL*	*ALL*

## 9.7. AFO 217 – Backlink from WebOpac

### Requirement

The records are in a potential file in AFO 217. The idea is to allow librarians to make a selection in AFO 217 from the WebOpac. They consult records in WebOpac and if a title is interesting, a link (button) allows coming back in the screen of selection in AFO 217.

### Implementation

In the WebOpac Preferences there is a new option under Texts per Profile, in the Full record section “Show button ‘Add selection’ Yes/No:

FULL DESCRIPTION	
<input type="checkbox"/>	Full description
<input type="checkbox"/>	Relations
*	Show button 'LeenDirect': Yes ▾
*	Show button 'Suggestions': Yes ▾
<input type="checkbox"/>	Suggestions <span style="float: right;">Style class: buttonekst</span>
<input type="checkbox"/>	Related works <span style="float: right;">Style class: buttonekst</span>
*	Show button 'Add selection': Yes ▾
<input type="checkbox"/>	Add selection
<input type="checkbox"/>	Retrieve record
*	Text before Last Received Issue: Last received issue : <B>from We

### Functionality

From the search screen in AFO 111 use the WebOpac button and the WebOpac browser is launched. Do your search in the WebOpac and find a record. Click the Add selection button and the system switches you back to the V-smart session and takes you directly to the Add selection form. When you are finished adding the selection, the V-smart session returns to the search screen. You manually switch to the WebOpac browser session to continue with your WebOpac searching. When you find another record you like (in the WebOpac session), choose the Add selection button and you are switched again to the V-smart session and taken directly to the Add selection form.

## 9.8. AFO 242 – ISO4217 currency codes

AFO242 has been enhanced to allow Currency codes to be selected from the codes defined in the international standard ISO4217. For certain applications (e.g. Interlibrary loan) it is necessary that currency codes used are contained within this standard set.

The currency codes from ISO4217 are made available as a standard set of codes within the system, and from this list the codes may be selected as valid codes for use elsewhere in the system e.g. in Acquisitions, Interlibrary loan and so on.

Other codes may be entered manually if so required; any existing currency codes defined in AFO242 are therefore accepted.

Entry to the Exchange rates display offers the following display.



Currency and exchange rate information						
	No	Currency	Wording	Exchange rate (CAD)	Entry date	ISO4217 no.
<input type="checkbox"/>	1	ABC	abc lower case fixed	0.23	24/08/2010	
<input type="checkbox"/>	2	AMD	Armenian Dram	0.45	23/08/2010	051
<input type="checkbox"/>	3	AUD	Australian Dollar	0.57	23/08/2010	036
<b>i</b>	4	CAD	Canadian Dollar	0.88	23/08/2010	124
<input type="checkbox"/>	5	CDN	Canadian Dollar2	0.63	01/09/2010	
<input type="checkbox"/>	6	CT	Canadian Tire Coupons	0.01	03/08/2010	
<input type="checkbox"/>	7	EUR	Euro	1.00	14/03/2008	978
<input type="checkbox"/>	8	FL	Dutch guilder	0.45	12/01/2010	
<input type="checkbox"/>	9	GBP	British Pound	1.43	01/09/2010	826
<input type="checkbox"/>	10	HFL	Dutch Guilder	0.45	14/03/2008	
<input type="checkbox"/>	11	THB	Baht	0.02	23/08/2010	764
<input type="checkbox"/>	12	USD	United States	0.88	14/03/2008	840

This is comparable to the display in earlier releases with the addition of

- a. A column showing the Currency code number from the ISO4217 standard. This indicates then that this is a code defined in the standard. Thus “CDN”, for example, is not a valid ISO4217 code.
- b. A blue “I” indicates that this code is defined to be the default currency code in the system.



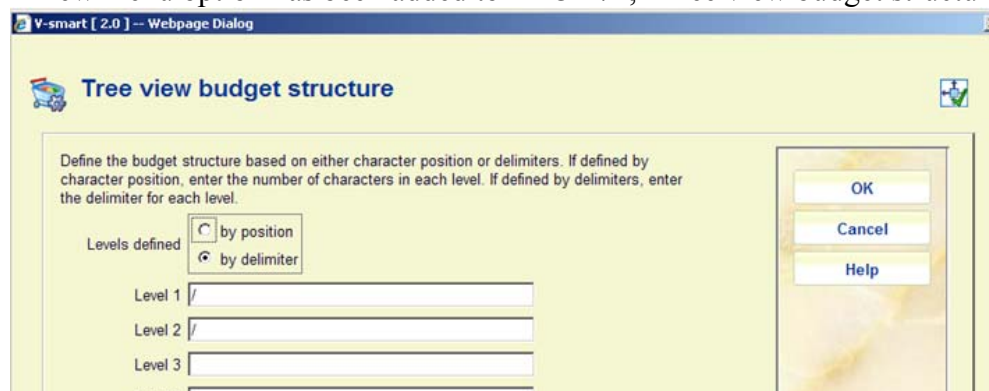
## 9.9. AFO 243 – Tree view for budgets

### Requirement

Create a new inquiry screen on the status and hierarchy of the budgets in a tree view. The left pane displays the tree view of the budgets and the right pane is dynamically populated when a position in the tree is clicked.

### Implementation

A new menu option has been added to AFO 272, “Tree view budget structure”:



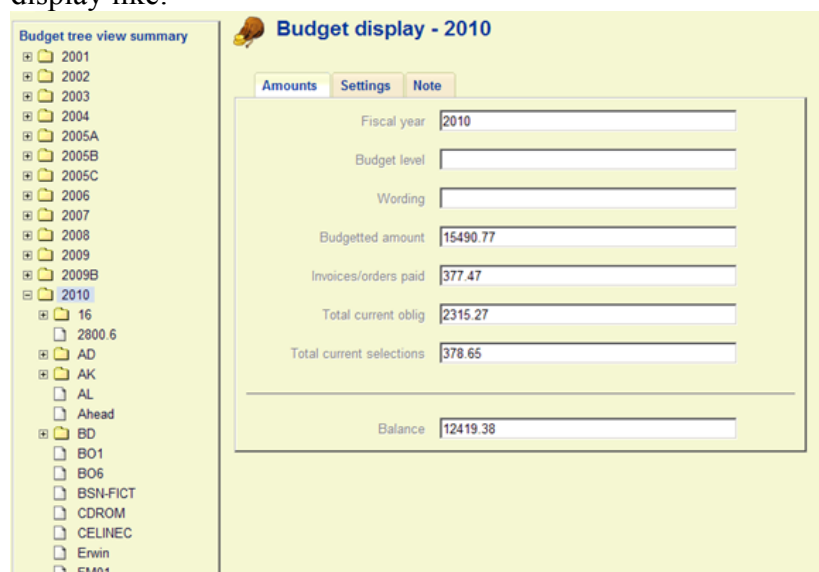
Up to 10 levels can be defined and these levels are defined either by character position or by delimiters. You do not need to define all 10 levels.

If defined by character position, enter the number of characters in each level. You must define at least 20 characters in total.

If defined by delimiter, enter the delimiter used for each level in the Level fields.

### Functionality

Once this has been defined. Selecting the Tree view option in AFO 243 results in a display like:



**9.10. AFO 271 – New field for order layouts**

To enable the printing of the total number of copies received for an order, new field 'Total received (to date)' has been added to AFO 271 layouts. This field has also been added to the Orders application in AFO 141 for reporting purposes.

**9.11. AFO 272 – New field for default tax %**

A new parameter has been added to AFO272 – Miscellaneous – “Default tax assigned to invoices” (amount or percentage).

This amount or percentage defaults into newly created invoices. It is shown under Tax in the GB block of an invoice, under Expenses in the Budget display and will be applied/calculated when you pay the invoice.

**9.12. AFO 277 – New output options for report group lists**

Various new options have been added to AFO 277 - Report group list, to allow for output to spreadsheet, optionally in combination with sending via email.

*9.12.1. Report group detail screen*

On the detail screen of a report group, two new options have been added:

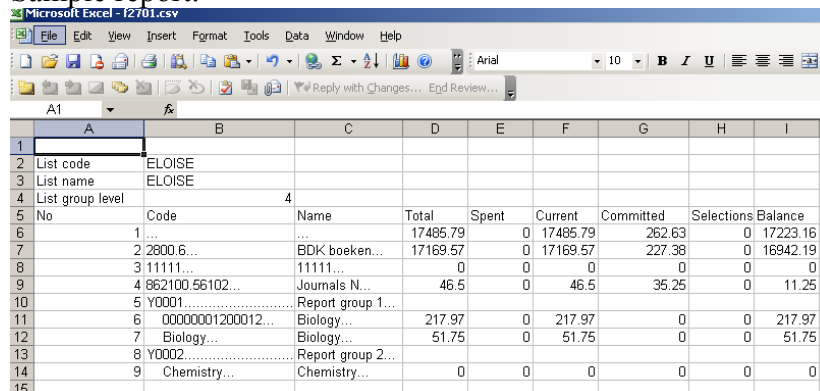
**Display budgets [date range]:** Use this option to display changes in commitment, spent and selection amounts in a specified date range within the current fiscal year.

**Email automatically:** Use this option to set up parameters so that the system can automatically email reports (attached Excel spreadsheet) with set criteria at scheduled times during the week or month.

*9.12.2. Budgets screen*

After selecting the option Display budget from the detail screen of a report group, you will find the new option Output.

This allows you to output the information on the screen to an Excel spreadsheet or to send an email that contains the Excel spreadsheet as an attachment.

**Sample report:**


No	Code	Name	Total	Spent	Current	Committed	Selections	Balance
1	...	...	17495.79	0	17495.79	262.63	0	17223.16
2	2800.6...	BDK boeken...	17169.57	0	17169.57	227.38	0	16942.19
3	11111...	11111...	0	0	0	0	0	0
4	862100.56102...	Journals N...	46.5	0	46.5	35.25	0	11.25
5	Y0001	Report group 1...						
6	0000001200012...	Biology...	217.97	0	217.97	0	0	217.97
7	Biology...	Biology...	51.75	0	51.75	0	0	51.75
8	Y0002	Report group 2...						
9	Chemistry...	Chemistry...	0	0	0	0	0	0

### **9.13. New fields on order records**

AFO 272 – Additional order fields - Add two additional fields to the order screen: treatment type and binding type. The Treatment type field is a valid entry from a new authority list (Treatment type) controlled by the library. The Binding type field is also a valid entry from a new authority list (Binding type) controlled by the library. In addition, a list of valid binding types can be assigned to each supplier. A potential or an order for a supplier can be assigned a binding type from the supplier's list. If a supplier does not have any valid binding types defined, a binding type cannot be assigned to potentials or orders for the supplier.

AFO 272 – Acquisitions authority lists - Add two new authority lists, Treatment type (4174) and Binding type (4175). Codes can be added, updated, copied and deleted by the library.

AFO 211/216 – Partial order entry - In AFO 211, when creating a new order, the system will prompt for the selected fields on the Enter order form.

AFO 217 – Potentials processing – Selection process – Update header form - The two new fields (if activated) are prompted for on the Update header form.

AFO 141 – SSP - The new fields will be available in the SSP module in the application "Orders" and the application 'Potentials'. The new fields will be included in SSP regardless of whether they are in use or not.

AFO 271 – Print parameters control – Layout - The new fields appear in the dropdown list of available fields when creating layouts for orders, claims, etc.

AFO 278 – Import potentials and Import standing orders - When creating conversion profiles for importing potentials files and standing order files, two new fields are available; TREATMENTTYPEORDERTAG and BINDINGTYPEORDERTAG. These fields can be used in your conversion profile to default information into the treatment type and binding type fields respectively.

AFO 241 – Suppliers - The new Binding type(s) field in the Identification section of the supplier record defines which Binding types can be ordered from the supplier. If no Binding types are defined for a supplier, a binding type cannot be assigned to a potential or order for the supplier.

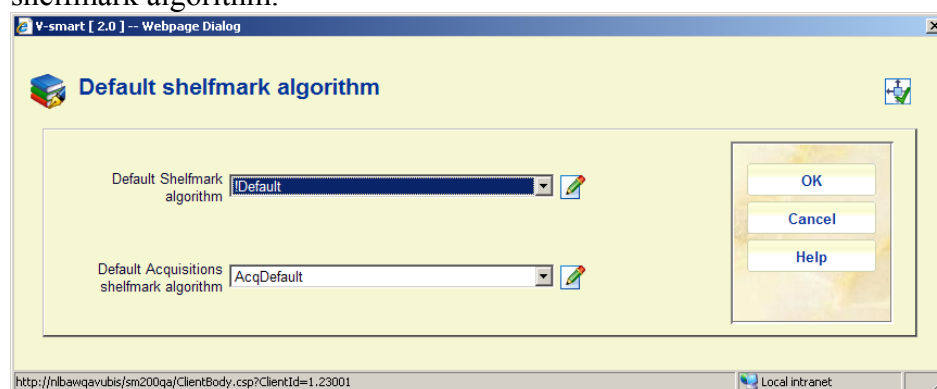
### 9.14. Default shelfmark algorithm for Acquisitions

Purpose: define a default shelfmark to be assigned to all items (barcodes) created in Acquisitions. To use this functionality, you must turn on the parameter, Offer shelfmark input in partial order in AFO272 – Miscellaneous.


#### AFO469-Shelfmark algorithms

New field – Default value – This default value is assigned to the shelfmark when the Element/group profile and Local subroutine fields are left blank (or when the Element/ group profile and Local subroutine calls do not return data). In this case, the generated shelfmark is ‘OnOrder’. Note: make sure you define the Extract characters for classification portion (i.e. 1,20).




AFO469-Default shelfmark algorithm - New parameter – Default Acquisitions shelfmark algorithm.



In AFO211, when adding a partial order, the system will default the shelfmark generated from the Default Acquisitions shelfmark algorithm into the Shelfmark field

Selection code	<input type="text"/>
Shelfmark	<input type="text" value="OnOrder"/>
Material type	<input type="text" value="Books (BO)"/> 

When the copies of the partial order are subsequently barcoded, the Shelfmark classification field is defaulted from the partial order.

Barcode	<input type="text"/>
Institution	<input type="text" value="PNB"/>
Location code	<input type="text" value="BD - BD"/> 
Sublocation code	<input type="text"/> 
Shelfmark classification	<input type="text" value="OnOrder"/> 

## **10. Subscriptions review & renewal (new AFO 279)**

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### **10.1. Introduction**

#### *Request*

Subscription orders for serials can be renewed individually by Acquisitions staff or automatically by a processing job

The system can calculate the new renewal price based on a supplied inflation rate change.

The **processing jobs** involved are :

- Subscription review report
- Subscription renewal

The setup of the jobs determines which orders are selected for review or renewal, set bounds on the length of the renewal period, provides cost adjustment.

### **10.2. Implementation**

1. Create new AFO279 Review / Renewal Report
2. AFO279 – Renew /Renewal Menu with the following options.
  - Review/Renewal Setup
  - Review Process
  - Review Report
  - Renewal Process
  - Renewal Report
3. Creation of a Serials Review Report.
4. Creation of a Serials Renewal Report.
5. AFO211 – Orders – Add a new option to renew the order manually.

### **10.3. Functional description**

The system selects subscriptions to review or renew based on the following:

- The subscription has a valid link to a purchase order at detail level.
- The subscription is active.
- The subscription has the “Generate renewal” flag on.
- The subscription Review date is between the start and end dates defined under Setup.

The library might execute the subscription jobs quarterly or annually, or whenever renewals are required. It is assumed that when the subscription renewal is done that the passed subscription period is complete and no more commitment will remain for the period. By doing this we are automatically completing the passed commitment before creating the new commitment.

The Review/Renewal reports are sorted by budget number and with in budget number by order title.

**The Subscription Review Job** can be executed frequently, as often as desired. Activities should be carried out in the following sequence:

1. execute the Subscription Review Job to see which orders are due for renewal and which budgets they are to be encumbered from
2. Acquisitions staff could update orders to change their budget allocation, copy locations, vendor, and so on
3. execute the Subscription Review Job again to verify any budget allocation changes made, and to see the total amounts that will be encumbered from each budget
4. Acquisitions staff should ensure that these budgets contain enough money for the renewals
5. Acquisitions staff could manually RENEW any orders that they do **not** want handled automatically by the Subscription Renewal Job
6. optionally, execute the Subscription Renewal Job to automatically renew the orders based on current or predicted unit cost
7. to check the results, Acquisitions staff could produce the RENEWAL REPORT

This job selects order records that meet the conditions described at the beginning of this section. This job does not affect the database.

### **The Subscription renewal job**

This job selects order records that meet the conditions described at the beginning of this section.

The job first checks that there is sufficient money in the funds to encumber for the renewed orders. If even one fund is short, none of the renewals will take place.

For each order, the job:

- reset the start date to end date +1
- reset the end date to old end date + renewal number of days
- adjust the total price and commitment on the order
- adjust the commitment on the budget of the order

### **Manual renewal via AFO 211**

There is a new icon (Renewal) on the order detail screen. This is only active for records with a serials subscription defined.

After choosing this option a selection form will be displayed. The first four fields come from the general details of the subscription. The fifth field (inflation rate) is derived from the Setup in AFO 279.

The same conditions and checks apply as for automatic renewal via AFO 279. However, you can manually adjust this information if required.

## 11. Enhancements serials module

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This section describes various smaller enhancements within the serials module.

### 11.1. Changes for holdings display in WebOpac

#### *Problem description*

There is a setting in AFO367 - Issue status codes - 'Suppress display in OPAC'. This setting was initially intended to control what was displayed in the Cardex display. (i.e. don't show Withdrawn issues, Claimed issues, Next expected, etc). Unfortunately, this setting is currently also controlling the Holdings display in WebOpac (which it shouldn't).

We need a new setting in the issue status record: "Include on WebOpac holdings display".

#### *Solution*

This new setting allows customers who want to display unbarcoded issues on the WebOpac holdings display to include only those issues with specific statuses. i.e. Received, Bound, etc.

Changes to WebOpac holdings display logic:

- The logic for the Holdings display will always (for all customers) show barcoded issues regardless of the settings in AFO367 - Issue status codes.
- The logic for the Holdings display will also show any unbarcoded issues that have the new 'Include on WebOpac holdings display' flag set for their issue status.

In the case of a customer wanting to show only barcoded issues on the Holdings display, no action is required. In the case of a customer using Stack requests, the new flag should be set in *AFO367 - Issue status codes* in each status that the customer allows stack requests against. i.e. if the library allows stack requests to be placed against unbarcoded issues with a status of Received, set the new flag in the Received issue status record.

## 12. Enhancements circulation module

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This section describes various smaller enhancements within the circulation module.

### 12.1. Suppressing new items from SDI global

When adding a new item you can place a [ (square bracket) in front of the barcode number. This ensures the new item will not be counted as “new” for SDI. This only applies to entering the original barcode, for any subsequent barcodes for the same item a [ will be stored as data (if it passes an edit check). For SSP such a barcode would also still be counted as a “new” entry. So if you have ordered a new copy of an existing title (to replace lost or damaged copies) and you want to suppress these from being processed as new titles for SDI, (they are not new titles) then add the new copies with the [barcode - SDI will not see these new items as new titles now available.

### 12.2. Display of uniform title information in various instances

#### *Request*

The display of titles on loan to a borrower (and possibly elsewhere) needs to be enhanced to show the “name-title” heading for records where the main title is a uniform title.

The specific requirement is for the title to be shown in this way in

- (a) Within the WebOpac
- (b) The display of a borrower’s loans from AFO431 (and related AFO’s)

#### *Implementation*

A !UniformTitle group element has been created for each format in both AFO 151 and 152. The system will first check if there is anything coming back from the !UniformTitle and if there is, will show it with the !Author first then the !UniformTitle. If nothing is returned in the !UniformTitle then the display is as it is now with !Title / !Author.

Please note

!UniformTitle is NOT available for layout definitions in 271, 363 and 483.



The uniform title is displayed in:

- 111 – search results
- 155 – blocked records
- 411/431 – list items on loan
- 412 – when returning a reserved item, the popup for printing a slip
- 413 – renewals
- 415 – reservations
- 418 – picklist view
- 422 – reservation queue
- 462 – generate output when sending collection
- Also on various loans & payments slips, but due to length of author name (part of) the title may be truncated
- WebOpac – current loans
- WebOpac – outstanding amounts
- WebOpac – reservations
- WebOpac – loan history

And it is NOT displayed (but !Title instead) in:

- 411 – loan item
- 411 – list items on loan, option Item details on popup
- 414 – payment screen
- 413 – popup message when no renewal
- 412 – return item
- 418 – reservations overview
- 418 – trapping an item from picklist
- 462 – send/receive item
- 495 – manually create item invoice
- 495 – overview of outstanding loan fees
- WebOpac – payment history

### **12.3. Last activity / last loan date**

#### *Requirements*

- For an item that is returned in AFO 412 while it was not on loan, a return date should still be set.
- Record “last activity date” in the item record

#### *Implementation*

- New parameter in AFO 481 – Miscellaneous – Circulation workflow – Returns: Returning an item that has status 'In the library' updates last return date" – checkbox.
- A new field on the item record: “Last activity date”. The last activity against the item is one of these actions: loan, renewal, return, trap reservation, trap stack request, sent in collection, received from collection. This field is only updateable by the system. It is displayed in the header portion of the Item detail screen and is available in SSP.

