

AFO 461 – Location manager control

461.1 Introduction “Item transfers”

This AFO forms a part of the function group 'Item transfers'. Using 'Item transfers' you can perform all 'temporary transfers' of items within your system, with the exception of the loan itself. However, items that are sent to another library location using item transfers can be checked out to borrowers at that location as normal. Use AFO 411 ('Loans') for this purpose. In general, the function group is used to temporarily move items. In concrete terms, this function group can be used to perform, for example, the following 'transfers':

- Control of rotating collections (to other library locations, schools, senior citizens' homes, prisons, hospitals, etc.).
- Assigning a status to items

In addition to the general statuses assigned by the system, you can also assign a variety of library defined status types to an item, for example: 'at binder's', 'to cataloguing department', 'temporarily removed from collection', 'to repair department', et cetera. The status can be assigned using AFO 462 and AFO 463.

Special item status codes can be used to provide additional details on an item (Lost, Claim returned Damaged etc.) which are defined in AFO 481 – Loan Status code settings and applied to each item via the Modify status option (e.g. in AFO 423).

Note

The Loan Status code is used to append to the system status of an item on the display. Its behaviour will override the system status until it is cleared.

Example: an item is sent to the cataloguing department (manager). On arrival of the collection, a manual status is applied to the item stating it is perhaps lost in shipment so the Modify status is used to assign this code.

The result on the display is:

Status Cataloguing dept : Lost in Shipping 6/14/07 16:58

If the Lost in Shipping status is removed the item is still In Cataloguing department until it is received at the online location again.

- Sending items with reference to the reservation request circulation.

The transfer of items can be used for 'bulk processing'. Large numbers of items can be sent or received simultaneously. The system uses the term 'collection' for this purpose. A package of items that is sent simultaneously is considered a collection. A collection can have one of many statuses.

- Under construction: the collection is being 'filled'.
- Closed: the collection is closed and ready to be sent to the addressee.
- Received: the addressee has received the collection.

The AFO's that play a role in the transfer of items are the following:

- AFO 461 (Location manager control)
- AFO 462 (Item transfer (modify shelfmark))
- AFO 463 (Item transfer (retain shelfmark))
- AFO 489 (Item transfer parameters)

In addition, the following AFO's play a role in the transfer:

- AFO 478 (Library defined loan statistics)
- AFO 451 and AFO 452 (Borrower notices)

461.2 Managers

Vubis Smart distinguishes between three types of Location manager.

- Online managers - the automated institutions/locations in your library network.
- Offline managers - institutions/locations that are not an active part of your automated library network, for example, senior citizens' homes, schools, prisons, hospitals and non-automated branches.

- Administrative managers - virtual locations used as statuses that can be assigned to an item, for example sent to binding, temporarily part of an exhibition. Administrative managers may also be used for departments within a location.

Every location manager must be assigned a manager type. The distinction between offline and administrative managers is often discretionary. A binder, for example, could be an off-line manager or an administrative manager. The choice of manager type is important because the procedure for sending and receiving collections differs, depending on the type of manager.

	Online manager (1)	Offline manager (2)	Administrative manager (0)
Close the collection	Explicit	Explicit	Implicit
Manager may receive items	Explicit	Implicit	Implicit
Manager may return items	Explicit	No	No
Modify shelfmark	Yes	Yes	No
Loans	Yes	No	No

Close the collection

When the system exits from the collection, it will ask whether the collection is to be closed. This must be done explicitly by online and offline managers but is assumed for administrative managers. In practice, the term collection is not really applicable to administrative managers.

Manager may receive items

When a collection is sent to an online manager, it must be physically received. This step is implicit for offline managers because they do not have access to the system. The collection is assumed to have been received as soon as it is sent. For administrative managers receiving is not applicable, because the term collection is not really applicable.

Manager may return items

Only online managers can return collections since they are the only type of manager who can receive collections in the first place. With offline managers the collection has to be received back by the online manager who owns the items. Items located with an administrative manager can be put back into circulation by being received by their owning online manager.

