

AFO 423 – Edit items

423.1 Introduction

AFO 423 can be used to view the status of an item and to modify some of the information about the item. The information that can be changed is as follows:

- a new barcode can be assigned to the item;
- the item category can be modified;
- if appendixes go with the item and whether on loan proof of registration is required can be indicated
- the item can be 'manually' called back
- the item status can be changed, e.g. to “missing”

Note

When there is a transaction for an item and/or you are not the owner of the item, it is not possible to modify certain item details.

This AFO can also be used to view information about items that have been removed from the catalogue using AFO 112 ('Delete items'). AFO 423 is also accessible using the copy screen in AFO 111 ('Cataloguing').

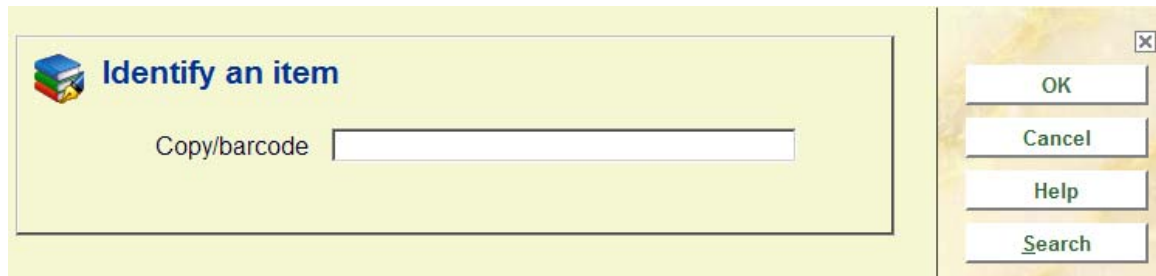
The system can be configured in such a way that only certain passwords can use the 'view facilities'. The system distinguishes between passwords with:

- 'system facilities': fields in this AFO can be entered, modified and viewed; use can be made of all options in AFO 423;
- 'view facilities': fields can only be viewed; no authorisation is given for all other options in AFO 423.

Using AFO 611 ('Password control'), you can indicate which passwords are to be given 'system facilities' in AFO 423.

423.2 Search for an item

After choosing this option the following search form will be displayed:



The screenshot shows a dialog box titled "Identify an item" with a small icon of a stack of books. Below the title is a text input field labeled "Copy/barcode". To the right of the dialog box is a vertical stack of four buttons: "OK", "Cancel", "Help", and "Search". A small "X" icon is visible in the top right corner of the dialog box.

You can either key in or scan a barcode here. This will take you straight to the overview screen with item information (see section 423.3).

Alternatively you can click on **Search**. In that case you will be offered the standard screen for bibliographic searches. You will then have to click your way to result list etc., before ending up on the overview screen with item information.

423.3 Overview screen

After identifying the item, you will be presented with the overview screen with item information:

The screenshot shows the V-smart library system interface. The top half displays item details for 'A Boy And His Tank / Leo Frankowski / Frankowski, Leo'. The bottom half shows a form for editing item details, including barcode, location, and miscellaneous information.

Title	A Boy And His Tank / Leo Frankowski / Frankowski, Leo
Shelfmark	[PNB] CEN mc999z (BO)
Date added	19/03/2002
Date updated	-
Owner	PNB/CEN mc999z (16 - BO) - Updated 24/03/2010
Manager	PNB/BD
Status	In the library
Last loan	on 24/03/2010 (17:11) to: Casteren, N.J. van (3235)
Last renewal	on 23/05/2002 (16:00) by: Frère, Florence (9999)
Due date	-
Last return	on 11/10/2010 (15:15) at PNB/BD
Previous loans	on 24/03/2010 (17:09) to: Casteren, N.J. van (3235) returned on 24/03/2010 (17:09) at PNB/BD on 24/06/2002 to: Carter, Newton (200200049X) returned on 24/03/2010 (17:08) at PNB/BD
Last activity	on 11/10/2010 (15:15)
No. reservations	- (current)
Loan history	12 total (11 loans + 1 renewals) / 0 loans (current year) / 3 reservations

Item detail entry - Item: 00008999 (00009999)

1 Barcode	00008999 (OBC: 00009999)	4 Notes
2 Location	PNB CEN mc999z	Action Notes
3 Miscellaneous	16 - BO : Books	5 Electronic holdings
Item Category	1 - Volw non-fictie	
Statistical Category	0	
Attachment	No	
Permission slip	- :	
Pending item category	- :	

The top half of the screen contains all kinds of information about the item. This information is generated by the system and cannot be changed (protected field).

The information in the bottom half of the screen can (in certain cases) be modified. The data shown here, as well as on the various input forms for updating these lines, is dependant on settings in AFO 469 – Data to be displayed and Data to be corrected.

Note

Whether or not the borrower name is displayed in **Last loan** and **Previous loans** is determined by a parameter in AFO 469 – Miscellaneous. If this parameter is checked, then the borrower name will be replaced by *****.

Fields on the screen

Title: the item's title.

Shelfmark: the shelfmark for the item displayed in the form [Institution] Location [Sublocation] Shelfmark. Followed by the item category that is part of the shelfmark. Therefore this may be different from the item category as shown under **Miscellaneous** in the bottom half (this happens when the item category is modified).

Date added: the date on which the item was added to the catalogue.