#### **12.4. AFO 423 - Loan history by owning location**

##### *Problem description*

When the owner of an item changes, the loan count continues to increase and there is no way to differentiate between loans made while the item is at the different owners.

At the moment when an item changes of owner in AFO 423 the loan count stays the same and in the field "loan history" the total of loans goes on without differentiation of loans between the old owner and the current owner.

##### *Request*

- 1-To put back on zero the loans count when the item's owner changes.
- 2- The loan history of the old owner must be kept.
- 3-To add in the screen of item detail (AFO 423) the date of the owner change.

##### *Implementation*

On the line displaying Owner information, include Date that owner changed  
i.e. Owner BPVP/RESE [RESEAD] 194 AGA {4 – LIA} – Updated 17/09/2009

Introduce a new parameter in AFO 481- Miscellaneous – Circulation – Loans – "Display loan history by owner". If set, system will show loan history for each owner after the general Loan history information is displayed. E.g.

Loan history                    20 total (20 loans + 0 renewals) / 20 loans (current year) / 4 reservations

Loan history BPVP/BGRE    19 total /19 loans (current year)

Loan history BPVP/RESE    1 total / 1 loans (current year)

In the example above, if the Owner changes back to BPVP/BGRE, the counter will not be reset but will continue to accumulate from 20 loans to 21 loans.

If the Owner changes to a location that has never been assigned to this item before, the loan count will accumulate from zero to 1 loans.

#### **12.5. AFO 431 - Removal of borrower picture link**

##### *Request*

Add the option to remove the borrower picture link from the borrower record after the borrower label is printed.

##### *Implementation*

There is a new parameter in AFO 481 - Miscellaneous - Circulation workflow - Printing- Miscellaneous : "Remove picture link after borrower label printed" -Y/N.  
Note that this is valid only for mailmerge type labels and not other standard labels.

## 12.6. AFO 431 – Enhancement of Reservation option

### *Requirement*

The shortcut [R] Reservations needs to be active always from Borrower Details, not just when there is an existing reservation.

### *Implementation*

This option now functions as follows:

- If the borrower has reservations, you are taken to the list of reservations for the borrower (as in AFO 415). If the borrower is blocked, you cannot add a new reservation.
- If the borrower has no reservations and is blocked, the message 'Borrower has no reservations' is displayed.
- If the borrower has no reservations and is not blocked, the system displays the message, "Borrower has no reservations. Do you want to add a new reservation?". If you click OK, you are taken to the screen displaying the empty list of reservations for this borrower (AFO 415) and you can proceed with adding a new reservation. If you click Cancel, nothing happens.

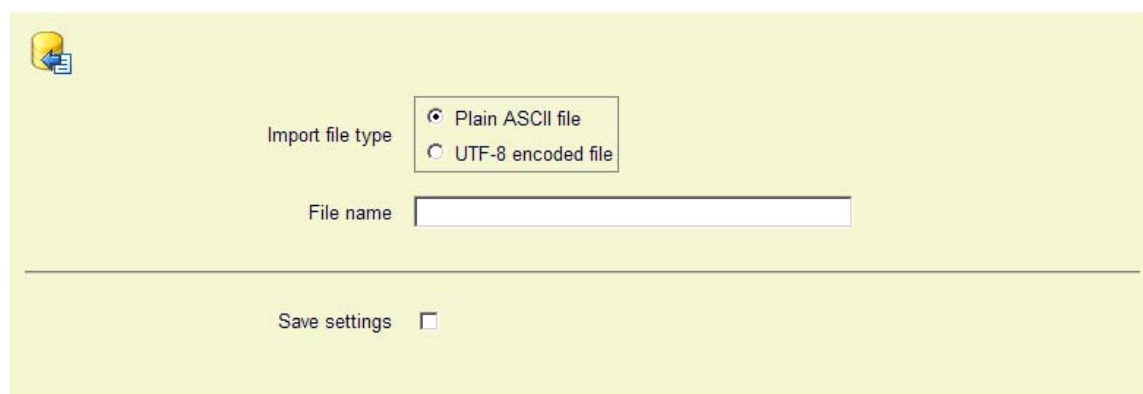
## 12.7. AFO 441 – Borrower import to handle UTF-8 records

### *Requirement*

AFO441 / AFO442 - Borrower Import needs to be modified to handle UTF-8 records.

### *Implementation*

The input form at the start of AFO 441 now has a radio button selection for ASCII or UTF-8 encoded file type:



The screenshot shows a web-based form for importing borrower records. It features a yellow background and a blue folder icon with a document and arrow in the top left corner. The form includes the following elements:

- Import file type:** A label followed by two radio button options: "Plain ASCII file" (which is selected) and "UTF-8 encoded file".
- File name:** A text input field.
- Save settings:** A checkbox that is currently unchecked.

## **12.8. AFO 451 – Courtesy notices and closed days**

### *Problem description*

Courtesy notices generated before the due date do not take closed days into consideration.

### *Solution*

The regular and variable closed days (for the location where the courtesy notices are generated) will be taken into account.

For instance if the library wants to send the courtesy notice two days before the due date and the library is closed on Saturday and Sunday then the courtesy notices for the items due on Monday and Tuesday will already be generated on Friday.

## 12.9. AFO 461 – Administrative managers and reservations

### *Problem description*

Items are sent to an administrative location (type 0 manager). In AFO481 - the parameter for Reservation for on shelf items is OFF. If an item is at an administrative location it will not be considered as available / on the shelf. If this parameter is ON, items which are at administrative locations should then be considered available for a reservation. Sites would like to be able to place reservations on items at administrative locations however do not want to allow reservations for items which are on the shelf.

### *Solution*

There is a new parameter in AFO461 *Are items at this location considered to be not "On shelf" for reservations*. This allows control for each administrative location. The parameter is inactive for online/offline locations.

Send items with reservations to offline/administrative manager

Are items at this location considered missing?

Location number for ERP

Are items at this location considered to be not 'On Shelf' for reservations?

In summary:

AFO481 - Reservation of on shelf items allowed = OFF

AFO461 – Items are considered not ‘On shelf’ for reservations = ON Then: reservation allowed

AFO461 – Items are considered not ‘On shelf’ for reservations = OFF Then: reservation not allowed

AFO481 - Reservation of on shelf items allowed = ON

AFO461 – Items are considered not ‘On shelf’ for reservations = ON or OFF (ignored) Then: reservation allowed

## 12.10. AFO 481 – New RFID parameter

There is a new parameter in AFO481 - Miscellaneous - RFID parameters to allow for different formats for RFID web services.

Trace Web service response (in global TempWebserviceRfid)

Label type used

French label

NBD label

## 12.11. AFO 481 – Reservations – Reservation areas

### Problem description

AFO481 - Print Parameters - Reservations - Reservation Areas: Missing from output generated is the setting for Limit pickup location to included location(s) and it should be included.

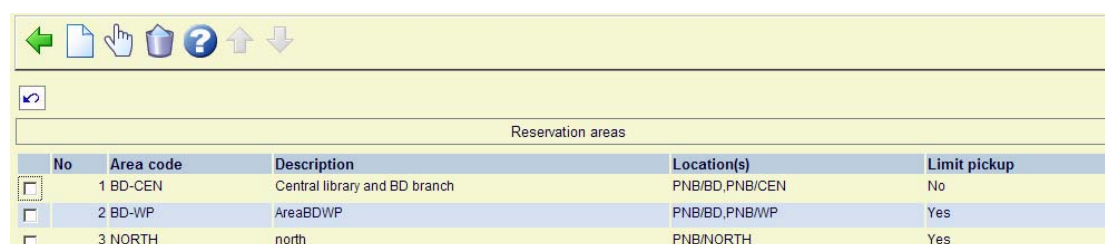
2010-07-15  
Infor Libraries - CENTRAL LIBRARY

Reservations - Reservation Areas

No	Area code	Description	Location(s)
1	BD-CEN	Central library and BD branch	PNB/BD,PNB/CEN
2	BD-WP	AreaBDWP	PNB/BD,PNB/WP
3	NORTH	north	PNB/NORTH
4	SOUTH	south	PNB/CEN
5	WP	AreaWP	
6	WP-CEN	AreaWPCEN	PNB/CEN
7	all	AllPNB	PNB/*

### Solution

The summary screen now also displays whether or not the parameter “Limit pickup location to included location(s)” has been set:



No	Area code	Description	Location(s)	Limit pickup
<input type="checkbox"/>	1 BD-CEN	Central library and BD branch	PNB/BD,PNB/CEN	No
<input type="checkbox"/>	2 BD-WP	AreaBDWP	PNB/BD,PNB/WP	Yes
<input type="checkbox"/>	3 NORTH	north	PNB/NORTH	Yes

This ensures that the parameter setting is also printed when using the Print parameters option from the AFO 481 main screen (because the print option is based on grid display):

2010-07-22  
Infor Libraries - <B>WORKPLACE <I>FOR WEBOPAC</I></B>

Reservations - Reservation Areas

No	Area code	Description	Location(s)	Limit pickup
1	BD-CEN	Central library and BD branch	PNB/BD,PNB/CEN	No
2	BD-WP	AreaBDWP	PNB/BD,PNB/WP	Yes
3	NORTH	north	PNB/NORTH	Yes
4	SOUTH	south	PNB/CEN	No
5	WP	AreaWP	No	
6	WP-CEN	AreaWPCEN	PNB/CEN	No
7	all	AllPNB	PNB/*	No

## 12.12. AFO 481 – Reservations – Picklist printing from AFO 418

Printing a picklist (either from picklist view or reservations messaging view) outputs the list using the columns and widths defined for the grid (i.e. it uses the grid definition).

Enhancements to what is shown on this list, however, mean that the width of the output may be too wide to print, even in landscape. There is a new option that allows users to define which columns are required and how many characters should be allowed for each.

A new menu option from AFO481/Reservations has been added

### Output columns for printing picklist

This leads to an input form such as

Field	Width
No.	4
Title	40
Author	20
Item	15
Shelfmark	20
Pickup Loc.	0
Res.	6
Item category	15
Last return date	0
Activation date	0

Initially this will have empty fields. It is not necessary to define this and the system will continue to use the default settings, as defined by the grid itself. However, this may be populated with column widths as shown above.

If the form is used, then each column must be defined. The [Reset] button clears these settings, causing the system to revert to the default settings.

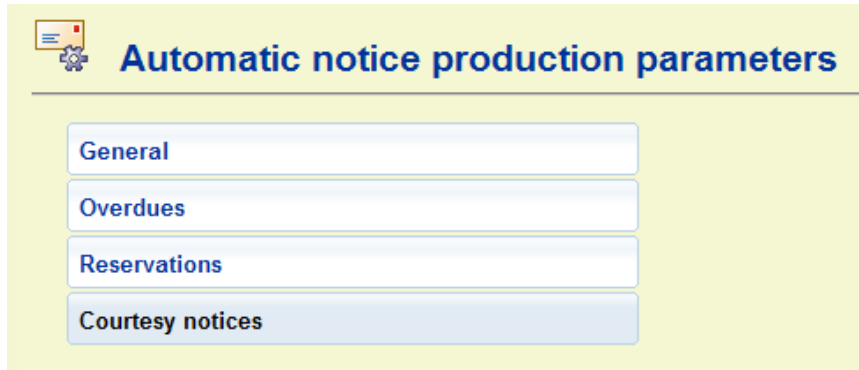
If the total column width is greater than 200 characters, the system will warn the user but they may continue. As shown on the screen, the settings apply to the circulation meta-institution.

The fields shown correspond to the wording for the grid in the current user's language.

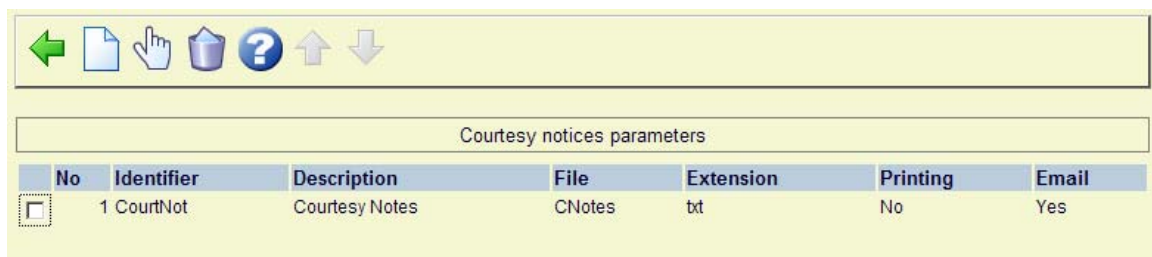
Note that the printing does NOT use the grid columns as displayed i.e. if the "Change column" feature is used, then this does not change what is actually printed.

### 12.13. AFO 483 – Automatic notice production for courtesy notices

AFO 483 – Notices – Automatic notice production has been enhanced with a new menu option for Courtesy notices:



The rules can be set up in a similar manner to the setup for Overdues and Reservations:



Each rule is identified by the first 2 column values and the pair of values are combined to form a unique “key” to the stored parameter values for each rule. There can be as many rules defined are required and these my each be marked as “in use “ or “not in use” for each notice output type (printing or email).



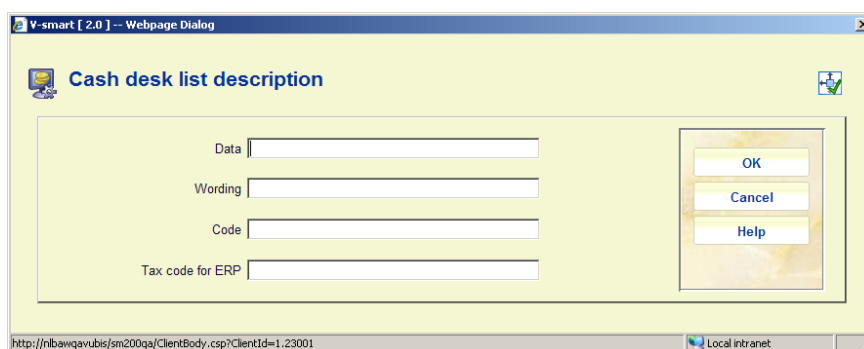
## 12.14. AFO 494 – Cash desk list descriptions

### *Problem description*

Under “To be worded as” one had to enter both wording and optionally code corresponding for instance with external financial codes.

### *Solution*

The input form now has 4 fields:



As a consequence the column display has also been expanded:



No.	Data	Wording	Code	Tax code for ERP
1	B/BO	[80245]Book fines	80245	

## 12.15. AFO 495 - Overview of outstanding loan fees

This option is now operational. You can use it to view lists of all unpaid loan fees. This list is compiled per borrower. In AFO 481 – Invoices – Invoice , you can determine for each borrower category /material type combination if an invoice is required for unpaid loan fees.

When set, the system will prompt for creation of an invoice when items are loaned for which a loan fee is required. Such invoices can be found in this section.

This menu option works in the same manner as the menu option Overview of outstanding amounts due.

## 13. Automatic item barcodes

---

### *Request*

The requested functionality consists of the possibility to:

- define specific formats in AFO 651/custom barcodes for automatic item barcodes
- Turn on the ability to use the new feature (i.e. make it optional)
- click on an automatic item barcode option in AFO's where an item can be added (111, 222, 311, 423, etc.)

Sites now may optionally activate a button to automatically generate a new item barcode in sequence. This sequence number may be set at the institutional or at the location level.

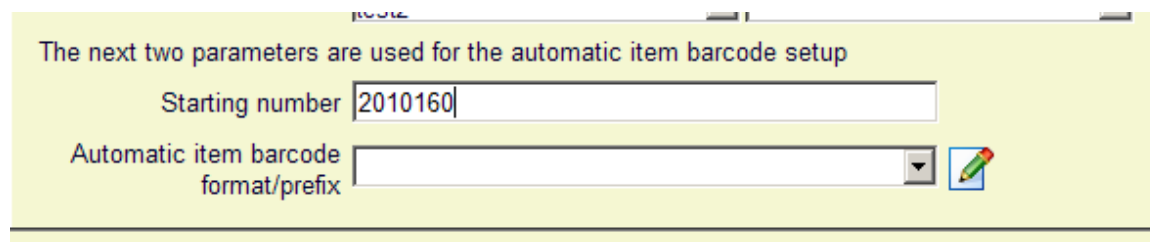
### *Implementation*

AFO469 – Miscellaneous – new parameter *Show Automatic Item barcode button*.

AFO651 - If using a custom barcode format, define a format to be used for Automatic Item barcodes, then assign this format to the locations requiring the format.


Log off the system (session needs to be restarted to use the new button as activated in AFO 469).

Set starting barcode number and optionally the custom barcode format to be used. Use AFO651 – Custom Barcodes – Locations to set the following value(s) at the institution or location level:



The next two parameters are used for the automatic item barcode setup

Starting number

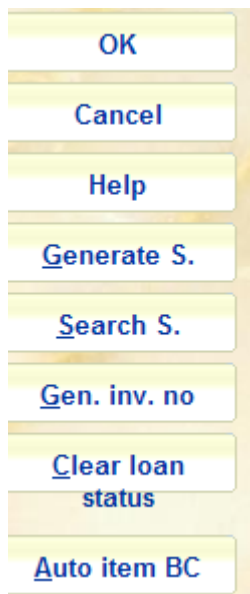
Automatic item barcode format/prefix  

The starting number value is the next available automatic barcode sequence. Optionally, the custom barcode format or Prefix (if custom barcodes have not been activated) to be used can be defined.

The Automatic item barcode format/prefix will provide a drop down list of any custom barcode formats currently defined. If selected, and the In Use flag is ON, this will be the format used for the automatic barcodes. If text is entered / in use flag for custom barcodes is OFF, then this string becomes the prefix for the new barcodes.

*Implementation*

On the input forms for adding item details, there will be a button item AutoBC in the area with other buttons:



When a custom barcode format has been defined in AFO 651 – Custom barcodes for automatic barcode generation, you can use this button. In that case the system will redisplay the form with the automatically assigned barcode:

A screenshot of a form with two input fields. The first field is labeled 'Barcode' and contains the value '2010162'. The second field is labeled 'Institution' and contains the value 'PNB'. The form has a light yellow background.

## 14. Family address change & renewals

### 14.1. Introduction

Purpose: In AFO413 and AFO419, provide the ability to renew items for other borrowers linked to the current borrower.

If AFO431, provide the ability to update the main address of a borrower's linked records when the borrower's main address is changed.

### 14.2. Linking family members

AFO431 – setup of linked borrowers. Assuming that the parent's borrower record has already been added to the system and you are now entering the borrower records for the children. Create this borrower record in the usual way (i.e. by copying from the parent's record).

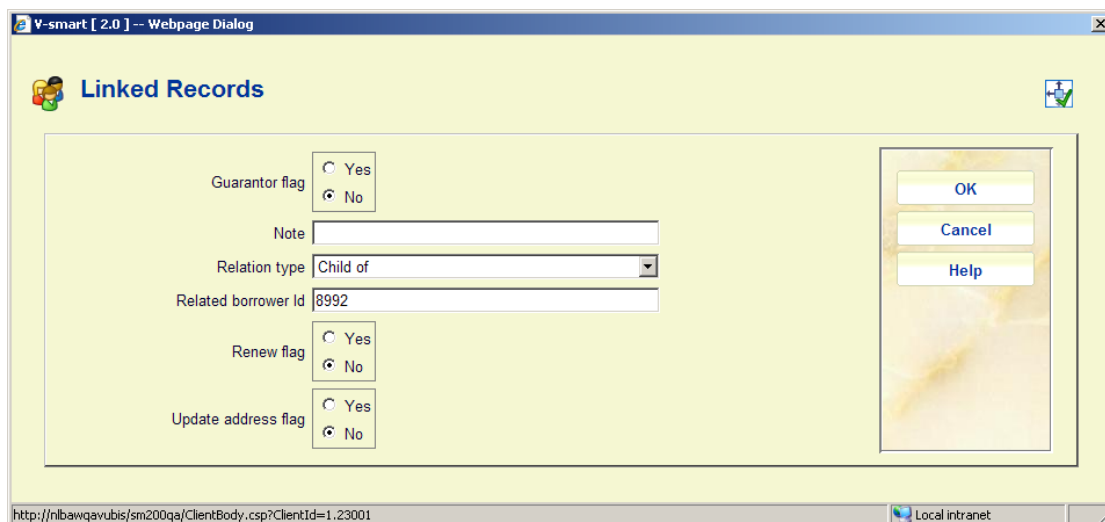
The screenshot displays the V-smart 2.0 web interface in a Windows Internet Explorer browser window. The page title is 'V-smart [ 2.0 ] - Windows Internet Explorer'. The user is identified as 'User: Tineke' and the location as 'Location: PNB/BD AFO: 431'. The interface shows a summary of borrower statistics and a detailed view of the borrower's information.