Modify shelfmark

Collections can be sent with or without the shelfmark being modified. When sending a collection to online or offline managers, the choice is optional. When an item is sent to an administrative manager the shelfmark is never modified.

Loans

Items that are sent to an offline or an administrative manager cannot be lent because they are effectively outside the online system. When an item is sent to an online manager it can be lent from that location once it has been received.

Note:

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': managers can enter, delete, modify and view; you can use all of the options available in AFO 461;
- 'view facilities': managers can view only; no authorisation is given for all other options in AFO 461.

Using AFO 611 ('Password control'), you can indicate which passwords are to be given 'system facilities' in AFO 461.

461.3 Location manager control

When you choose this option, a search window is displayed for you to identify a location manager.

Enter part of the name of a location manager or a location manger code and click **OK**. An overview screen will be displayed similar to the screen resulting from the **All** button. This is described further in Section 461.3.1 'Overview screen manager'.

Manager's can be searched for in the following manner:

- String XXX – This results in a list containing all manager's with the string XXX at the beginning of Name: Main Part, Name: 2nd part or if the string is the location code portion of the manager code. Example: a search for MIS would retrieve managers MISAAA, MISBBB but not manager ZZZMIS.

If there is no direct match - you go to the list even if there is only one match.

- Direct Match method:

- /Code = retrieves the Location CODE entered, if the location manager belongs to your current institution, example: /BD

- inst/code – direct match on the Inst/ location code - retrieves the Manager specified, example: PNB/BD

If you click the **All** button to display a list of all the location managers a further screen will be displayed showing the managers retrieved. This is described further in Section 461.3.1 'Manager survey screen'.

You can also choose **New record**. In that case you will be presented with the following screen.

The screenshot shows a web browser window titled "V-smart [2.0.01] -- Webpage Dialog". The main content area is a form for configuring a manager. The form includes the following fields and options:

- Name (main part)
- Name (part 2)
- Display in WebOpac
- Manager's code
- Address
- Postcode
- City
- Contact name
- Phone no.
- Item transfer periods
- Selection period
- Type of manager: Administrative, Online, Offline
- Send items with reservations to offline/administrative manager
- Are items at this location considered missing?
- Location number for ERP
- Save settings

On the right side of the form, there are three buttons: "OK", "Cancel", and "Help". The "OK" button is highlighted. The status bar at the bottom shows the URL "http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23001" and "Local intranet".

The fields in this screen are discussed in the next sections. After entering the required data the overview screen of that manager will be shown.