Date updated: the date on which the item data was last modified.

Owner: the code for the Location Manager that owns the item. If an item has been permanently relocated to another owner, the date of relocation will be shown here. This can be important for loan history (see below).

Manager: - the code for the Location Manager that is currently managing the item

Note

For example, if the item has been sent to another branch to satisfy a reservation, that branch's Location Manager code will be shown here.

Status: the item's status. V-smart uses the following statuses:

- In the library
- Out on loan - the due date will be displayed in the Due date field.
- Reservation available for pickup - the item is awaiting pickup at the Manager location. The item may also be available for pickup at another location, this will be shown here when the item has NOT gone in transit to that other pickup location:

Owner	PNB/WP tvb 123 {16 - BO}
Manager	PNB/WP
Status	Reservation available for pickup - PNB/BD (reserved for : C Jansen - 00010454)

- In transit from Institution/Location to Institution/Location - the item is on its way from the first location to the second location.
- Being transferred from Institution/Location to Institution/Location - the item is due to move from the first location to the second location but has not left the first library yet.
- Reservation - not trapped - the item is on the library shelf but has not been trapped for the reservation. If the reservation is on the shelf and not trapped it will also be on a Picklist.

Note

In addition to the statuses assigned by the system, you can also assign a variety of items to an item, for example: 'missing', 'at binder's', 'to cataloguing department', 'temporarily removed from collection', 'to repair department', et cetera. The status can be assigned using special managers in AFO 462 and AFO 463. Or you can assign a status via the Modify status options (see section 423.4.3).

Last loan: shows the date on which the item was lent, followed by the name of the borrower and their barcode number. If the item was never lent, this field will be empty.

Note

This information is changed as soon as the item is lent.

Last renewal: shows the date on which the item was renewed, followed by the name of the borrower and their barcode number. If the item was never renewed, this field will be empty.

Note

This information is changed as soon as the item is renewed.

Due date: the date the item is due for return if it is out on loan. If the item is not on loan, this field will be empty.

Last return: shows the date on which the item was last returned, the time and the location. This information disappears when the item is lent again. If the item was never returned, this field will be empty.

Note

This information is changed as soon as the item is lent.

Previous loans: this field contains up to five previous loans. If the item was never lent, this field will be empty.

Last activity: Records the date of the last activity of this item. Actions that cause update of this field are: loan, renewal, return, trap reservation, trap stack request, sent in collection, received from collection.

No. reservations: the number of current reservations. If there are no reservations, this field will be empty.

Loan history.: the following information is displayed separated by forward slashes (/):

- the total number of loans to date + the total number of renewals.
- the number of loans in the current year.
- the total number of reservations to date

If the parameter in AFO 481- Miscellaneous – Circulation – Loans – *Display loan history by owner* is ON, the system can also differentiate between loans for different owning locations. E.g. an item belongs to location A and has been loaned X times. Then it is permanently relocated to location B. The loan counter for location A is closed and a new loan counter started for location B:

No. reservations	- (current)
Loan history	15 total (14 loans + 1 renewals) / 4 loans (current year) / 10 reservations
Loan history PNB/CEN	1 loans (total) / 1 loans (current year)
Loan history PNB/BD	13 loans (total) / 3 loans (current year)

If later the item is permanently relocated back to location A, the loan counter will not be reset, but new loans will be added to the original count.

423.4 Options on the screen

From the overview screen described above you have the option to perform the following actions.

Note

When there is a transaction for an item and/or you are not the owner of the item, it is not possible to modify certain item details.

Options on the screen

Select a group and click. If allowed, you can make changes to the item data. See section 423.4.1.

Copy: copy the item information to a new item record. See section 423.4.2.

Copy multiple: copy the item information to add multiple new item records. See section 423.4.2.

Delete: delete the item record. This can only be done when there are no transactions and you are the owner.

Item status history: use this option to look at the history of item status changes. See section 423.4.3.

Min/max screen: this option has no function in V-smart.

Modify status: to change the item status. See section 423.4.3.

Borrower: details of the current borrower who has the item on loan, as in AFO 431.

Recall: used to trigger a (manual) recall notice.

Do not recall: do not recall this item if automatic recall is used.

Loans: displays total number of loans and renewals for the item, loans this year and loans in previous years.

Total loans	4 (3 loans + 1 renewals)
Loans this year	2
Loans in 2005	1
Loans in 2006	0
Loans in 2007	0
Loans in 2008	0
Loans in 2009	2

Current item transfer information: details of when the item was currently transferred from where and where to. See section 423.4.4.

Title transfer history: when the item was sent, where to and how often it was sent in the past. See section 423.4.4.

Sublocation administration information: only available if you use sublocation administration.

Reservations queue: This option takes you to the reservations queue as in AFO 422. Only available if there are outstanding reservations for the item.

Return floating stock: Use this option to 'return' one of your items that was elsewhere as floating stock. The system will update the end date of this item's collection to today's date. Standard procedures for sending back items in an overdue collection will prompt the manager location to send the item back to the owner using AFO 462/463.

Export savelist: With this option you can generate a special savelist which can then be used to compare with items on the shelves (stocktaking). See the help of AFO 424 for an introduction.