Last loan	Loans	Reservations	Unpaid balance	Membership fees and security payments	Suspensions	Status
0	0	0(0)	CAD 10.00	0	0	Complete

Borrower - Borrower maintenance - 9064

<a href="#">1 Barcode</a>	9064	<a href="#">10 Linked from</a>
<a href="#">2 Locations</a>	Institution/Locations: PNB/BD	<a href="#">11 Membership fee</a>
<a href="#">3 Identity</a>	Name: Sis Familiari Gender: Unknown Borrower Type: Person	Borrower category: EPA Last activity date: 19/10/2010 Expiry date: 19/10/2010 Last renewal date: 19/10/2010 Registration date: 19/10/2010 Copyright tax: 1 - Not yet paid this year
<a href="#">4 Home Address</a>	Address	<a href="#">12 Block</a>
<a href="#">5 Address 2</a>	Address	Status flag: 0 - Unblock Blocked as guest member: No
<a href="#">6 Business address</a>	Address	<a href="#">13 Suspensions</a>
<a href="#">7 Linked Records</a>		<a href="#">14 Circulation Note</a>
<a href="#">8 Preferences</a>	Loan history: Yes Use loan history for mailings: No ILL Budgets: 0 ILL Budgets status: 0 Correspondence Braille allowed: No Home Service: No	<a href="#">15 Maintenance Note</a>
<a href="#">9 Accept giro/Bank</a>	Data concerning acceptgiros: No Direct debit: No Automatic invoicing: No	<a href="#">16 Outstanding membership fee</a> : CAD 10.00
		<a href="#">17 Local fields</a>
		Optional field 13: 0 Optional field 1: 0
		<a href="#">18 Guest loans</a>
		Guest library enrolment date

To link this child's record to the parent, click the Linked records group. The system presents you with the summary display for the records linked to the current borrower. Select the New option to link the current borrower to her mother's record.



There are two new fields defined for each linked record: renew flag and update address flag.

Renew flag: if set, the option Renew linked will become active (in AFOs 413 and 419) for borrowers with related records.

Update address flag: if set, the system will update the current borrower's main address (defined in AFO482) to match that of the related borrower when the related borrower's main address is changed in AFO431.

When you add/update a linked borrower, you can change the setting of these two new fields.

After pressing OK, the system displays a summary of the records linked to the current borrower.

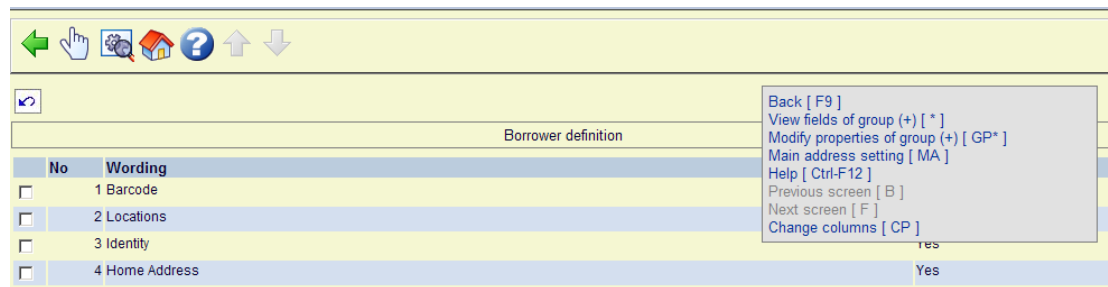
No.	Type	Barcode	Note	Guarantor flag	Renew flag	Update address flag
1	Child	8992 (Familali, Ma)		No	No	No

Returning back to the child's borrower record, you see that the current borrower is a Child of Familali, Ma.

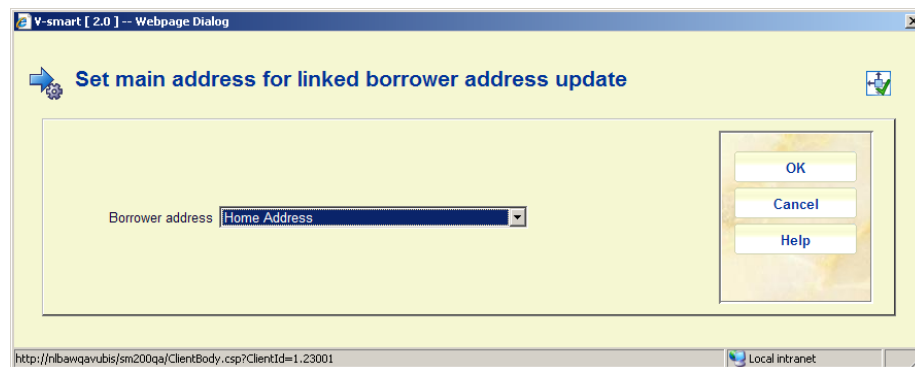
Link	Value
6 Business address	Address
7 Linked Records	Child of Familali, Ma
8 Preferences	
Loan history	Yes
Use loan history for mailings	No

### 14.3. Address parameters

In AFO482 – Borrower definition settings – there is a new option “Main address setting”:



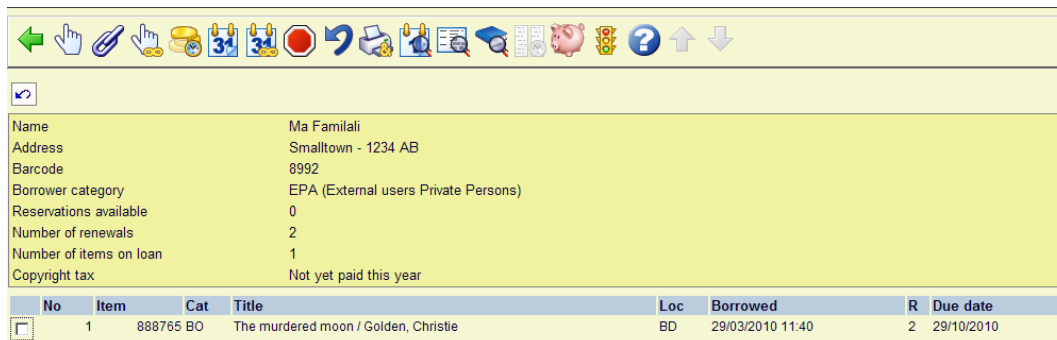
The Main address setting allows you to define (at a system level) which of the borrower record’s 10 addresses will be copied during a ‘family’ address change



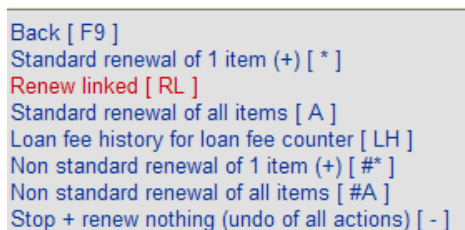
In this case, when the main borrower’s Home address is changed, the system will attempt to update the home address of linked borrowers with the same information.

#### 14.4. “Family” renewals

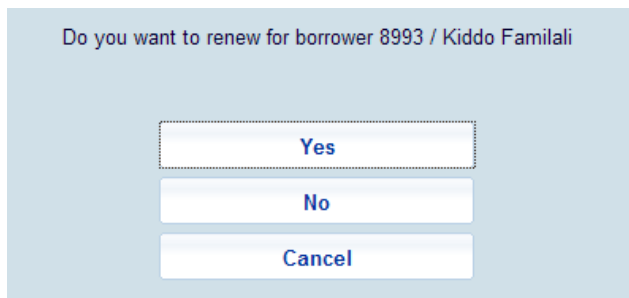
In AFO413/419 – renewal of linked borrower’s items, search for a borrower. The system displays the Renewals screen for this borrower.



Renew his/her items normally. If this borrower has related borrowers with the Renew flag set, the Renew linked option will be available.



Choose the Renew linked option to renew the items for related borrowers. For each linked borrower with the ‘renew flag’ set, the system asks the question,



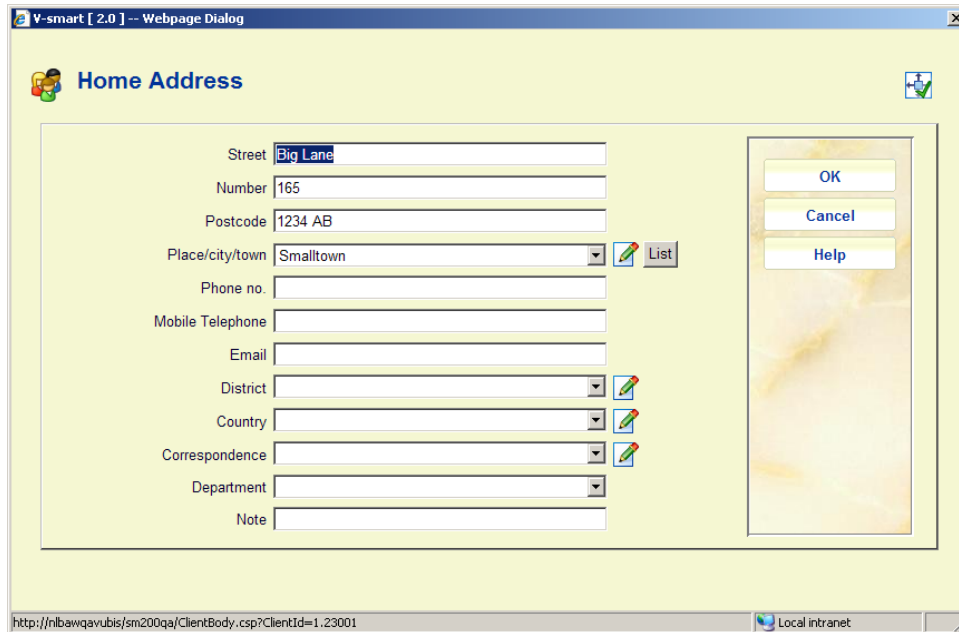
Answer Yes if you want to renew this borrower’s items. The system will first check if this borrower is blocked (you may need to provide an override password to continue with the renewals process). The system will also check if the borrower record can be locked (i.e. someone else in the system may already be accessing this borrower record). Once you have gained access to the borrower record, the system displays any items waiting to be picked up, etc and then displays the borrower’s Renewals screen. Renew this borrower’s items and then back out of the Renewals screen. The system will then prompt for the next linked borrower.

Answer No if you do not want to renew this borrower’s items. The system will then prompt for the next borrower in the list.

Answer Cancel to stop prompting through the linked borrowers and return to the borrower search screen.

## 14.5. “Family” address change

In AFO431 – update of borrower’s address, search for a borrower and change any of the information in the main address (in this case, the Home address).

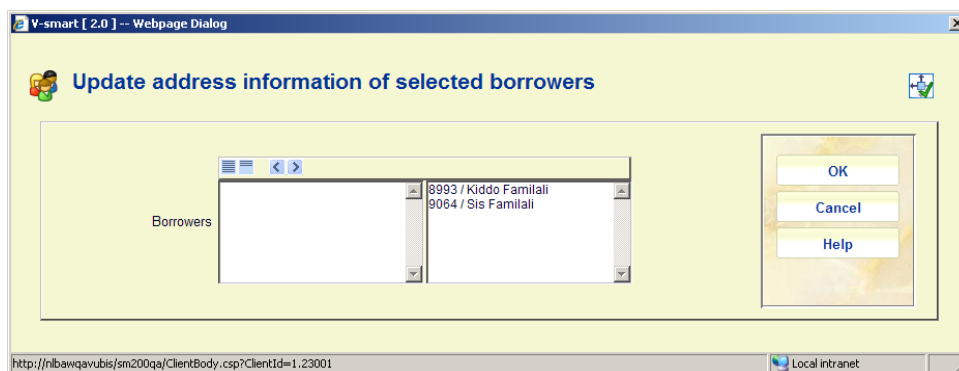


The screenshot shows a web browser window titled "V-smart [ 2.0 ] -- Webpage Dialog". The main content area is titled "Home Address" and contains a form with the following fields:

- Street: Big Lane
- Number: 165
- Postcode: 1234 AB
- Place/city/town: Smalltown (dropdown menu)
- Phone no.:
- Mobile Telephone:
- Email:
- District: (dropdown menu)
- Country: (dropdown menu)
- Correspondence: (dropdown menu)
- Department: (dropdown menu)
- Note:

There are "List" icons next to the dropdown menus. On the right side of the form, there are three buttons: "OK", "Cancel", and "Help". The browser's address bar shows "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and the status bar shows "Local intranet".

When the borrower record is saved, the system checks for linked borrowers with the Update address flag set and presents the following form:



The screenshot shows a web browser window titled "V-smart [ 2.0 ] -- Webpage Dialog". The main content area is titled "Update address information of selected borrowers" and contains a form with a table of borrowers:

Borrowers
8993 / Kiddo Familali 9064 / Sis Familali

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help". The browser's address bar shows "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and the status bar shows "Local intranet".

If you do not want to update the main address in any of the displayed borrowers, simply move the borrower to the left-hand side. When you press OK, the system will update the main address information in all of the selected borrowers.

Any borrowers that were moved to the left-hand side will have their Renew flag and Update address flag turned off.



## 15. Reserved items

### 15.1. Introduction

There are several requirements related to reserved items:

- When an item is issued or renewed, the loan period should be reduced, if a defined ratio of reservations to copies is exceeded.
- Creation of a Purchase alert report - A report listing bibliographic records where a defined ratio of reservations to copies is exceeded.

### 15.2. Reservation ratios

In AFO469 – Item management parameters – a new menu option has been added:  
Reservation ratios

Enter the ratio of reservations to circulating copies for each item category in the format a:b (i.e. 50:10)

Item category 1 (MISC)	<input type="text"/>
Item category 2 (LAW)*	<input type="text" value="2:1"/>
Item category 3 (PER)	<input type="text"/>
Item category 4 (SER)	<input type="text"/>
Item category 5 (YB)	<input type="text"/>
Item category 6 (ANN)	<input type="text" value="2:1"/>

Buttons: OK, Cancel, Help, Next, Jump to

In this example, the acceptable ratio of reservations to circulating copies is 2:1. Once this ratio is exceeded, the system can reduce loan periods based on values specified in the Loan policy record.

### 15.3. Reduced loan period

In AFO481 – Loan policies the form has been expanded with some new fields:

The screenshot shows a web-based form titled "V-smart [ 2.0 ] -- Webpage Dialog". The form is organized into several sections:

- Loan period start date:** 19/10/2010
- Comment:** (empty text field)
- Loan period units:** Days (dropdown menu)
- Loan period amount:** 0
- Fixed due date in use:**
- Fixed due date:** 19/10/2010
- Loan period units (ratio of reservations to circulating items is exceeded):** Days (dropdown menu)
- Loan period amount (ratio of reservations to circulating items is exceeded):** (empty text field)
- Renewal period units:** Days (dropdown menu)
- Renewal period amount:** (empty text field)
- Renewal period units (reserved):** Days (dropdown menu)
- Renewal amount (reserved):** (empty text field)
- Fixed due date (renewal) in use:**
- Fixed due date (renewal):** 19/10/2010
- Renewal period units (ratio of reservations to circulating items is exceeded):** Days (dropdown menu)
- Renewal period amount (ratio of reservations to circulating items is exceeded):** (empty text field)
- Maximum no. of renewals:** 999
- Maximum days on loan overall:** 99999
- Maximum due date in use:**
- Maximum due date:** 19/10/2010

On the right side of the form, there is a vertical sidebar containing three buttons: "OK", "Cancel", and "Help".

The browser address bar at the bottom shows: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001> and the status bar indicates "Local intranet".

Loan period units (ratio of reservations to circulating items is exceeded): combo box offering a selection of "Days", "Minutes" plus the list of short loan rules that are set in use. The associated amount settings therefore correspond to the units selected (except if a short loan rule is entered). If the regular Loan period units field is Days or Minutes, the value in this field must match.

Loan period amount (ratio of reservations to circulating items is exceeded): number of days or minutes for the reduced loan period. If left blank or set to zero, this field is ignored. If the number of days/minutes specified in this field is greater than the number or days/minutes in the regular loan period amount, this field is ignored.

Renewal period units (ratio of reservations to circulating items is exceeded): combo box offering a selection of "Days", "Minutes" plus the list of short loan rules that are set in use. The associated amount settings therefore correspond to the units selected (except if a short loan rule is entered). If the regular Renewal period units (reserved) is Days or Minutes, the value in this field must match.

Renewal period amount (ratio of reservations to circulating items is exceeded): number of days or minutes for the reduced renewal period. If left blank or set to zero, this field is ignored. If the number of days/minutes specified in this field is greater than the number or days/minutes in the Renewal period units (reserved) field, this field is ignored.

In this example, the normal loan period is 28 days. If the acceptable reservation ratio is exceeded, the loan period is reduced to 15 days. Similarly, a normal renewal of an item with reservations is 10 days but this will be reduced to 5 days if the acceptable reservation ratio is exceeded.

## 15.4. New job in AFO 451

AFO451 – Reservations to circulating copies count:

No.	Print job	Period	Generated	Qty	Date printed	Contact method & no. of notices
1	Courtesy notice	-	12/08/2010	31	-	- PRINTonly:45,SMS then email:4, System:12,VOICE:22
2	Overdues (1-4)	-	03/06/2010	42	30/07/2010	METHOD:3;10,MailMerge:3,PRINTonly:47,SMS then email:11, System:8,VOICE:56
3	Reservations	-	03/06/2010	1	24/08/2010	zzz:1
4	Acceptgiros	01/2010	03/06/2010	4	-	-
5	Acceptgiros (1st overdue)	11/2009	20/11/2009	3	11/01/2010	-
6	Acceptgiros (2nd overdue)	11/2009	20/11/2009	3	11/01/2010	-
7	Automatically update borrower categories	09/2009	28/10/2009	-	-	-
8	Renew borrower cards	06/2010	03/06/2010	-	-	-
9	Reset real time borrower statistics	-	11/01/2010	-	-	-
10	Manual recalls	-	03/06/2010	0	-	-
11	Prepare invoices	-	25/08/2010	11	-	-
12	Generate invoices	-	25/08/2010	1	25/08/2010	-
13	Direct debits	-	-	-	27/04/2009	-
14	Overdues (1-4) for item transfers	-	03/06/2010	6	12/08/2010	-
15	Check block status of borrowers	-	26/08/2010	-	-	-
16	Cancel expired reservations	-	03/06/2010	-	-	-
17	Acceptgiros for Deposits	06/2010	03/06/2010	0	-	-
18	Direct debits for Deposits	-	-	-	-	-
19	Acceptgiros for Deposits (overdue)	12/2009	24/11/2009	0	-	-
20	Direct debits for Deposits (overdue)	12/2009	24/11/2009	0	-	-
21	Reset Copyright tax	-	24/09/2009	0	-	-
22	Expiring membership	-	22/02/2010	15	-	-
23	Floating Stock count items at all locations	-	03/06/2010	-	-	-
24	Update borrowers with future borrower category	06/2009	03/06/2010	0	-	-
25	Reservations to circulating copies count	-	03/06/2010	-	-	-

A regular job, Reservations to circulating copies count, runs (for example every night, but can set up in 451 as desired) to count reservations and circulating copies per item category per title, storing the results in a global in the database. This global is then consulted when items are issued and renewed to determine if the acceptable reservation ratio has been exceeded and, if so, calculate the shortened loan/renewal period (if specified).

## 15.5. AFO 141 – purchase alerts

The system provides the ability to report on bibliographic records where the acceptable ratio of reservations to circulating copies is exceeded. AFO 141 selections, savelists and publish profiles can be created for the new *Purchase alert* application.

Application: Purchase alert  
 Select elements from: Purchase alert  
 Where the boolean relationship is:

Defined selection criteria of profile rsvrpt

No.	Criteria	Operator	Data type	Variable	Value	Exact value
<input checked="" type="checkbox"/>	1 Ratio exceeded (0/1)	Equal to	String		1	No
<input type="checkbox"/>	2 Number of reservations	Greater than	String		0	No

## 16. Reservations of on shelf items

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### 16.1. Requirement

Provide the ability for the WebOpac to block reservations on titles where any reservable copy is available, but for the staff to be able to override this and reserve regardless of availability.

### 16.2. Implementation

In AFO481-Reservations-Miscellaneous there is a new parameter *Refuse WebOpac reservation if reservable on shelf items found*. This parameter setting is consulted only if the *Reservation for on shelf items allowed* parameter is turned off. An 'on shelf' item is defined as one that is not on loan and has no current reservations.

Settings:

- Never – this is the default and the system would function as it does currently. This system will create the reservation and it will include items that are not *on shelf*.
- in current Circ institution - if any reservable item belonging to the borrower's meta institution is 'on shelf', a WebOpac reservation is refused.
- in current institution - if any reservable item belonging to the borrower's institution is 'on shelf', a WebOpac reservation is refused.
- in current location - if any reservable item belonging to the borrower's location is 'on shelf', a WebOpac reservation is refused.