461.3.1 Overview screen manager

V-smart [1.0.01] - Windows Internet Explorer

Id: 1.20042/572 User: tineke Location: PNB/BD AFO: 461

V-smart Settings Exit

← ? ↑ ↓

<input type="checkbox"/>	No.	Manager	Institution/Location
<input type="checkbox"/>	1	OAP home 10	PNB/OAP10
<input type="checkbox"/>	2	OAP home 11	PNB/OAP11
<input type="checkbox"/>	3	OAP home 12	PNB/OAP12
<input type="checkbox"/>	4	OAP home 13	PNB/OAP13
<input type="checkbox"/>	5	OAP home 14	PNB/OAP14
<input type="checkbox"/>	6	OAP home 15	PNB/OAP15
<input type="checkbox"/>	7	OAP home 16	PNB/OAP16
<input type="checkbox"/>	8	OAP home 17	PNB/OAP17
<input type="checkbox"/>	9	OAP home 18	PNB/OAP18
<input type="checkbox"/>	10	OAP home 19	PNB/OAP19
<input type="checkbox"/>	11	OAP home 20	PNB/OAP20
<input type="checkbox"/>	12	OAP home 21	PNB/OAP21
<input type="checkbox"/>	13	OAP home 22	PNB/OAP22
<input type="checkbox"/>	14	OAP home 23	PNB/OAP23
<input type="checkbox"/>	15	OAP home 24	PNB/OAP24
<input type="checkbox"/>	16	BACKOFFICE 2nd part department	PNB/BACK
<input type="checkbox"/>	17	deleteme 2nd part	PNB/DELETE
<input type="checkbox"/>	18	AAtop AAtop	PNB/AATOP
<input type="checkbox"/>	19	HOMEE Test HOME as a code for department	PNB/HOME
<input type="checkbox"/>	20	AWOL	PNB/AWOL
<input type="checkbox"/>	21	BD	PNB/BD
<input type="checkbox"/>	22	test beheerder	PNB/T
<input type="checkbox"/>	23	Binding	PNB/BIND
<input type="checkbox"/>	24	BRA TEST BRA	PNB/BRA
<input type="checkbox"/>	25	C-FLY C-FLY	PNB/CFLY
<input type="checkbox"/>	26	Cataloguing department	PNB/CAT
<input type="checkbox"/>	27	CEN Katharine Walker	PNB/CEN
<input type="checkbox"/>	28	Repair department	PNB/BRD
<input type="checkbox"/>	29	Geac Development	PNB/DEV
<input type="checkbox"/>	30	EAST	PNB/EAST
<input type="checkbox"/>	31	EXCLU DU PRET	PNB/EXCLU
<input type="checkbox"/>	32	Frances	PNB/FR

Choose a manager and click on the **Select no. (+)** button. The manager definition will be displayed:

No.	Section	Field	Data
<input type="checkbox"/>	1 Name	Main part	erp
		2nd part	ERP for AFAS output
		Display in WebOpac	
<input type="checkbox"/>	2 Manager		PNB/ERP
<input type="checkbox"/>	3 Address	Address	
		Postcode	
		City	
		Country	
		External number	
<input type="checkbox"/>	4 Contact	Contact	
		Phone	
		Language	
<input type="checkbox"/>	5 Parameters	Item transfer periods	
		Selection period	
		Type of manager	0
		Area	
		Status	
		Type of institution	
		Maximum no. of items	
		Overdues	
		Barcode	
		Send reserved items (1=Yes)	1
	Items at this location considered missing (1=Yes)	0	
	Location number for ERP	erp number	
<input type="checkbox"/>	6 Note	Items at this location considered to be not 'On Shelf' for reservations (1=Yes)	

Fields on the screen

Name: This field consists of the following three sub-fields:

- Main part: this field indicates the head section of the manager;
- 2nd part: this field indicates the manager in more detail;
- Display in WebOpac: this field indicates how the manager shown in the WebOpac. This text is shown as the wording of the manager (the location), as part of the call number.

Please note!

A manager can be sought within AFO 461 based on any significant word in the field 'main part' and '2nd part'.

Please note!

The distinction between the fields 'main part', '2nd part' and 'Display in WebOpac' make it possible to include the manager in the system under his/her own name and display this in the WebOpac under a broader reference, e.g. 'Temporarily on loan to location'.

Manager: This field displays the manager code. This code consists of an agency and a location code. The two codes are separated by a "/" (slash) and may each consist of a maximum of eight characters.

Please note!

The manager code may not be changed after entry; if it is entered incorrectly, the manager must be deleted and re-entered using the correct code.

Address: This field consists of the following sub-fields:

- Address: this field contains the street and house number of the manager;
- Postcode: this field contains the manager's postal code;
- City this field contains the manager's city;
- Country this field contains the manager's country;
- External number: this field contains an external number; this number can be used to link up with an external system.

Contact: This field consists of the following three sub-fields:

- Contact: this field contains the name of the manager's contact;
- Phone: this field contains the manager's telephone number;
- Language: this field contains the manager's language;

Parameters: This field consists of the following sub-fields:

- Item transfer periods: Enter two numbers, separated by a comma.