423.4.1 Select group

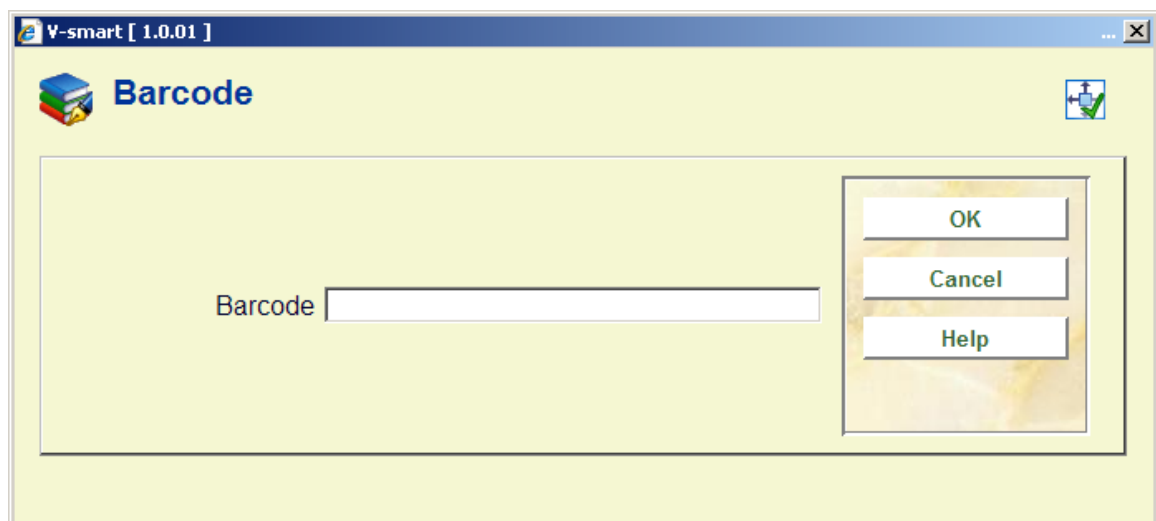
Select a group and click. If allowed, you can make changes to the following item data groups: Barcode, Location, Miscellaneous, Notes, Electronic Holdings.

Note

When an item is on loan, reserved or in transit, certain parts of the item information can not be updated (Institution, Location, Shelfmark algorithm, Item category).

Barcode: Contains the barcode number of the item. After the barcode or copy number has been replaced, the item can be looked up using the original or the new number. Both numbers are displayed in the Barcode field on the Edit items screen. The original number is marked OBC.

Select this line to add a new barcode, an input screen is displayed:



The screenshot shows a software window titled "v-smart [1.0.01]". The window has a light yellow background and a blue header bar. In the header bar, there is a small icon of a book and the text "Barcode". On the right side of the header bar, there is a small icon of a person with a checkmark. Below the header bar, there is a large white text input field labeled "Barcode". To the right of the input field, there is a vertical stack of three buttons: "OK", "Cancel", and "Help".

Location: after choosing this option, the following input form is displayed:

The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is titled "Location" and contains a form with the following fields:

- Institution: PNB
- Location code: BD - BD
- Sublocation code: (empty)
- Shelfmark classification: tvb 123
- Copy number: (empty)
- Shelfmark algorithm: Default

On the right side of the form, there is a panel with the following buttons:

- OK
- Cancel
- Help
- Generate S.
- Search S.

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

Your system administrator may have set a Default shelfmark algorithm in AFO 469. If this is the case, the system will default the shelfmark based on the Default shelfmark algorithm. To generate a shelfmark using the shelfmark algorithm click on the **Generate S** button. A summary screen with shelfmark algorithms is displayed from which you can choose the correct one. You can also use the **Search S.** button. This will result in a summary screen with existing shelfmarks from which you can choose the correct one. You can modify the default data entered in this way.

Please note

The **Generate S** button will only appear if the respective field is defined in AFO 469 – Data to be entered, Data to be corrected.

Miscellaneous: after choosing this option, the following input form is displayed:

V-smart [1.0.01]

Miscellaneous

Item category: 16 (BO)

Item data: []

Number of parts: []

Permission slip

Statistical category: []

Product category: []

Impression: []

Cost: []

Optional statistical category 1: []

Attachment: []

Purchase order number/item number: []

Date to circulate: []

Circulating Stock: []

Inventory number: []

OK

Cancel

Help

Gen. inv. no

The Inventory number field on these forms is protected (you are not allowed to enter data into this field directly). You must use the **Gen. inv. no** button to generate an inventory number, after which an input form will be displayed.

V-smart [1.0.01]

Generate an inventory number

Inventory number: []

OK

Cancel

Help

Inventory number – dropdown list of inventory number range codes as defined in AFO 469 – Inventory number ranges. You can choose an entry from the list, type in a free text number or leave the field empty. If the entry is from the list, the system generates the next number in the