Reservation of on shelf items allowed

Scope of 'reservation of on shelf items' (Circ institution level setting)

- system wide
- item location
- this location's items only

Refuse WebOpac reservation if reservable on shelf items found

- never
- in current Circ institution
- in current institution
- in current location

### 16.3. Functional description

#### AFO421

If the *Reservation of on shelf items allowed* parameter is turned off, *on shelf* items will appear as *Non reservable-on shelf* when creating a reservation in AFO421.

RESERVATION for : Jansen, B.E.M. 900011541 (no. copies : 5)							
Current scoping: System							
Reservations - document '2.214'							
No	Item	Shelfmark	Due date	Res	Comments	Owner	
<input checked="" type="checkbox"/>	1	00000140	PNB_BD F CAR	---	0	Non reservable-on shelf	PNB/BD
<input type="checkbox"/>	2	00000141	PNB_BD F CAR	---	0	Non reservable-on shelf	PNB/BD
<input type="checkbox"/>	3	09876543	PNB_BD F CAR	Not available	0	Non reservable-on shelf	PNB/BD
<input type="checkbox"/>	4	00654321	PNB_WP F CAR	Not available	0	Non reservable-on shelf	PNB/WP
<input type="checkbox"/>	5	07654321	PNB_WP F CAR	---	0	Non reservable-on shelf	PNB/WP

To include these items in the current reservation, use the new option, *Override on shelf restrictions*.

RESERVATION for : Jansen, B.E.M. 900011541 (no. copies : 5)							
Current scoping: System							
Reservations - document '2.214'							
No	Item	Shelfmark	Due date	Res	Comments	Owner	
<input checked="" type="checkbox"/>	1	00000140	PNB_BD F CAR	---	0		PNB/BD
<input type="checkbox"/>	2	00000141	PNB_BD F CAR	---	0		PNB/BD
<input type="checkbox"/>	3	09876543	PNB_BD F CAR	Not available	0		PNB/BD
<input type="checkbox"/>	4	00654321	PNB_WP F CAR	Not available	0		PNB/WP
<input type="checkbox"/>	5	07654321	PNB_WP F CAR	---	0		PNB/WP

## **17. Apply special loan status automatically for new items**

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### **17.1. Introduction**

When a bibliographic record is added and an order is created, reservations can be placed against the title (reservation parameters in AFO 481 permitting). When the ordered item is received and barcoded (e.g. in AFO 222), the item is immediately trapped for the borrower. The system produces a reservation notice to inform the borrower that the item is available for pickup. In actuality, it may take a couple days for the item to get out of 'processing' and onto the reservation shelf. The borrower may arrive at the library to pick up the item before it actually gets to the reservation shelf.

We need to be able to delay the trapping of a newly created item for a reservation until such time as the library is finished processing the item.

To accomplish this, a special Loan status can be added to an item (barcode) when it is created. This Loan status tells the system to delay trapping the item. Staff is able to process the item and, when the processing of the item is complete, scan the barcode into AFO412, AFO411 or AFOs 463/464 to remove the loan status and trap the item for a reservation.

### **17.2. Implementation**

There are various new parameters and fields to enable the system to deal with this requirement:

#### **AFO 481 – Loan status codes – tab When set:**

'Do not trap for a reservation': set this parameter if you do not want items with this loan status to be trapped for a reservation immediately after being added to the system.

If you want the system to warn you when an item with this loan status is scanned in AFO411, AFO412 or AFOs 463/464, set the 'Report when item found' flag on the *Further processing* tab.

#### **AFO 469 – Miscellaneous:**

The parameter 'Default loan status for newly created items' is a dropdown list of Loan status codes that have the 'Do not trap for a reservation' parameter set. Choose a loan status from the dropdown list and the system will assign this loan status to items (barcodes) when they are created. Leave this field empty if you do not want the system to assign a loan status to newly created items.

#### **AFO469 – Item definition settings:**

A new field, Loan status, has been added to the Miscellaneous group. This field is used to default a specific loan status into new item records.

**AFO469 – Data to be entered and Data to be entered in Acquisitions:**

The Loan status field appears in the Miscellaneous group on the Data to be entered and Data to be entered in Acquisitions forms. Move this field to the right-hand side to add the Loan status field to the item data entry forms. When the Loan status field is added to the data entry form, a Clear loan status button will also appear on the form. If you do not want the ability to clear the loan status when the item is created, do not add the loan status to the form – the system will automatically assign the default loan status defined in AFO469-Miscellaneous to new items.

**17.3. Adding items**

**Loan status not defined on the Item entry form:**

The resulting item has a “Do not trap” type loan status assigned and displays with the corresponding status wording on the item detail screen.

**Loan status is defined on the Item entry form:**

The Loan status appears as a protected field on the Item data entry form. The Clear loan status button can be used to clear out the Loan status field.

If you do not use the Clear loan status button, the item is created with a “Do not trap” type loan status and appears on the Item detail screen with the corresponding status wording.

If you use the Clear loan status button before saving the item, the item will be created with a standard Status of ‘In the library’.

**17.4. Processing**

Items with a “Do not trap” type loan status will not appear on regular picklists and will not be eligible for selection by reservation messaging.

If you attempt to trap an item in AFO418-Picklist view that has a “Do not trap” type loan status (and is not displaying in the Picklist), the system displays the message, “This item has a loan status that prevents it from being trapped”

The loan status needs to be removed from the item before it can be trapped.

When you remove the “Do not trap” type loan status from an item (i.e. in AFO111, AFO423, AFO123-Change loan status), the item will appear in the appropriate picklist (if required) and will once again be eligible for selection by reservation messaging.



## 18. Special fine rules

### 18.1. Introduction

These changes cater for several aspects of the way this is handled by the system, including

- The ability to calculate charges based on periods less than 1 day (e.g. for hourly fine rates for short loan material).
- The ability to define rules according to specific date ranges; for example to allow users to define and check such calculations prior to their date of implementation.
- The ability to define more complex calculations than is presently possible, for example to allow for special fine rates for recalled items.
- A more general approach to defining the rules for a calculation to make it easier to input and maintain such rules.

The rules for calculating the overdue fine on a late return are currently defined for each borrower category / for each item category / for each location by entering the specific details of the calculation for each entry in such a matrix.

For example :

**Circulation parameter management : fine calculation**

For each item category, enter a value in the following format: amount / period / exemption / maximum amount / use daily fine rules / alt amount / alt period / n days switch to alt period / alt use daily fine rules

Item category 1 (MISC)	5/7/7
Item category 2 (LAW)*	5/7/7
Item category 3 (PER)	5/7/7
Item category 4 (SER)	5/7/7
Item category 5 (YB)	5/7/7

Buttons: OK, Cancel, Help, Next, Jump to

In the enhanced version of the system, such “old format” entries will continue to be maintained, but in addition it will be possible to define “Fine calculation rules” which are then entered in the matrix rather than the explicit values; for example

**Circulation parameter management : fine calculation**

For each item category, enter a value in the following format: amount / period / exemption / maximum amount / use daily fine rules / alt amount / alt period / n days switch to alt period / alt use daily fine rules

Item category 1 (MISC)	Different rates per Month based on Due Dates
Item category 2 (LAW)*	Hourly Fine rules for Issuing location WP
Item	

Buttons: OK, Cancel, Help, Next, Jump to

In this example, we see 2 different rules, applied to two different item categories. The input field for this setting will be changed to allow the selection of a rule from a dropdown list; so that settings may be either keyed or selected from a list.

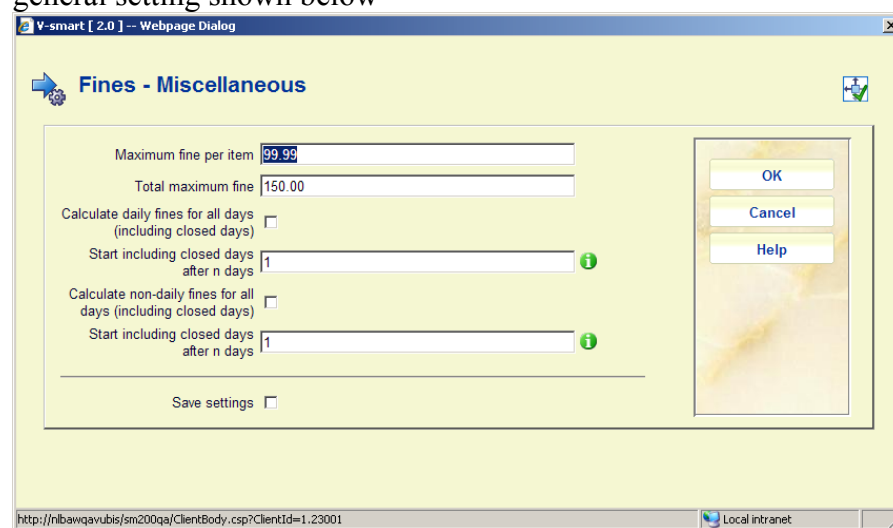
The main advantage of this is that the specific rules for calculating an overdue fine may be changed in one place, resulting in the new calculations being applied automatically to all the loans for which the rule is defined.

In addition to this, the parameters and options available for determining how the fine is calculated are considerably enhanced; in particular, allowing for fines to be calculated on an hourly basis (or even by the minute!).

One other significant change is that it is possible to define different calculations based on date ranges – that is, use this set of options for one date range, use another set for a second date range, and so on. This means that changes to the calculations can be prepared prior to the date that they take effect; OR where some libraries make their fines more severe (for example) near the end of term “pour encourager” students to return their loans.

## 18.2. Compatibility with previous releases

In the previous releases, the rules were defined as shown above. In addition there is a general setting shown below



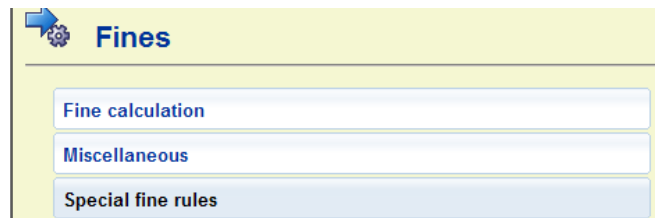
As mentioned, the existing calculations are still supported, so that no changes are **required** after upgrading to the new version. The system can determine whether the entry in the matrix (borrower/item category) is an old style entry or whether it links to a new fine rule.

It should be noted though that if a new rule is added to a borrower/item entry then most of the previous all settings are no longer used, including the general Miscellaneous settings above. The options for the new rule are fully defined within the rule itself.

The single exception to this is the “Total maximum fine” amount, which covers many items, since this may cover fines calculated using both old and new techniques.

### 18.3. Implementation

Fine rules are accessed by a new option “Special fine rules” on the Fines menu from AFO481:



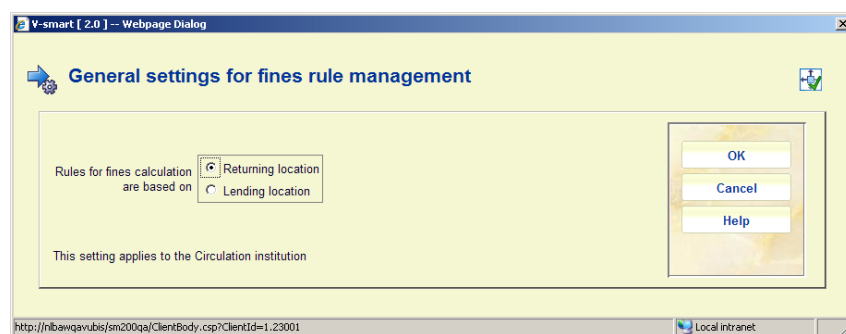
The special fine rules, like “Loan policies”, are defined in isolation i.e. the rule is defined as a general setting, and **then** linked to a specific borrower / item category.

Although most options from AFO481 are specific to the location of the current user, the new fine rules are defined for the circulation system (meta-institution) as a whole and are therefore available equally from any location. (Note however, as discussed later on, the link to a rule from a borrower/item category IS location specific).

There is just ONE setting which needs to be specified for the circulation system (meta institution) as a whole. At the moment, when calculating a fine, the system uses the rules applicable to the location at which the item is being returned.

For the new “fines rules” there is a new setting

*For overdue fines, use the rules defined for the returning location or for the original issuing location.*



In other words, the rules can be based on the borrower/item matrix entry for the “current” (i.e. returning) location OR on the entry for the location at which the item was issued. Typically it would be expected that the matrix entry (i.e. the “rule”) is going to be the same for both locations; but the choice is now made as an explicit option for the library.

#### **18.4. Date ranges**

It is possible to define how the calculation is made for different date ranges. A simple example might be “10 cents/day” for the period 01 Jan 2009 – 31 May 2009”, then “20 cents/day for 1<sup>st</sup> June 2009 – 30th June 2009”, then back to “10 cents/day from 1<sup>st</sup> July until further notice”. (This being an example of where the rates are made more severe, temporarily).

**It is NOT necessary to define multiple periods or specific start or end dates; if these are undefined, then the specific rule applies always.** The settings for a specific period may be changed at any time, and additional periods may be added at any time (and the dates of a period may also be changed at any time), so it is really a matter of convenience to the librarian.

However, even if there is only 1 period, then this initial display of date ranges will always be shown (otherwise there is no easy way to get to the additional functions).

#### **18.5. Closed days and calendars**

The periods that a library is considered closed are defined in “system calendars”. These are already in use in Vubis – in brief, to revisit this, calendars are used to define “dates” that are considered “open”. These are generally defined by the days of the week, and in addition holidays and exceptions can also be defined. For each day, specific opening and closing times can be defined – up to 3 such periods per day. The bottom line is that for each such calendar we have a list of specific dates with a set of opening and closing times.

#### **18.6. Which location ?**

How does the system determine which set of rules to apply?

The system has an option to use the rules based on either the returning location OR the issuing location in order to determine which borrower/item matrix entry to use. This same setting is also used to determine the Location of the calendar i.e. the calendar is taken either from the issuing location OR the current returning location if that is different.

#### **18.7. Fines for recalled items**

It is possible to have separate fine rates for items that have been recalled.

Firstly it is possible to define different calculations to be used, depending on whether the item is recalled or not (optionally, of course).

If this IS required, then we would expect there to be TWO entries for the fine detail calculations.

In addition, the question arises as to how to calculate the overdue fine if the item was recalled AFTER it became overdue. Is it fair to charge the higher fine rate for the time before it was recalled ?

This is the purpose of the setting “**Fines for recalled items start from recall date**”. If this is checked, then the system effectively calculates the fine in two goes; the first for the period up to the recall date, using the regular fine rules; and then another calculation for the period from the recall date to the return date. The two amounts are combined.

If the option is NOT checked, then the system simply uses the rules defined for the recalled period.

It should be noted that (presumably) if a rule is defined for “recalled items”, then a rule should be defined for “items NOT recalled” (but the system will not enforce this!).

Finally, it should be noted that the system does not record a specific TIME of recall. For “hourly” fine rates, therefore, when the recalled rate is used, then this applies only to days after the actual recall date. (Effectively, treating the recall as having happened at midnight on the day it was output).

### **18.8. Multiple entries for a rule**

The system allows several calculations to be defined for a rule.

In general, the system simply allows any number of calculations to be defined; it will simply apply all applicable rules, and **total** the amounts calculated for each. (This is why there is a Maximum amount defined not only for an individual calculation but also for the rule as a whole! The Maximum amount at the higher level is applied to this running total calculated.

This provides a mechanism for very complicated fine calculations. One practical example is where the fine rates change – e.g. where the fine period is daily to begin with, but is then charged by the week after the first period.

In such a case, the first fine rule might be based daily, with a maximum amount set appropriately. The second fine rule is then configured as (say) units of 7 days or perhaps weekly, but with the periods to ignore set to 1. The second calculation would only then take effect after the period of the first rule is complete.

## 18.9. Note on processing when the period overdue overlaps a change of fine rate

It is possible that a fine rule period overlaps a change of fine rate; for example

Date ranges	01 Jan 2009 - 30 June 2009	0.20 / day
	01 Jul 2009 - onwards	0.30 /day

If the item was due on 15<sup>th</sup> June and returned on the 15<sup>th</sup> July should the system use 0.20 /day for the first part and 0.30 subsequently.

In this case, the system only uses ONE rule – the period to use may be set to be based on the issuing date, or the due date, or the return date. But when that period is established only THAT rule is used.

## 18.10. Testing the rules

An option, shown in the summary of date ranges for a rule, allows for the rule to be tested i.e. to see what it would calculate for a given date and so on. When selected the system shows the following form.

The screenshot shows a web browser window titled "V-smart [ 2.0 ] -- Webpage Dialog". The main content area is titled "Testing the fine rule - ByMonth". It contains a form with the following fields and values:

- Date of loan: 19/10/2010
- Time of loan: (empty)
- Due date: 19/10/2010
- Due time: (empty)
- Return date: 19/10/2010
- Return time: (empty)
- Lending location: PNB/AL
- Returning location: PNB/AL
- Date of item recall: (empty)
- Recall time: (empty)

At the bottom left of the form is a "Save settings" checkbox, which is currently unchecked. On the right side of the form is a vertical panel containing three buttons: "OK", "Cancel", and "Help". The browser's address bar shows the URL: <http://nibawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001> and the status bar shows "Local intranet".

This allows the user to specify the relevant dates and locations to check that the calculation matches the expected results. On pressing OK, the system will redisplay the form with the fine calculated.

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## 19. Age content restrictions

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### 19.1. Introduction

To prevent that age restricted material (especially video's and games) comes in the hands of children, the circulation module should be able to prevent loans and reservations of these age restricted materials.

Since 2009, the Dutch public library organization NBD inserts information concerning age restriction in their bibliographic records.

The NBD currently uses two systems:

- Kijkwijzer for video's
- PEGI for games.

Both age restriction systems contain two kinds of information:

- A code indicating the age restrictions
- A descriptor indicating the reason.

Example:

`$a P12 $b ge $ b di`

This means: Not recommended for children under 12 year because of violence and discrimination.

Also, each piece of the classification is related to an icon. These icons should be available in the WebOpac for display with the bibliographic record by using the mechanism available as reference lists on the display template for WebOpac

### 19.2. Functionality

Based on an indication in the bibliographic data, items may be considered to be not suited for certain age groups.

In case such a document is presented for loan or for reservation, and if the borrower is not older than the age for which the document is prohibited, an error message OR a warning message is displayed (depending on the parameters).

This functionality may be introduced in the following functions/applications:

- AFO 411 (Loan)
- AFO 421 (Reservation)
- Stack Requests
- Self service (SIP2): Loan
- Self service (SIP2): Reservation
- WebOpac: Placing a reservation
- WebOpac: Placing a stack request
- Iguana: Placing a reservation

### 19.3. Implementation

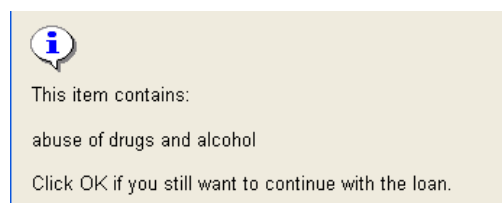
The following changes / extensions have been made to the system

- Creation of the Age content restriction classification as an authority list (AFO 152)
  - As there are two types of information (age groups and descriptors), there are four new authority lists
- Modification of the authority list format (AFO 152)
  - The age goes in a new field 630. For this reason, the format for authority lists is modified and also a new template is created that displays this field
- Modification of the bibliographic formats
  - Creation of new fields/subfields in the MARC21, Smart, and UNIMARC formats. All the formats use the same syntax (field 981 - Advisory systems ratings and descriptors). This is a hard coded tag reference for all formats.
- AFO 481 -> Miscellaneous -> new entry “Age content restriction.”
  - Here we define the parameters for each age restriction system.
- Various modifications were made to allow SIP2 for self service stations to interact correctly with this functionality, including message texts in AFO 616 – Messages for 3M self check (messages 25, 29 & 32)
- It is possible to show the icons for the age classifications in the WebOpac.
  - These should be set up in the Preferences, similar to what is often done for material types as reference lists on the display template
- Some general text messages can be defined for the WebOpac in the Preferences under User activities.
- Modification of conversion programs
  - In the Netherlands, the Pica-Smart conversion has to be adapted: conversion of Pica kmc 1114 (Kijkwijzer) and kmc 1115 (PEGI)

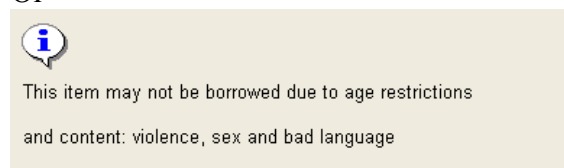
There will be retrospective adaptation of records imported from NBD.

#### Use:

If the bibliographic record contains age content restriction tags (981) and a borrower under age attempts to loan or reserve material, a message similar to the following will be presented:



Or





## 20. Enhancements system control module

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This section describes various smaller enhancements within the system control module.