- 1st – the default number of days that the manager may keep items. You should set a period that is at least the number of days that an item can stay Available for pickup on the reservation shelf. If you are using manual item transfers you can set the period to be the length of time you want the collection of items to remain at the location.

Note: The period may be changed for each individual collection and it can be modified after a collection has been Received.

- 2nd - the number of days that an item should remain at another location after being loaned (typically to satisfy a reservation but not necessarily - any loan will behave in the same way). This will normally be set at 0 for Online location managers. If you do not set this to 0 then items returned after being loaned will not automatically go into transit to the home location.

- Selection period: this field plays a role in the composition of collections for a manager. The system is namely (using SSP) capable of composing lists of items that have not been at the manager's during n number of days. When compiling these lists, the system applies the period indicated here; items that have not been sent to the manager during the number of days defined as the selection period can be included on the list. In addition, the selection period plays a role in a similar function: when sending items to a manager, the system checks whether the relevant items have not already been sent to the manager within n number of days (in particular: the number of days applied as the selection period); if the item has been sent to the manager within this period, the system will indicate this and offers the option of not sending the item to the manager (again). If no selection period is entered, the system applies the default value of 365 days.

- Type of manager: this field indicates what type of manager this manager is;

- Area, Status and type of institution: entries can be made in these fields at your own discretion. They have been included for use in the future and do not have a function within the system for the time being.

- Maximum number of items: this field indicates the maximum number of items that the relevant manager may have in his/her possession (cumulative total). If this number is unlimited, enter "999999".

- Overdues: this field indicates the overdue periods for the first through fourth overdues, separated by commas. The overdue period for the first period indicates the number of days with reference to the due date; the other periods indicate the number of days with reference to the previous overdue.

- Barcode: if the manager is a 'registered borrower', the borrower barcode can be entered here. This sub-field then links this record to the borrower record. This link does not have a function in the system at this time.

- Send reserved items: If set to Yes, it means it is allowed to send items that are reserved to this manager. This option is not available for online managers.

- Items at this location considered missing: This functionality is retained for compatibility with earlier versions. It has been superseded by the option to assign a Loan status code of 'missing' (see the help on AFO 423 and 481 for more information on Loan status codes).
- Location number for ERP: The location number for ERP export to AFAS (functionality for the Dutch market)
- 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. This parameter interacts with the parameter In AFO481 – Reservations – Miscellaneous - *Reservation of on shelf items allowed* as follows:
 - 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.

OR

- AFO481 - Reservation of on shelf items allowed = ON
- AFO461 – Items are considered not 'On shelf' for reservations = ON or OFF (ignored) Then: reservation allowed.

Note: This field contains a free message that does not play any functional role in the system.

Options on the screen

Modify information (+): Select a piece of information and then this option to modify it. When you select this option, an input screen will be displayed.

Please note!

The manager code may not be modified.

Delete manager: Use this option to delete a manager.

Please note!