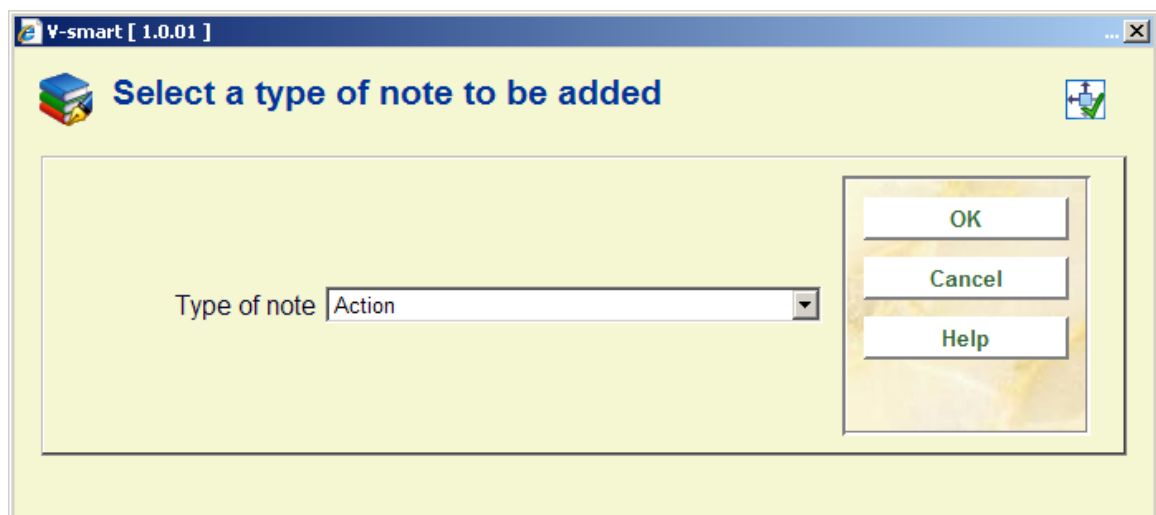
selected range. If the entry is not a code or is a duplicate (already found in the index), the system will display a warning.

You can optionally add a note when adding an inventory number. When entering in a new inventory number, add '.-' (period minus sign) followed by the note. This will generate the next inventory number and add the note field to the end of the generated number.

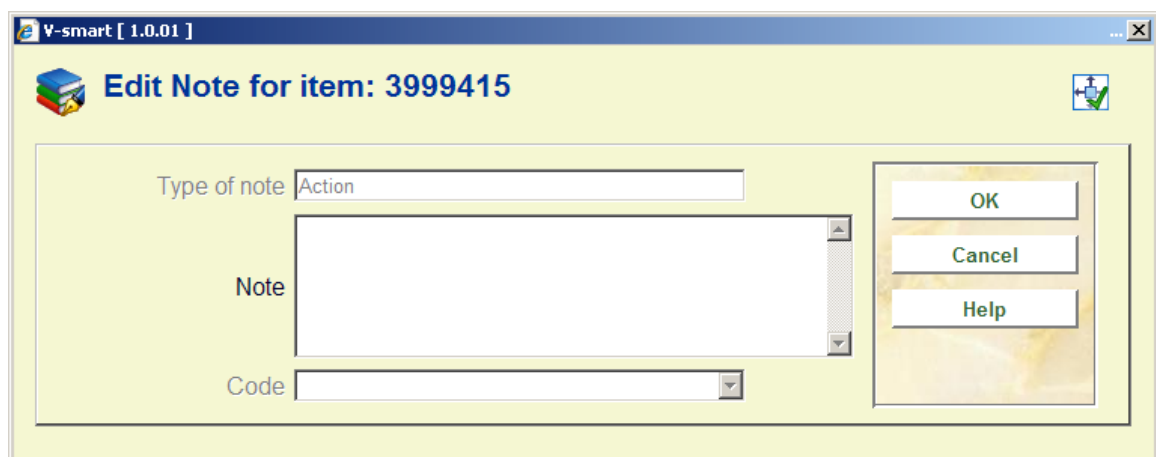
Please note

The **Gen. inv. no** button will only appear if the respective field is defined in AFO 469 – Data to be entered, Data to be corrected.

Notes : after choosing this option, the following input form is displayed:



After having chosen a type a new form is displayed:



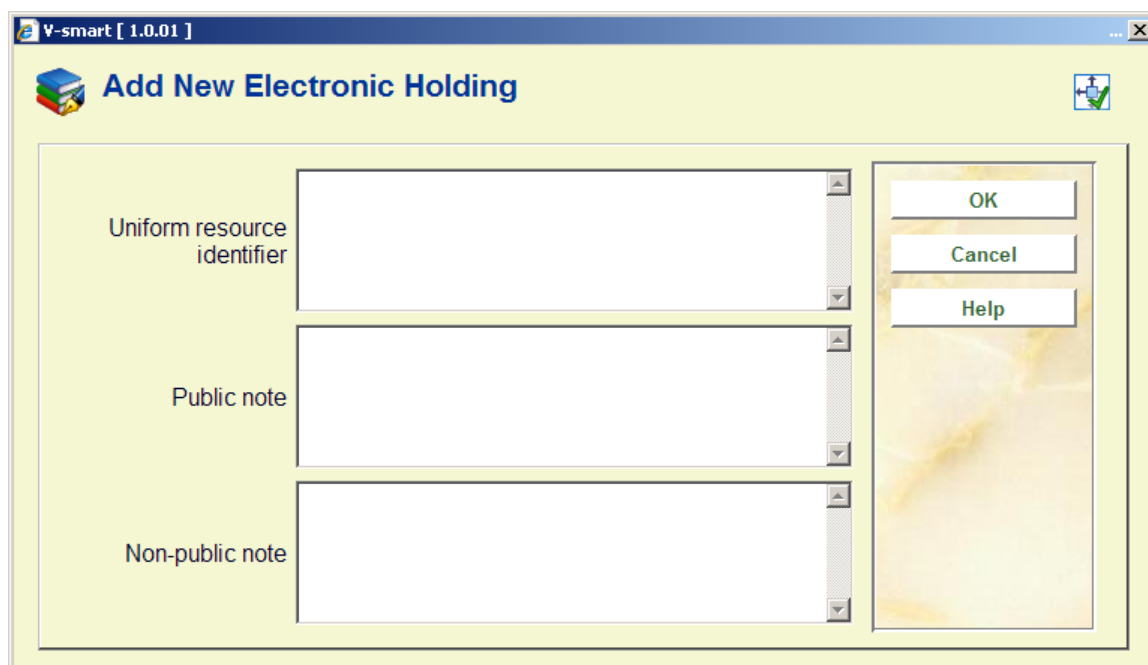
Note

This information is displayed as an alert in Loans and Returns. Depending on the note type a note may also show up in the public catalogue.

In this field the last note of each type (Attachment, Reproduction, Ownership, Non-public, Public, Return, Terms, Version Identification) – as defined in AFO 469 – is shown. The screen shows all types of notes related to the item, sorted by note type. You can add, modify or delete notes here. When adding a new note and there are already notes of that type, you will be taken to the overview screen with notes first.

You must enter either a code or text but not both. All note types except Return, can have multiple notes.

Electronic holdings : after choosing this option, the following input form is displayed:



You can add or update information relating to the electronic holdings . The form contains the fields as defined in 'in use' in AFO 469 in the group Electronic Objects (Item Definition Settings).

423.4.2 Copy

There are various ways to add items to a title by copying information.

Copy: copy the item information to a new item record. After choosing this option the following form will be displayed:

Note

The fields displayed on the input form depend on definitions in AFO 469 – Data to be entered.

V-smart [2.0] -- Webpage Dialog

Enter a new item

Barcode

Institution

Location code

Sublocation code

Shelfmark classification

Shelfmark Suffix

Shelfmark algorithm

Item category

Statistical category

Attachment

Cost

Purchase order number/item number

CirculatingStock

Inventory number

Loan status

SWAN date last processed

SWAN original cost

OK

Cancel

Help

Generate S.

Search S.

Gen. inv. no

Clear loan status

Auto item BC

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23005 Local intranet

The fields marked in AFO 469 (Item Definition Settings) as to be copied, will be filled with data from the current item. Each field selected, even if not shown on this form, will be copied. This information can be modified.

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

Enter a new item

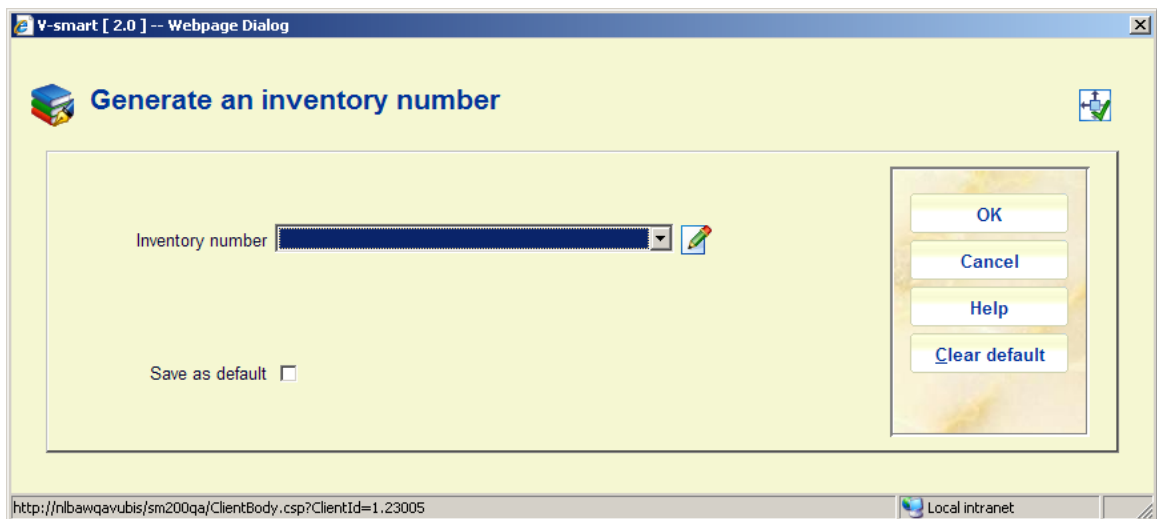
Barcode

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.

Your system administrator may have set a Default shelfmark algorithm in AFO 469. If this is the case, the system will default the shelfmark based on the Default shelfmark algorithm. To generate a shelfmark using the shelfmark algorithm click on the **Generate S** button. A summary screen with shelfmark algorithms is displayed from which you can choose the correct one. You can also use the **Search S**. button. This will result in a summary screen with existing shelfmarks from which you can choose the correct one. You can modify the default data entered in this way.

The Inventory number field on these forms is protected (you are not allowed to enter data into this field directly). You must use the **Gen. inv. no** button to generate an inventory number, an input form will be displayed:



Inventory number – dropdown list of inventory number range codes as defined in AFO 469 – Inventory number ranges. You can choose an entry from the list, type in a free text number or leave the field empty. If the entry is from the list, the system generates the next number in the selected range. If the entry is not a code or is a duplicate (already found in the index), the system will display a warning.