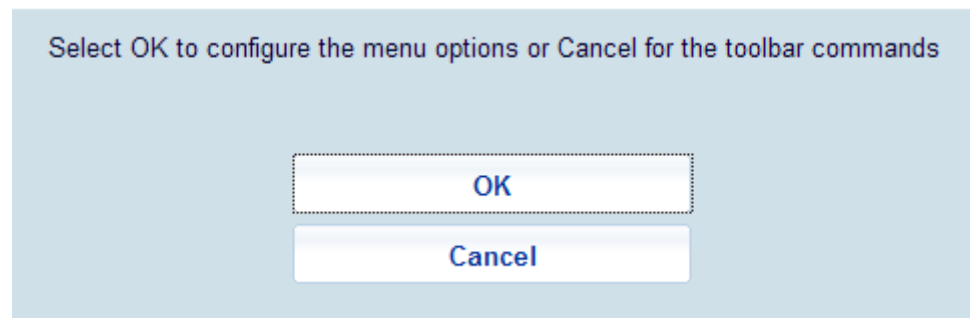
### 20.1. General – access management

#### *Problem description*

Access management allows you to disable menu options. It should also be possible to disable toolbar options on a menu screen (such as in AFO 481 – Main menu screen).

#### *Solution*

There is a new question as to which of the sets you want to modify for menu screens that also have toolbar options:



## 20.2. General – mailmerge output

It is now possible to tell the mailmerge print processor to remove empty rows in the final printed document for mailmerged outputs.

For example, suppose we have a master template like

ISBN	Title	Date due
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»«Next-Record»
«ISBN»	«Title»	«DueDate»

This allows for 7 items at a time to be output. However, if only 3 are required, then we end up with 4 empty rows in the output table.

By setting a custom property for the master document called “RemoveEmptyRows”, set to the Value “Yes”, the system will automatically delete empty rows from the final output.

## 20.3. General – SSP user

### *Problem description*

Currently there is no easy method to be able to use SSP to select transactions as there is no PUB user defined.

### *Solution*

The upgrade will add the user PUB (Public User) as a system user. It will use the system default language and access to the databases as available to user VGG.

This can be used for SSP reporting of WebOpac and ILL requests from WebOpac.

## 20.4. AFO 613 – Sublocation wording

### *Problem description*

Sublocation wording is not by language. The wording appears, for example, in shelfmark displays in WebOpac. Other WebOpac display wordings may be different for different languages, but this is not.

### *Solution*

Fields for the various wording definitions on the form are now all multi-lingual:

The screenshot displays a 'Sublocation management' dialog box. The title bar reads 'V-smart [ 2.0 ] -- Webpage Dialog'. The main area contains a form with the following fields:

- Sublocation code: 04201
- Default wording [eng]: eng Shelf 042 Slot 01
- Default wording [dut]: dut Shelf 042 Slot 01
- Default wording [fre]: fre Shelf 042 Slot 01
- Wording in OPAC [eng]: Shelf 042 Slot 01
- Wording in OPAC [dut]: Shelf 042 Slot 01
- Wording in OPAC [fre]: Shelf 042 Slot 01
- Wording U OPTION [eng]: Shelf 042 Slot 01
- Wording U OPTION [dut]: Shelf 042 Slot 01
- Wording U OPTION [fre]: Shelf 042 Slot 01

On the right side of the dialog, there are three buttons: 'OK', 'Cancel', and 'Help'. The status bar at the bottom shows the URL 'http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.24001' and 'Local intranet'.

## 20.5. AFO 616 – Physical output formats

### *Problem description*

When defining a new output format, the form allowed to define FAX or Mailmerge output. They are not in use (and marked as such in the online help); they will not show up on the contact methods as methods that can be selected.

### *Solution*

These two fields have been removed from the input form for a new format definition:

### *Note*

This DOES NOT and WILL NOT change any current output formats.

If you had defined any such output formats, showing up as C and M respectively:

No	Format	Description	Output codes
<input type="checkbox"/>	1 E	Email	E
<input type="checkbox"/>	2 EP	Email & Print	PE
<input type="checkbox"/>	3 FAX	Fax Output	C
<input type="checkbox"/>	4 MM	MailMerge Output	M

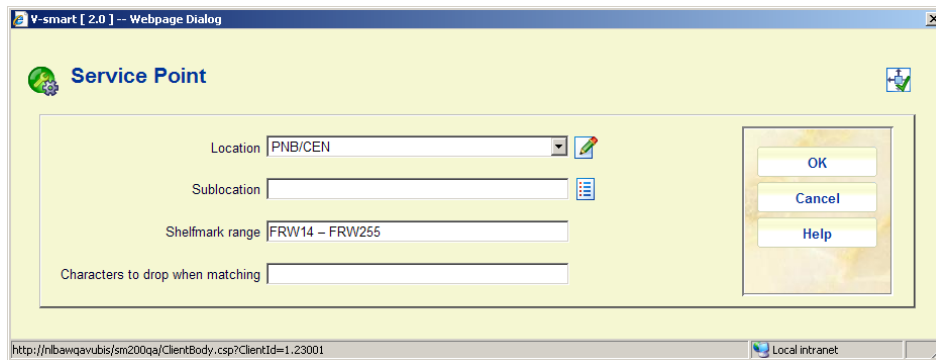
you will have to use the Delete option to get rid of them.

The Online help made reference to the M option as required for Mailmerge documents. This is not true and is not required.

## 20.6. AFO 618 - Improve matching algorithm for shelfmarks

AFO618 (Service points) allows for a set of locations to be entered to define the locations and shelfmarks which relate to this service point. These are defined using the input form shown below.

There is room for ambiguity regarding how to interpret ranges of shelfmarks; this is considered with the example shown below.



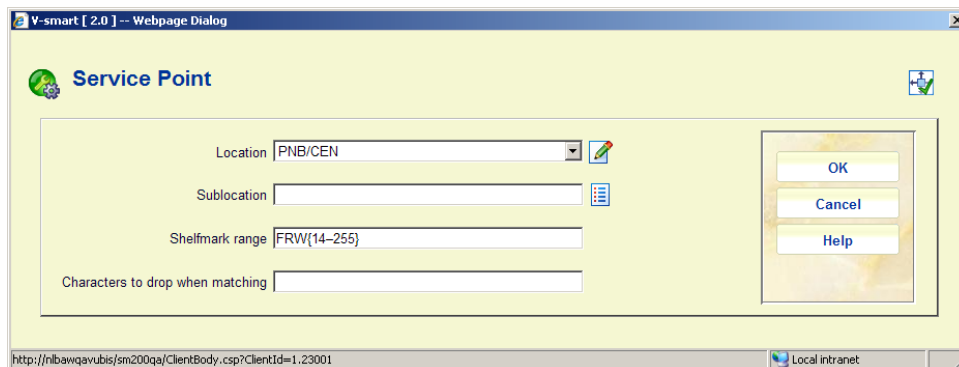
The screenshot shows a web browser window titled "V-smart [ 2.0 ] -- Webpage Dialog". The main content area is titled "Service Point" and contains a form with the following fields:

- Location: A dropdown menu with "PNB/CEN" selected.
- Sublocation: An empty text input field.
- Shelfmark range: A text input field containing "FRW14 - FRW255".
- Characters to drop when matching: An empty text input field.

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help". The browser's address bar shows the URL "http://nibawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and the status bar shows "Local intranet".

Consider the range above FRW14 – FRW255. The question is should (for example) the shelfmark “FRW34” be considered to lie within this range. It depends, of course, as to whether the shelfmark is treated as FRW followed by the number or whether the shelfmark should be considered character by character. In the latter case, FRW3 is outside the range FRW1 to FRW2, and therefore would not be treated as part of the range.

If the range entered is completely numeric, then the shelfmark matching is processed numerically, but the above example is ambiguous.



The screenshot shows the same "Service Point" form as above, but with the "Shelfmark range" field containing "FRW{14-255}". All other fields and the browser window details are identical to the previous screenshot.

In order to allow users to be more explicit, the range may be entered in the above form. If a range is specified with { } brackets, then the treatment of the matching is split into two steps. The “prefix” is treated first, so that the shelfmark being checked must begin with “FRW”. The remainder is then processed according to the range inside the {}s. In this example, the range is purely numeric, so the shelfmark will be tested NUMERICALLY rather than character by character.

Checking (say) FRW34 – the 34 lies between 14 and 255 and therefore the shelfmark IS considered to lie in this range.

### **Characters to ignore**

In addition to this feature, an additional setting allows the user to tell the system to DROP certain characters from the shelfmark being tested. Thus, for example, punctuation may be stripped before testing. If this is used, then the range entered should NOT contain these characters! (This is not checked!)

### Note

This applies to shelfmark matching for both types of service points: Reservations messaging and Stack requests.

## 20.7. AFO 625 - Allow posting of multiple statistics with new command

This enhancement to the current functionality means that staff can scan the barcode and after that they key the number of events using a special code (ES) in front.

Example:

- Staff scan the barcode VISENQ
- this will log an event statistic
- Staff key for example: “es99”<enter>
- this will log the last event statistic an extra 99 times

A code in front of the count is necessary in order to distinguish between event statistics count and AFO numbers.

Every time staff key in “esNN”, the system will log that number of transactions for the initial barcode scanned until another barcode is scanned.

Staff scanning single barcodes can continue to do so without having to manually add es1 every time

Note that this does not apply to statistics codes where the parameter “Record time elapsed” is set.

There is a maximum of 100 set for the extra statistics. So to enter the occurrence for 121 iterations, first enter the initial entry, (1) then enter es100 followed by es20. This maximum has been put into place to differentiate between a barcode and number of occurrences

## 21. New AFO 765

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### *Requirement*

There is a need for an interactive module, based on data from AFO 764. This module must enable customers to define where specific statistical data can be retrieved in Vubis. Customer should be able to choose their own criteria and grouping tables within a consortium. It should be possible to store/save these criteria and grouping tables so that they can be re-used / adapted in the next years. Results need to be output as csv-files.

### *Solution*

A new AFO has been added, 765

AFO765 screen has the following options



Create statistics option - will create statistics as in AFO 764.

Export statistics option - allows you to define specific templates for the output.

General parameters option – this form has the same options as the one in AFO 764.

Profile parameters option – contains the options *Edit / View Statistics profile* and *Edit / View export profile*.

Initialize statistics option - This option works just like AFO 764 and will remove all the statistical data.

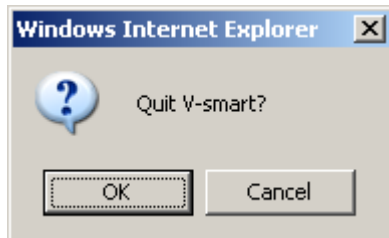


## 22. General enhancements

This section describes various enhancements made for the application in general.

### 22.1. Logging out

When you try to log out of the application, the system will prompt for confirmation:

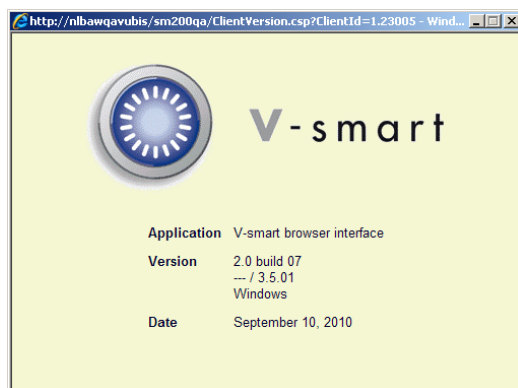


### 22.2. Version information

The top of the V-smart screen has a new option "?", to display version information:



Clicking on the question mark results in a pop-up screen with version information:



### 22.3. Font type and size for print window

#### *Problem description*

Font type and size for print window can not be changed - allow for stylesheet to set printer fonts when no applet is used.

#### *Solution*

If the Printer applet is not defined, the default output is produced in Courier-10pt. This may be adjusted by adding the class definition to the style sheet being used

#### 22.4. Option to insert numbers before menu items

It was always possible to enter a line number of a menu item on any menu screen, to access that option (although no line numbers are displayed on screen).

The V-smart Preferences have been enhanced with the option “Display menu entry numbers if number of entries higher than”. You can enter a number. If a menu screen contains more items than the value defined here, line numbers will appear to the left of each entry. If you set this value to 1, line numbers will always appear.

This is an example for AFO 481:



#### 22.5. “Display menu at the left” option removed

There was an option in the V-smart settings that allowed you to specify that the buttons frame (where applicable) will be displayed on the left and AFO frame will be displayed on the right:

Preferences - Options		
Setting description	Value user	Value cookie
Extra space within table cells (in pixels)	<input type="text" value="5"/>	<input type="text" value="5"/>
Space between table cells (in pixels)	<input type="text" value="5"/>	<input type="text" value="5"/>
Width of the frames (AFO, main screen, menu)	<input type="text" value="225,*,175"/>	<input type="text"/>
Minimum width of form fields	<input type="text" value="300"/>	<input type="text" value="300"/>
Width of record editor (positions)	<input type="text" value="100"/>	<input type="text" value="100"/>
ENTER in record editor = new field	<input type="checkbox"/>	<input type="checkbox"/>
<b>Display menu at the left</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preferred language	<input type="text" value="Dutch"/>	<input type="text" value="English"/>

This option has been removed.

## 22.6. Deep link for V-smart

### 22.6.1. Introduction

The deep link is used to start up a V-smart session from within another application and access a function in V-smart without logon dialog.

The link is called through

.../ClientLink.csp?parameters

Depending upon the caller, a check may be performed to make sure that access can be allowed.

For V-sources, for instance, a web service will be called that should confirm the validity of the deep link call.

For V-smart, a test is done for a value that is set by the calling process.

### 22.6.2. Parameters

- Caller [ identifier for the calling application, e.g. "V-sources" ]
- User [ user as in ^AFO("P") ]
- AFO [ AFO id ]
- RecordId [ record-id, e.g. *database.record*, *institution.borrower*, ... ]
- Action [ optional code that indicates the kind of action, e.g. "edit" for record editor ]
- RequestId [ request id for verification ]
- RequestCode [ request code for verification ]

### 22.6.3. V-sources

If the caller is "V-sources" the request id and request code will be sent to a specific web service that will check for the validity of the request. Once this has been confirmed the request is executed.

This same mechanism may be used in the future for other external callers.

### 22.6.4. Currently implemented deep links

At this time a deep link can be used to go directly to any AFO in the application.

If the AFO is X11 or X13, and a record number is specified, it will go to the record overview screen in that AFO.

If the action parameter is "edit", the record overview screen will directly call the record editor.

## 22.7. Printing from browser

### *Problem description*

From the standard form for generating output, select Screen. This opens the output in Notepad. If you then select to option to Print the file, the margins are not as defined originally. So it seems that due to "browser restrictions" it is not possible to print a text file to a printer.

### *Solution*

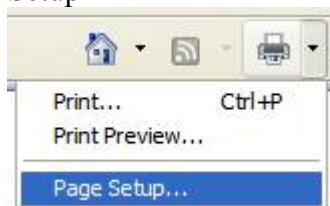
Output sent (printer) to the browser will use the browser settings for Printed output. When the browser is enabled to allow downloads, printed output is sent back to the browser with the Print option visible.



Clicking on the print button, will allow the browser to print the data. By default, all browsers will include a margin, header and footer information such as the URL, page numbers, date/time etc. as well as orientation set to portrait. For output such as notices generated, the default printer settings for the browser should be adjusted to remove the margins as well as the header and footer information.

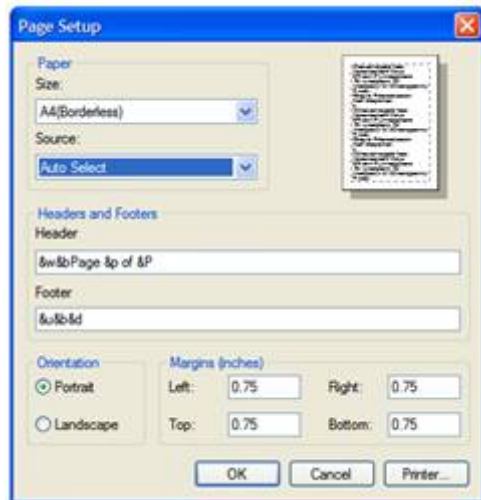
### **Internet Explorer 7 Internet Explorer 8 Settings**

Click on the down arrow for the printer icon on the IE7 / IE8 toolbar and select "Page Setup"



Select your Paper Size: that is Letter Borderless or A4(Borderless) from the drop down list. Set margins up to 0 (there will be other defaults that come in from the browser but just accept them.) Clear the Header and footer to suppress the page / url / date / time etc from automatically being inserted into the browser output. Select Orientation.

Example IE 7 (with large margins and header/footer information)

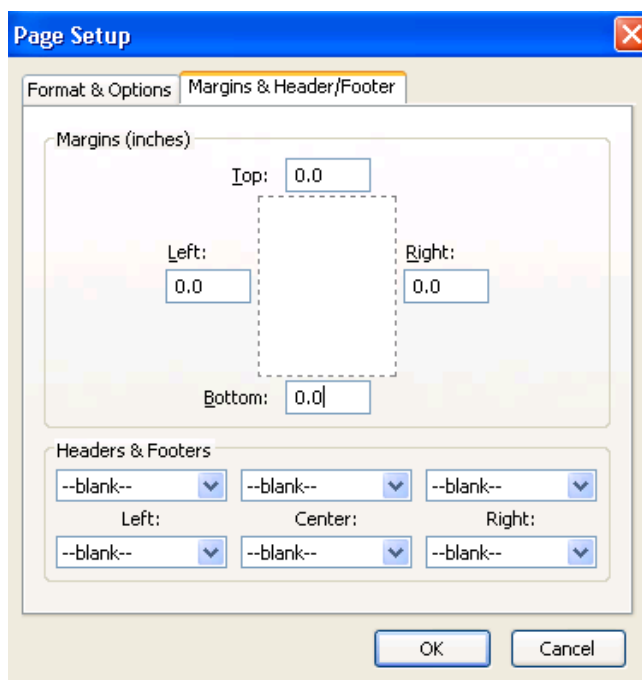
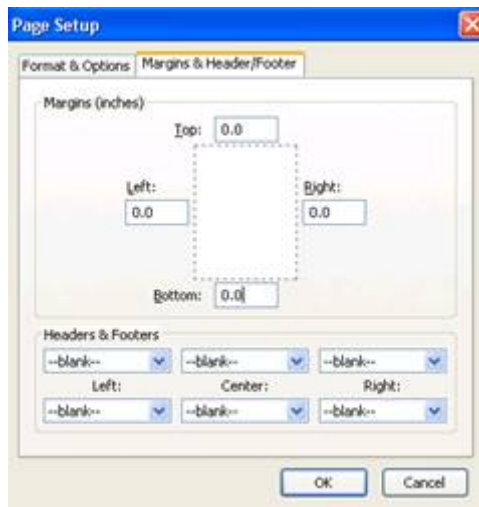


IE 8 With minimal margins and no header/footer on output. Note that default font can be set also.



### Firefox Printer settings

Choose "File" -> "Page setup..". Click on the second tab called "Margins & Header / Footer". Adjust the margin numbers to 0. Adjust headers and footers.



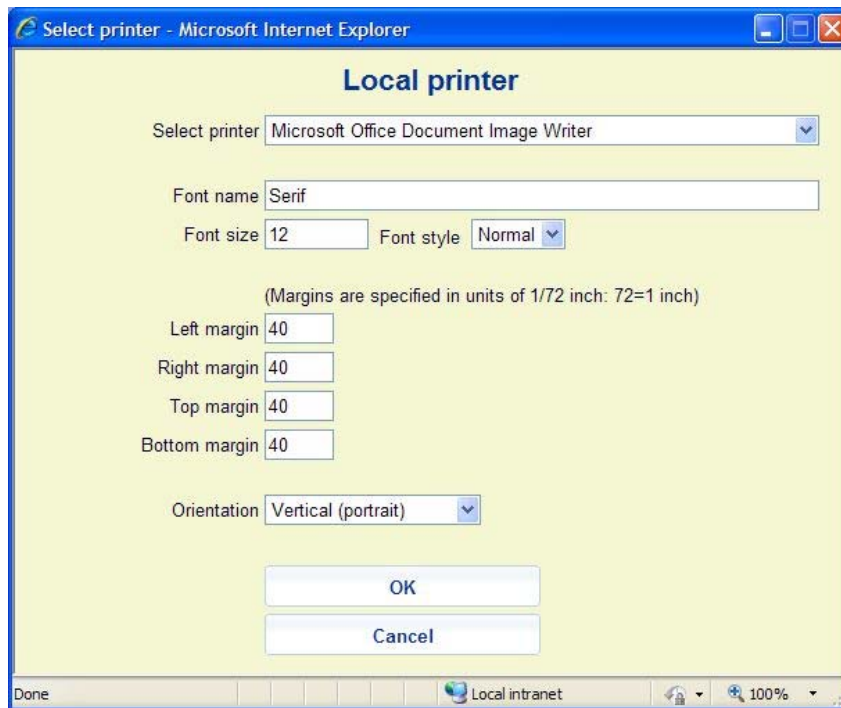
## 22.8. Printer orientation

### *Problem description*

The Printer applet takes its page orientation from the default printer on a workstation and not that of the printer assigned to the applet.