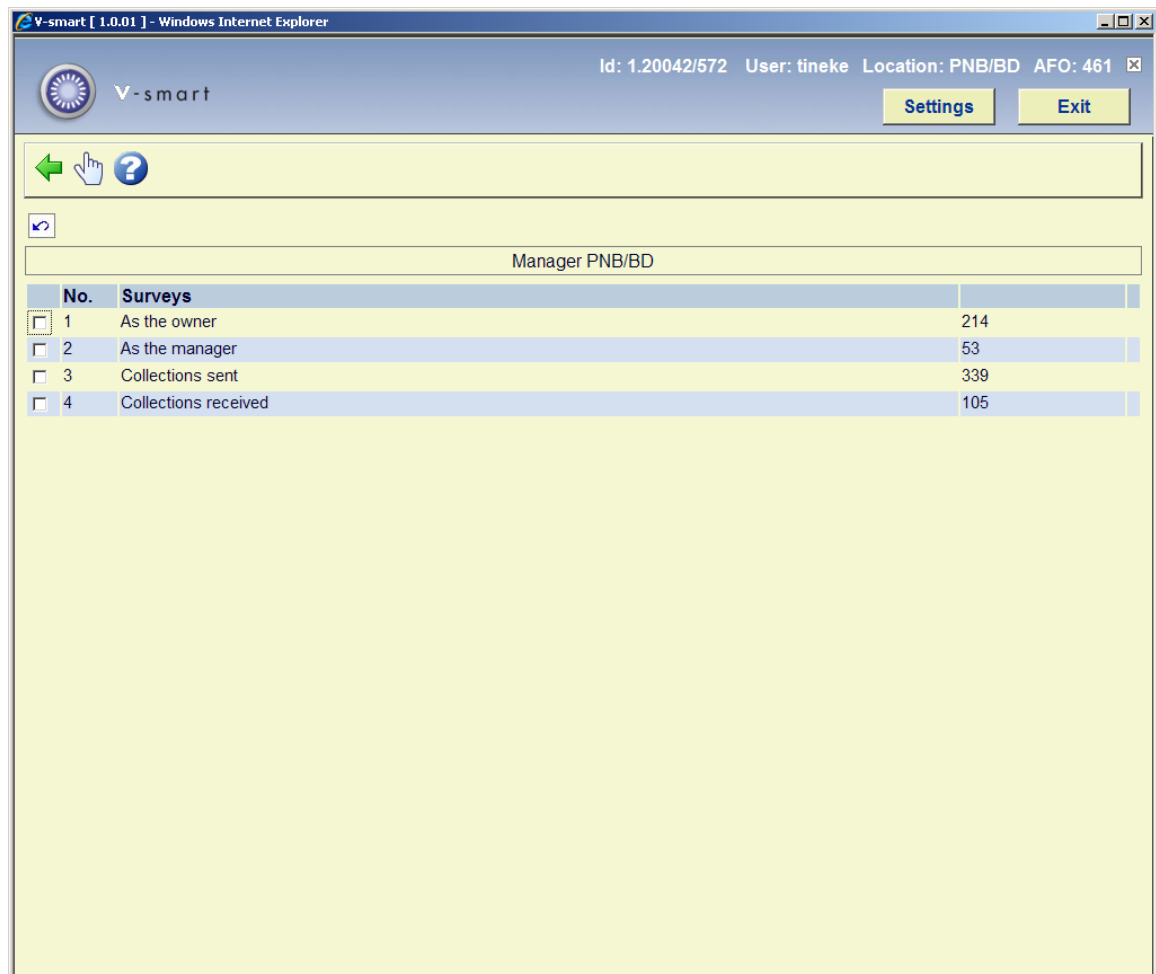
A manager may not be deleted if s/he is still involved in the transfer of one or more items.

Overviews: Select this option to view a number of lists pertaining to the transfer of items. When you select this option, a survey screen will be displayed. This option is explained in the section below.

The system maintains online overviews of all items that are moving. For each manager, the system maintains an overview of:

- all items that have been sent from owner A to other managers (by which overviews per manager as well as a total overview is made available);
- all items that have been sent to owner A by other managers (by which overviews per manager and a total overview is made available);
- all collections that owner A has sent to other managers;
- all collections that other managers have sent to owner A..

If the 'Overviews' option is selected on the survey screen for a manager, an overview screen is displayed:



In this screen, the four overviews are displayed that the system maintains. After the first two overviews, the system indicates the number of *items* involved; after the last two, it indicates the number of *collections* involved.

Select an overview and then this option in order to view the relevant overview. When you select this option, a survey screen will be displayed. If there are no overviews, an error message will be displayed.