You can optionally add a note when adding an inventory number. When entering in a new inventory number, add ‘.-’ (period minus sign) followed by the note. This will generate the next inventory number and add the note field to the end of the generated number.

When you click **OK** on this form, the system returns to the add/update form with the new inventory number.

The Loan status field on these forms is protected. You must use the **Clear loan status** button if you want to clear this status.

If the item you copied from has a loan status with the parameter '*Do not trap new items for a reservation*' set (see the help of AFO 481 – Loan status codes), this status will be copied; provided the field is set for copying in AFO 469 – Item definition settings – Miscellaneous.

If the item you copy from has no loan status or a loan status that does NOT have the parameter '*Do not trap new items for a reservation*' set, the status will NOT be copied. Neither will the default status for new items as defined in AFO 469 – Miscellaneous be applied if the item you copy from has no special loan status. This means that newly added items WILL be trapped for a reservation if they are copied from an item that does not have a loan status with the parameter '*Do not trap new items for a reservation*' set.

If a status has been copied and you do not want this, you can clear the status in the normal way via the **Modify status** option, button, **Clear status**.

Please note

The **Generate S, Gen. inv. no** and **Clear loan status** buttons will only appear if the respective fields are defined in AFO 469 – Data to be entered, Data to be corrected.

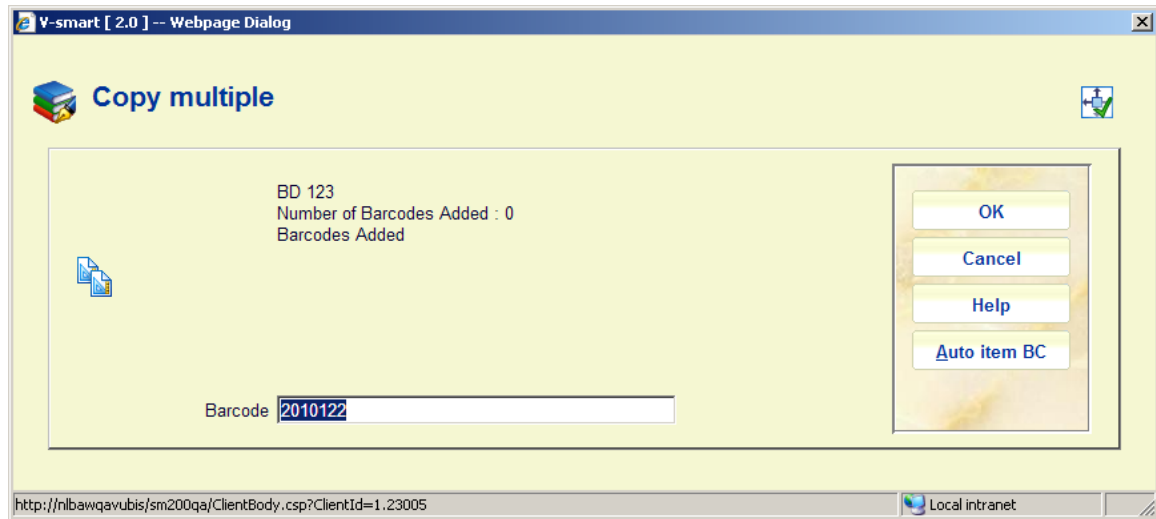
After clicking **OK** on the Enter a new item form, the overview screen of the item will be displayed.

Copy multiple: copy the item information to add multiple new item records. After choosing this option the following form will be displayed:

The screenshot shows a web browser window titled "V-smart [2.0] -- Webpage Dialog". The main content area has a light yellow background and is titled "Copy multiple" with a small icon of stacked books. Below the title, there is a copy icon and the following text: "BD 123", "Number of Barcodes Added : 1", and "Barcodes Added 2010122". At the bottom left of the main area, there is a label "Barcode" followed by an empty text input field. On the right side, there is a vertical stack of four buttons: "OK", "Cancel", "Help", and "Auto item BC". The bottom status bar of the browser window displays the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23005" and "Local intranet".

Scan a barcode and a new item will be created using fields marked in AFO 469 (Item Definition Settings) as to be copied. Every time after clicking **OK**, you can add another barcode. The counter after **Number of barcodes** entered, will be incremented automatically. When you have finished adding barcodes you click on **Cancel**. Now you will be shown the overview screen for the *last* item just added

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



If the item you copied from has a loan status with the parameter '*Do not trap new items for a reservation*' set (see the help of AFO 481 – Loan status codes), this status will be copied; provided the field is set for copying in AFO 469 – Item definition settings – Miscellaneous.

If the item you copy from has no loan status or a loan status that does NOT have the parameter '*Do not trap new items for a reservation*' set, the status will NOT be copied. Neither will the default status for new items as defined in AFO 469 – Miscellaneous be applied if the item you copy from has no special loan status. This means that newly added items WILL be trapped for a reservation if they are copied from an item that does not have a loan status with the parameter '*Do not trap new items for a reservation*' set.

If a status has been copied and you do not want this, you can clear the status in the normal way via the **Modify status** option, button, **Clear status**.