### *Solution*

Added new option to printer settings to indicate paper orientation (horizontal - landscape or vertical - portrait):



## 22.9. Opening additional V-smart sessions

### *Problem*

Multiple browser sessions in tabbed browsers are not handled well by V-smart due to Browser 'merged session handling'. By default, one login for these browsers is used for multiple sessions. One session logout, will affect all active sessions. This is a technical issue for the browser and cannot be controlled by V-smart.

### *Solution*

It is NOT recommended to run multiple V-smart client sessions using the various browsers' "New TAB" functions as requests can become "confused". The "New Window" option is OK to use. Multiple instances in different tabs of the same browser session is not recommended unless the browser start-up has been modified to remove the merged session handling.

Firefox users, do not start / close multiple sessions for V-smart OR multiple TABs with V-smart sessions. Once you have logged off one Tab, all others will be automatically closed. At the time of publication, no workaround for Firefox browsers had been identified.

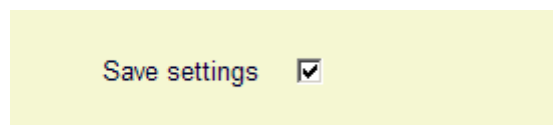
IE7 users may try adding the attribute `-nomerge` to the IE7 command line to suppress the merged session handling.

For example, "C:\Program Files\Internet Explorer\iexplore.exe" -nomerge

For IE8 users, '`-noframemerging`' can be added to the command line as an attribute for `iexplorer.exe` to allow for single session handling again. For example, "C:\Program Files\Internet Explorer\iexplore.exe" -noframemerging

## 22.10. Save settings option

There was a requirement to remember per user the "Save as defaults" setting (on or off) on the forms where this checkbox is present. Currently it is always off initially. The setting is now retained on a per user / per form base.



### *Note*

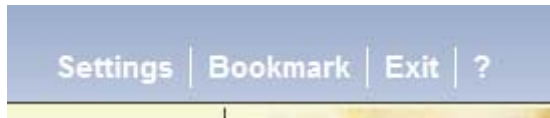
On the filter forms where you can clear the filter, you have to remember that you have to clear all the settings on the forms as well otherwise the clearing of the values is not remembered.



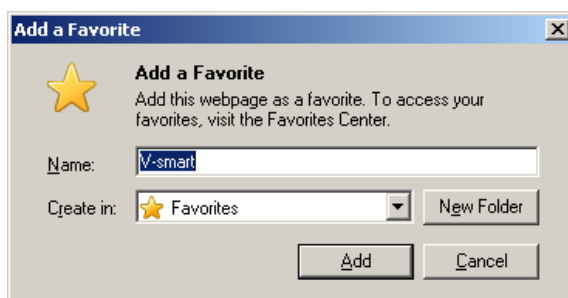
## 22.11. Bookmarking the V-smart url

There was a requirement for a means of adding the V-smart URL to favourites / bookmarking it.

In the top frame there is a new option Bookmark:



Clicking this will result in a standard dialog window for adding the url to your Favourites:



## 22.12. Browse button to retrieve files

### *Problem description*

You can use the Browse button to select a file (e.g. in AFO 131, AFO 367 – Miscellaneous, AFO 618 – Notice sets etc.). After retrieval the input field will show full path and file name.

If you switch to the Pencil icon, the system only shows the file name and not the full path of the selected file.

The Browse button will then go to the last file instead. Unable to see full path and file entered via V-smart.

### *Note*

This is an issue with Firefox only. Firefox does not pass the full path for security reasons.

### *Solution*

If you need the full path, for instance because you want to save it for the next time, you will have to enter it yourself in the textbox (via the Pencil icon).

### 22.13. Enabling sounds

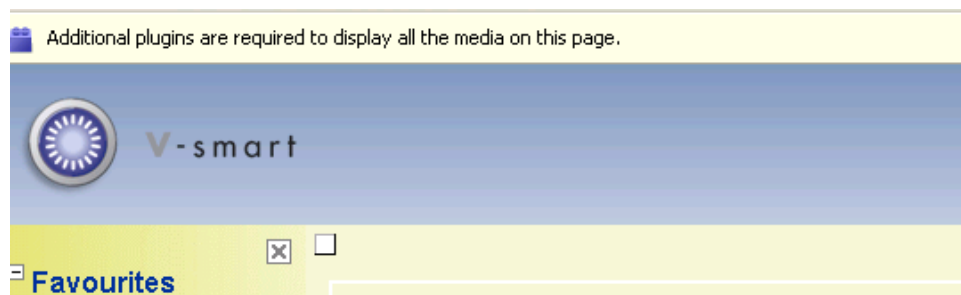
V-smart now has support for audible alerts. Source of the wav file is located in the Sound Directory as beep.wav). This is an activeX control.


When initially connecting to the V-smart application, browsers may require the activeX control to be enabled for the workstation. They may also require plug-ins to be downloaded.

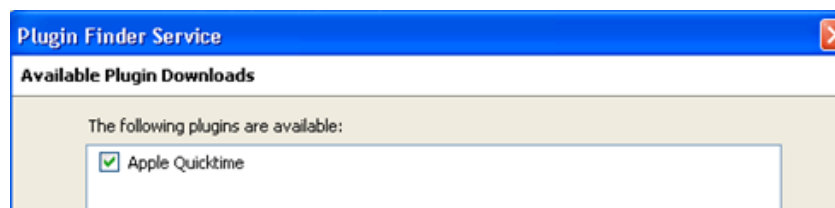
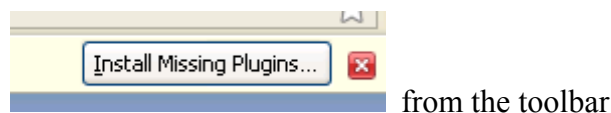
#### 22.13.1. Firefox – sound Plug-in

Firefox users will have to install the Apple QuickTime plug-in.

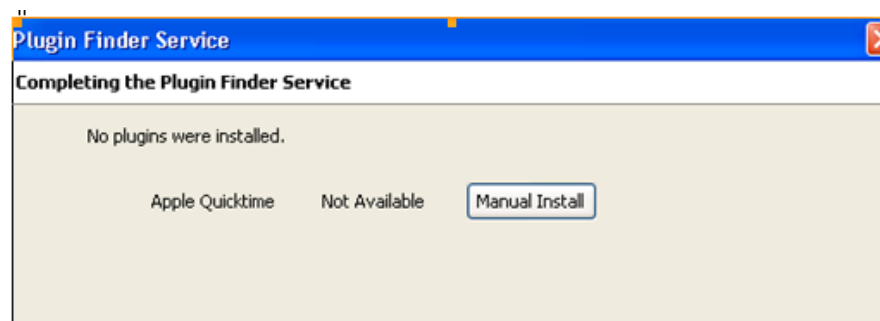
When initially starting the V-smart session, users will see a message in a title bar as well as a checkbox



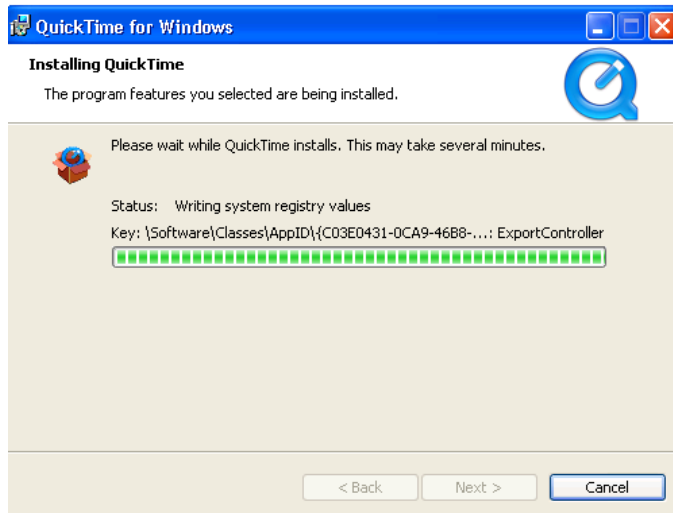
Click on the square  to get the required plug-in or click on the button



Select Apple QuickTime then click on the Next button



Click on Manual installation and follow the instructions from the Apple website  
This will require download of installation package and then the execution of the installation package on your workstation



Restart the Browser.

## 22.14. Remember last used tab on tabbed forms between sessions

### *Problem description*

Currently the last used tab on a tabbed form is remembered if the server setting for that form tells the client to do so. This is however only kept during the current session. The next time the user uses V-smart the last tab of the previous session is no longer known and the display defaults to the first tab.

### *Solution*

For most **bibliographic** search type forms (e.g. AFO 111, 113, 421, within 813 and 821) the system now remembers which tab was “on top” the last time the form was accessed and returns to this one:





## **23. Enhancements to stack request module**

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This section describes major enhancements within the stack request module.

### **23.1. Introduction**

In the specification below, the term “reservation” is used to mean request reservations i.e. a queue of requests for a given item, rather than “regular reservations” in the system. The terminology “regular reservation” will be used to indicate a ‘traditional’ reservation.

For the most part, the changes are a miscellaneous set of additions to the processing. This makes it a little difficult to present a coherent picture of the processing and implications.

### **23.2. Maximum reservation requests by item category**

This new setting allows the library to define the maximum length of a reservation queue according to the category of the item being requested.

Setup in AFO618 – Service point maintenance – “Maximum reservation requests by item category”.

These are defined separately for each service point on the system.

This setting can be used to prevent requests being placed on certain item categories, by setting the limit to 0, of course.

### **23.3. Authorization by item and borrower category**

In addition to the above setting, it is also possible to specifically exclude item categories for specific types of borrower.

A new option in the Service Point summary display will allow a matrix of item category by borrower category to be maintained.

BY DEFAULT, all item categories are enabled for all borrower categories. First time into this display, all settings will therefore be checked as “on”. And in the WebOpac and in the online system, if an entry has not been explicitly entered here, then it is deemed to be OK to place a request.

#### **23.4. Loan Status Codes**

When a loan status is applied to an item, then the functional implications of the status can be defined by the library. There is a new option *Item may not be requested* on the tab When set, which tells the system that items with this loan status set may have no further requests placed against them.

In this case, the option to request it is NOT offered in the WebOpac and neither is it on the staff side.

#### **23.5. Option to suspend request processing**

This option allows a staff member to suspend the adding of new requests through the system.

It should be noted that it is possible to suspend specific routes already in the system, assigning a “reason for the suspension of the route”.

A new AFO 816 will be added to allow for ALL routes to be suspended in a single operation.

A distinct AFO is used, to simplify the access control issues.

(Note also that there are features of the system which allow routes to be automatically suspended e.g. when there are too many outstanding requests for works through that route).

### 23.6. Enhanced display options from AF0431

The summary of transaction for the borrower display lists existing requests under the summary “Total no. of reservations”.

This summary line will be enhanced to itemize requests in a little more detail :  
This is total number of reservations and the total number of Requests, Reservation request, Deleted, and Expired.

Also include the enhanced line 3 details.

The totals here are only Current number of Reservations and only total number of Requests counts based on the AFO 815 Stacks management – System wide options  
**How many days back to show request summary in 431 [ 365]**

#### Details

Total no of reservations (as now) includes both regular reservations AND “active requests”. The reservations requests are also included in this total

An additional summary in ()s will summarise the history of requests for this borrower.

In all cases, if the value is 0, then the description is not shown – for example, the system would not display “Expired : 0”

#### Cut off date

It may not be very useful to display such a summary for requests going back many years. A system wide option will be added to the “General settings” from AFO815.

#### How many days back to show request summary in 431 [ 365]

If set, then the system will “ignore” requests older than the number of days entered. In the above case, where this is set to 365, then the summary will only concern requests less than 1 year old.

#### Additional

In addition line 3 of the borrower details display shows something like, which refers to the current status of requests and reservations.

<input type="checkbox"/> 3	Reservations	1 (Requests:2, Reservation requests:2, Expired:4]
----------------------------	--------------	---

### 23.7. Blocks

Noting that Stack requests codes are linked to specific borrower categories, a number of additional options will be added to the settings associated with the stack request code.

Two new settings are added to the Stack request code to manage the automatic creation of blocks against the borrower, as follows :

<b>Block on number of requests not collected</b>	[10 ]
<b>Cut off period for determining block</b>	[730]

If a borrower fails to collect requested items, then the system will create a “block” (in the usual way) against their record. This block will ONLY apply to the ability to place stack requests.

The “block on number of requests” above determines the number of these occurrences, but based on the “period” defined e.g. in the above case, they are not allowed to miss collecting items 10 times in a 2 year period.

An additional setting on the request display, on the Client tab will show the date and time of the block. This can be cleared by a staff member to reverse the block. Note that this means that the block as a whole cannot be cleared, but the setting on the individual requests are cleared, potentially, therefore, clearing the block.

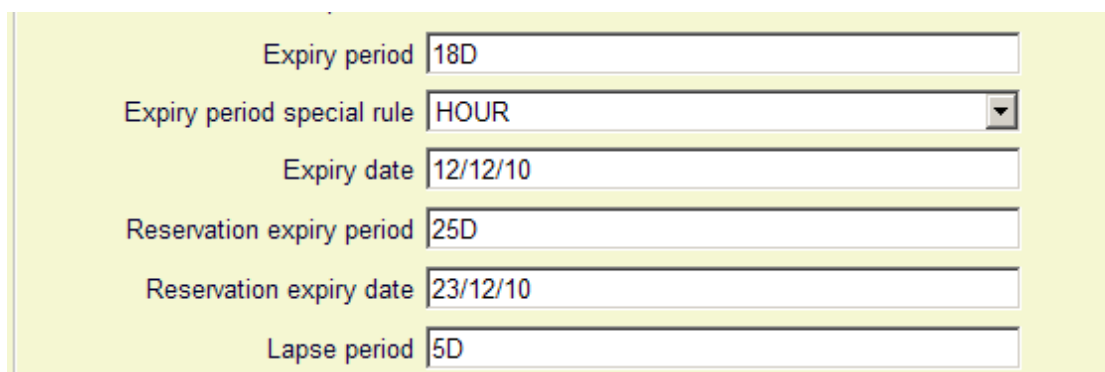


## 23.8. Request expiry date

There are a number of changes associated with the request “expiring”, discussed in sub-sections below.

### 23.8.1. Request reservations

The system will now make a distinction between the default expiry date for a request for an available item and that when we need to place a reservation request.



The screenshot shows a form with the following fields and values:

Expiry period	18D
Expiry period special rule	HOUR
Expiry date	12/12/10
Reservation expiry period	25D
Reservation expiry date	23/12/10
Lapse period	5D

Currently the expiry date/period is associated with the Stack Request code (for example, the expiry periods may be different for academic staff or undergraduates).

Two additional settings will be added for “reservations”

#### **Reservation expiry period**

#### **Reservation expiry date**

These work on the same principle as the previous expiry period / date settings but are applied when the request is created as a reservation. (The expiry period is an actual period e.g. 20D (days), 18H (hours), whereas the Date is an explicit date- e.g. this might be set to the end of term.)

### 23.8.2. *Expiry date and time for requests*

In some situations, it is necessary to be more precise about the request expiry period. For example, the library may allow a borrower to place a request for an available item in the morning, and expect them to collect the book by the evening (let's say 18:00 that day).

In this situation, if the item is NOT collected by that time, the request is considered to be expired and the work is available for another borrower to request, with the implication that they can collect the book more or less immediately.

The expiry date and time is therefore particularly significant in this situation. The library can define a number of rules for the calculation of expiry date/times which can then be linked to stack requests.

#### **Details**

A new option "expiry date rules" will be available from AFO815 (Stack request management). This allows any number of rules to be defined as follows:  
Create a new Expiry date rule, for each day of the week it is possible to define a range of times, followed by a rule for the calculation of the expiry date and time.

### 23.8.3. *Lapse Period*

In the original design of the system, when an item is trapped for the request (i.e. it becomes available for collection), then the original expiry date becomes irrelevant. The **Lapse period** setting takes over, this tells the system for how long the work is to be held at the issue desk for the borrower to collect it.

For example – suppose the expiry date was 03 Feb 2010, and normally the item is held for 3 days for the borrower to come in to collect it. In this case, if the item is trapped on 02 Feb 2010, then it would be unfair to expire it on the 3<sup>rd</sup>. The regular 3 days takes priority.

In order to cater for this in the enhanced environment, then for a regular request (i.e. for a title that was available immediately) the Lapse date and time will be set to the Expiry date; however for a reservation, the LAPSE period will be used.

In other words for the regular request, the borrower knows to collect the item more or less immediately (and there is no available notice); for a reservation request, a notice will be generated AND the request will be set to effectively expire according to the lapse period.

## **23.9. Maximum reservations**

In the current version, there is a setting "Maximum current requests" defined for the Stack Request code.

Maximum current requests	10
--------------------------	----

This currently applies to both active requests and reservations. For example, with the above setting, the borrower may have 3 active requested items and 7 reservations but no more.

This setting will be retained with its current use. Two extra options will be added

**Maximum active requests** [5]  
**Maximum reservations** [5]

With these settings, the user may have 5 requests actively in progress, and an additional 5 reservations. They may place no further requests – either reservations OR requests.

It should be noted that at some point, one of the reserved items may be trapped for the borrower and then become “active”. They would therefore have 6 active items and 4 reservations; the system will not prevent this; but would, of course, continue to prevent them from creating new requests. In other words, these settings only apply at the specific moment that the borrower attempts to request another title.

(It should also be noted that the maximum current requests (in the above case) might be set to, say, 8 – in which case, this is interpreted as meaning that they can have up to 5 active, 5 reservations but no more than 8 in total.)

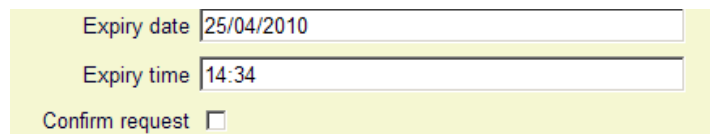
### 23.10. Stack Request codes

Various fields have been added to the request code input form:

- Maximum active requests
- Maximum reservations
- Expiry period special rule
- Reservation expiry period
- Reservation expiry date
- Block on number of requests not collected
- Cut off period for determining block

### 23.11. Stack Request confirmation notices

A new option to allow the system to generate a notice to the borrower at the moment that the request is confirmed by the staff member.



Expiry date 25/04/2010  
Expiry time 14:34  
Confirm request

Requests entered over the WebOpac may be saved either as confirmed or not. With this new setting, when the Confirm request box is checked (and the request saved) then a notice may be generated by the system.

The notice to be produced is defined in the request notice sets.

Emailed confirmations will be sent more or less immediately (i.e. they are not saved for a specific reporting run).

### 23.12. Stack Request Availability notices

In the current version, when a requested title becomes available for collection, a notice may optionally be generated to go to the borrower. (This may be delivered by email or by post). The available notice may be suppressed entirely.

It is, however, necessary to make a distinction between a reservation and a request for an available item. In the case of an available item, there may be no need to create an available notice, especially if the time taken to retrieve the item is short. In this case, the borrower can assume that the item will be delivered more or less at once, and we don't need to inform the borrower.

For a reservation, on the other hand, the borrower is waiting for their turn, so it is appropriate to send a notice.

For available items, whether or not to send a notice, is, as described, a decision based on how long it takes to get the item to the delivery point. The option to send a notice is therefore defined for each route in the system.

Two new fields are added

#### **Suppress available notice for regular requests** **Suppress available notice for reservations**

Note - in order to preserve compatibility with earlier versions, the option offered is therefore to suppress notices rather than include them!

For the specific scenario discussed above, then the first option would be checked, and the second not.

### 23.12.1. Request available vs. Reservation available

In addition to the above, the system will be enhanced to allow a distinction to be made in the “available” notice when a reservation is trapped, vs. a regular request.

2 Borrower availability notice	M:\StackSource\ASRRRequestAvailability.doc	M:\StackSource\ASRRRequestAvailabilityEmail.doc
14 Borrower availability notice (Reservation)		

This allows the wording on the notice to be different if required, and also a different policy as regards email only ...

### 23.12.2. Email only availability notices

In the sample screen above, we see the two types of notice (*Availability* and *Availability (Reservations)*) defined. Note that in this example, no “main” (i.e. ;printed) availability notice is defined.

In this case, the system will NOT attempt to send an “available” notice by post – only the emailed version will be sent. On the other hand, when a reserved item becomes available, the system WILL send a printed notice (or an email).

In this situation, when the item is trapped, the system WILL warn the staff member that no availability notice will be sent (allowing them the option to contact the borrower by other means).

## 23.13. Stack Request Summary Listings

From AFO 813 you can print lists of requests. This is done using the mailmerge functionality. The mailmerge documents (previously defined outside the Vubis system) are made available for this functionality in AFO815 – Request summary print setup.

The input form in AFO 815 allows the user to select a mailmerge master template, and add a suitable description to associate with this layout. With the Print option in AFO 813 the specific layout required can be selected from a dropdown list containing the AFO 815 definitions, at which point the system continues with the standard workflow for mailmerge output.