Survey screen for the overviews 'As owner' and 'As manager'

No	Manager	Number
<input type="checkbox"/> 1	Binding	2
<input type="checkbox"/> 2	BRA TEST BRA	20
<input type="checkbox"/> 3	Cataloguing department	7
<input type="checkbox"/> 4	CEN Katharine Walker	54
<input type="checkbox"/> 5	deleteme 2nd part	2
<input type="checkbox"/> 6	NORD	1
<input type="checkbox"/> 7	Philtest	1
<input type="checkbox"/> 8	Scsschool library	4
<input type="checkbox"/> 9	test beheerder	1
<input type="checkbox"/> 10	Vermist	120
<input type="checkbox"/> 11	Wp VSMART Work Place	14
<input type="checkbox"/> 12	ZZtop ZZtopper	1
<input type="checkbox"/> 13	ZZZ	1
<input type="checkbox"/> 14	Total	214

Columns on the screen

Owner or Manager: This field contains the name of the manager to which the items have been sent by the selected manager (in the overview: 'As owner'), or the name of the manager who has sent the items to the selected manager (in the overview: 'As manager'), respectively.

Number: This field contains the number of items sent from the selected manager to the manager in the overview, or the number of items that the manager in the overview has sent to the selected manager, respectively.

Options on the screen

Modify due date (+): this option enables you to modify the due date of the items that the manager is responsible for.

Please note!

After using this option, your modification will not be displayed. Use the option 'View list of items (+)' to view the (new) due date

List of items (+):- this option enables you to view a list of the items that the manager has received. After choosing this option an overview screen is displayed:

The screenshot shows the V-smart application interface. At the top, there is a header bar with the text "V-smart [1.0.01] - Windows Internet Explorer" on the left, and "Id: 1.20042/572 User: tineke Location: PNB/BD AFO: 461" on the right. Below the header, there are two buttons: "Settings" and "Exit". A toolbar with various icons (back, forward, search, etc.) is located below the header. The main content area displays a table with the following columns: No., Item, Title, Coll. (status), Sent, and Due. The table contains 14 rows of data, each representing an item with its respective details.

No.	Item	Title	Coll. (status)	Sent	Due
1	644	C-fly record	2388 (Received)	04/04/2008	18/04/2008
2	5006	Created CFLY record in 464 for Lenen Loont	2402 (Sent) Offline 14/04/2008	07/04/2008	21/04/2008
3	222007	A history of the Dakota or Sioux Indians from their earliest traditions and	2218 (Received)	07/08/2007	07/08/2007
4	222009	Epidemics and history :	2220 (Received) Lost Paid for 15/08/2007	07/08/2007	31/12/2007
5	665321	Dragoncharm / Graham Edwards	1816 (Sent)	23/11/2004	23/11/2004
6	865553	The Baker's Boy / J.V. Jones	1847 (Sent)	03/12/2004	03/12/2004
7	992345	Het groene eiland / Wim Gijzen	1813 (Received)	15/11/2004	15/11/2004
8	6576474	Dochter der regalen / Stephen Donaldson	1851 (Sent)	10/12/2004	10/12/2004
9	6664321	De diamanten troon / David Eddings	1928 (Sent)	05/07/2005	05/07/2005
10	9878585	The Death of Chaos / L.E. Jr. Modesitt	1897 (Sent)	04/05/2005	04/05/2005
11	1110111	Harry Potter and the philosopher's stone / J.K. Rowling.	1760 (Received)	15/06/2004	29/06/2004
12	1	Zombies / Bret Easton Ellis ; traduit de l'américain par Bernard Willerval	1413 (Not sent)	13/03/2003	13/03/2003
13	ADD123	C-fly record -- Book]	2216 (Received)	03/08/2007	30/05/2007
14	12003PNB0031	Red is an American color; Red star rising with carets or without carets : SUBTITLE / Anne McCaffrey	1619 (Received)	29/10/2003	12/11/2003

Columns on the screen

Item: The item number of the item is shown in this field.

Title: This field contains part of the title of the item.

Coll (status): The collection number of the collection in which the item is included is displayed in this field. The status of the collection is displayed in parentheses.

Sent: The date that the collection was sent is displayed in this field.

Due: The due date of the item is shown in this field.