423.4.3 Modify status

Modify status: to change the item status. This can be used to set items to 'claimed returned', 'missing' etc. After choosing this option the following form will be displayed:

The screenshot shows a software window titled "V-smart [1.0.01]" with a subtitle "Add or update item status details". The window contains a form with the following elements:

- Loan status type:** A dropdown menu.
- Notes:** A large text area for entering comments.
- User date:** A text input field.
- Created by:** A label at the bottom left.
- Buttons:** A vertical stack of buttons on the right: "OK", "Cancel", "Help", and "Clear status".

If the item was already set to some special status, then the form will be shown with the current values completed, and may be used to update or change the status.

Fields on the screen

Loan status type: choose a type from the dropdown list. Different types result in different behaviour of the system. See the Help on AFO 481 – Main circulation parameters – Loan status code settings for more information.

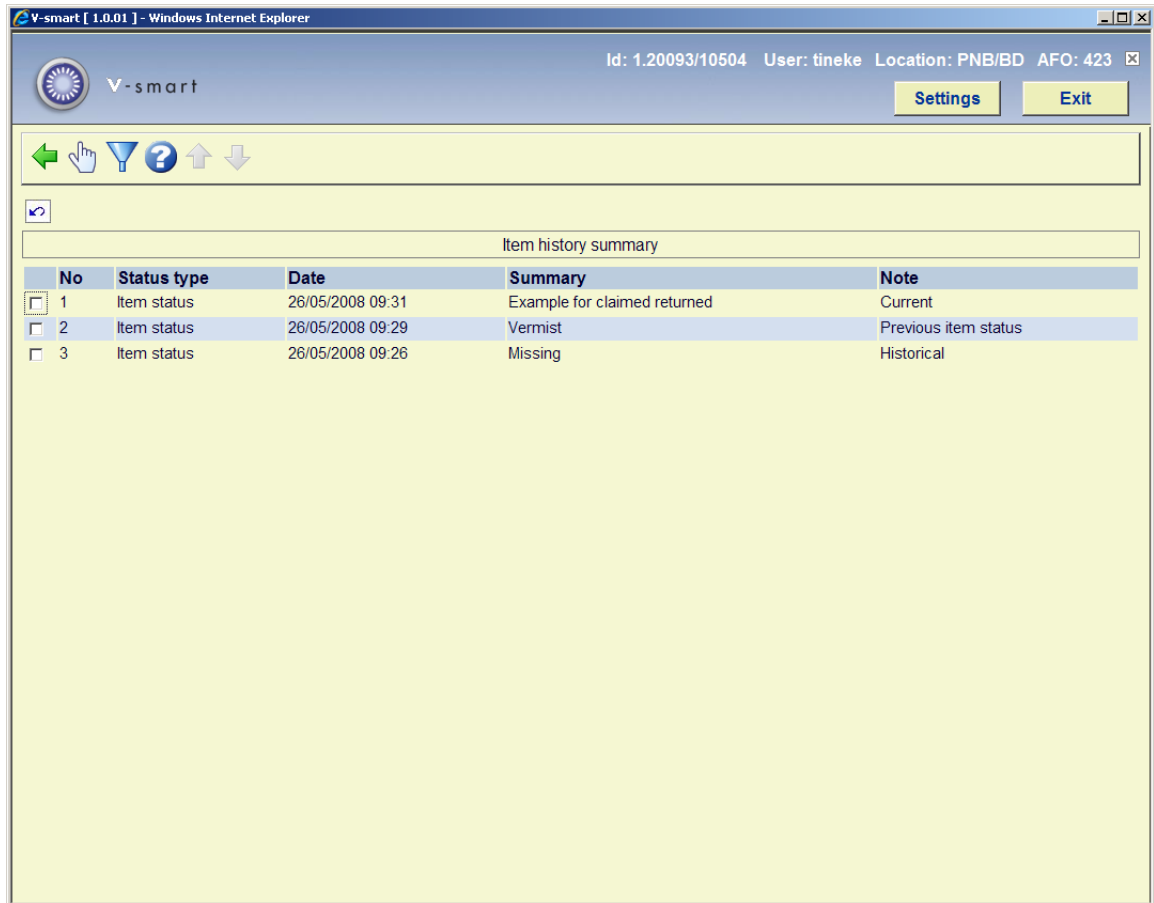
Notes: Optionally add comments. It is also possible to simply add a note to the item, by leaving the loan status empty.

User date: Optionally you can enter the date on which the user claims he/she already returned the item.

A previous status may be removed by using the “**clear status**” button or by clearing the data fields on the input form.