## 23.14. Interaction of Standard reservations and requests

There are a number of system settings

- Can stack requests be placed on copies of this title
- Can reservations requests be placed on copies of this title
- Can regular reservations be placed on copies of this title
- Can regular reservations be placed on copies which would typically have stack requests

- Can regular reservations be placed on title for which there are copies “on the shelf”

which affect the way that the processing of requests and reservations are presented to the borrowers. This section attempts to describe the various permutations of circumstance and how the system can be configured to handle the library’s requirements in the light of such circumstances.

In all circumstances, if there is a stack request (or a queue of requests i.e. reservations requests exist) for a copy of the title, then this copy is considered to be NOT available for loan. In addition, if there is a POST-DATED request, then the copy is also considered to be unavailable (and therefore potentially reservable).

If the request processing is for a site where the “stack” is a genuine closed access stack for which the time delay in retrieving the title is significant (e.g. at Oxford University), then it would be expected that regular reservations would not be sensible for stack items, and that reservations requests would be used. On the other hand (e.g. VdP) where the stack request processing as a kind of priority request (MDC) then regular reservations may well be a more suitable way to process the demand for titles which aren’t immediately available.

### **Other considerations**

A. In order to be able to decide whether a stack request can be placed on one or more copies of a title, we need to know who the requester IS (since for example the ability to place a request on a copy may depend on the item / borrower category matrix). There is therefore a single “Reserve” command in the WebOpac, which leads immediately to the borrower identifying themselves. Only then can it be decided what options to offer the borrower.

B. IF standard reservations are allowed on stack copies, then we need to consider what happens if a stack request copy is “on the shelf”. For example, although we may disallow standard reservations on titles for which there are copies available, should this apply to the stack copies. There is therefore a new option for the stacks service point with 3 possible settings meaning

- Do not allow standard reservations
- Allow standard reservations and treat items as unavailable
- Allow standard reservations but treat items as available

We now explore some of the different scenarios, starting with the simpler situations.

#### *23.14.1. No copies can be requested*

This is the simplest situation – we simply drop into the regular reservation processing.

#### *23.14.2. All copies are at one or more stack locations*

#### ***If standard reservations are allowed on stack copies***

*If no stack requests can be placed* because no copy is immediately available, AND reservations requests are not allowed, then the system will display a message to

inform the borrower that no requests can be placed BUT that a regular reservation can be placed on the title, giving them the opportunity to cancel or otherwise continue to place a reservation.

*If a stack request can be placed on at least one copy, then the user is offered a choice e.g.*

**Stack request : The text of the Mabinogion.**

You can choose to place a regular reservation on this title by clicking on the Reservation button.  
In this case, the library will attempt to find a suitable copy and inform you when it is available

OR

You can place a request on the items which are in the stacks locations, for immediate delivery usually.  
It may take some time to get the item to you - the system will give you some guidance as to how long it might take if you continue with this by clicking on the Stack Request button

OR

Use the Cancel button to return to the previous screen

If the [Reservation] option is selected, then the system drops into the regular reservation processing. It should be noted that at this point it may THEN be possible that a reservation cannot be placed because, for example, there is a copy available and the copies at the relevant service point are to be considered as available. (See Other considerations / B above)

If it is possible to place Reservations requests, then the site should amend the wording above to indicate that this will be an option offered when the borrower selects “stack request”.

### ***If standard reservations are NOT allowed on stack copies***

In this case, there is no intermediate screen - the system will drop straight through to the stack request processing. It may of course be that no request can be placed –for example

**Stack request : Y Mabinogi /**

None of these items may be requested from this session.

Institution	Location code	Shelfmark Classification	Availability	Estimated delivery	Delivery location(s)
PNB	NUNEHAM	278935 d.152	Already requested	Reservations in the queue:1	BJL Desk

Click here  to return to the previous screens.

Or if stack request reservations are allowed

**Stack request : Y Mabinogi /**

Some of these items may be delivered to locations other than BJJ Desk

You can request some of these items in person at the other location(s) that are shown below

	Institution	Location code	Shelfmark Classification	Availability	Estimated delivery	Delivery location(s)
<a href="#">Select</a>	PNB	NUNEHAM	278935 d.152	Already requested	Reservations in the queue:1	BJJ Desk <input type="button" value="v"/>

You are being shown an estimated time of delivery for each copy from its location if the item is In Place, but you can select items which are not in place if you want to reserve the item for when it becomes available.

Click here [Cancel](#) to return to the previous screens.

### 23.14.3. *Some copies are reservable and some are stack request copies*

*If no stack requests can be placed because no copy is immediately available, AND reservations requests are not allowed, then the system will display a message to inform the borrower that no requests can be placed BUT that a regular reservation can be placed on the title, giving them the opportunity to cancel or otherwise continue to place a reservation. (This is the same condition as “If standard reservations are allowed on stack copies.”)*

#### *Otherwise*

The borrower will be offered the option to place a reservation or a stack request (as the condition above).



## 24. Interlibrary Loan module

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### 24.1. Introduction

The Interlibrary loan module provides full support for both the international standard for the electronic transmission of interlibrary loan requests (ISO10160/10161) and for the traditional delivery and receipt of requests in printed or emailed form.

The interlibrary loan processing is completely and fully integrated with the circulation, bibliographic management and acquisitions processing within Vubis. This provides for an elegant and seamless interaction with the rest of the system and allows for some many features not available in other ILL solutions, For example, requests can be converted directly into orders by a single command, no re-keying of borrower or bibliographic data is required. Checks on borrower validity and so on are carried out in real time.

Handling of data transmitted into and out of the system in the ISOILL format is managed by a third party (open source) package called OpenRequest, developed by K-Int. Messages of various kinds going out of the system are initiated by Vubis application code, but it is OpenRequest which packages this data up and directs to the relevant recipients and conversely receives and unpacks replies and communications, making these available to the Vubis application.

A note on wording – in this document we refer to Requests made against some other library as outgoing requests, and requests that are made on "our" copies as incoming requests. This all sounds reasonable, except of course, whilst the request is outgoing, the book is incoming, so it is quite possible to get confused. Every attempt has been made to keep this straight but apologies are made in advance when it gets confusing!

Other terminology – we have attempted to use the wording that matches that used in the formal ISOILL protocol documentation. Thus "client" represents the person or organisation for whom the item is being requested, whilst "requester" is the requesting library. Notwithstanding, the documentation refers to "reservation" (rather than ISO10160's "hold") since this is the wording used on the existing Vubis displays.

## 24.2. Functional description

This section aims to give an overview of the ILL module, and a description of the processes and workflow within the module i.e. it attempts to put the module into context.

The Interlibrary Loan module is designed to handle both incoming and outgoing ILL requests. It is fully integrated with the rest of the system and all related data is available, in appropriate contexts, to all parts of the system.

In addition to ILL requests, the module may be used to manage document delivery requests for external users (e.g. companies) to whom requested material is to be delivered.

### *24.2.1. Integration*

We identify here some examples of the key aspects of the way that the system is integrated :

Borrower data – all borrower information for requests comes from the main Vubis Smart database – no separate keying of information is required.

Bibliographic data – as an outgoing request is entered into the system, a temporary catalogue record (which by definition wouldn't exist) is created; when the copy of the requested work is received, then a temporary item record is made which can be used to track the issue of the work to the requesting borrower.

Request processing is completely integrated into the regular processes within the library – for example, when an incoming request is accepted by the library, then it is a single operation to 'extend' the request so that it acts as a hold or a stack request, so that the normal library functions for retrieving books (e.g. hold shelf check messages) can be used to retrieve and dispatch the work to the requesting library.

Many of the input forms and screens, perhaps daunting at first sight, will have default values when being entered; and many fields are optional. If a library does not use an option available in the system, then the relevant data fields are simply not displayed or requested. In other words, it is possible to tailor the system to make it as ergonomic and user friendly as possible.

### *24.2.2. Delivery and receipt of the requests*

The delivery and receipt of requests (as opposed to the works themselves) can be handled using a variety of mechanisms. The primary method is to use the ISOILL protocol (ISO 10160/10161) so that all requests and related transactions can be transmitted electronically between the requesting libraries.

But support is also provided for transmitting and receiving requests to and from systems which do not support the ISOILL protocol, e.g. by email or in hardcopy form. The mechanisms developed also allow for the electronic transmission of requests

using methods other than ISOILL, although these are unlikely to be developed for the first release of the ILL module.

Other mechanisms for the automatic transmission and receipt of requests is also implemented, including the British Library ARTEmail mechanism, the PICA Email format and in a future release for Impala in Belgium.

#### *24.2.3. Delivery and receipt of the work*

The ILL module provides support for the transmission of electronic copies of the work, via variety of mechanisms, including via FTP.

#### *24.2.4. Bibliographic enquiries*

It is possible to configure the system to allow for enquiries from remote libraries using the system's Z3950 server processes. The ILL module itself allows for the configuration of profiles for searching for material on other library systems, not only to check the availability of the requested item but also to draw upon the bibliographic information to make sure that the data passed with the request is accurate and correct.

#### *24.2.5. Workflows for outgoing requests*

The discussion below represents the main or expected workflow through the system; the many options available are discussed in detail later on.

The original request from a borrower may be entered using the ILL module "New" request input screens OR may be entered directly by the borrower via the WebOpac.

Bibliographic data entered will be saved to a catalogue record in a workfile, which may be accessed in the normal ways, but need never be directly retrieved in this way for the main ILL processing.

New requests may be checked against the main database(s) in case the borrower has mistakenly requested a work which is held by the library. Requests may, at any stage, be converted to normal reservations. Requests may, of course, be cancelled or rejected and appropriate messages relayed to the borrower e.g. via email or the WebOpac.

Staff may check the request against any appropriate system using the system's Z3950 client software to check for availability at a possible supplying library (for example, against COPAC) –appropriate searching profiles are fully configurable by the library. And it is possible to retrieve the bibliographic information to enhance what might be a rather brief or inaccurate request from the user.

Once a supplying library has been selected, and any other possible forwarding libraries added, the system will calculate charges accruing both to the library and independently to the borrower. Such charges may be a function of both the supplying library and the borrower category; in addition the system will allow for a borrower "quota" – a limit of the number of requests – at which point exceeding the quota may cause the rules for calculating the charges to vary.

Obviously, such information as whether the request is for a book or a copy, how the work is physically to be delivered (e.g. electronically, or by post etc.) can be entered, although much of this can be inferred by the system automatically.

When a request has been entered, it may be delivered immediately or at scheduled intervals to the supplying library. In particular, if the supplying library supports the protocol, then the message will be delivered using the ISOILL protocol, and in this event much of the interaction can be handled automatically by the system.

For messages handled by the ISOILL protocol, the system maintains a list of items requiring attention – for example, if the response to a request indicates that there is a special condition attached to the loan.

There is a well defined set of steps – responses / replies – for the ISOILL protocol which is handled by a simple "Action" button to allow users to respond as appropriate; for "manually" handled requests the relevant steps can be truncated without affecting the system logic.

For a photocopy, the request is marked as completed when the supplying library indicates the item is supplied; for books, the receipt of the item causes the system to create a temporary book barcode and the book can be issued in a single operation to the user. In some libraries, the book may be delivered to the ILL department; in this case a single key stroke allows a logical "hold" to be placed against the copy, and it could be shipped to a remote branch, for placing on the hold shelf for issue to the borrower in the regular way. The system is thoroughly integrated – so that the processing workflow for holds and ILL can be identical.

Requests for renewal of the item by the borrower are automatically fed into the ILL system, generating (subject to staff approval) a request for renewal being sent to the supplying library

#### *24.2.6. Workflow for incoming requests*

Requests from other libraries may be received via the ISOILL mechanism, in which case they will appear online immediately or may be keyed directly into the system.

The bibliographic data from the incoming request will be checked against the catalogue, to identify possible matches within the system. A request may be confirmed or, of course, refused; and it is possible via the ISOILL protocol to submit conditions on the potential loan back to the requesting library.

Once a local catalogue record has been associated with the request, then it is possible to "extend" the incoming request, so that it is treated like a normal reservation or stack request, with a pickup location, typically set to the ILL department.

When the item is made available at the location responsible for actually shipping the item, it can be issued to the requesting library, a shipping message sent to the library and labels printed all in a single operation.

A "dummy" borrower record is created for the requesting library and the loan appears in all other respects as a regular loan.

There are some differences in options, of course, for the two general sources of the request initially. For example, for an ISOILL request it is not permissible to edit the incoming bibliographic data (since it is THIS that they asked for), but of course you MUST be able to for manually entered requests !

Requests which cannot be supplied may be automatically forwarded to other libraries.

The initial release will NOT handle the actual electronic delivery of material but this is planned.

#### *24.2.7. Display of requests*

The normal range of search keys and views will be available – it is possible, to name just a few examples, to limit results to requests from a given library, to requests associated with a specific branch, to view requests which are all "pending" and so on.

Borrowers will be able to monitor the progress of their requests via the WebOpac; and, requesting libraries will be able to monitor their requests via the WebOpac.

## 24.3. Concepts

### 24.3.1. ILL Departments

The ILL department settings in AFO 822 define "your" organisational details. This is the organisation to which requests are sent and received. A single ILL department corresponds to a complete circulation meta institution, but more than one department is allowed for each meta institution. So, for example, a single ILL department may only process outgoing requests on behalf of borrowers registered with that meta institution; however more than one ILL department may "manage" requests for that set of borrowers / items. Effectively, this means that from an external point of view the system may comprise multiple "libraries" to which requests can be sent; but once those requests arrive, to all intents and purposes, subsequent processing is indistinguishable.

### 24.3.2. ILL Libraries

ILL libraries are the organizations to and from which requests may be sent and received. With the in AFO 822 you define the details of other organizations.

#### Note

For BL and PICA, there are special formats for electronic delivery, using specially formatted emails. It is necessary to define the email server, passwords and so on as shown above in order to send the emails.

### 24.3.3. Consortial / Multi institution systems

Supplier libraries are defined on a system-wide basis. This is required for technical reasons, in the way that the ISOILL protocol communicates with the system (at the point of receipt and delivery of such messages, the "meta-institution" is not an available setting). This is, of course, a desirable feature, since libraries need only be defined once on the system.

However, if there ARE multiple organisations using ILL, independently, then many settings above are "specific" to them. The settings shown and described above (as a single "form") are actually therefore a combination of some system wide settings AND some ILL department ones.

In brief the ISOILL technical fields are system wide – viz.

- Library code (e.g. RLG:TCDU)
- Library name
- Delivery type
- ISOILL email / IP address
- Suspend / until
- Web address

All other fields must be defined on a per ILL department basis.

The following should also be noted.

- The Z3950 search settings are defined on a system-wide basis. Since the library symbol is defined for the database, then ILL departments ought to ensure that they refer to the supplier with the same symbol (which is the reality anyway). (See 5.3.4 Z3950 Setup)
- There will only be a single ISOILL database defined, which is therefore shared (as are the other databases) across multiple organisations. In general bibliographic searches for requests may therefore result in matches on requests for other organisations. Of course, users would NOT have privileges to amend such requests, but limited "read-only" access cannot be avoided.
- For technical reasons, all such library codes are available for selection and use at all the various places where it is necessary to select a supplier, BUT further processing of a request with such a supplier selected is suspended until the necessary ILL specific settings are assigned.

#### **24.4. Implementation**

The following additions and extensions have been made in relation to the Interlibrary Loan module.

- The parameters for the Interlibrary Loan module are set in the new AFO 822.
- Handling of requests is done via the new AFO 821.
- The WebOpac preferences have a separate section for Interlibrary Loans
- There are warning messages related to ILL in AFO's 411, 412 and 413
- The AFO 415 screen will also show Interlibrary Loans, they can be identified by the wording Interlibrary Loan in the Type column
- AFO 431 will show ILL requests in square brackets on the overview screen and separately under Reservations on the Detail screen of a borrower
- AFO 482 – Borrower definition settings – Preferences, has 2 new fields: *ILL Budgets* and *ILL Budgets status*
- As the ILL module uses mailmerge technology, some additions have been made in this area
- In the WebOpac preferences – User Activities, you can define wording for Interlibrary Loan requests in the My Vubis section
- Buttons for placing ILL and Document delivery requests are available for placing on various screens in WebOpac preferences – Menus

## 25. SSP additions

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The following additions have been made for SSP:

[1] Link to get from Borrowers to Stack Requests

[2] ILL related data dictionaries

"Wording", "dut")=IBL Transactie berichten  
"Wording", "eng")=ILL Transaction messages  
"Wording", "fre")=Messages transactions PEB

"Wording", "dut")=IBL Aanvraagkosten  
"Wording", "eng")=ILL Request charges  
"Wording", "fre")=Frais demandes de PEB

"Wording", "dut")=IBL aanvragen  
"Wording", "eng")=ILL Requests  
"Wording", "fre")=Demandes PEB

"Wording", "dut")=IBL leveringskosten  
"Wording", "eng")=ILL Supply charges  
"Wording", "fre")=Frais fourniture PEB

"Wording", "dut")=IBL Transacties  
"Wording", "eng")=ILL Transactions  
"Wording", "fre")=Transactions PEB

[3] Purchase Alert

"Wording", "dut")=Aanschafwaarschuwing  
"Wording", "eng")=Purchase alert  
"Wording", "fre")=Alerte commande



[4] Search transactions

"Wording", "dut")=Zoekacties  
"Wording", "eng")=Search actions  
"Wording", "fre")=Recherches

has been changed to

"Wording", "dut")=Web aanvragen  
"Wording", "eng")=Web requests  
"Wording", "fre")=Requêtes Web  
and  
"Wording", "dut")=Websessies  
"Wording", "eng")=Web sessions  
"Wording", "fre")=Sessions Web

[5] Circulation Invoices

Set ^DDCircInvoices("Globals", "CircInvoices", "Wording", "dut") = "Facturen uitlening"  
Set ^DDCircInvoices("Globals", "CircInvoices", "Wording", "eng") = "Circulation Invoices"  
Set ^DDCircInvoices("Globals", "CircInvoices", "Wording", "fre") = "Factures de prêt"

## **26. Nielsen LibScan**

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This feature was developed specifically for the UK market.

### **26.1. Introduction**

LibScan will provide a continuous weekly measurement of UK public library book issues (lending information). This means information will be collected from public library authorities covering which books have been issued, the location of the issuing library and the number of issues.

The data will then be validated and analysed to produce a range of reports which have been designed to provide the information libraries need to support their stock purchasing decisions, to review/inform their stock supplier selection arrangements and to understand the trends both at local and national levels.

Ideally data will be collected directly from an individual library's LMS (library management system) using FTP technology in order to automate the process. This will not affect the libraries' operations and only four pieces of information will be collected: ISBN, quantity issued, date of issue and, if applicable, library identifier. Participating libraries will receive free access to standard LibScan reports in exchange for their data.

### **26.2. Functionality**

Libraries provide ISBN, quantity issued, date of issue and, if applicable, library identifier on a weekly basis. In exchange libraries receive free access to standard LibScan reports. You can use the reports to compare your library authority with the national picture. E.g.:

- Identify which products are issued in your authority.
- Identify issues by author, title and genre.
- Compare your local issues with the national trends.
- Identify gaps in your stock.
- Identify and promote titles that are issuing well nationally.
- Compare local and national issue data with the national retail sales information (for those subscribing to BookScan for Libraries).
- Identify titles which are selling but not being issued.
- Use issue data to help define stock selection requirements.
- Use issue data to help produce/review supplier selection profiles.

The functionality can be accessed via the special AFO 733, third menu option.

## **27. ODBC access for generating reports**

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### *Requirement*

Generation of Caché classes based on the SSP data dictionary with the purpose of allowing external access to the data through ODBC.

Please contact Infor for information on how to set this up.

## 28. Enhancements to WebOpac

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This section describes various smaller enhancements for the WebOpac and Preferences.

### 28.1. Reserving all titles on a savelist

#### *Requirement*

Ability to reserve all titles in a savelist or reserve a selected title from a savelist. Titles that cannot be reserved from a savelist using the Reserve all option include the following:

- multi-volume works
- stack requests
- titles on which the user already has placed a reservation (previously)
- titles that could not be reserved for another reason (borrower category maximum, etc, blocks)

#### *Process*

Reserving all titles on a savelist will be a wizard-like process, consisting of multiple steps.

1. After accessing one of his/her savelists, the user has an option (new button) “reserve all” to reserve all titles in the savelist. This new button appears on the savelist screen only. Once this button is pushed, the system will create a temporary copy of the savelist which will be used for further processing.

2. The system proceeds with the reservation of the titles in the savelist. Depending on existing settings in the WebOpac preferences, the system may next prompt the user for input of a pickup point and/or reservation area in a popup screen.

Choice of pickup point.

- list of valid pickup locations or pickup where found or limited to current location

Choice of reservation area:

- Dropdown list based on contents of ‘Possible placement reservation areas’ found in AFO 481 - WebOpac – Reservations – Miscellaneous. The contents of list are not title-specific – i.e. user may choose a reservation area that cannot fulfil all of the titles in the savelist.