Options on the screen

Item info (+): Select an item and then this option in order to view more information about the item. Once you have selected this option, the system will switch through to AFO 423 ('Item control'). Read the description for this AFO for more information.

Output: Select this option to create output. When you select this option, an input screen will be displayed. Indicate the type of output you want to create. The system distinguishes between the following types:

- Unsorted standard print format;
- Sorted standard print format: sorted based on author and title using the !Author and !Title element group profile definitions.
- Vubis.
- File via export profile; allows for export in ISO2709 format

Unblock: Select this option to unblock all items in the overview.

Display from item: This option can be used to browse through the list and go directly to the item entered.

Copy to savelist: Select this option to include items in the list in a save list. When you select this option, an input screen will be displayed. Enter a save list (or select a save list from the list of existing save lists) and enter, if desired, a comment.

Block: Select this option to block all items in the overview. The items can then no longer be checked out.

Survey screen for the overviews 'Collections sent' and 'Collections received'

No	Collection	Number
<input type="checkbox"/>	1 Collection 2475 to PNB/CEN on 12/06/2008	1
<input type="checkbox"/>	2 Collection 2474 to PNB/CEN on 12/06/2008	1
<input type="checkbox"/>	3 Collection 2458 to PNB/CEN on 30/05/2008	1
<input type="checkbox"/>	4 Collection 2457 to PNB/CEN on 30/05/2008	1
<input type="checkbox"/>	5 Collection 2455 to PNB/BRA on 26/05/2008	1
<input type="checkbox"/>	6 Collection 2436 to PNB/BD on 22/05/2008	1
<input type="checkbox"/>	7 Collection 2435 to PNB/BRA on 21/05/2008	1
<input type="checkbox"/>	8 Collection 2434 to PNB/CEN on 21/05/2008	1
<input type="checkbox"/>	9 Collection 2433 to PNB/SCH on 21/05/2008	1
<input type="checkbox"/>	10 Collection 2432 to PNB/BD on 20/05/2008	1
<input type="checkbox"/>	11 Collection 2431 to PNB/BRA on 20/05/2008	1
<input type="checkbox"/>	12 Collection 2429 to PNB/BRA on 19/05/2008	1
<input type="checkbox"/>	13 Collection 2427 to PNB/CEN on 19/05/2008	1
<input type="checkbox"/>	14 Collection 2425 to PNB/CEN on 19/05/2008	1
<input type="checkbox"/>	15 Collection 2424 to PNB/SCH on 19/05/2008	1
<input type="checkbox"/>	16 Collection 2421 to PNB/CEN on 19/05/2008	1
<input type="checkbox"/>	17 Collection 2416 to PNB/CEN on 14/04/2008	1
<input type="checkbox"/>	18 Collection 2413 to PNB/CEN on 11/04/2008	1
<input type="checkbox"/>	19 Collection 2403 to PNB/FRA on 07/04/2008	1
<input type="checkbox"/>	20 Collection 2402 to PNB/WP on 07/04/2008	1
<input type="checkbox"/>	21 Collection 2388 to PNB/WP on 04/04/2008	1

Columns on the screen

Collection: The number of the collection, the manager to whom it was sent and the date it was sent are displayed in this field.

Number: The number of items sent in the relevant collection is shown in this field.

Options on the screen

List of items (+):- this option enables you to view a list of the items that the manager has received. After choosing this option an overview screen is displayed, that is similar to the one for the overviews 'As owner' and 'As manager'.

Modify due date (+): this option enables you to modify the due date of the items that the manager is responsible for.

Please note!

After using this option, your modification will not be displayed. Use the option 'View list of items (+)' to view the (new) due date

In the overviews 'Collection's sent' and 'Collections received', the same options are available as in the overviews 'As owner' and 'As manager'. Read that section for more information.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	May 2008	creation	
2.0	August 2009	removed references to Bisbas; new field for ERP location part of 2.0 updates	
3.0	March 2011	New field for reservation of on shelf items part of 2.5 updates	