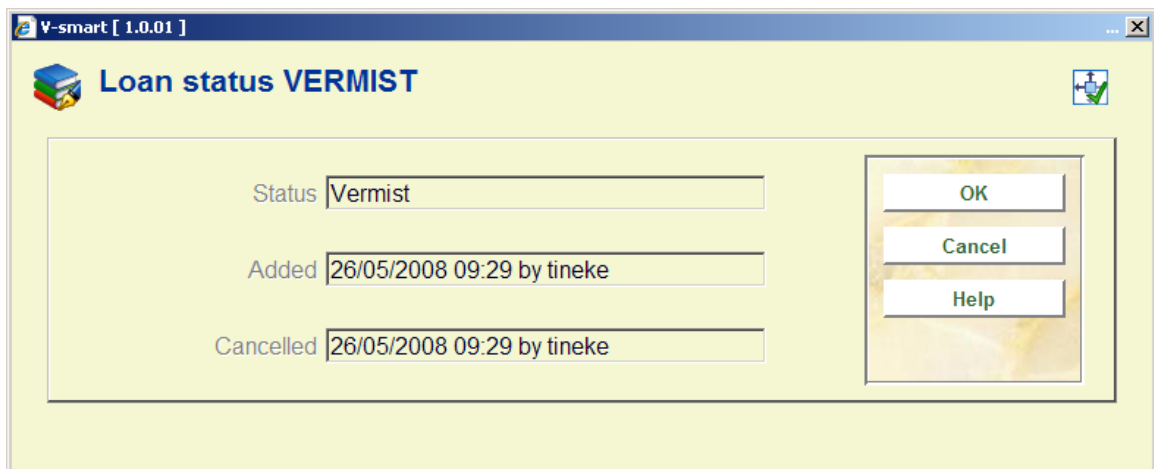
423.4.3.1 Item status history

Items which have had a loan status set will have some of the details of the original loans together with relevant details of the loan status. When a loan status code changes, then we keep a history of these changes i.e. to track the change of claimed returned, to lost.(for example). This history can be displayed by using the **Item status history** option. After choosing this option the following overview screen will be displayed:



The **Note** column displays in what state the various statuses are.

You can double click on a line to see the historical details of the selected status. This may vary for different statuses.



Whether or not historical information is retained for a status depends on a parameter in AFO 481 – Main circulation parameters – Loan status code settings. However the system always

keeps the PREVIOUS setting for an item, when the loan status is cleared. For example, we keep a note that an item HAD been set to Lost even when it has been found.

423.4.4 Item transfer information

Current item transfer information: Use this option to obtain information about an item that is involved in a transfer between libraries. The option will be greyed out if the item is not related to a current transfer. If an item has been moved from one location to another (AFO's 462 and 463) or has been given a special status, the information will be shown here.

The screenshot shows the V-smart web application interface. At the top, the browser title is "V-smart [1.0.01] - Windows Internet Explorer". The user interface includes a logo, a user ID "1.20093/10504", a username "User: tineke", a location "Location: PNB/BD", and an AFO number "AFO: 423". There are "Settings" and "Exit" buttons. Below the navigation bar, there are navigation icons (back, home, forward, search, refresh, print). The main content area displays item details for item 87855:

- Title: The vulcan academy murders [DVD-Video] / Jean, Lorrh
- Shelfmark: [PNB] BRA F Lor (MISC)
- Date added: 01/12/2004 Phil.Oxléy
- Date updated: -
- Owner: PNB/BD F Lor {1 - MISC}
- Manager: PNB/BRA to 23/06/2008 (collection 2455 on 26/05/2008)
- Status: In the library
- Last loan: -
- Due date: -
- Last return: -
- No. reservations: - (current)
- Loan history: -

Below the details is a section titled "Item detail entry - Item: 87855" containing a table of transfer history:

No	Transfer	Collection	From	To	Date
<input type="checkbox"/> 1	Added to collection	2455	PNB/BD	PNB/BRA	26/05/2008
<input type="checkbox"/> 2	Collection sent	2455	PNB/BD	PNB/BRA	26/05/2008
<input type="checkbox"/> 3	Collection received	2455	PNB/BD	PNB/BRA	26/05/2008

Title transfer history: when the item was sent, where to and how often it was sent in the past. The screen shows all managers who have ever received the item, how often this happened and the date of the last transfer.

V-smart [1.0.01] - Windows Internet Explorer

Id: 1.20093/10504 User: tineke Location: PNB/BD AFO: 423

V-smart Settings Exit

← ? ↑ ↓

↶

Title	Star child / James P Hogan / James P., Hogan
Shelfmark	[PNB] BD QA1234 (BO)
Date added	04/05/2004 Super User
Date updated	26/05/2008 tineke
Owner	PNB/BD QA1234 {24 - TALKBOOK}
Manager	PNB/BD
Status	Claimed 26/05/2008 09:31
Last loan	on 26/05/2008 (09:20) to:Jansen, A.E.M. (00020867)
Due date	-
Last return	-
Previous loans	on 19/12/2007 (16:29) to:Pietjouw, C.H.C. (00012690) returned on 26/05/2008 (09:20) at PNB/BD on 19/12/2007 (16:27) to:Jansen, C (00010454) returned on 19/12/2007 (16:28) at PNB/BD on 19/12/2007 (16:27) to:Blankers, P.A. (900021036) returned on 19/12/2007 (16:27) at PNB/BD
No. reservations	- (current)
Loan history	4 loans (total) / 1 loans (current year) / 14 res. (total)

Item detail entry - Item: 3999415

No	Manager	Number	Last loan date
<input type="checkbox"/> 1	PNB/BD	1	05/05/2004
<input type="checkbox"/> 2	PNB/BRA	3	01/06/2004

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
1.1	January 2009	info on inventory numer & note	
2.0	August 2009	more info on header portion of screen; changes to item update; new option Return floating stock; new option Export savelist; ability to see the number of renewals part of 2.0 updates	
3.0	October 2010	new parameter for loan history display; new automatic barcode feature; clear loan status button; [bracket for item barcode; new field Last activity part of 2.0.06 updates	