After entering the pickup up location and/or reservation area, the user must accept to proceed with the reservations or abandon the process.

3. The system displays a popup screen containing the number of items that can be reserved and the number of items that cannot be reserved using this workflow. The screen also contains a (bandwidth) total of the costs (of the items that can be reserved).

For example,

5 titles can be reserved.

3 titles cannot be reserved

Total reservation cost will be between .50 and 15.00

[texts of these messages are defined in the WebOpac Preferences]

The user has to accept the reservations or abandon the process.

4. If the user accepted the reservations (step 3), the system processes the reservations that it can and then displays a popup screen containing the number of reservations that were successfully placed. The system also sends acknowledgements to the user (if configured). If all of the titles in the savelist were successfully reserved, the user acknowledges the screen by pressing the OK button, the popup window closes and the original savelist is still displayed in the main browser window.

If all of the titles in the savelist were not successfully reserved, the user has a choice of choosing an OK or Exceptions list button. The form also contains a message, “The titles that could not be reserved are in the Exceptions list. You can attempt to place individual reservations against these titles (text to be defined in WebOpac preferences – the library can modify text to mention serial volumes, etc).

If the user chooses the OK button, the popup window closes and the original savelist is still displayed in the main browser window.

If the user chooses the Exceptions list button, the successfully reserved titles are removed from the temporary savelist and the updated temporary savelist containing only the titles that could not be reserved is displayed in the standard savelist window (the header of the savelist indicates that this is the exception list).

The user can now attempt to place individual reservations for the titles (using the new Reserve button) that could not be processed or print (or output) the titles in the exceptions list.

The temporary savelist will only contain the items that could NOT be reserved. When the user leaves the exceptions savelist (by choosing new search, user activities, etc.), the temporary savelist is deleted.

The assumption is that, in real life, only a very small percentage of items will be exceptions.

### *Implementation*

On the standard savelist screen as well as the new Exception list savelist screen, there will be a new Reserve button that allows an item on the list to be individually selected (one at a time) and reserved (so that the user does not have to go to the full record display of each individual record to place the reservation).

This button can be (de)activated via Preferences – Menus (per Profile).

Texts can be defined for

- introduction
- messages on the forms
- bulk email and SMS messages
  - Subject confirmation
  - Confirmation header
  - Confirmation footer

This is done via Preferences – User activities – Reserve all titles on a savelist

## 28.2. Guest registration

### Requirements

It should be possible to place a direct link to the GuestRegister.csp page.  
Ability to specify contact methods when registering as guest in WebOpac.

### Implementation

#### 28.2.1. Link to Guest registration page

It is possible to offer a direct link to the guest register from the library's home page.  
The url should be in this format:  
`http://library/webopac/GuestRegister.csp?OpacLanguage=eng&Profile=Public`

### Note

The OpacLanguage= and Profile= settings are REQUIRED in order for this to work.

#### 28.2.2. Output formats

It is possible to indicate contact preferences for overdue and reservations directly on the enrolment/change data form.

The parameters that control this functionality are located in AFO 616 – Contact methods, using the button Circulation.

Depending on settings there, the WebOpac form may look like:

**Contact methods for overdue/reservations notifications**

How would you like to be reminded regarding overdue notifications?  E-mail (free of charge)  Mail (1 euro per mail)

How would you want to receive the reservation availability notifications?  E-mail (free of charge)  Mail (1 euro per mail)

or:

**Contact methods for overdue/reservations notifications**

Do you wish to receive a reminder when the loan period for your items on loan has expired?

If yes, how would you want to be reminded?  E-mail (free of charge)  Mail (1 euro per mail)

Do you wish to receive a message when your reserved items are ready for pickup?

If yes, how would you want to receive the message?  E-mail (free of charge)  Mail (1 euro per mail)

These fields can also be set/viewed for the borrower record in AFO 431 icon Contact Method.

The WebOpac wordings related to this functionality are located in Preferences-User Activities-Register as guest/Change data.

The output formats that are set at borrower level for overdues/reservations override the general contact method (set in AFO 616 – contact method or AFO 481 Miscellaneous-Notification contact method or AFO 431 – contact method [general]).

**NOTE** If the parameters:

Allow borrowers to define how to be contacted regarding reservation pickup notices:

and/or

Allow borrowers to define how to be contacted regarding overdue notices:

are turned on, the output format for reservations/overdues for all the borrowers in the system will be affected according to the parameters settings from above.

For instance for the setup

The screenshot shows a configuration window titled "Allow borrowers to define how to be contacted regarding reservation pickup notices" with a checked checkbox. Below the title, there is a dropdown menu labeled "If yes then select the default option" with "Send notices" selected. Underneath, there are two columns of output format options. The left column, labeled "Select the available output formats", contains "SMS" and "Voice". The right column, labeled "Select the default output format(s)", contains "Email" and "Print". Between the columns are left and right arrow buttons. To the right of the right column are up and down arrow buttons. Below this section, there is a checkbox labeled "Multiple output formats allowed" which is unchecked. At the bottom, there is another section labeled "Select the default output format(s)" with a left column containing "Print", "SMS", and "Voice", and a right column containing "Email". Similar arrow buttons are present between and to the right of this section.

Then the default functionality for a borrower that has not changed his/her WebOpac settings will be to send an email notification. If the borrower does not have an email address then a print notice will be created.

Another example:

The screenshot shows the same configuration window as above, but the dropdown menu "If yes then select the default option" now has "Do not send notices" selected. The rest of the interface, including the output format selection boxes and the "Multiple output formats allowed" checkbox, remains the same as in the previous screenshot.

Then the default functionality for a borrower that has not changed his/her WebOpac settings will be to NOT send a notification.

### 28.2.3. *Enrolment acknowledgement*

After completion of the enrolment there is an option to display an overview containing the fields from the registration form and the (temporary) barcode generated by Vubis. This information will also be sent by email (already existing functionality). The borrower has the option to print the form immediately. There is the possibility to display some free text on this overview.

**Register as guest**  
overview introduction

Your BorrowerID is 200200506

Email	sd
Date of birth	12/12/1980
Copyright tax	
Last Name	Bridges
First Name	Jeff
Department	DEPARTMENT3
Contact method for overdues notifications	Do not send notification
Contact method for reservation notifications	E-mail

**OK** **Print**

The parameters that control this functionality are in Preferences-User Activities-Settings specific for register as guest



### 28.3. Reservations - volumes and serial/multi-part records

#### Problem description

If reservations on the WebOpac are not allowed, there is no means of suppressing the reserve button for detailed holdings (volumes and serial/multi-part records ).

#### Solution

In the TEXTS for the profile under the Holdings Details, there is a new set of parameters for the reserve button. The default installation will be NO and default wording is Reserve.

*	Button pop up beneath:	Details availability
	Style class:	buttontekst
	<b>Show reservation buttons for serials on the holding availability pop-up form:</b> Yes	
*	Button text:	Reserve Me!
	Style class:	buttontekst
<b>Acquisition status</b>		
<input checked="" type="checkbox"/>	Show acquisition status even if shelfmarks exist	

Title: Botanical journal of the Linnean Society										
Year All Volume All Shelfmark All										
		Shelfmark	Institution	Location code	SubLocation code	Item Category	Barcode	Availability	Part title	Reservations
1	22	Branch BD DM QA 1484	Infor Libraries	Branch BD		Annual reports	97968976	✓		0
<b>Reserve Me!</b>	2	v.2008: no.44:pt.2	CEN frances Infor Libraries					Received	M15 the issue update	
	3	CEN frances	Infor Libraries					Received	M15 the issue update	
	4	CEN serials	Infor					Received	M15	

### 28.4. Reservations – hidden items

#### Problem description

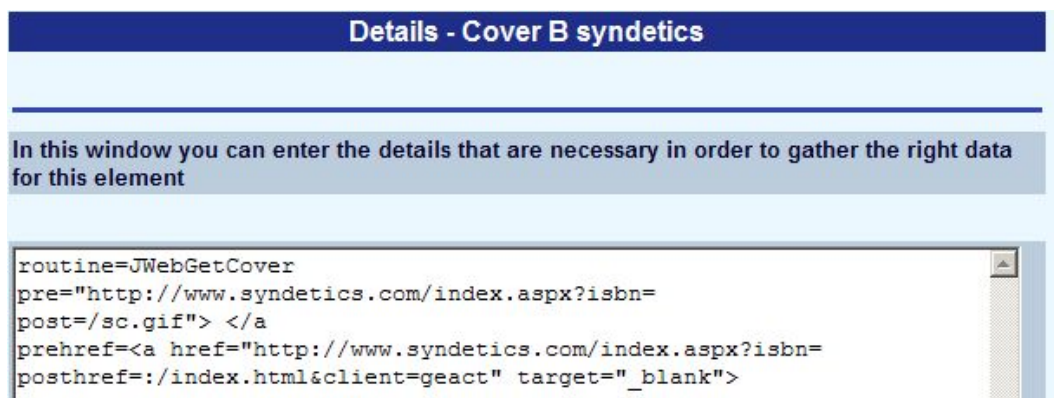
WebOpac reservations: If item flag is set to suppress-from-WebOpac, the item should not be included when placing reservations from WebOpac-- Require a means to suppress item from reservation other than status code

#### Solution

Items with the Hide from WebOpac flag set are no longer included in WebOpac reservations. This does not have any effect at all on the client reservations nor will it affect reservations previously placed.

## 28.5. Integration of Syndetics in WebOpac enrichment

It is now also possible to display cover information from Syndetics in the WebOpac. This can be defined in the WebOpac Preferences – Templates as usual. Example:



Please note this feature requires a special license from Infor as well as a Syndetics license.

## 28.6. Rate & Review

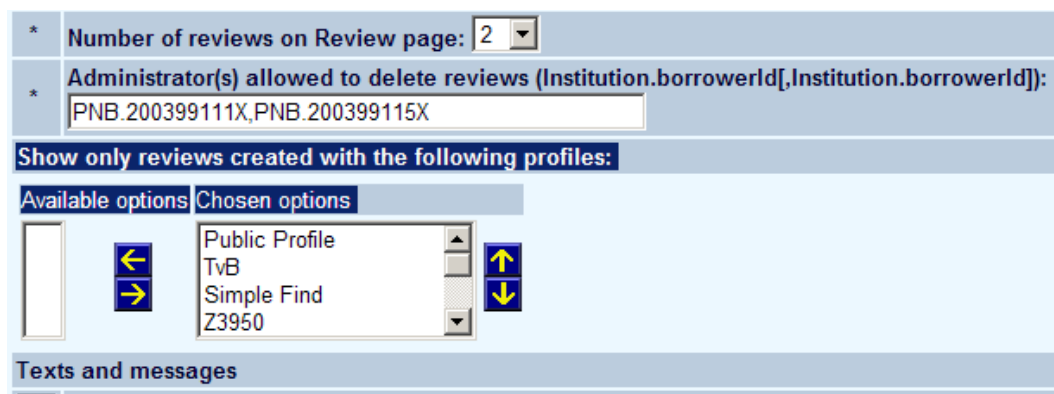
### *Requirement*

Need possibility to limit review display to certain profiles or to limit the display of reviews created by specific profiles.

### *Solution*

A new option "Show only reviews created with the following profiles:" has been added to the Rate and Review preferences (Profile/Texts). This allows for selection of one or more profiles.

If nothing is selected, all reviews are shown (thus keeping compatibility with the existing situation) - if one or more profiles are selected, only reviews created in those profiles are shown.



Note that until now the profile was not stored with the review data. Reviews without profile will always be shown.

## 28.7. Public availability display

There are two enhancements related to public availability displays in the WebOpac.

### 28.7.1. Sublocation wording

If a shelfmark contains item OR sublocation override settings, then display the override defined regardless of which one it is on. If a shelfmark contains both item AND sublocation override, then the logic remains as it currently is: i.e. “Display the sublocation”.

### 28.7.2. Display options

There is a new option that allows the user to attach specific wordings/icon descriptions for Available, Unavailable and Ordered to be used on the record lists. This can be found under Options and Texts in the Public Availability section:

Ordered	 Ordered	<input type="button" value="Add new wording"/>
		Available Soon <input type="button" value="Delete"/>
		On Order <input type="button" value="Delete"/>
If you want to use specific wordings/icons on the record lists select them.		Available <input type="text"/>
		Unavailable <input type="text"/>
		Ordered <input type="text"/>
When unavailable due to loan, show due date		Append to wording <input type="text"/>

This allows you to define an icon (Green checkmark for example) for record lists and then use the wording in the full record display.

## 28.8. Loan History details

### Requirement

Allow for site configuration of Loan History details available to borrowers. If a borrower has selected to turn off the borrower History flag, they do not want to see details of titles borrowed in the WebOpac. Based on the premise that the customer's preferences are leading and that it should NOT be a decision of the library to overrule the customer's setting. (However, it is also backwards compatible, - be it through different parameter settings.)

### Solution

The flag being referred to is the Borrower History flag in the borrower record (Preferences Group) which currently controls the storage of loan history details:

- [1] If loans are registered via AFO 464, all loans are stored in the borrower's loan history, independent of any setting in his borrower record.
- [2] If loans are registered via other AFO's than 464, loans are only stored in the borrower's loan history if the flag "store loan history" in the borrower record is ON.

This is expanded / enhanced for the WebOpac to control the display of loan history and optionally allow the borrower to control whether or no details need to be displayed.

A new field is added to the WebOpac preferences / User activities / Loan History section which can be set on a per profile basis "Display loan history details". This new flag has 3 possible values:

<b>General options</b>	
<input checked="" type="checkbox"/>	Borrower can enable use of loan history for mailings
<input checked="" type="checkbox"/>	User can delete items from loan history
<b>Loan History Details</b>	<div style="border: 1px solid black; padding: 2px;">         Never Display <span style="float: right;">▼</span>          Always Display          Never Display          Based on Borrower Loan History Flag       </div>
<b>Texts and messages</b>	

which will do the following:

Borrower Flag for loan history set to	Y	N
Set to NEVER	Not seen	Not Seen
Set ALWAYS	Seen	Seen
Set to As per record	Seen	Not Seen

## 28.9. SMS option for the 'Forgot pincode' option

### *Problem description*

Forgot Pincode /passwords - offers to send SMS even if SMS is not configured. This results in an error.

### *Solution*

Preferences user activities now has an option for Offer SMS option for the 'Forgot pincode' option: No/Yes; this is OFF or NO by default.

Fields that will be used for identification	
<input checked="" type="checkbox"/>	Library card barcode
<input type="checkbox"/>	Password
<input type="checkbox"/>	Date of birth
<input type="checkbox"/>	Name code
Offer SMS option for the 'Forgot pincode' option	No ▼
Number of unsuccessful consecutive login attempts allowed	2

Also note that the AFO431 - PIN option - Send by SMS will now only be available on the form if you have AFO651 - Email and SMS - SMS server defined. When this is not defined, borrowers with mobile phones will not get the option. (in order to get the Send Pincode by SMS in AFO431, you need 2 conditions. AFO651 definition for SMS server plus the borrower with a mobile phone number.

## 28.10. Enhancements to Faceted search

It is now possible to use authorities as facets. Also new is that from now on all facets are always retrieved, also if they were used already. The facets are now retrieved/displayed via Ajax. In the Preferences there is a new CSP to exclude subjects that are too generic.

This is set up in the preferences under Options per Profile:

Authority indexes for facets	
Available options	Chosen options
[MARC21] Author keywords	[MARC21] Subject keywords [MARC21] Personal authors M21 [MARC21] Series title
<b>Wording with the authority indexes</b>	
[MARC21] Subject keywords	[MARC21] Subject keywords <input type="button" value="Exclude authority values"/>
[MARC21] Personal authors M21	[MARC21] Personal authors M21 <input type="button" value="Exclude authority values"/>
[MARC21] Series title	[MARC21] Series title <input type="button" value="Exclude authority values"/>
<b>Maximum number of items to show for facets</b>	15

You can now specify optionally 'authority' type indexes, which may also be displayed as part of the facets pane. For each authority index, certain headings may be optionally excluded from the facets display. Type in the heading desired, then select.

**Exclude authority values**

<b>Authority index:</b>	[MARC21] Subject keywords
<b>Authority:</b>	his
<div style="border: 1px solid gray; padding: 5px; min-height: 100px;">                     HIS DARK MATERIALS □A □A □ □00                      HISTOIRE □A □V □ □                      HISTOIRE ECONOMIQUE □A □V □ □                      HISTOIRE SOCIALE □A □V □ □                      HISTOIRES EN IMAGES □C □V □ □                      HISTORICAL FICTION □A □Z □ □                      HISTORICAL RECORD PRESERVATION □C □A □ □                      HISTORY ,SOURCES □A □A □ □                 </div>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
<b>Selected authority values</b>	
Historical drama	✗
Historical fiction	✗

**28.11. Export to Refworks and Endnote***Requirements*

An option to export bibliographic references to software tools for publishing and managing bibliographies, such as Refworks and Endnote.

In the WebOpac, after log in, the user chooses bibliographic reference and puts it in a basket. Then, he can export the data in different formats, as listed below.

*Implementation*

<b>Export type</b>	<b>Format</b>	<b>Process</b>
File creation	RIS, EXCEL, RTF	1. User clicks on the button Export. 2. Window opens and user can choose export format(RIS,EXCEL,RTF)
Dispatch by email	RIS, EXCEL, RTF	1. User clicks on the button Export. 2. Window opens and user can choose export : - export type : email - export format (RIS,EXCEL,RTF)
Direct Export	via OpenURL by value profile	1. User clicks on the button Export. 2. Window opens and user can choose “direct towards Refworks” export type. Ref works opens and references are automatically imported . If necessary, user must log in

Please note this option is not activated automatically. Please contact Infor for more information.

## 29. Indexing WebOpac reviews

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### 29.1. Requirement

It is now possible to index the reviews entered by users in the WebOpac. The indexing can be done separately, in a special index, and/or can be added to or combined with any other word index.

### 29.2. Implementation

There is a new index mechanism, "WebOpacReviews". There also are two new index mechanism sets:

- SET1PLUSREVIEWS
- SETWEBOPACREVIEWS

SET1PLUSREVIEWS is a copy of mechanism set SET1 plus the mechanism WebOpacReviews.

SETWEBOPACREVIEWS is a copy of mechanism set SET1 where the mechanism RetrieveData is replaced by the mechanism WebOpacReviews.

The place of mechanism WebOpacReviews in the order is unimportant. WebOpacReviews is only used during indexing (create/modify/delete index entries), while the rest of the mechanisms is used for searching.

WebOpacReviews does not use a stopword list. So all stopwords go in the index. During the retrieval, stopword lists are used as defined in the mechanism that exists for that purpose, so the fact that the index contains stopwords is transparent for the user.

### 29.3. Setup

The following steps are necessary in order to be able to use this new functionality:

#### **AFO 151:**

Create an index/modify the index as required.

Note that you can allow this index to be available for staff search, however the WebOpac reviews will not be available from the staff client.

#### **AFO 157:**

Build the index.

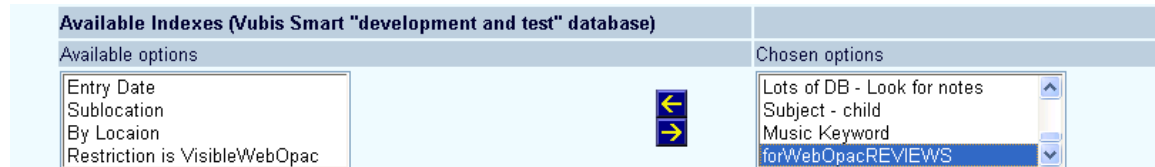


## WebOpac Preferences:

Allow for an index to search the WebOpacReviews.

(Options and Texts - Select the database - Add new Index to the available indexes)

Add the new Index as available to the Options tab for the profile



Modify search method (as required) to include this index.

\*\*\*\* Note that any additions or edits or deletions of reviews will update this index on the fly via the WebOpac.

Result for WebOpac search:

[Staff profile start page](#) > [Search](#) > RecordList

Search Search - expert 1 Search - expert 2 MultipleDBs Index scan Search tree Thesaurus English

Searchterm thriller WebOpac Review Contents Search

Database Vubis Smart "development and test" database

**Search for this in wikipedia Instead**

Active reading list Personal savelist for Jansen, A.B. Show

Year	Description	Shelfmark Availability	Year Author Publisher Title	Page 1 / 1 (2 items)	GeneralAvail.
<input type="checkbox"/> 1996	The murdered star-- Christie Golden, as Author -- New York [etc.] 1996	BD : 123	✓	✓	✓
<input type="checkbox"/> 1996	The murdered sun-- Christie Golden, as Author -- New York [etc.] 1996ArrangerMeyer, Nicholas	WorkPlace for WebOpac : c-fly BD : Test BD : Unknown items To be catalogued - c-fly	✗ On loan until: 2010-Aug-30 ✓	✗	✓

Review(s)

(User) Jansen, A.B. February 15, 2011 (16:44) Edit Delete

Nice book for anyone who likes a good thriller.